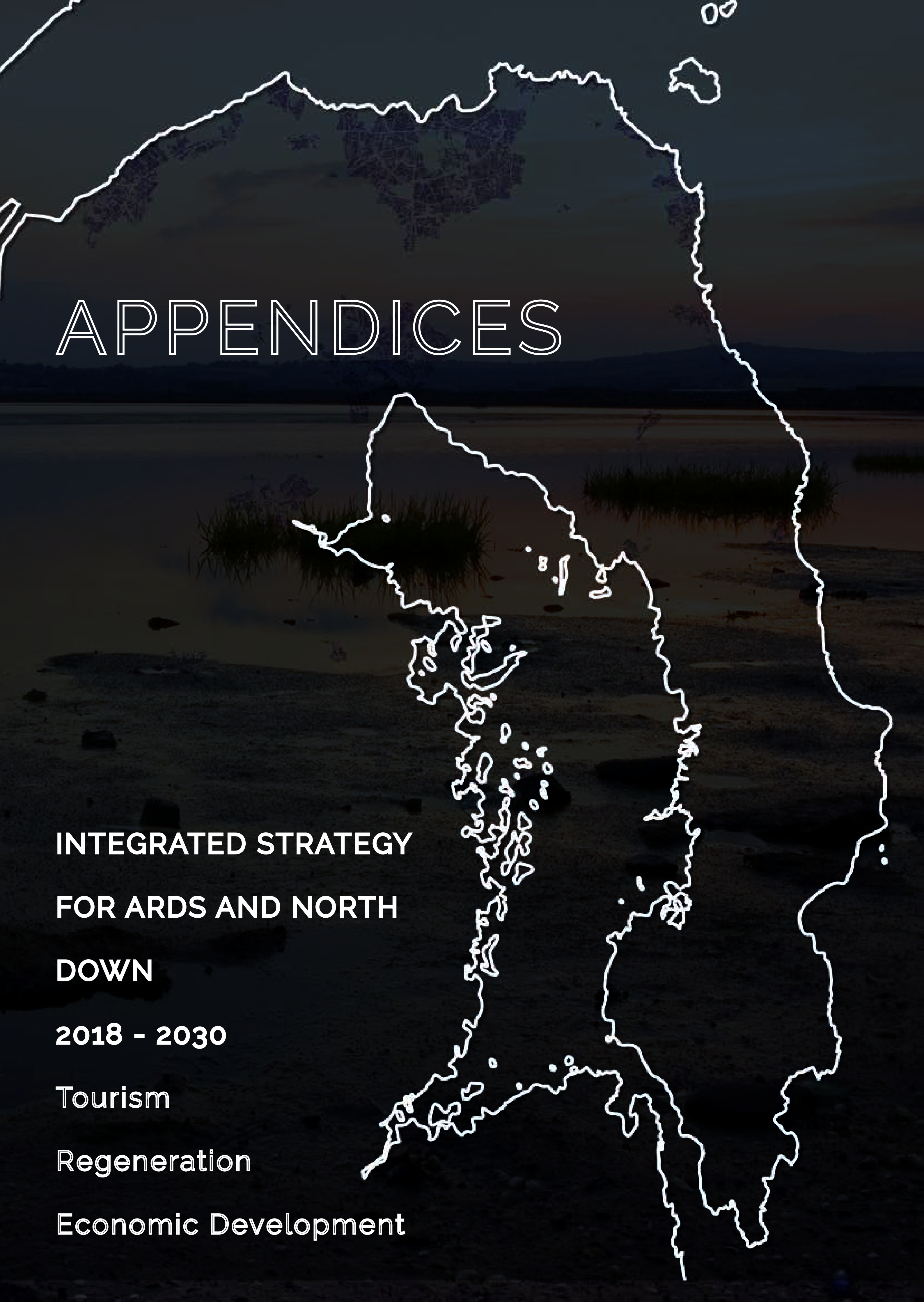


APPENDICES

INTEGRATED STRATEGY FOR ARDS AND NORTH DOWN

2018 - 2030

Tourism

Regeneration

Economic Development

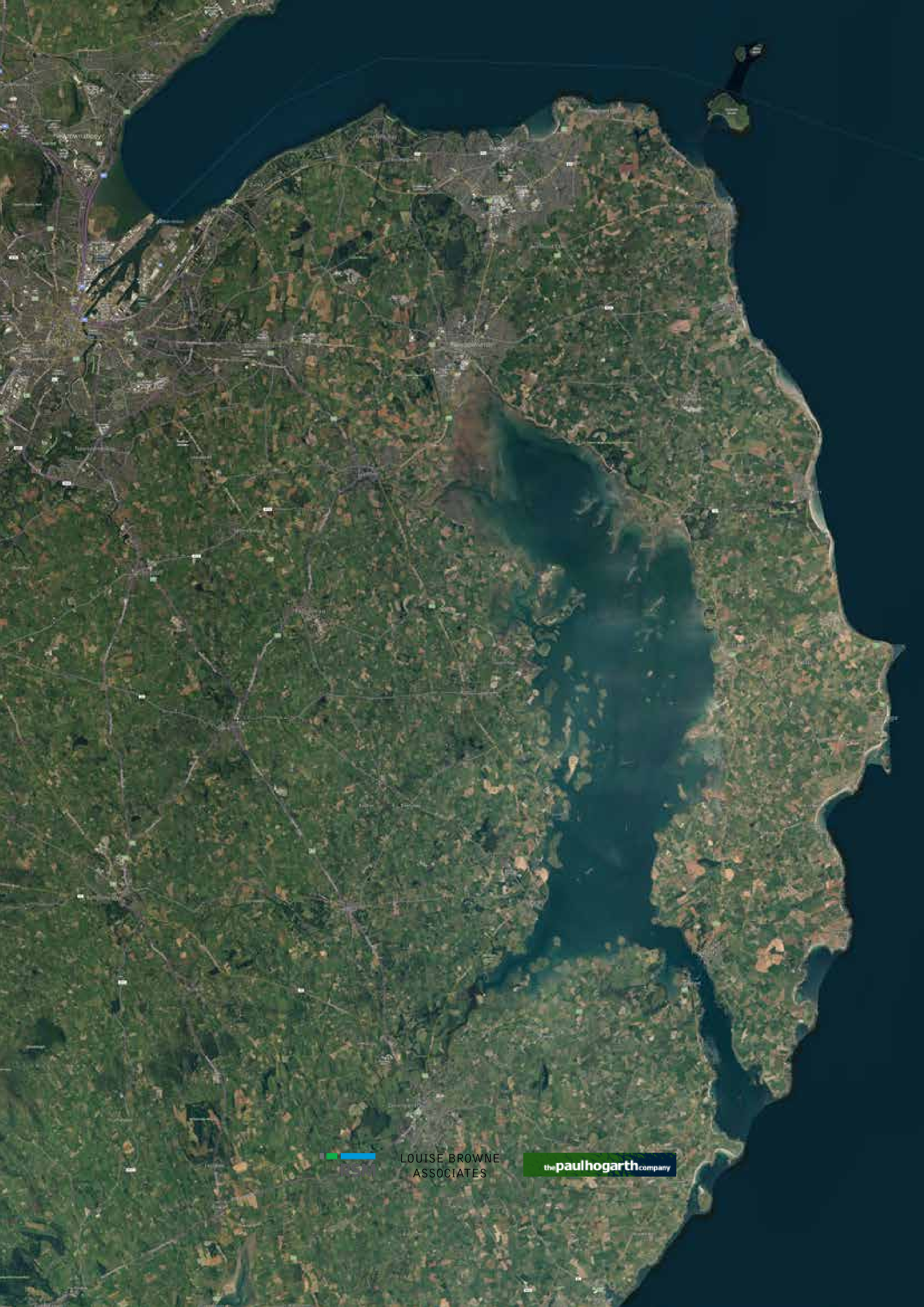

LOUISE BROWNE
ASSOCIATES
thepaulhogarthcompany

TABLE OF CONTENTS

A. STRATEGY BASELINE ANALYSIS REPORT

A1.0 INTRODUCTION

This Appendix presents the findings of a desk based study undertaken to inform the Ards and North Down Integrated Tourism, Regeneration and Economic Development Strategy. (ITRDS).

It is written by The Paul Hogarth Company, Louise Browne Associates and RSM Ltd who were appointed in April 2017 by Ards and North Down Borough Council to prepare the Strategy.

The purpose of the ITRDS 2017-2030 is to:

- Position the Council to maximise the return on investment in Tourism, Regeneration, Economic Development and Planning in a measurable context.
- To define and agree the priorities to grow the economy including tourism priorities, regeneration initiatives both urban and rural, enterprise and business development solutions and the Council's investment proposition within a planning context.
- To positively influence the creation and delivery of a Local Development Plan as required for the Borough.
- The Strategy will also seek to identify Council's unique selling points (USPs) that will inform a robust investment proposition and destination tourism narrative as part of a co-ordinated approach to raising the Council's profile in target markets.
- To provide opportunities to maximise Tourism, Regeneration, Planning and Economic benefit via a more integrated approach which in turn will inform financial, physical and human resource allocation.
- Maximise opportunities to deliver on wider local, regional and national strategies and inform the new Community Plan for the Borough.
- The strategy will be both sympathetic and complementary to the parallel strategy project, namely the Arts and Heritage strategy 2017-2030.
- The strategy will be shaped to include the active participation of identified stakeholders.
- The strategy should be influenced by identified future trends and methods of consumption and communication which will position the Borough in an innovative and sustainable space.

The ITRDS is being prepared over an 8 month process consisting of the following stages:

1. Project Initiation
2. Desk Based Research
3. Stakeholder Consultations
4. Benchmarking / Case Studies
5. Analysis of Preliminary Findings
6. Strategy Development

The findings of this Appendix was used to inform subsequent stages of the Strategy development process.

A2.0 REVIEW OF STRATEGIC / OPERATING CONTEXT

2.1 CENTRAL GOVERNMENT

Economic and regional development policy highlights three recurring themes, namely:

- Growth of private sector and development of external markets (e.g. the Economic Strategy, Invest NI Corporate Plan draft PfG 2016-21 etc.);
- Enhanced skills, innovation and productivity (draft the Industrial Strategy, Innovation Strategy 2014-25, Success through Skills Transforming Futures etc.); and
- Inclusive growth (draft PfG 2016-21, Draft Industrial Strategy, Regional Development Strategy etc.).

Brexit has cast a high degree of uncertainty around future "priority sectors" as it is unclear what potential trade deals may result from trade negotiations. Depending on the outcome of future trade negotiations, Northern Ireland may be facing trade tariffs to export to the EU market, which may impact negatively on local exporters. However, as GB is NI's largest external market[1], this may have a subdued impact on NI relative to the UK economy.

The impact of Brexit on Northern Ireland's border with the Republic of Ireland is also a significant issue, as development of a 'hard border' could impeded the flow of labour, goods and visitors between the two jurisdictions. The potential loss of the free movement of labour within EU countries will also have implications for sectors that rely heavily on workers from EU countries.

However the weakening of the pound/£ against the Euro/€ should give a boost to exporters, including the tourism trade.

[1] In 2015, GB accounted for 60% of Northern Ireland's external sales (source: DfE "Broad Economy Sales & Exports Statistics")

A2.0 REVIEW OF STRATEGIC / OPERATING CONTEXT

Strategy / Policy	Summary
National / Regional	
NI Draft Programme for Government Framework 2016 - 2021	The Draft Programme for Government (PfG) 2016-2021 identifies the macro strategic priorities of the Executive, against which public spending is allocated in Northern Ireland. The key purpose of the PfG is *"Improving wellbeing for all by tackling disadvantage, and driving economic growth"* through a number of key outcomes, namely: • A strong, competitive, regionally balanced economy • Creating a place where people want to live and work, to visit and invest. • A place where citizens enjoy long, healthy, active lives • More people working in better jobs • A safe community where people respect the law, and each other • A shared society that respects diversity • A confident, welcoming, outward-looking society • A more equitable society • Living and working sustainably- protecting the environment • An innovative, creative society, where people can fulfil their potential • A society which cares for others and helps those in need • A society which gives children and young people the best start in life • A society with high quality public services • Connect people and opportunities through infrastructure.
NI Executive Economic Strategy 2012	The ultimate aim of this strategy is to improve the economic competitiveness of the NI economy. The focus of the strategy is on developing export-led economic growth as the best means of increasing employment and wealth in NI and improving overall competitiveness. The economic vision for 2030 is: *'An economy characterised by a sustainable and growing private sector, where a greater number of firms compete in global markets and there is growing employment and prosperity for all'* In order to deliver the longer term priority of the Executive, five strategic rebalancing themes have been developed. These themes are: • Stimulating innovation, R&D and creativity; • Improving employability and the level, relevance and use of skills; • Competing in the global economy; • Encouraging business growth; and • Developing our economic infrastructure.
Draft Industrial Strategy "Economy 2030: An Industrial Strategy for Northern Ireland"	The draft Industrial Strategy for Northern Ireland outlines a vision for 2030: *"To be a globally competitive economy that works for everyone".* The strategy is underpinned by five pillars for economic growth, namely: • Accelerating innovation and research; • Enhancing education, skills and employability;

<table>
<tr><th>Strategy / Policy</th><th>Summary</th></tr>
<tr><td></td><td>

Driving inclusive, sustainable growth;
Succeeding in global markets; and
Building the best economic infrastructure.

Key milestones have been identified for three periods within the strategy: 2021, 2025 and 2030.

2021:

50,000 new jobs created;
18,000 economically inactive people back into the workforce; and
Number 1 destination for FDI outside of London.

2025:

380,000 qualifications at Level 3 and above;
Increased value of sales outside of NI by 80%; and
Doubled expenditure from out-of-state visitors.

2030:

Grown private sector output by 35%, creating 80,000 new jobs;
Northern Ireland in top 3 most competitive small advanced economies;
80,000 new jobs in the Knowledge Economy;
Increased annual R&D spend to £1.5 billion; and
Maintained the highest level of wellbeing in the UK.

</td></tr>
<tr><td>Regional Development Strategy 2035</td><td>
This is the spatial strategy of the Executive. Its purpose is to deliver the spatial aspects of the PfG. It aims to ensure that all places benefit from economic growth in NI. The strategy focuses on numerous areas including:

Economy:

Ensure adequate supply of land to facilitate sustainable economic growth
Deliver a balanced approach to transport infrastructure
Implement a balanced approach to telecommunications infrastructure that will give a competitive advantage
Promote a sustainable approach to the provision of tourism infrastructure
Deliver a sustainable and secure energy supply

Society:

Strengthen community cohesion
Support urban and rural renaissance
Manage housing growth to achieve sustainable patterns of residential development

In relation to Ards and North Down specifically, the strategy states that "the potential for Bangor's development centres on its modern marina and creating activities around the promenade area." It also aims to promote the regeneration of Bangor, which has a significant housing catchment area. It states that while Belfast City will continue to provide job opportunities for many of the residents, it will be important for Bangor to widen its economic base as a means of reducing its role as a dormitory town.
</td></tr>
</table>

A2.0 REVIEW OF STRATEGIC / OPERATING CONTEXT

<table>
<tr><th>Strategy / Policy</th><th>Summary</th></tr>
<tr><td>Strategic Planning Policy Statement for Northern Ireland</td><td>
The overall objective of the planning system is to further sustainable development and improve well-being for people in NI. The SPPS aims 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 planning system.
The SPPS sets the strategic direction for the new councils to bring forward detailed operational policies within future local development plans. The Core Planning Principles include:

Improving Health and Well-Being
Creating and Enhancing Shared Space
Supporting Sustainable Economic Growth
Supporting Good Design and Positive Place-Making
Preserving and Improving the Built and Natural Environment

The provisions of the SPPS must be taken into account in the preparation of Local Development Plans and are also material to all decisions on individual planning applications and appeals. The SPPS states that a transitional period will operate until such times as a Plan Strategy for the whole of the council area has been adopted. During this transitional period the policy provisions of a number of extant Planning Policy Statements (PPS's) are retained. While many of these extant PPS's have some relevance to this assignment, the two of direct relevance are PPS 4 Planning and Economic Development and PPS 16 Tourism.
PPS 4: Planning and Economic Development
The planning system has a key role to play in achieving a vibrant economy that promotes sustainable economic development and integrates employment generation with essential supporting provision such as housing and infrastructure. To this end PPS 4 sets out the planning policy for economic development uses and indicates how growth associated with such uses can be accommodated and promoted in development plans. The key aim of this PPS is to facilitate the economic development needs of the Region in ways consistent with protection of the environment and the principles of sustainable development.
The objectives of PPS 4 are:

to promote sustainable economic development in an environmentally sensitive manner.
to tackle disadvantage and facilitate job creation by ensuring the provision of a generous supply of land suitable for economic.
development and a choice and range in terms of quality, size and location.
to sustain a vibrant rural community by supporting rural economic development of an appropriate nature and scale.
to support the re-use of previously developed economic development sites and buildings where they meet the needs of particular economic sectors.
to promote mixed-use development and improve integration between transport, economic development and other land uses, including housing.
to ensure a high standard of quality and design for new economic development.

</td></tr>
</table>

Strategy / Policy	Summary
	PPS 16: Tourism Tourism encompasses a very wide range of activities and makes an increasingly important contribution to the Northern Ireland economy in terms of the revenue generation, employment opportunities and the potential it creates for economic growth. PPS 16 sets out planning policy for both the safeguarding and development of tourism assets, including the main forms of tourist accommodation and tourist amenities. It also seeks to facilitate economic growth and social well-being through tourism in ways which are sustainable and compatible with environmental welfare and the conservation of important environmental assets. The Policy states that, "through utilising existing environmental, historical, cultural and geographic assets, tourism can be a key economic driver capable of stimulating further growth and development opportunities". The objectives of PPS 16 are to: • facilitate sustainable tourism development in an environmentally sensitive manner. • contribute to the growth of the regional economy by facilitating tourism growth. • safeguard tourism assets from inappropriate development. • utilise and develop the tourism potential of settlements by facilitating tourism development of an appropriate nature, location and scale. • sustain a vibrant rural community by supporting tourism development of an appropriate nature, location and scale in rural areas. • ensure a high standard of quality and design for all tourism development.
Invest NI Corporate Plan 2011-2015	The aim of the Corporate Plan is to support wealth creation in NI by growing innovation, exports, productivity and employment through the business base, resulting in increased living standards for all. Invest NI's activities will be aligned with increasing the size, competitiveness and value of the NI private sector by embedding innovation, growing local companies to scale, increasing export base and attracting inward investment. This is in line with the NI Executive's Programme for Government Economic Strategy. In relation to improving employability and the relevance and use of skills, Invest NI has allocated a budget of £36 million to be used on improving management and leadership throughout business the base, SME mentoring support, and ensuring education/skills are aligned to business needs. Upskilling the workforce includes further education, tailored course provision in NI universities, company tailored programmes, software professional courses and generic conversion courses.
NI Executive Innovation Strategy 2014 - 2025	The strategy identifies actions under four themes. These are: • Knowledge Generation; • Knowledge Exchange; • Knowledge Exploitation; and • Cultural Change.

Strategy / Policy	Summary
	DfE is also developing the Smart Specialisation approach to funding projects which concentrates on funding regionally strong sectors in order to provide growth and innovation in a given region, which has already been adopted by the EU commission. The sectors of high economic importance for Northern Ireland are: Agri-food; Advanced Engineering (Transport); Advanced Materials; Information & Communication Technologies (ICT); Life & Health Sciences.
DfC - Urban Regeneration and Community Development Policy Framework Document 2013	This Framework sets out the strategic direction for the delivery of urban regeneration and community development policies and programmes in Northern Ireland both before and after the Reform of Local Government (RLG). The Framework sets out four policy objectives that will form the basis of any future policy or programme development in urban regeneration and community development. The policy objectives are: • Policy Objective 1 – To tackle area-based deprivation. • Policy Objective 2 – To strengthen the competitiveness of our towns and cities. • Policy Objective 3 – To improve linkages between areas of need and areas of opportunity. • Policy Objective 4 – To develop more cohesive and engaged communities. It also contains a set of four supporting actions which will help develop a more conducive policy and financial environment in which the Policy Framework will operate. The four supporting actions are: • Supporting Action 1 – We will maximise the potential of regeneration and community development by supporting an evidence-based policy environment. • Supporting Action 2 – We will maximise the resources available to regeneration and community development by supporting an innovative financial environment. • Supporting Action 3 – We will support the development of skilled and knowledgeable practitioners in regeneration and community development. • Supporting Action 4 -We will promote an effective and efficient voluntary and community sector.
'Success through Skills - Transforming Futures'	The strategy aims to enable people to access and progress up the skills ladder in order to: • Raise the skills level of the whole workforce; • Raise productivity; • Increase levels of social inclusion by enhancing the employability of those currently excluded from the labour market; and • Help to secure Northern Ireland's future in a global marketplace. The Skills Strategy examines the current skills base, considers the skills we will need in the future to grow the local economy and highlights a number of challenges which must be addressed if we are to have a workforce equipped with the skills needed by employers to rebalance and rebuild the economy. In particular, there will be an increased need: • For people with higher level skills; • For people with skills in STEM; • For people with better management and leadership skills; • To up-skill those people already in work; and • To attract certain skills into the workforce, as the economy grows.

Strategy / Policy	Summary
DEL: Securing our Success: The Northern Ireland Strategy on Apprenticeships (2014)	Across much of the developed world, there has been a renewed focus on apprenticeships as a mechanism to improve and encourage skills development, innovation and economic growth. Apprenticeships can help governments with efforts to improve the prospects of young people through providing better education to employment transitions, and clearer progression pathways to higher level education and training. They can also help to ensure that employers are provided with the skills needed to grow their business and improve competitiveness. This strategy provides the future direction of apprenticeships in Northern Ireland, and sets out the new policy commitments and an implementation plan to ensure their delivery. It is the ambition of the Department that Northern Ireland's system of apprenticeships will be of a gold standard and will form a key part of a new skills landscape. This system will offer a spectrum of support from entry level up to level 8 (equivalent to a Doctorate), facilitate lifelong learning and allow participants to move in and out of professional education and training at their own pace. The complementary and connected Review of Youth Training will, among other outcomes, provide opportunities for young people to progress into apprenticeships. To contribute to this wider goal, this policy outlines the definitive way forward for apprenticeships through 20 key policy commitments that fall under the following four themes: • The Components of an Apprenticeship; • Increasing Participation; • Partnership – The Roles of the Key Players; and • Ensuring Quality. The primary benefit to the economy from apprenticeships is a better matching of supply and demand for skills. In Northern Ireland, there is a clear need to be pro-active in interventions and approaches that develop the skill levels of our workforce. While recent evidence demonstrates that qualifications of the working age population have improved at all levels, when compared to other countries, we still have a high proportion of people with low or no qualifications. The potential for apprenticeships to contribute to economic growth and alleviate youth unemployment is also particularly vital in the context of Northern Ireland. While the labour market is showing positive signs of improvement, the ratio of youth unemployment compared to total unemployment has been persistently high. Meeting the challenges of high youth unemployment and low skills through a range of interventions, including apprenticeships, will help to re-engage young people in the labour market and also promote greater social inclusion.
DEL Structured to Deliver Success (2015)	This document sets out how the Department draws together the major strategies, with other related strands of work, so that the strategic goals set out in 'Success through Skills - Transforming Futures' can be delivered. The actions necessary to achieve the goals fall broadly under five themes. These are: • understanding the demand for skills; • improving the quality and relevance of education and training; • improving productivity by increasing the skill levels of the workforce; • tackling the skills barriers to employment and employability; and • engaging stakeholders. This document highlights the strategies and programmes which have directly contributed to the success of these 5 themes. These include:

Strategy / Policy	Summary
	- Those coming into the workforce: – Graduating to success; – Access to success; – Further education means business; – Success through STEM. - Those already in the workforce: – Securing our success; – Assured skills; – Leading to success. - Those who are currently not in the labour force: – Pathways to success; – Working for success; – Enabling success; – Together building a united community; – Steps to success; and – Training for success.
DAERA Rural Development Programme 2014 - 2022	The programme aims to protect and enhance our rural environment and contribute to the development of competitive and sustainable rural businesses and thriving rural communities. It is worth over £500million and represents one of the largest ever investments in rural communities in Northern Ireland. Following an assessment of the Strengths, Weaknesses, Opportunities and Threats in the context of the current situation in NI, the following key aims and objectives were identified as a priority for supporting NI rural development: - To improve the competitiveness of the agri-food industry through: - Improving the skills and knowledge and stimulating innovation, needed for business continuity and growth. - Improving resource efficiency by reducing operating costs. - Investing in capital equipment and buildings to ensure the long-term viability of the industry. - Improving the health and welfare of animals through increased knowledge and skills. - To improve the natural environment through: - Ensuring the growth of the agri-food industry is sustainable through the reduction of GHGs and ammonia emissions. - Supporting those that own and actively manage the land and woodlands to develop practices which improve biodiversity. - Supporting farming practices which improve water and soil quality. - The planting of new woodlands and the management of existing forests to mitigate the effects of climate change. - To develop and improve rural areas through: - Promoting economic growth through the provision of support for rural businesses and the rural tourism sector. - Reducing poverty and social isolation by targeting support to tackle inequalities, deprivation, and access to key services including ICT.

A2.0 REVIEW OF STRATEGIC / OPERATING CONTEXT

Strategy / Policy	Summary
Rural Needs Act (Northern Ireland) 2016	On 1 June 2017, the Rural Needs Act became operational for district councils and government departments. The Rural Needs Act places a duty on public authorities, including local councils, to have due regard to rural needs when developing, adopting, implementing or revising policies, strategies and plans and when designing and delivering public services. It also requires public authorities to provide information to DAERA on how they have fulfilled this duty on an annual basis and to include this information in their annual report.
Heritage Lottery Fund Strategy 2013-18	The HLF's goal is to make a lasting difference for heritage and people. In assessing projects, the fund takes account of the broad range of benefits that projects may deliver, and gives extra weight to the outcome that are most valued within the HLF, such as learning. The key project outcomes which the HLF aims to promote through its funding strategy are: **Heritage outcomes:** Heritage will be: • Better managed; • In better condition; • Better interpreted and explained; and • Identified / recorded. **Individuals' outcomes:** People will have: • Learnt about heritage; • Developed skills; • Changed their attitudes and/or behaviour; • Had an enjoyable experience; and • Volunteered time. **Communities / society outcomes:** Through investment: • Environmental impacts will be reduced; • More people and a wider range of people will have engaged with heritage; • Organisations will be more resilient; • Local economies will be boosted; and • Local areas / communities will be a better place to live, work or visit.
Living Places – Urban Stewardship and Design Guide for NI	This Urban Stewardship and Design Guide aims to clearly establish the key principles behind good place making. It seeks to inform and inspire all those involved in the process of managing (stewardship) and making (design) urban places, with a view to raising standards across Northern Ireland. The guide recognises the wider economic, cultural and community benefits of achieving excellence in the stewardship and design in these places, be they existing or proposed.

A2.0 REVIEW OF STRATEGIC / OPERATING CONTEXT

Strategy / Policy	Summary
OFMDFM Lifetime Opportunities, Government's Anti-Poverty and Social Inclusion Strategy 2006-2020	Lifetime Opportunities, the Anti -Poverty strategy for Northern Ireland, identifies a series of cross cutting priorities for action, namely: • Eliminating Poverty; • Eliminating Social Exclusion; • Tackling Area Based Deprivation; • Eliminating Poverty From Rural Areas; • Shared Future – Shared Challenges; • Tackling Inequality in the Labour Market; • Tackling Health Inequalities; and • Tackling Cycles of Deprivation. The '*Tackling Area Based Deprivation'* priority acknowledges that people who live in such areas suffer a much greater risk of poverty, poor health, both physical and mental, and the despair that comes from having no apparent prospect of improvement. Tackling the multiple deprivation that has persisted in many areas for decades, is a priority within the overall strategy.
Section 75	Section 75 of the Northern Ireland Act 1998 came into force in January 2000 and placed a statutory obligation on public authorities in carrying out their various functions in Northern Ireland, to have due regard to the need to promote quality of opportunity between: • Persons of different religious belief, political opinion, racial group, age, marital status or sexual orientation; • Men and women generally; • Persons with a disability and persons without; and • Persons with dependents and persons without. In addition, without prejudice to this obligation, community and voluntary organisations are also required to have regard to the desirability of promoting good relations between persons of different religious belief, political opinion, and racial group.

A2.0 REVIEW OF STRATEGIC / OPERATING CONTEXT

2.2 ARDS AND NORTH DOWN BOROUGH COUNCIL

The Council's Corporate Plan sets out objectives that include developing a prosperous, competitive economy and capitalising on the area's current tourism offering in order to grow visitor numbers and expenditure.
The Council also aims to attract external investment to the area whilst also promoting business start-up, development and growth.

The overarching ambition of Community Plan "The Big Plan for Ards and North Down" is to have empowered, resilient individuals and communities, to reduce inequalities; to promote good relations and sustainability; and to improve the accessibility of all public services. It includes the following five outcomes, which reflect ambitious statements that the Council area aspires to achieving by the year 2032.

- Outcome 1: All people in Ards and North Down fulfil their lifelong potential;
- Outcome 2: All people in Ards and North Down enjoy good health and wellbeing;
- Outcome 3: All people in Ards and North Down live in communities where they are respected, are safe and feel secure;
- Outcome 4: All people in Ards and North Down benefit from a prosperous economy; and
- Outcome 5: All people in Ards and North Down feel pride as they have access to a well-managed sustainable environment.

A2.0 REVIEW OF STRATEGIC / OPERATING CONTEXT

<table>
<tr><th>Strategy / Policy</th><th>Summary</th></tr>
<tr><td colspan="2">Ards and North Down Borough Council</td></tr>
<tr><td>Ards and North Down Borough Council Draft Corporate Plan</td><td>The objectives set out in the Ards and North Down Borough Council Corporate Plan were developed under 3 categories: People, Place and Prosperity.
People:
• Develop more engaged, empowered and integrated communities
• Foster a United Community, based on equality of opportunity, the desirability of good relations and reconciliation
• Improve health, wellbeing and promote active lifestyles
• Increase pride in the Borough
Place:
• Promote a clean, green, healthy, safe and sustainable environment
• Invest in and promote the Borough's rich cultural heritage and environment
• Invest in and promote facilities and outdoor spaces
• Enhance our towns, villages and coastlines
Prosperity:
• Attract and Promote Economic Investment
• Support Business Start-up, development and growth
• Enhance the visitor experience to increase visitor spend
• Develop a thriving rural community
•</td></tr>
<tr><td>Ards and Down Area Plan 2015.</td><td>The purpose of the plan is to Plan is to inform the general public, statutory authorities, developers and other interested bodies of the policy framework and land use proposals that will be used to guide development decisions within the two former Council areas of Ards Borough Council and Down District Council over the plan a period.

The objectives of the plan are to:

- Facilitate sustainable patterns of growth and development
- Promote Newtownards and Downpatrick as main towns within Northern Ireland
- Allocate land for additional housing
- Facilitate appropriate development in existing urban areas
- Promote compact urban forms
- Facilitate economic development
- Facilitate integration between land-use planning and transportation
- Promote vital and viable town centres
- Protect character, quality and biodiversity of natural and man-made environments
- Facilitate the promotion of equality of opportunity and good relations

The Plan Strategy is to deliver

- a polycentric network of growth poles integrated with transport corridors and incorporating enhanced public transport
- compact urban forms
- more housing within existing urban areas
- sensitive and sensible use of built heritage and the rural environment</td></tr>
</table>

Strategy / Policy	Summary
	The Area Plan provides the policy framework for a range of matters of direct and indirect relevance to the Integrated Strategy, including Environment and Conservation; Industry; Retailing, Services and Offices; Transportation; Tourism and Agriculture, Forestry and Fishing, The Settlement Proposals consist of designations, policies, proposals and zonings specific to the administrative areas of both former councils and defined by boundaries of relevant maps.
Belfast Metropolitan Area Plan 2015	The purpose of the Plan is to inform the general public, statutory authorities, developers, and other interested bodies of the policy framework and land use proposals that will be used to guide development decisions within the Belfast Metropolitan Area (BMA) over the Plan period. This includes the former North Down Borough Council area. The Plan Aim is to provide a planning framework which is in general conformity with the RDS in facilitating sustainable growth and a high quality of development in the Belfast Metropolitan Area throughout the Plan period, whilst protecting and, where appropriate, enhancing the natural and man-made environment of the Plan Area The Plan Strategy is to: • support the growth and regeneration of cities, towns and villages whilst sustaining a living and working countryside and protecting from inappropriate development • identify, define and designate as appropriate, areas of conservation, archaeological, scientific, landscape or amenity importance or interest • provide a settlement hierarchy, designate settlement development limits, zone land and designate policy areas • establish key site requirements, as appropriate, against which particular site development proposals will be assessed • designate additional employment land to make provision for an adequate supply and choice of • sites for employment uses • identify, define, designate and safeguard, as appropriate, specific areas where the retention of, or provision of, additional retail, services, recreational and other community facilities • define, as appropriate, transportation-related proposals in accordance with the Regional Transportation Strategy The Area Plan provides the policy framework for a range of matters of direct and indirect relevance to the Integrated Strategy, including Employment, Transportation, Retailing, Offices, Urban Environment, Natural Environment and Tourism. The North Down District Proposals consist of designations, policies, proposals and zonings specific to the administrative areas of the former North Down Borough Council area defined by boundaries of relevant maps.

A2.0 REVIEW OF STRATEGIC / OPERATING CONTEXT

<table>
<tr><th>Strategy / Policy</th><th>Summary</th></tr>
<tr><td>Ards and North Down Local Development Plan</td><td>A new Local Development Plan (LDP) for the Borough is under preparation and once adopted, will, replace the Ards and Down Area Plan and the Belfast Metropolitan Area Plan (North Down).

The Ards and North Down LDP will:
provide a 15-year plan framework to support the economic and social needs of the council's district in line with regional strategies and policies, while providing for the delivery of sustainable development;
facilitate sustainable growth by co-ordinating public and private investment to encourage development where it can be of most benefit to the well-being of the community;
allocate sufficient land to meet society's needs;
provide an opportunity for all stakeholders, including the public, to have a say about where and how development within their local area should take place;
provide a plan-led framework for rational and consistent decision-making by the public, private and community sectors and those affected by development proposals; and
deliver the spatial aspects of The Big Plan – the Council's Community Plan</td></tr>
<tr><td>The Big Plan for Ards and North Down 2017 - 2032</td><td>The Big Plan provides an overarching framework setting out a shared vision and ambition that Ards and North Down's Strategic Community Planning Partnership has agreed to work towards over the next 15 years. The Vision for the Big Plan is:
"Ards and North Down is a vibrant, connected, healthy, safe and prosperous place to be."
The overarching, cross-cutting ambition of The Big Plan is to have empowered, resilient individuals and communities, to reduce inequalities; to promote good relations and sustainability; and to improve the accessibility of all public services. The Big Plan for Ards and North Down explains how ANDBC want to make life better for all the people who live in the borough.
Outcomes
The Big Plan contains five outcomes. These are ambitious statements that the Council area aspires to accurately reflect the situation of the people who live in Ards and North Down by the year 2032.
Outcome 1: All people in Ards and North Down fulfil their lifelong potential;
Outcome 2: All people in Ards and North Down enjoy good health and wellbeing;
Outcome 3: All people in Ards and North Down live in communities where they are respected, are safe and feel secure;
Outcome 4: All people in Ards and North Down benefit from a prosperous economy; and
Outcome 5: All people in Ards and North Down feel pride as they have access to a well-managed sustainable environment.</td></tr>
</table>

2.3 TOURISM

The Department for the Economy NI has prepared but has not yet released a ten-year strategy for tourism in Northern Ireland. The vision for the destination is that Northern Ireland will become an internationally competitive destination, equipped to grow the value of tourism to £1bn by 2025. The purpose of the strategy is to provide direction on how Northern Ireland can survive and thrive in a highly competitive global market for tourism, respond to trends in that market place and be responsive to the changing motivations and expectations of visitors.

Indications are that the forthcoming strategy will draw attention to the following strategic imperatives;
A proposition of scale for tourism in Northern Ireland that is capable of achieving stand out in the international market place; will spark the imagination of visitors; will harness the support of the industry locally and will realise dividends in terms of increased visitor numbers and enhanced revenue will be key to realising the ambition for tourism.
Within the context of the new strategy experience development is being moved centre stage. An experience is seen as more than a product offering or an appealing location or a great service. An experience will engage the senses, the mind and the spirit, offering discovery and learning and creating strong memories. A great experience will lead visitors to talk about the unique elements of the destination and grab the attention and imagination of future visitors. Experiences will go beyond nice places and good views to connect visitors, through words, images and the power of storytelling to the place – its people, its provenance and its contemporary relevance.

There will be a particular focus on the internationalisation of tourism, supported by an enduring commitment to deliver high quality in all aspects of the experience on offer. This will also involve a drive to leverage the capacity of those unique attributes that will work to differentiate the destination in the mind of the prospective international visitor.

Emphasis will also be placed on the importance of taking a visitor-centric approach that will be based on a deep understanding of visitor expectations and motivations as well as an understanding of emerging trends in the role of digital technologies and platforms in generating awareness of the destination – prior to, during and post visit -, engaging directly with consumers and converting intentions to visit to actual bookings.

A renewed emphasis will be placed on a partnership model for the delivery of tourism which will be secured through effective collaboration between the public and private sectors, with government playing an enabling role.

Within the context of the forthcoming Tourism Northern Ireland Skills Action Plan, there will also be an emphasis on the need to ensure that relevant skill-sets are identified, nurtured and supported to enable those involved in the business of tourism – whether directly or indirectly - and those wanting to become involved to equip themselves to deliver on the ambition to significantly grow the visitor economy.

A3.0 EXISTING RESEARCH & DATA

3.1 BASELINE SOCIO-ECONOMIC PROFILE OF THE ARDS AND NORTH DOWN AREA

This section presents a summary of the key findings of the socio-economic baseline. Further information can be found in the fact card in Annex A and the Ward analysis in Annex B.

Population

- In 2015, ANDBC had a population of 158,797 which accounted for 8.6% of the population of Northern Ireland;
- The population is growing at a slower rate than Northern Ireland's population (1.2%) and is projected to grow at a significantly lower rate than NI to 2039 (2.5% compared to 9.8%). In 2039, it is estimated that ANDBC will have a population of 161,809, accounting for 8.0% of the total population of NI;
- There is a slightly younger population in ANDBC than in Northern Ireland generally. However, by 2039, ANDBC will have an older population than NI, with almost one in three people being aged 65 years or older, compared to one in four in NI.

Employment and Skills

- ANDBC has a higher proportion of its population qualified to Level 4 or higher than the Northern Ireland average (27%);
- ANDBC has the second lowest proportion of its working age population with no qualifications out of the 11 council areas (11%) and was lower than the Northern Ireland average (17%);
- The four largest employing sectors in the Council area are:
  - Retail and wholesale (22%);
  - Health activities (18%);
  - Education (10%); and
  - Hospitality - accommodation and food services (10%).
- Agriculture and construction are the two most prominent types of business in ANDBC (13.4% and 12.9%) however they do not have the highest proportion of employee jobs. The financial, professional and business sector accounts for the highest number of jobs in ANDBC (46.7%) while construction sector has the lowest figure. (2.5%) These statistics can be seen below in Figures 2:3 and 2:4.
- Median weekly wages for both full time (£495) and part time (£173) employees are in line with the NI average. The proportion of full-time to part-time employees is slightly higher in ANDBC (73:27) than in NI (70:30).

Business Growth and Productivity

- ANDBC's productivity (GVA per employee) is significantly lower than then NI average;
- The business birth rate (9.4%) is higher than the death rate (8.1%) indicating that the business base is growing at a rate of 1.3%, however, this is slower than the Northern Ireland average (2.6%);
- The business profile of ANDBC is dominated by sectors that typically produce low levels of productivity (retail/wholesale, public sector service provision and accommodation/ food services); and
- Whilst strong growth in the NI tourism sector is projected, little/no growth is projected for retail and wholesale and employment in public sector service provision is forecast to decline.

Economic and Social Deprivation

- At a Council level, ANDBC is one of the least deprived in Northern Ireland in terms of income and employment, however, there are pockets of deprivation. Five of the 48 wards (10.4%) in the Council area were in the top 30% most deprived wards in Northern Ireland;

- Furthermore, Harbour ward in is in top 2% most deprived wards in Northern Ireland in terms of Living Environment and within the top 5% most deprived wards in relation to Crime and Disorder;

Foreign Direct Investment

NI is amongst the lowest ranked UK sub-regions when it comes to attracting Foreign Direct Investment (FDI). Whilst new FDI projects to NI increased in 2016 this trend is unlikely to continue due to the implications of Brexit. At a local level, Ards and North Down has ranked amongst the lowest LGDs in NI in terms of assistance offered to external companies seeking to re-locate.

A3.0 EXISTING RESEARCH & DATA

Further Analysis

Demography

In 2015, AND had a population of 158,797 which accounted for 8.6% of the population of Northern Ireland. The population is growing at a slower rate than Northern Ireland's population (1.2%) and is projected to grow at a significantly lower rate than NI to 2039 (2.5% compared to 9.8%). In 2039, it is estimated that AND will have a population of 161,809, accounting for 8.0% of the total population of NI.

There is currently a slightly younger population in the AND area than in Northern Ireland generally. However, NISRA population projections suggest that by 2039, AND will have an older population than NI, with almost one in three people being aged 65 years or older, compared to one in four in NI, as outlined in Table 1.1. This change would reflect a significant ageing of the AND population, which would have implications for future public service provision, labour market dynamics and economic activity / productivity.

Table 1:1: Population Projections by Age

	2015			2039		
	0-14	15-64	65+	0-14	15-64	65+
AND	18%	62%	20%	16%	53%	31%
NI	16%	65%	20%	17%	58%	25%

Source: NINIS Population Projections

In 2015, AND had a significantly higher number of people per square kilometre (347.2) compared to Northern Ireland generally (136.5). As may be expected, the population density across the Council area is varied. In North Down, the average number of people per hectare was 24.0 in 2011, whereas in Ards, the average number was 6.2. In the wards located within the Ards peninsula, the average number of people per hectare was 1.5, and at the bottom end of the spectrum only 0.7 people per hectare in Carrowdore ward.

This indicates high levels of rurality, which has implications for transport and digital connectivity, access to services, and social inclusion / combatting isolation.

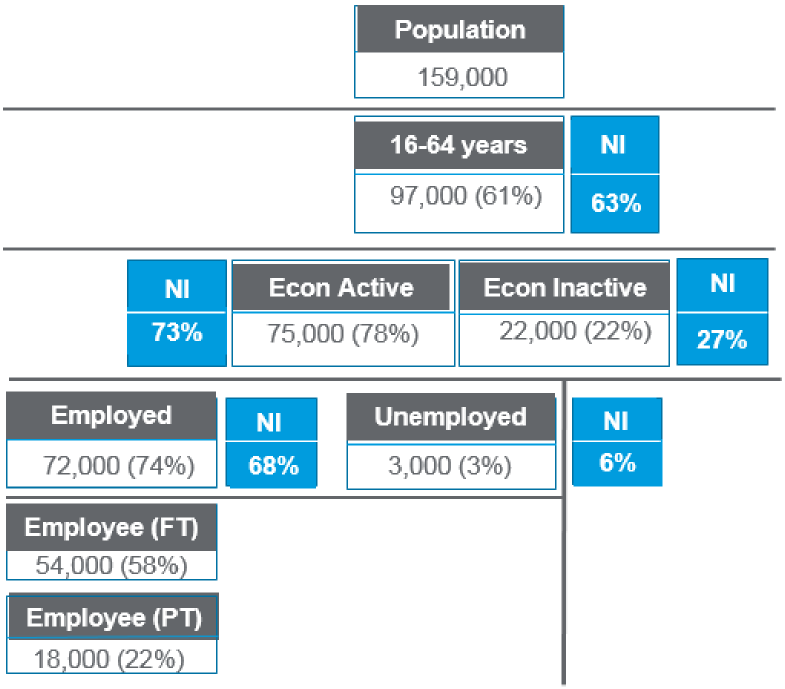
Employment and Skills

Figure 1.1 provides an "audit" of the population of AND in 2015. In comparison to Northern Ireland, AND has a higher economic activity rate (79%), a higher employment rate (67%) and a lower unemployment rate (2.5%).

In 2015, AND had a higher economic activity rate of those aged 16 – 64 (78%) than NI in total (73%). Of those aged 16 – 64, 74% were in employment in 2015, which is 6% higher than the Northern Ireland average (68%). Furthermore, in 2015, the unemployment rate in AND was 3.0%, lower than the unemployment rate for NI generally (3.7%). Long term unemployment in the Council area varied significantly within wards, ranging from 46.8% in Killinchy to 15.7% in Ballycrochan in 2011.

In AND, 36% of the working age population were qualified to Level 4 or above in 2015 which is the second-highest proportion of the eleven local authorities and is higher than the average for Northern Ireland, 30%. Furthermore, AND had the second lowest proportion of its working age population with no qualifications out of the 11 council areas (11%) and was lower than the Northern Ireland average (17%).

Figure 1:1: Population Audit, 2015



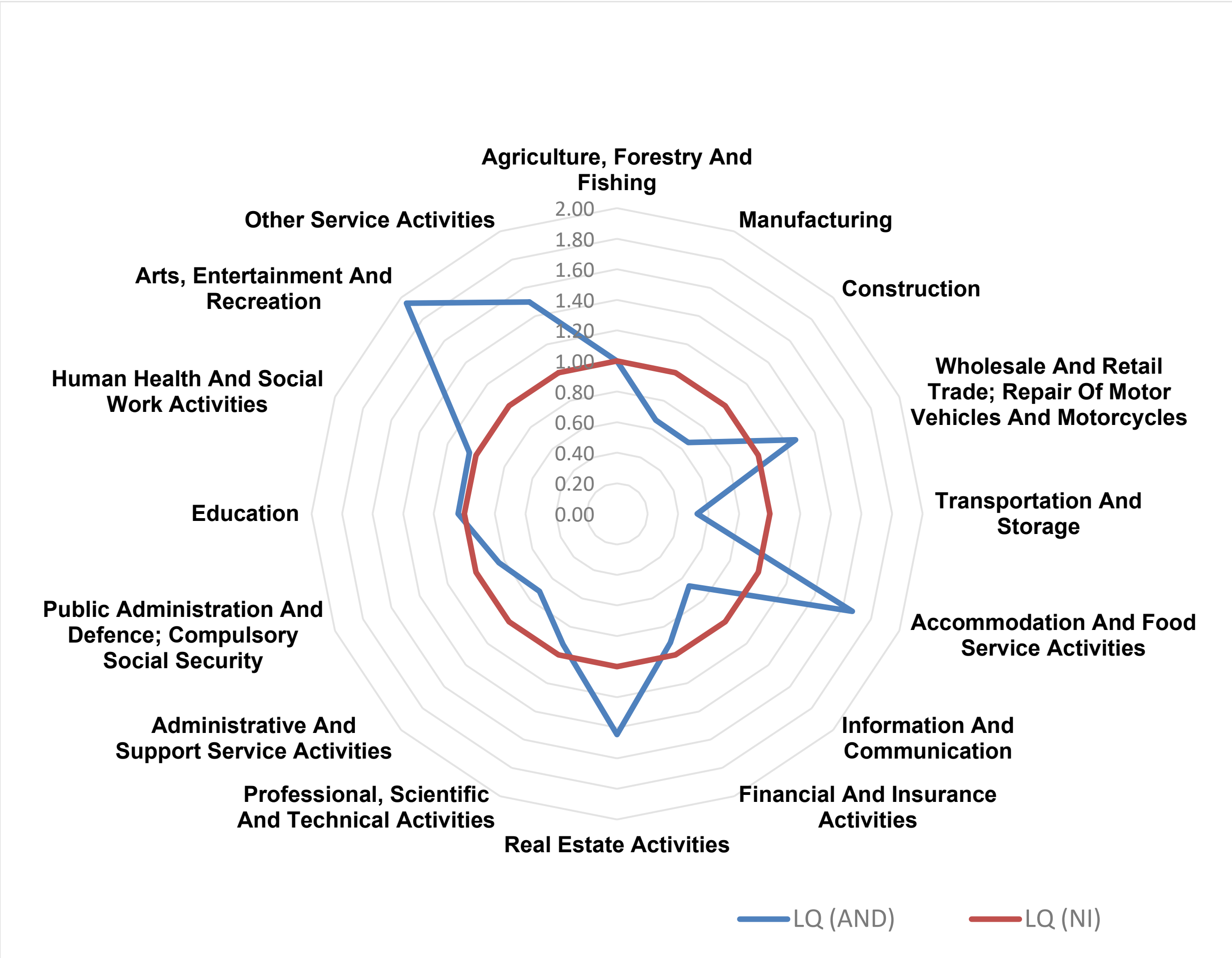
Source: NINIS; Labour Force Survey

Business Sector Composition

As indicated in Figure 1.2, when compared to Northern Ireland overall, AND has a higher employment concentration in wholesale/retail, real estate activities, tourism-related sectors (such as ‘accommodation and food services’, ‘arts, entertainment and recreation’ and ‘other service activities’) and arts, entertainment and recreation.

It should also be noted that AND has under-representation in some highly productive and growing sectors such as Information and Communication, Professional, Scientific and Technical, and Finance and Insurance activities.

Figure 1:2: Employment Location Quotient, 2015

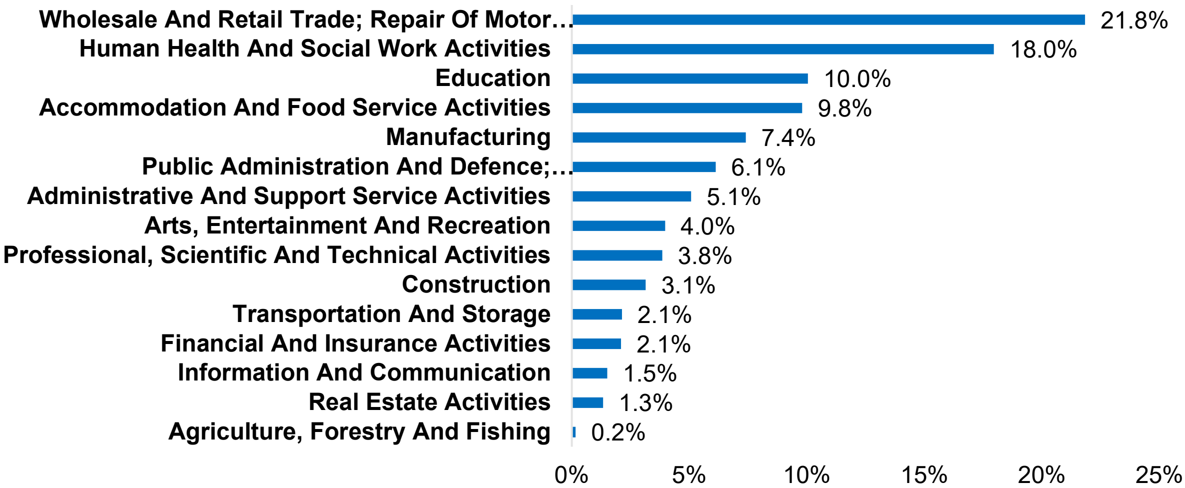


Source: Business Register and Employment Survey 2015

Figure 1.3 highlights that the sectors employing the largest number of people in AND are:

- Retail and wholesale (21.8%);
- Health/ social work (18%);
- Education (10%); and
- Hospitality - accommodation and food services (9.8%).

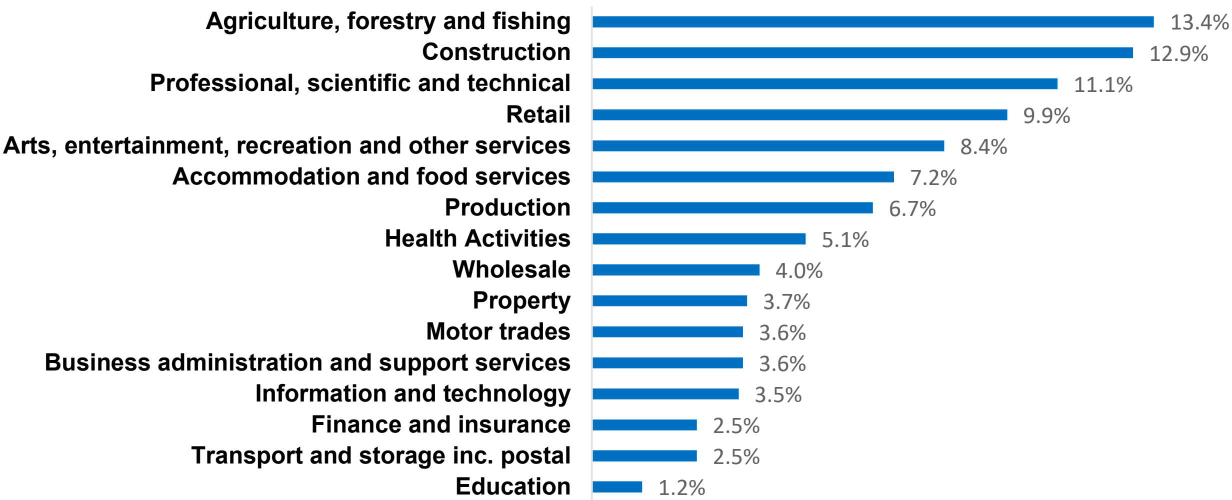
Figure 1:3: Employment Numbers by Sector in AND



Source: Business Register and Employment Survey 2015

Figure 1.4 identifies that the largest number of registered businesses are located within the agriculture, construction, professional/technical and retail sectors.

Figure 1:4: Number of Businesses (as % of total) in AND



Source: NINIS Annual Business Inquiry 2016

Annex 1 provides further details on numbers of registered business, numbers employed, productivity and growth prospect by sector for AND. This analysis highlights that AND has a high proportion of workers employed in sectors that are not expected to grow over the next 8 – 10 years and relatively small proportions of employee jobs in sectors that have good growth prospects - see details below:

High growth sectors:

- Information and Communication (currently representing c1.5% of total employee jobs in the AND area);
- Professional, Scientific and Technical (3.9% of total AND jobs);
- Arts, Entertainment and Recreation (4% of total AND jobs).

Medium growth sectors:

- Finance and Insurance (2.1% of total AND jobs);

- Administration and Support (5.1% of total AND jobs);
- Real Estate and Property (1.3% of total AND jobs);
- Construction (3.2% of total AND jobs);
- Accommodation and Food (9.8% of total AND jobs);
- Manufacturing (7.4% of total AND jobs).

Low growth sectors:

- Education (10% of total jobs in the AND area); and
- Wholesale and retail (21.8% of total jobs in the AND area).

Business Growth and Productivity

The sector profile of the AND area contributes to its low productivity as tourism, retail, and public-sector services tend to have low levels of Gross Value Added (GVA) per head.

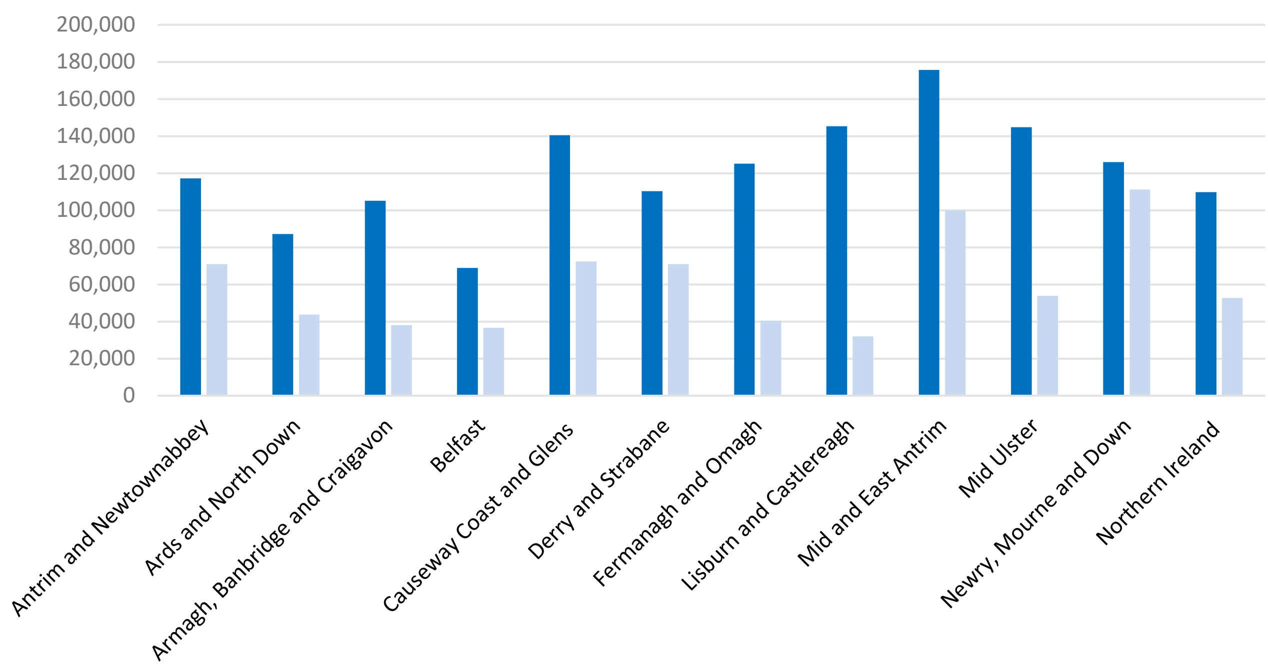
AND productivity in 2015, measured as GVA per head (£11,678) is significantly lower than the 2015 NI average (£18,584). *Source: ONS Regional Gross Value Added.*

The business birth rate (9.4%) is higher than the death rate (8.1%) indicating that the business base is growing at a rate of 1.3%, however, this is slower than the Northern Ireland average (2.6%). *Source: Inter Departmental Business Register, ONS Business Demography 2015.*

Export Orientation

Figure 1.5 illustrates external sales per employee and the total number of export sales per employee by LGD for Invest NI client businesses (June 2017). This shows that external sales outside NI per employee was £87,252 in AND compared to NI average £109,714. AND ranked 10th against the other LGDs. For outside the UK, export sales per employee for AND was £43,650 and for NI it was £52,704. Here, AND is ranked 7th out of 11 LGDs.

Figure 1.5: Invest NI Client External Sales and Export Sales across the LGDs



Digital Infrastructure

Broadband speed is a measurement of digital infrastructure and the salient points to note based on AND broadband access are:

- 81% of households have access to home broadband in AND which is 6% higher than the NI average and ranks 2nd at LGD level; and
- 7% of premises are unable to access speeds greater than 10MBps which is lower than the NI average of 15% and ranks 3rd at LGD level.

Social and Economic Deprivation

At a Council level, AND is one of the least deprived in Northern Ireland in terms of income and employment, however, there are pockets of deprivation. Five of the 48 wards (10.4%) in the Council area were in the top 30% most deprived wards in Northern Ireland including:

- Central – top 15% most deprived;
- Scrabo – top 20% most deprived;
- Dufferin – top 25% most deprived;
- Whitehill – top 25% most deprived; and
- Ballyrainey – top 30% most deprived.

Furthermore, Harbour ward in is in top 2% most deprived wards in Northern Ireland in terms of Living Environment and within the top 5% most deprived wards in relation to Crime and Disorder.

3.2 TOURISM PERFORMANCE

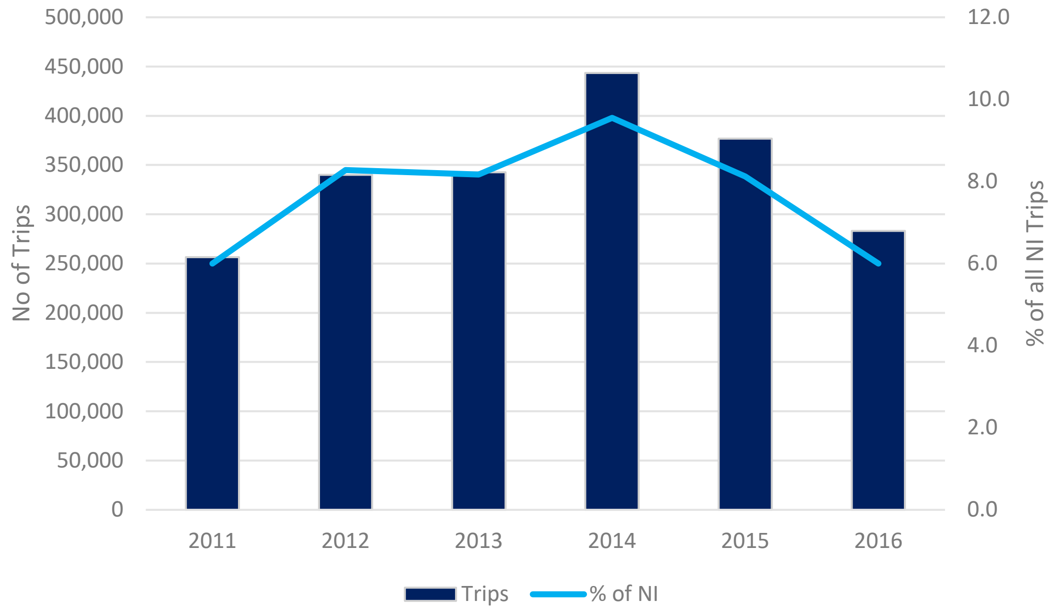
The analysis of the tourism sector in Ards and North Down has revealed some key points to note:

- Relative to other Council areas, Ards and North Down is performing strongly in terms of the number of trips and expenditure;
- Ards and North Down has some strong tourism assets at their disposal. Strangford Lough is key to attracting people to the area;
- Ards and North Down is primarily a "staycation" destination and the majority of visitors believe that a weekend is the ideal length of time for a visit in order to see all that the area has to offer, suggesting that there is more scope for raising awareness / improving the visibility of the destination's many other attributes and assets in addition to the more familiar key attractions;
- Finding ways to facilitate more access to the physical resource base for tourism – the lough, the coast and the countryside – will be an important consideration for the development of the strategy in terms of increasing dwell time and providing opportunities for visitors to enjoy the area's distinctive offer of value;
- Ards and North Down is also a popular day trip destination as highlighted in Table 3.3 where Pickie Park is considered the 10^{th} most popular day trip destination in Northern Ireland (NI Visitor Attraction Statistics 2016).

Current Tourism Profile

Ards and North Down Borough Council has performed strongly in the tourism sector in recent years. As highlighted in Figure 1.6, in 2016, Ards and North Down benefited from c. 283,000 overnight trips to the area, which is the second lowest year recorded on the graph. Up to 2014, Ards and North Down had been steadily increasing its share of the total trips in Northern Ireland and in 2014 accounted for 9.5% of all trips, however, this did fall to 8.1% in 2015 and again to 6% in 2016. Hotels in the area experienced occupancy rates of 54% in 2015. 44% of visitors came to the area to visit family and friends, whilst a further 45% of visitors were on holiday in the area.

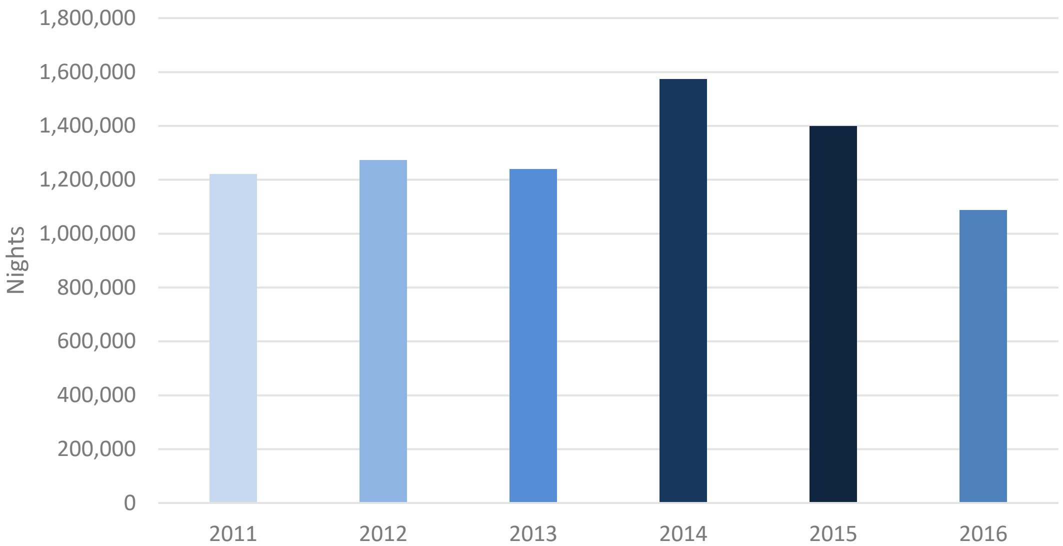
Figure 1:6: Total Number of Trips to Ards and North Down Borough Council



Source: NISRA / NINIS Tourism Statistics 2015

Similarly to the number of trips to the area, the total number of nights stayed by visitors to Ards and North Down had been experiencing significant growth up until 2014, the total number of nights stayed increased by over 330,000 to a total of 1,571,905. This increase can be seen in Figure 3.2. But since then, there has been a slight decline in the number of nights stayed by visitors to 1,087,260 in 2016.

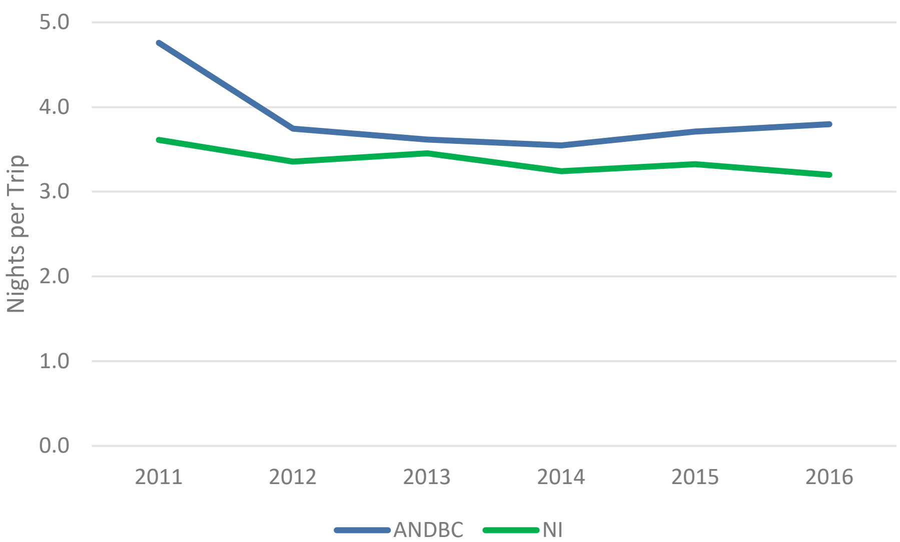
Figure 1:7: Total Number of Nights Stayed in Ards and North Down



Source: NISRA / NINIS Tourism Statistics

Interestingly, the average trip duration in 2016 was 3.8 nights which is higher than the average for Northern Ireland (3.2 nights). However, closer examination of the nights spent by visitors has revealed that this has been falling since 2011 when the average trip duration was 4.8 nights, this decline can be seen in Figure 1.8 (however, it should be noted that the average number of nights per trip has remained above the NI average during this time). This information suggests that the increase in the total number of trips has increased the total nights stayed by visitors but this masks the fact that visitors are now staying one day less than visitors in 2011 i.e. more visitors are coming to the area but they aren't staying as long.

Figure 1:8: Average Number of Nights Stayed per Trip in Ards and North Down and NI

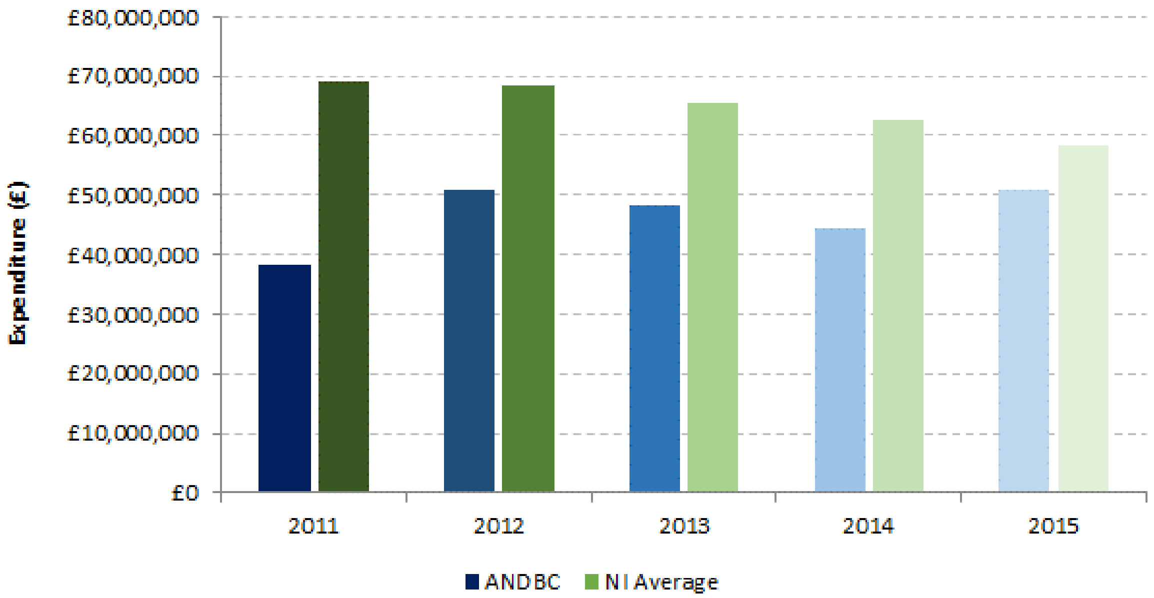


Source: NISRA / NINIS Tourism Statistics

Total tourism-related expenditure in the Ards and North Down area has increased by over £12.5 million since 2011, despite a period of declining expenditure from 2012 to 2014, as demonstrated in Figure 1.9 below. This information, when combined with the analysis of average trip duration, suggests that a higher expenditure is linked to a longer trip.

Table 1.9 below, presents the average spend per trip for the past five years for both Ards and North Down and the NI average.

Figure 1:9: Total Expenditure in Ards and North Down



Source: NISRA / NINIS Tourism Statistics

Aside from the increase in expenditure in 2015, there was a significant drop in the average spend per trip from 2011 to 2014 (decreased by 33%). Visitors in 2015 were spending an average of approximately £135 per trip, which is still 10% less than the 2011 and 2012 figures. Furthermore, in comparison to the average spend per trip across NI, ANDBC closed the gap in 2015 and continued to increase the average spend in 2016 to £162 , however, the Council area still remains significantly below the NI average. It appears that in order to increase expenditure, and therefore the size and impact of the tourism sector, Ards and North Down Borough Council need to motivate visitors to stay in the area for longer and further develop the tourism offering.

Table 1:10: Average Expenditure per Trip in Ards and North Down

Year	Average Exp. per Trip (£)		% Change	
	ANDBC	NI	ANDBC	NI
2011	£150	£158	-	-
2012	£150	£168	0%	6%
2013	£141	£172	- 6%	3%
2014	£100	£162	-29%	-6%
2015	£135	£164	35%	1%
2016	£162	£185	20%	13%

Source: NISRA / NINIS Tourism Statistics 2016

In 2016, Ards and North Down had the second highest proportion of Tourism employee jobs of all local authorities in Northern Ireland, following Belfast City Council. 13% of employee jobs were identified as being tourism-related. Table 1.11 highlights the sectoral breakdown of this figure.

Table 1:11: Tourism Employee Jobs

Sector	ANDBC	NI
Accommodation for visitors	534	10,057
Food and Beverage serving activities	3,208	32,948
Transport	81	3,555
Sporting and recreational activities	573	7,135
Other	558	4,347
Total Tourism-related	4,954	58,042
Total Employee Jobs	38,182	691,501
% Tourism-related	13%	8.4%

Source: NISRA Tourism Employee Jobs 2016

Significant tourism attractions in Ards and North Down

Ards and North Down has an abundance of tourist attractions currently established in the area. According to Tourism NI, the Council area has one of the top ten attractions in Northern Ireland (Pickie Funpark) and two of the top five museums as ranked by visitor numbers (Ulster Folk & Transport museum and North Down Museum). Further to this, Strangford Lough is a major asset for the area. Although there are no official statistics released for visitor numbers to Strangford Lough, a Fact Card entitled "Destination Strangford" was released by Tourism NI (Visitor Attitude Survey 2014) and it estimates that 47% of visitors to the Strangford area come specifically for the lough and coastal views.

The "Destination Strangford"* report also noted that 25% of visitors to the area also visited Exploris Aquarium. According to the Hansard report (The Future of Exploris, 2013) visitor numbers to Exploris range from 78,500 – 111,000, averaging around 93,000 visitors annually at the aquarium before closing for refurbishment. The aquarium opened again in August 2016 and statistics show that in the first year of reopening (August 16- August 17) total visitors will reached 168,863. Other significant attractions in terms of visitor numbers include Castle Espie (?) and Mount Stewart House and Gardens (185,000).

**It should be noted that 'Destination Strangford' research, amongst other sources, is drawn upon for the purposes of this baseline report. 'Destination Strangford' as configured did not include the legacy North Down Council area therefore historic data relating to Destination Strangford does not provide full coverage for the Ards and North Down Borough Council area.*

Table 1.12 provides visitor numbers for some of the top attractions in the Ards and North Down Borough Council area.

Table 1:12: Attraction Visitor Numbers

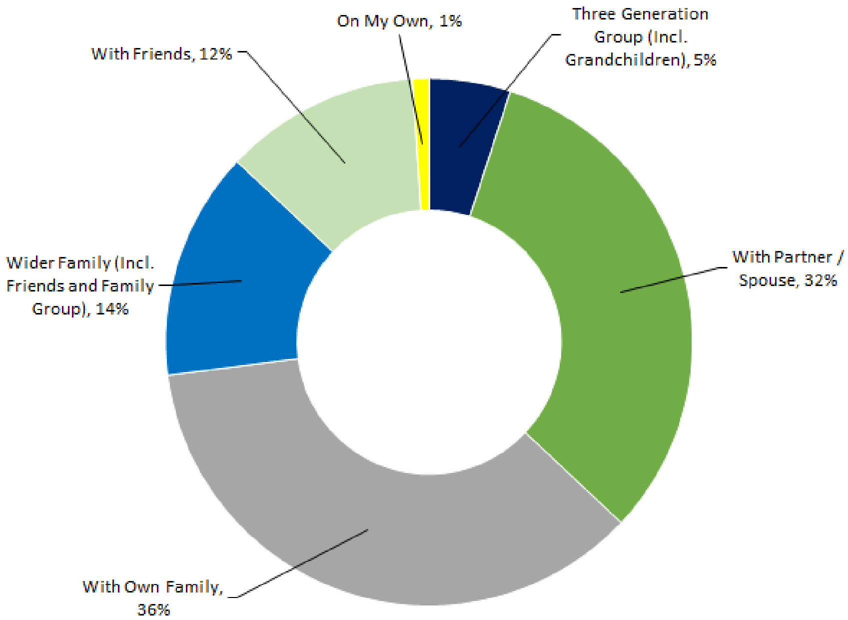
Attraction	Description	Annual Visitors (2016)
Pickie Funpark	Pickie Funpark, Bangor, is ranked as the 10th most popular visitor attraction in Northern Ireland. The park features an adventure playground, splash pads and an electric car track	225,000
Crawfordsburn Country Park	Crawfordsburn Country Park was the fourth most-visited country park in Northern Ireland in 2015, despite seeing its visitor numbers fall by 38% from 2014.	603,000
Scrabo Country Park	Scrabo Country Park, near Newtownards, was the 11th most visited park in Northern Ireland in 2014. The park is centred around Scrabo hill and features views of Strangford Lough	198,000
Mount Stewart House and Gardens	Mount Stewart House and Gardens, is ranked as the 11th most popular visitor attraction in Northern Ireland.	202,000
Ulster Folk & Transport	Ulster Folk and Transport Museum, Cultra, was reported as being the museum with the second highest visitor numbers in 2015.	179,000
North Down Museum	The sixth most visited museum in Northern Ireland in 2015 was North Down Museum, Bangor. The museum presents exhibits describing the area's history from the Bronze Age to the present day.	77,000

Source: NI Visitor Attraction Statistics 2016

Visitor Profile

According to statistics published by Tourism NI, the majority of visitors to Ards and North Down are from Northern Ireland (52%), followed by GB (27%) and other countries in Europe (5%) with approximately 20% of these visitors staying overnight. In Northern Ireland generally, 49% of visitors are from other places in NI, 29% are from GB and 7% are from other countries in Europe. This suggests that the key market for Ards and North Down, and indeed Northern Ireland, is the "staycation" market. The two largest visitor groups to the area are families and couples (without children) suggesting that the Strangford area appeals to both children and adults. The average party size for visitors to the area is 3.85 which is higher than most other Council areas and reinforces the "family-friendly" theme. The breakdown of the visitor groups are highlighted in Figure 1.13.

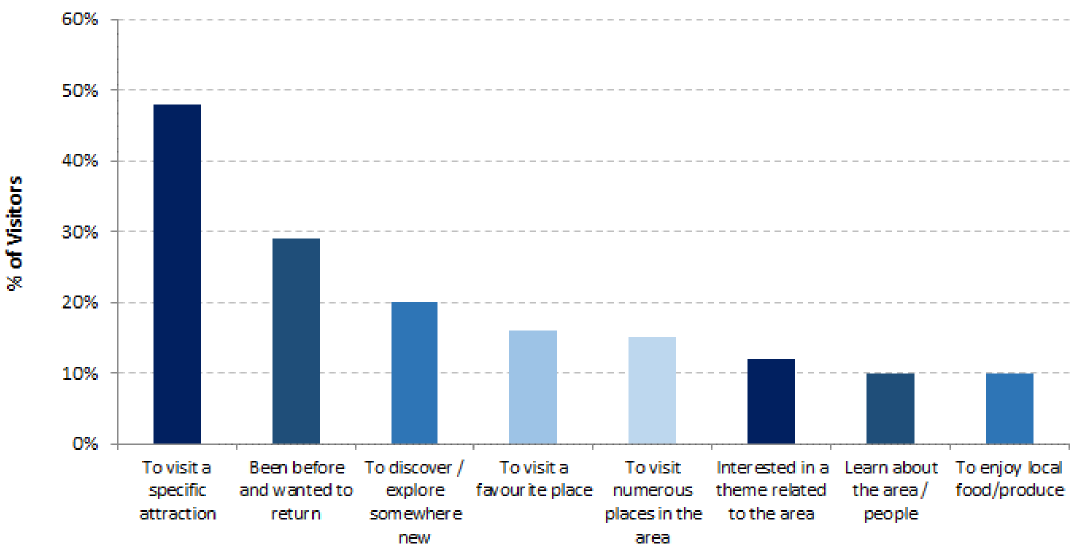
Figure 1:13: Visitor Groups



Source: Tourism NI: Destination Strangford

The key motivations for visits were to visit a specific attraction (48% of visitors) and to return to the area having previously visited (29% of visitors). One in five visitors chose to visit the area as they wished to discover and explore somewhere new.

Figure 1:14 Motivations for Visiting Ards and North Down



Source: Tourism NI

The most popular accommodation in the area is self-catering options, either houses, flats or cottages, with approximately 1 in 4 visitors staying in this type of accommodation. Once again, the domestic orientated market is reinforced as the second most common choice of accommodation is staying with friends and relatives.

A3.0 EXISTING RESEARCH & DATA

Tourism NI Pillars and Market Segments

Tourism NI has created 5 "pillars of experience" which are essentially the blueprint for capitalising on tourism opportunities in Northern Ireland. The five pillars of experience are:

- Living legends – bringing our heritage assets to life
- Coasts and lakes – celebrating our coast and waterways
- Unique outdoors – animating and interacting with our landscapes
- Culture and creative – celebrating our cites and creativity
- Naturally NI – Unique to NI, our food, people, craft and traditions

Further to the pillars of experience, Tourism NI have also developed market segments by which visitors are identified. The key market segments which apply to the Ards and North Down Borough Council area are:

- Culturally Curious
  - these audiences invest in activities, not just relaxation
  - they expect hassle free, convenient experiences
  - they expect safety, cleanliness, value
- Great Escapers
  - these audiences are in serious need of time out from busy lives and careers
  - they are interested in rural holidays, getting physical with nature
  - they appreciate peace and quiet between activities - the point is the trip itself. It's 'down time', it's being off the beaten track, it's a great escape
  - they want to actively explore more remote places, on foot or by bicycle
- Time together (NI & ROI);
- Mature cosmopolitans (NI & ROI); and
- Family fun (NI & ROI).

Priority Segments (RoI)

In light of the renewed emphasis on the RoI domestic market – new priority segments have been singled out for attention by Tourism Northern Ireland in the drive to capture greater market share. These include;

• 'Open to Ideas' market segment is characterised by a willingness and disposition towards trying new things, going new places and being open to new experiences. This segment has a greater focus on activity, the outdoors and nature

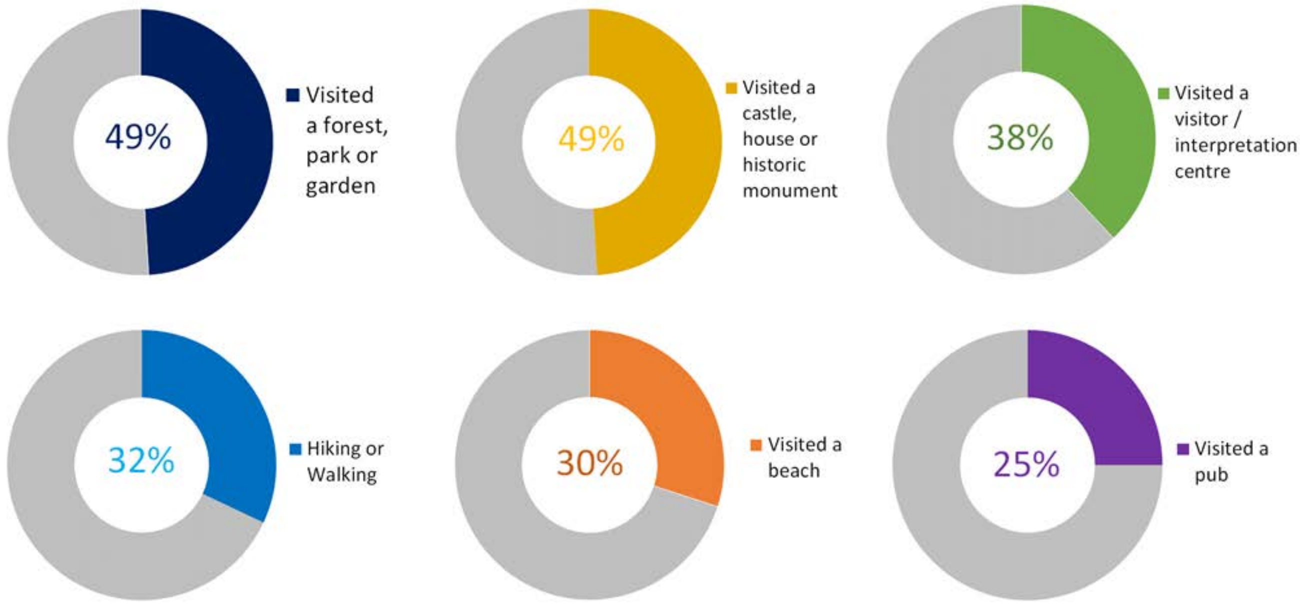
• 'Open-minded Explorers' segment is also characterised by a willingness and disposition towards trying new things, going new places and being open to new experiences, but with a greater interest in people, place and culture.

• 'Active Maximisers' is smaller in size but is currently more likely to visit Northern Ireland than the majority of other segments. This is a younger segment, more focused on getting the most out of their short breaks and seeking unique and mind-broadening experiences. As such, this segment represents not only holidaymakers of today but holidaymakers of the future.

Nature of Visitor Stay and Activities

According to the "Destination Strangford" report published by Tourism NI, the average overnight stay for the Strangford area is 5.3 nights which is high when compared to the average for Northern Ireland as a whole (3.3 nights). The vast majority of out-of-state visitors did not stay overnight in the area and one of the key motivators to visit the area was wanting to make a return visit, suggesting that the Strangford area is more aligned to the domestic market or 'staycations'. The main selling points of the area are the coast, lough, and the appeal of exploring the towns and villages in the surrounding areas. The key activities undertaken by visitors are profiled in Figure 3.7.

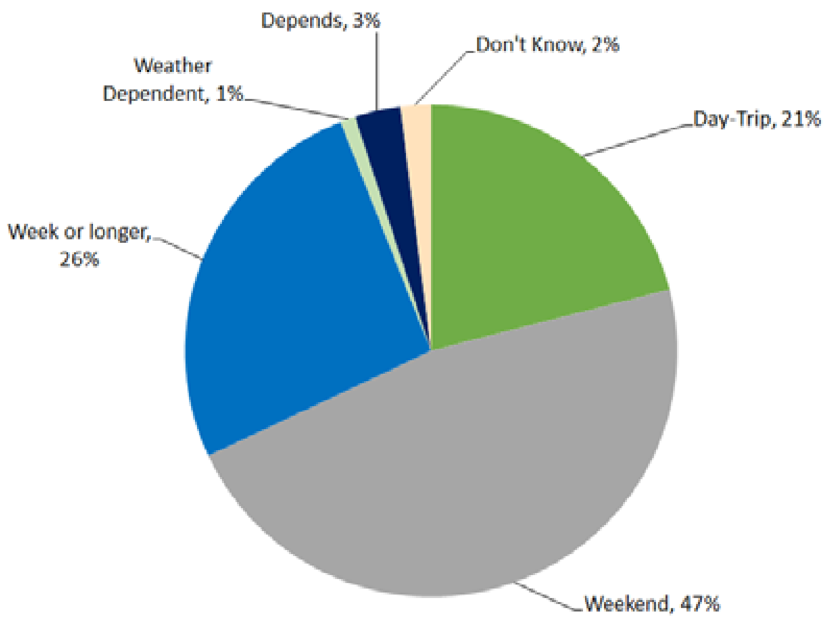
Figure 1:15 Activities Undertaken by Visitors



Source: Tourism NI "Destination Strangford"

47% of visitors felt that a weekend visit was the most ideal length of visit, however 26% believe that a week is a better length of time to see all that the Strangford has to offer. Figure 1.15 shows visitors' responses to the survey.

Figure 1:16 Ideal Length of Stay



Source: Tourism NI "Destination Strangford"

The most popular places for visitors to the area were Mount Stewart, Downpatrick and Exploris aquarium. Compared to other areas, visitors to the Strangford area were more likely to visit a castle or historic building/monuments and visit a forest, park or garden. Visitors rated the destination's most appealing aspects as being a place where they felt safe, a place to enjoy the local scenery and a place to rest and relax.

75% of visitors indicated that their trip to the Strangford area was either Excellent or Very Good with a further 18% rating their trip as Good. 94% stated that they would be fairly likely, very likely or definitely would recommend the area to friends and family.

A3.0 EXISTING RESEARCH & DATA

3.3 PLACE SPECIFIC STRATEGIES

The Council's regeneration policy is set within the context of the Department for Communities, which retains responsibility for regeneration in Northern Ireland (see Urban Regeneration and Community Development Policy Framework).

Through a close working relationship with this department and others, Ards and North Down Borough Council has been central to the development of place specific policies for the majority of its urban settlements, as well as other specific locations across the Borough. These regeneration plans, while non-statutory in nature, provide comprehensive visions, objectives and projects for each place that have been widely consulted upon with local communities, elected members and other stakeholders.

The Council's ongoing commitment to advancing regeneration across the Borough is evident within the recently published Community Plan, where urban and rural regeneration will be integral to the realisation of its 5 outcomes.

TOWN CENTRE MASTERPLANS

NEWTOWNARDS
BANGOR
HOLYWOOD
COMBER
DONAGHADEE

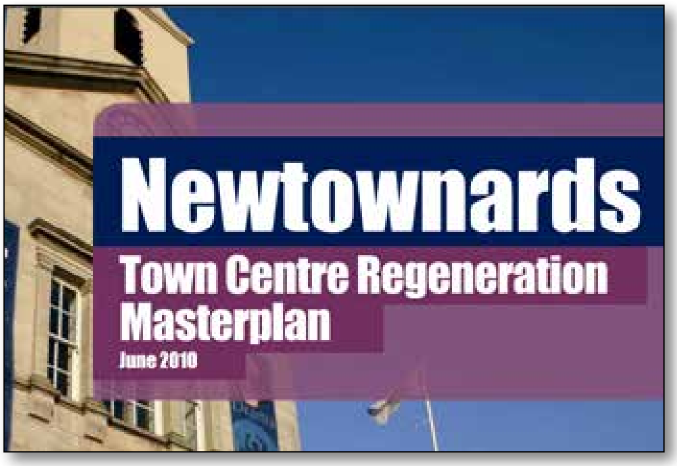
VILLAGE PLANS

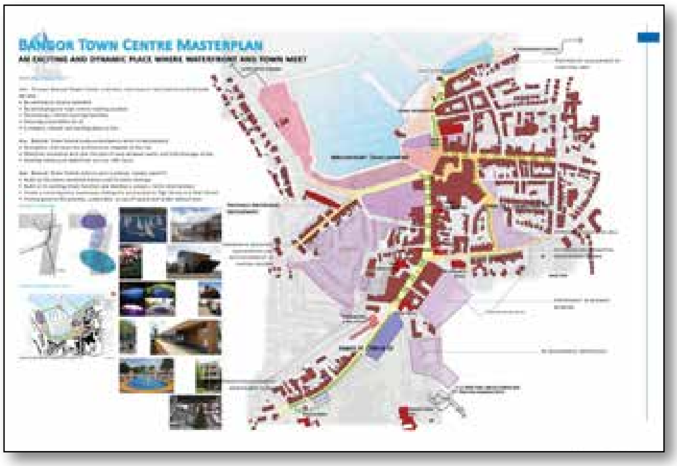
BALLYGOWAN
BALLYHALBERT
BALLYWALTER
CARROWDORE
CLOUGHEY
CONLIG
GREYABBEY
GROOMSPORT
HELENS BAY & CRAWFORDSBURN
KILLINCHY
KIRCUBBIN
LISBARNETT AND LISBANE
MILLISLE
PORTAFERRY
PORTAVOGIE
SIX ROAD ENDS

TOWN CENTRE MASTERPLANS

Newtownards

Overview
Anglo-Norman heritage, 6th and 13th century monastic origins, well located at head of Strangford Lough for tourism growth for Ards Peninsula St. Patricks country, strong built heritage (Town Hall, St. Mark's Church, the Market Cross, Conway Square,), Market town, unique retail offer.





Vision / Statement
"Unlocking the future by developing the present - a contemporary, vibrant Newtownards for local people and visitors alike"
In practice, this means that Newtownards Town Centre will aspire to fulfil the following Vision statement over the next 15-20 years:
"A vibrant and distinctive market town, Newtownards is a destination of choice complementing the wider tourism offer in the Borough. The local people are proud of their town and regularly visit the centre to enjoy the wide range of shops, services, cafés, restaurants and leisure facilities provided in a high quality, attractive and user-friendly environment. In particular, the Town Centre is well known for its selection of local and independent retailers, many of which are found only in Newtownards. It has a reputation for being a welcoming and friendly town, providing customers with a retail-leisure experience that is second to none.

Themes / Aims / Priorities / Categories
- Create a diverse Town Centre (with a rich mix of uses and a balanced provision of activities and opportunities.)
- Produce a thriving tourist economy,
  (making Newtownards a destination in its own right, from which the attractions of the wider Borough, and beyond, can be explored.)
- Expand the evening economy sensitively, (bringing life to Newtownards throughout the day, and into the night.)
- Improve the 'Quality of Place' (by making the most of Newtownards' built heritage and high quality townscape.)
- Ensure accessibility, (making Newtownards Town Centre pedestrian and cyclist friendly, reduce congestion, with good public transport links and adequate, accessible parking provision.)
- Present a friendly face (with a strong community spirit that is welcoming to visitors.)
- Over-arching branding and promotions,(providing Newtownards Town Centre with effective promotion and marketing, and an exciting programme of events throughout the year, managed in a partnership approach)

Masterplan Initiatives
key opportunities of Masterplan – Retail development (Reinvigorate town centre) , Public Realm (improved environment in town centre, destination), an improved evening economy (distinct quarters, animation town centre & complement local retail offer).

A3.0 EXISTING RESEARCH & DATA

BANGOR

Overview
Rich maritime and architectural past, experienced recent rapid residential growth supported by range of sporting activities, retail centres and quality educational centres. Strong transport links, attractive built and natural environment. Defined by ring road which serves a significant number of residential developments. Strong monastic origins, present form and character reflects growth as a seaside resort in the late 19th and early 20th Century. Cotton industry heritage.

Vision / Statement
"Bangor Town Centre will be re-established as a high quality, vibrant competitive town with a distinctive and historic maritime character. This will be achieved through effective and strategic regeneration of its key maritime asset. The town will be renowned as a welcoming place geared to families, youth and the elderly. The town centre will be a location where people want to visit, live and work in and where businesses are attracted to locate in and grow".

Themes / Aims / Priorities / Categories
- To make Bangor Town Centre a premier, high quality destination in Northern Ireland (by realising its tourist potential, by developing the town centre retailing product, developing a vibrant evening economy, ensuring accessibility for all)
- Bangor Town Centre should reconnect with its waterfront
  (To strengthen and retain the architectural integrity of the bay, maximise the recreation and civic function of the area between water and frontage of the bay, develop vibrancy of the waterfront on a 24 hour basis)
- Bangor Town Centre should have a strong unique identity
  (To build on the towns 'Maritime History' and 'Christian Heritage', to build on the existing retail function and develop a unique 'niche' retail product, create a contemporary townscape, linking the promenade to the Main Street, priority given to the positive, sustainable re use of vacant and utilised sites).

HOLYWOOD

Overview
Norman heritage, Market town heritage, substantial growth following the Belfast and County Down railway company opening service to Holywood in 1848, historic high quality residential suburbs on lower slopes of Holywood hills, popular coastal resort , hosts nationally significant events, high retail quality offer, LLPAs (Seapark, Ballymemoch, Redburn, Glenlyon), visitor destination – café, retail.

Vision / Statement
"Holywood Town Centre will be a prosperous and attractive destination for all. By linking communities, Holywood will work together to ensure its town centre works for everyone. By supporting business both existing and new, Holywood will continue to enhance its reputation for quality.

By harnessing heritage, Holywood will look its best and unlock its potential as a place of tourism. By making the most of its natural assets, not least its proximity to the sea, Holywood will further strengthen its identity and build upon its reputation as one of Northern Ireland's finest coastal towns."

Themes / Aims / Priorities / Categories
- Linking Communities (improving physical linkages, creating shared space, working together)
- Supporting Businesses (maintaining quality, nurturing emerging sectors, enriching the offer)
- Harnessing Heritage (safeguarding assets, reconnecting town with history, unlocking tourism potential)
- Strengthening Identity (enhancing first impressions, connecting land and sea, developing a brand)

Masterplan Initiatives
Including public realm improvements, Heritage centre, Town Greenway, Redburn Square, Tidal Marina, Holywood Pier etc.

COMBER

Vision / Statement

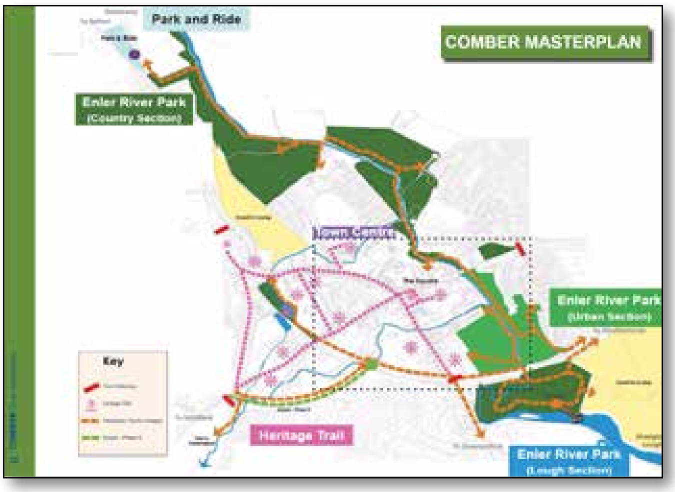
Comber is a thriving market town supported by its local community. The town centre is accessible and enticing, attracting people from far and wide for its superior quality and niche retail offer. The extended greenway through the town, linking to Newtownards and on to the coast has made Comber the focus for recreation and has established the town as the 'Gateway to Strangford.' Comber has also built upon its rich cultural heritage with The Square providing the focal point for activity.

Themes / Aims / Priorities / Categories

- Provide an attractive, accessible and viable town centre
  (extending the Comber Greenway into the town centre, aesthetic improvements to building frontages, reinvigorating vacant/derelict properties and sites, improving the diversity and quality of the retail offer)
- Protect and enhance Comber's cultural, built and natural heritage
  (revitalising historic building, re-establishing the historic character of the streetscape, extending the existing heritage trail, promoting Comber's proximity to Strangford Lough, promotion and marketing of events)
- Improve community, leisure and recreation services and facilities
  (potential new community centre, community garden, BMX and play area, developing community allotments, potential cycle facilities, improving the range and quality of outdoor leisure activities within the town, creating an enhanced network of walking and cycling routes within the town, connecting local communities)
- Promote and enhance the production and sale of quality foods, arts and crafts
  (developing community allotments, promoting growth of local enterprise based on the quality food sector, promoting and enhancing Comber Farmers' Market, developing small scale business and enterprise units, promoting arts and crafts)

Masterplan Proposal

Backbone of masterplan is creation of new linear park running through town, from current Comber greenway to Strangford Lough – Enler River Park, with distinctive sections.



DONAGHADEE

Overview

Approx. 300 years ago one of busiest ports in Ireland, (to Scotland), Norman heritage (est between 8th and 11th c), Moat & Folly , Harbour, Irish sea rescue of survivors of MV Princess Victoria (maintained and exiting lifeboat), rich architectural heritage (Plantation of Ulster, Medieval, Jacobean, Georgian, Victorian and Edwardian architecture) &natural heritage (coastal), heritage (maritime and shipping, fishing, milling) the 'Parade' business along seafront and help establish commercial leisure sector and evening economy, Coastline SPA and ASSI , Donaghadee Golf course, gateway, waterfront, sailing club regatta, future arts and crafts, family friendly offer.

Vision / Statement

In 2030, Donaghadee will have re-emerged as a thriving seaside town. The redeveloped harbour has provided the catalyst for visitor and community services to return. The increase in tourism activity has also stimulated a vibrant waterfront stretching to the Commons, acting as a focus for leisure and recreation. The increasing popularity of the town has attracted local and visitors.

The increasing popularity of the town has attracted local entrepreneurs and investment form further afield. The town has also become much more accessible with sufficient parking and public transport to service both local people and the influx of visitors throughout the year.

Themes / Aims / Priorities / Categories

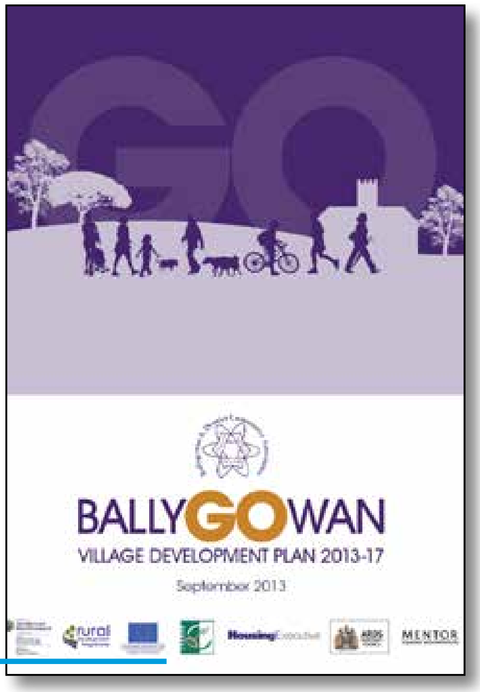
- To ensure the future protection of the harbour whilst fully exploiting the economic opportunity and acting as a catalyst for regeneration
- To provide an attractive and accessible town centre
- To protect and enhance Donaghadee's natural and built heritage
- To promote and encourage the development of services and facilities to support the growing tourism sector

Masterplan Proposals

- The Town Centre (townscape improvements, enhancing heritage, development of opportunity sites, parking and accessibility)
- The Harbour (redevelopment, extension, commercial)
- The Commons Coastal Park (heritage museum, park,)
- Crommelin Ecopark (fitness and nature trails, motorhomes, caravan, development of sports hub)

VILLAGE PLANS

BALLYGOWAN (PLAN CURRENTLY UNDER REVIEW)



Overview
Commuter village, the surrounding area historically was populated by a great number of small tenant farmers and weavers, centre comprising of approx. 12 houses and an inn. After introduction of Belfast County Down Railway (1850) village began to grow.

Vision / Statement
Ballygowan is a vibrant, sustainable rural community which provides a healthy environment for all its residents and a good place to live, work and play within a caring and organised community.

Themes / Aims / Priorities / Categories
- Village Services and Infrastructure
- The Environment, Heritage and Outdoor Activities
- Community Facilities and Activities
- Enterprise and Investment in the Local Economy

BALLYHALBERT

Overview
Coastal village, Glastry Nature reserve (clay bricks), WWII Heritage – War Memorial, RAF control tower, Glastry college.

Vision / Statement
Establishing a defined village core that reflects Ballyhalbert's strong community spirit will present new opportunities and a gathering space for the community. Safe walkways throughout the village will connect residential communities while a new coastal promenade will enhance leisure provision. Rediscovering its rich heritage asset base and strong Ulster Scots links, Ballyhalbert will be a forward looking village that its residents can be proud of.

Themes / Aims / Priorities / Categories
- Protecting Ballyhalbert's coastline
- Safeguarding the welfare of Ballyhalbert's residents
- Celebrating Ballyhalbert's Ulster Scots heritage and historic past
- Strengthening Ballyhalbert's relationship with its coast and harbour
- Consolidating a vibrant village centre
- Improving community services and facilities

BALLYWALTER


ACTION PLAN

Overview
Windmill heritage (Windmill Stump) Air Raid shelter, The Perch, Ballywalter House & Park, Lime Kiln, Whitechurch, Harbour.

Vision / Statement
Ballywalter will be a vibrant seaside village that is home to a strong local community and capitalises on its scenic coastal location. Regeneration of Main Street will provide opportunities for new business enterprises and the reuse of vacant sites and buildings, while its revitalised promenade, harbour and recreational hub will offer enjoyment to residents and sports enthusiasts. Ballywalter will showcase many of its heritage assets within a network of safe streets, pedestrian connections and walking routes that strengthen relationships between its centre, coast and neighbouring areas while heightening its offer as a key tourist destination.

Themes / Aims / Priorities / Categories
- Focussing community skills and services
- Tackling parking and traffic speeds
- Integrating pedestrian connections and walking routes
- Improving the promenade and harbour
- Promoting Ballywalter's heritage
- Formalising a sports and recreation hub
- Repairing the village fabric

CARROWDORE (PLAN CURRENTLY UNDER REVIEW)

Overview
Key – village 'in the heart' of the Peninsula, Quarry is main local employer, Carrowdore Early Years and Community Development Centre (CEYCDC) is striving to improve the quality of life for local residents, landmarks-castle and quarry, Louis McNeice grave, annual festival, Village promotes art and culture.

Vision / Statement
Carrowdore continues to offer a peaceful, family friendly and safe setting for residents and visitors alike and to provide quality opportunities for residents to develop and live sustaining, healthy lifestyles. The village has a strong and vibrant community spirit, excellent leisure, health, educational and community facilities and an attractive local environment.

Themes / Aims / Priorities / Categories
- Improving the local environment
- Developing the local community
- Improving local services including community safety, leisure, health, traffic and transport.

A3.0 EXISTING RESEARCH & DATA

CLOUGHEY (PLAN CURRENTLY UNDER REVIEW)

Overview
Key – Linear settlement, coastal location, original village to south end of beach. Anglo-Norman heritage, 'The Moat', Kirkistown Castle, early 20th century popular holiday destination, golf course, several airfields developed during WWII, one at Kirkistown converted into a motor racing track, Somme Heritage Garden, Slan's Graveyard, part of Strangord Lough cycle trail , Mourne coastal route, Cloughey coastal route (statutory planning is complete at time of report).

Regional development Strategy 2035 vision
The vision is to create an outward-looking, dynamic and liveable region and to sustain a high quality of life for all. The village plan's aim is to make Cloughey a better place in which to live, visit and conduct business, while promoting opportunities to create and sustain new diverse indigenous enterprises.

Themes / Aims / Priorities / Categories
- A collaborative Cloughey (establish stronger partnership working amongst the community, establish effective sharing of information, establish active participation in the regeneration of Cloughey)
- A connected Cloughey (strengthen regional linkages, strengthen village linkages, tackle traffic and parking issues)
- An attractive Cloughey (enhance the welcome and arrival experience, enhance the environmental quality throughout Cloughey, define village focal points)
- An active Cloughey (protect and enhance the natural habitat for leisure and recreation uses, enhanced outdoor leisure and recreation space, enhance indoor leisure and recreation space)
- A rediscovered Cloughey (rediscover Cloughey's heritage and historic sites, reintegrate and celebrate Cloughey's heritage and historic sites)
- A growing Cloughey (facilitate a growing visitor base, facilitate growth of the local economy)

CONLIG

Overview
Clandeboye golf club, forests and walking trails, leadmines, reservoirs, Little Clandeboye / Conlig House hertiage (Harland & Wolf shipyard – Olympic, Titanic, Britannic), Eddie Irvine sports centre, Somme Museum.

Vision / Statement
Building on its strong spirit and active community, Conlig's revived village core will offer both residents and visitors a central cluster of community services and usable green spaces. Enhanced entrance points will ensure a warm welcome to the village, while reduced traffic speeds will allow for a safer pedestrian environment. Conlig will have easy access to its many heritage assets and walking routes including the Somme Museum, Ulster Way, Conlig Reservoir and the lead mines at Whitespots, the largest in Ireland at its time.

Themes / Aims / Priorities / Categories
- Defining the village extents
- Rediscovering the village core
- Improving the quality of the environment
- Forging wider connections
- Facilitating improved health and wellbeing
- Celebrating Conlig's heritage


VISION AND OVERARCHING AIMS

5.1 SHARED VISION STATEMENT

"Building on its **strong spirit** and **active community**, Conlig's **revived village core** will offer both residents and visitors a **central cluster of community services** and **usable green spaces**.

Enhanced entrance points will ensure a **warm welcome** to the village, while **reduced traffic speeds** will allow for a safer pedestrian environment.

Conlig will have **easy access** to its many **heritage assets and walking routes** including the Somme Museum, Ulster Way, Conlig Reservoir and the lead mines at Whitespots, the largest in Ireland at its time."

A3.0 EXISTING RESEARCH & DATA

GREYABBEY

Overview
Georgian buildings, specialist antique offer, Cistercian Abbey/Grey Abbey, Greyabbey House, Rosemount Estate, future role of village hall - community hub , potential GP, Heritage and Heritage Trail, Walks and Promenade walks

Vision / Statement
As one of the most historic villages on the Ards Peninsula, Greyabbey, with its Cistercian abbey monastery ruins, will build on its growing reputation as a must see tourist destination. Its thriving business community, renowned for its high quality antiques offer within the backdrop of some of Northern Ireland's finest Georgian and Victorian architecture, presents a confident and welcoming village and one that's open to all. Improved pedestrian access along the Portaferry Road will strengthen the relationship between the village, the Lough and its unique wildlife setting.

Themes / Aims / Priorities / Categories
- Facilitating business growth, community enterprise and social welfare
- Championing history and heritage
- Addressing car parking and traffic issues
- Enhancing the built environment
- Beatifying the village

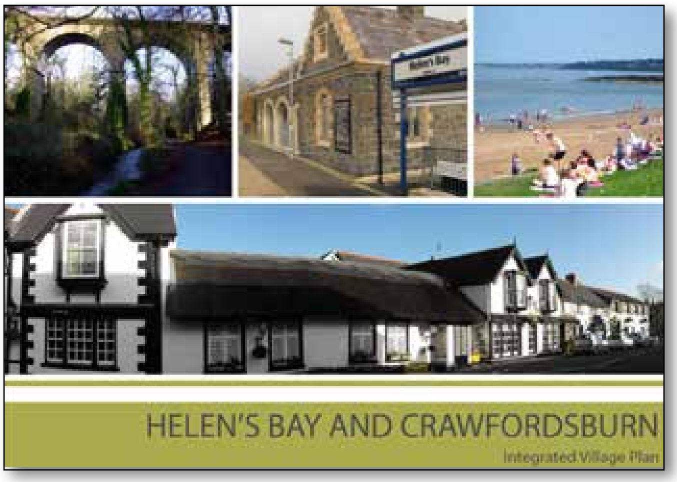
GROOMSPORT (PLAN CURRENTLY UNDER REVIEW)

Overview
Described as a dormitory seaside and holiday village in the (dBMAP) an areas of village character is designated with following key features contributing to its character (Cockle Row thatched cottages, Victorian buildings, churches) Four LLPA's – Donaghadee Road, Bangor Road, Groomsport shoreline, Main Street

Themes / Aims / Priorities / Categories
- Groomsport promotion strategy
- Revitalising Groomsport's seafront
- Improved management of Groomsport's coastline
- Protecting the character of Groomport's key streets
- Enhancing the village arrival experience

HELENS BAY & CRAWFORDSBURN

(PLAN CURRENTLY UNDER REVIEW)



Overview

HB - Commuter village, was a planned village deriving from the building of the Belfast and County Down Railway. To be a luxury holiday resort to rival the likes of Portrush and Portstewart

CB – small, picturesque and historic village. Originating in the 17th century as a small hamlet on an important route along north down, represented an important element in the settlement of the area by the Ulster Scots.

Vision / Statement

The vision is to create an outward-looking, dynamic and liveable Region and to sustain a high quality of life for all. The village plan's aim is to make Helen's Bay and Crawfordsburn a better place in which to live, visit and conduct business, while promoting opportunities to create and sustain new diverse indigenous enterprises.

Themes / Aims / Priorities / Categories

- Traffic management
- Expanding village amenities
- Enhancing the public realm
- Improving connections, Wayfinding and interpretation
- Promoting sympathetic development
- Consolidating community facilities
- Encouraging additional activities and events

KILLINCHY

(PLAN CURRENTLY UNDER REVIEW)

Overview

Small village on western side of Strangford Lough, largest local business of Willowbrook farm which is now Ireland's leading processor of salads and vegetable. Capital project – Community Hall improvements.

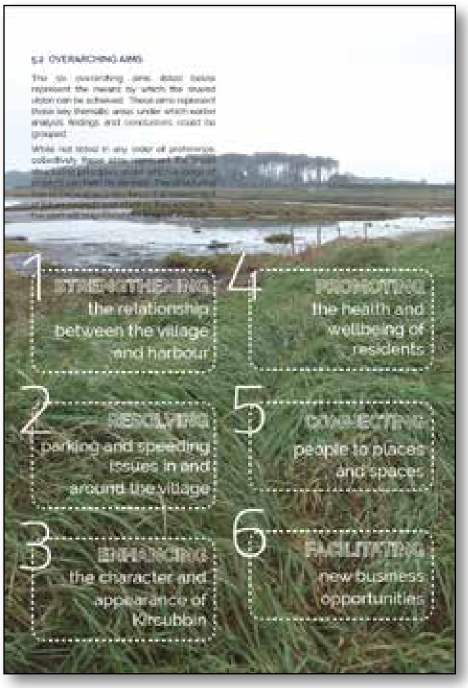
Vision / Statement

The main aim of this plan is to increase community integration and improve the local area for everyone within the area.

Themes / Aims / Priorities / Categories

- Communication & Facilities
- Outreach & Other
- Roads & Transport
- Village Regeneration

KIRCUBBIN



Overview

Harbour (poor condition), Kircubbin Sailing Club, historically important import/export destination along Peninsula, historically market village, beach, network of existing and proposed walking routes, proposed breakwater – improved facilities for water sports recreation and peninsula wide health hub.

Vision / Statement

Building on its friendly welcome and picturesque setting, Kircubbin will be a thriving village along the eastern shores of Strangford Lough. Its central strategic position will enable the village to provide extended health services to serve communities within the wider Peninsula.

Its restored harbour and strengthened links to the Sailing Club, will make Kircubbin's coastline more accessible for the benefit of both residents and visitors, as well as wildlife and water sport enthusiasts.

Opportunity sites will pave the way for new business ventures while a range of looped walks, including the popular 40 steps, will ensure its people are connected to key places and spaces around the village.

Themes / Aims / Priorities / Categories

- Strengthening the relationship between the village and harbour
- Resolving parking and speeding issues in and around the village
- Enhancing the character and appearance of Kircubbin
- Promoting the health and wellbeing of residents
- Connecting people to places and spaces
- Facilitating new business opportunities

LISBARNETT AND LISBANE

(PLAN CURRENTLY UNDER REVIEW)

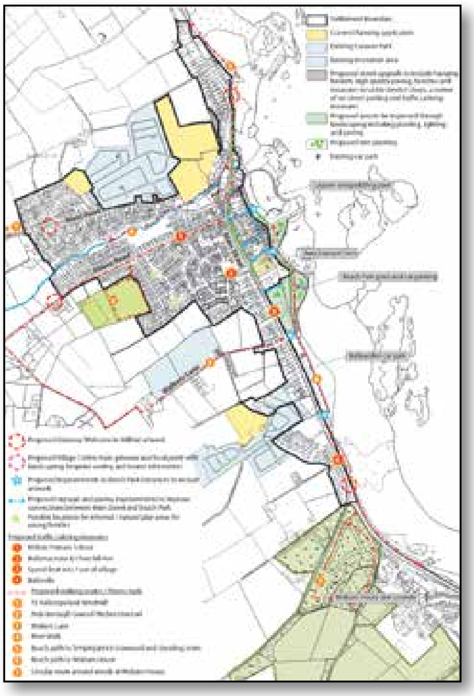
Overview

Two townlands on western edge of Strangord Lough. Lisbarnett and Lisbane Community Association (LLCA) founded in 1996, one of the first aims was to secure improved facilities for children and young people in the area.

Themes / Aims / Priorities / Categories

- Road Safety
- Improved play facilities
- Improved transport
- Community safety
- Promoting local assets
- Environmental improvements
- Community involvement

MILLISLE



Overview

'Gateway to Peninsula', seaside commuter village, originally a farming area, village grew around mills built by Carmichael family, WWII heritage, Holocaust memorial garden and sculpture.

Vision / Statement

'A place that is welcoming, vibrant and filled with opportunities' – Chairperson MDCA

The theme of the Action Plan is the regeneration of Millisle's identity as a thriving coastal village.

The challenge for the community moving forward is to make Millisle a vibrant and exciting place to live, work and visit, capitalising on its scenic seaside location.

Themes / Aims / Priorities / Categories

- Revitalisation of Main Street
- Tourism Development
- Beach Park, lagoon and sea front improvements
- Upgrading Millisle's Appearance
- Community Development

PORTAFERRY

Overview

Southern end of Peninsula, passenger and car ferry to / from Strangford, refurbished Exploris Aquarium, Marina, Quay, Castle, Portaferry Gala and Triathalon. Anglo Norman and plantation heritage, St. Cooey's Church, Market House, Portico refurbishment (Arts and heritage centre – role in regional tourist destination), proposed outdoor recreation and pursuits centre / touring site, proposed Coastal visitor and activity centre, maritime heritage centre, heritage trail, develop lough as premier angling/fishery destination, Sports centre and GAA facilities.

Vision / Statement

Renowned for its friendly atmosphere, community spirit and warm welcome, Portaferry will be an active and thriving village for both residents and visitors of all age groups.

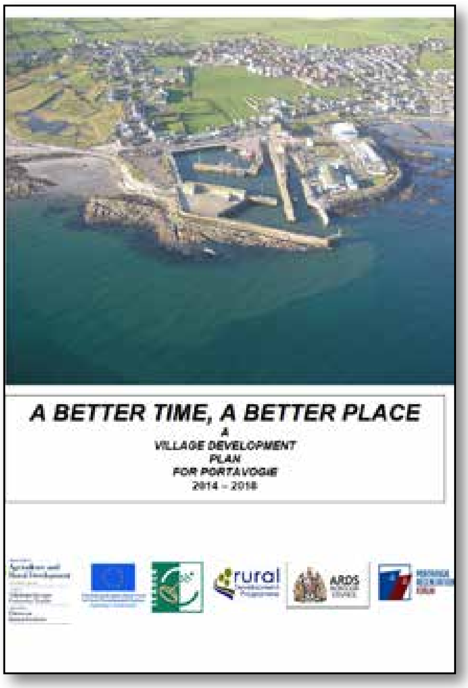
With its picturesque setting and panoramic views across Strangford Lough, alongside a range of family centred attractions, events, sporting activities, heritage, arts and crafts and rich cultural offer, Portaferry will be transformed into a tourist destination of regional significance. As a key gateway to Strangford Lough and the Ards Peninsula, Portaferry will offer a range of opportunities for new businesses, jobs, a strengthened agriculture sector, training and investment. Its regenerated buildings and vibrant tourist facilities will showcase it's many historical assets, while it's rejuvenated shorefront and harbour facilities will offer sporting and recreation opportunities and improved access to and from Strangford Lough.

Themes / Aims / Priorities / Categories

- Enhancing the attractiveness of the village
- Promoting Portaferry as a regional gateway, tourist and cultural destination
- Enhancing existing businesses and attracting new investment
- Optimising Portaferry's strategic position on Strangford Lough and Ireland's eastern seaboard
- Facilitating education, training and cultural programmes that empower local people
- Working collaboratively to improve efficiency of services
- Facilitating high quality recreation and sporting facilities and activities

A3.0 EXISTING RESEARCH & DATA

PORTAVOGIE (PLAN CURRENTLY UNDER REVIEW)



Overview
Mos t easterly village on the island of Ireland, one of Northern Ireland's leading fishing ports, part of Mourne Coastal Route, beautiful beaches and coastline, Proximity to Kirkistown race track and golf course.

Vision / Statement
A sustainable, progressive community which is the premier village in the Peninsula.

The aspirations of the community are that:
Residents in Portavogie enjoy access to quality services in recreation and leisure, community facilities and the environment. There is a strong community infrastructure which is fully supported by local people. The village is welcoming to everyone and cherishes its maritime and cultural heritage. Portavogie has a thriving economy where the fishing industry is a core employer and tourism plays a key role.

Themes / Aims / Priorities / Categories
- Improving the local environment
- Improving local services
- Developing the local community
- Improving traffic and transport
- Developing the local economy

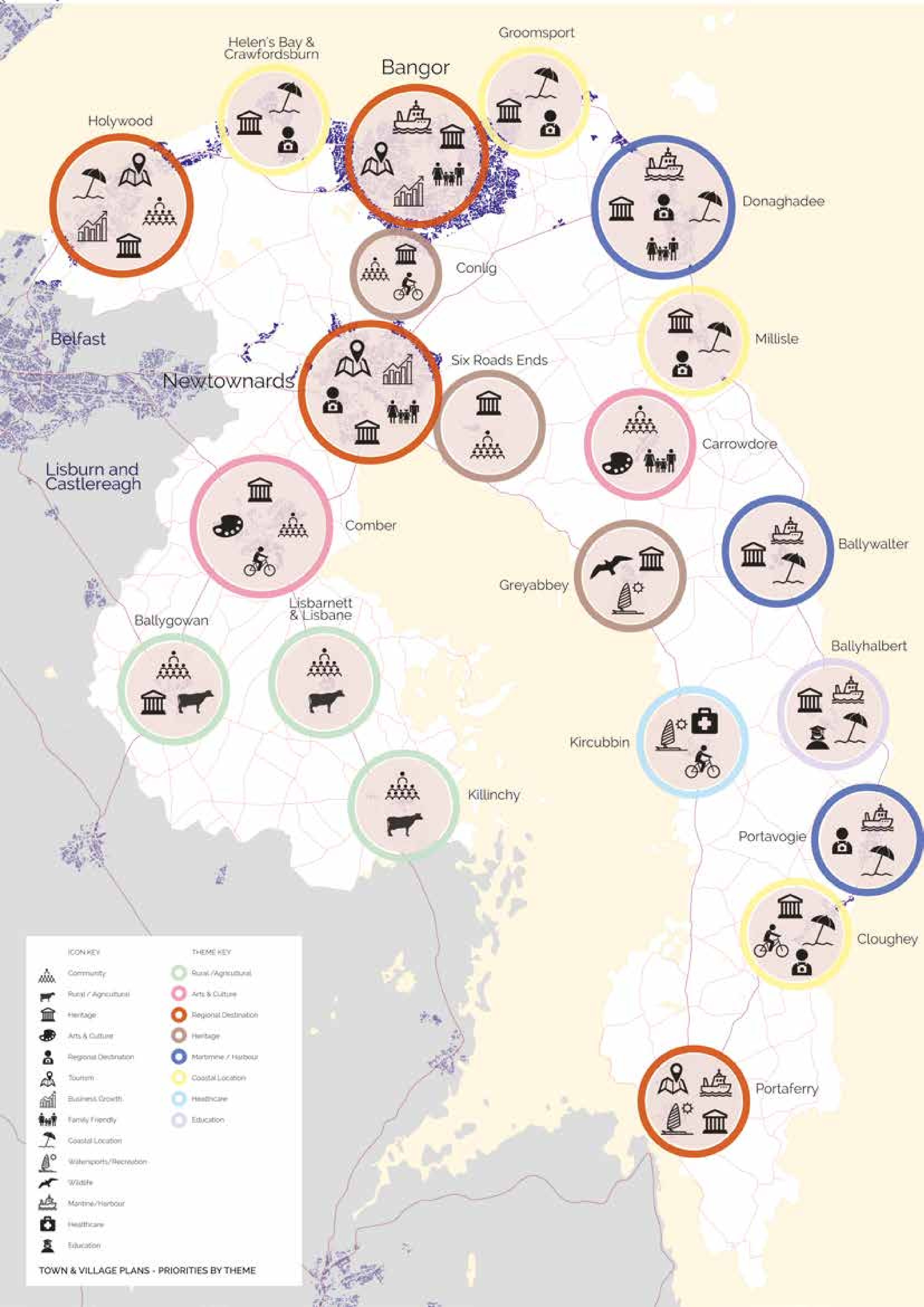
Priorities - Provision of a coffee shop/café which would cater for locals and visitors alike, improvements to the local environment to increase the attractiveness of the village, improvements to the provision of facilities for football in the village, improvements to road safety and to the public transport service, actions to engage and inform the community, actions to improve tourism infrastructure and facilities for tourists and residents alike.

SIX ROAD ENDS

Overview
Collection of hamlets, rural character, Betsy Gray heritage (Great Rebellion 1798), potential to establish greenway(s).

Themes / Aims / Priorities / Categories
- Defining the areas identify
- Improving the traffic and transport network
- Upgrading community facilities
- Reorganising the Six Road Ends hub
- Enhancing pedestrian connectivity
- Celebrating the historical legacy

LLPA part of Six Road Ends, those features contributing to the areas environmental quality and character are, Dismantled steam railway corridor and associated vegetation, Listed Buildings - Ballygrainey Presbyterian Church, locally significant buildings - Ashton House and various traditional farm buildings.


Helen's Bay & Crawfordsburn
Groomsport
Bangor
Holywood
Donaghadee
Conlig
Belfast
Millisle
Six Roads Ends
Newtownards
Carrowdore
Lisburn and Castlereagh
Comber
Ballywalter
Greyabbey
Lisbarnett & Lisbane
Ballygowan
Ballyhalbert
Kircubbin
Killinchy
Portavogie
Cloughey
Portaferry
ICON KEY
Community
Rural / Agricultural
Heritage
Arts & Culture
Regional Destination
Tourism
Business Growth
Family Friendly
Coastal Location
Watersports/Recreation
Wildlife
Maritime/Harbour
Healthcare
Education
THEME KEY
Rural / Agricultural
Arts & Culture
Regional Destination
Heritage
Maritime / Harbour
Coastal Location
Healthcare
Education
TOWN & VILLAGE PLANS - PRIORITIES BY THEME

A4.0 ANALYSIS OF FDI TRENDS & OPPORTUNITIES

Foreign Direct Investment

Data published in the Ernst & Young Attractiveness Survey (May 2017) highlights that the UK retained its place as Europe's number one recipient of FDI projects[1] ahead of Germany, with a 7% rise in total projects to 1,144 — the highest number on record. The UK was also the leading recipient of FDI jobs in Europe, recording a rise of 2% in FDI-generated employment to 44,665, over 20,000 more than second-placed Poland.

Figures published in the Department for International Trade (DIT) – International Inward Investment Results 2015/16 show that there has been a significant increase in FDI investments within the UK since 2011. DIT analysis of FDI investments reflects three distinct strands as highlighted in Table 1.17.

Table 1:17: Types of FDI Investment in the UK

Type of Investment	2011/12	2012/13	2013/14	2014/15	2015/16
New investments	752	777	820	1,058	1,130
Expansions	506	577	677	740	821
Mergers and acquisitions	148	205	276	190	262
Total	1,406	1,559	1,773	1,988	2,213

Source: DIT International Inward Investment Results 2015/16

The figures above show that new investments to the UK have increased by 50% in the period 2011/12 – 2015/16 and the total number of investment projects has increased by 41% in the same time period.

Table 1.18 provides an analysis of 2015/16 data at a sub- regional level, highlighting that Northern Ireland has had a lower number of FDI investments in comparison to the other major regions in the UK.

Table 1:18: UK Sub-regional FDI Performance

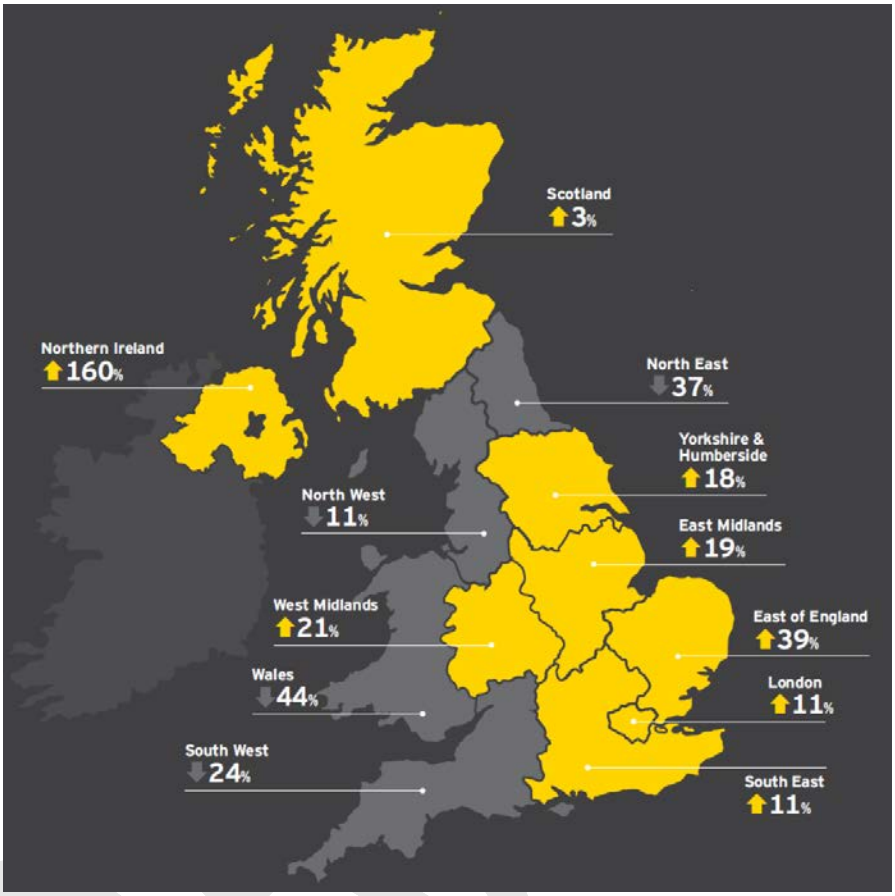
UK Region	Number of FDI Projects	Sum of Number of New Jobs	Rank
East Midlands	85	3,678	7
East of England	116	3,280	8
London	889	24,191	1
North East	77	2,991	10
North West	151	7,715	3
Northern Ireland	33	2,068	12
Scotland	108	4,178	6
South East	253	5,507	4
South West	89	2,434	11
Wales	97	5,443	5
West Midlands	168	11,119	2
Yorkshire and the Humber	104	2,992	9

Source: DIT International Inward Investment Results 2015/16

[1] These figures relate to new investments only – expansions, mergers etc are not included.

As shown in Figure 1.19, the Ernst & Young Attractiveness Survey (May 2017) highlights that Northern Ireland experienced the highest increase in FDI across all regions during 2015/16. Whilst the figures for 2015/16 show significant FDI growth for Northern Ireland, this is set against a low baseline and Northern Ireland still ranks as one of the lowest UK sub-regions in terms of attracting new FDI.

Figure 1:19: FDI project growth 2015-2016



Source: EY Attractiveness Survey 2017

AND FDI Performance

Table 1.20 details the amount of Invest NI assistance offered (£m) to externally owned businesses in the period 2011 – 2015. It highlights that AND ranks 8th out of the 11 NI Council areas in terms of the total amount of assistance offered to external businesses in the period 2011-2016. This falls well below the average assistance offered per LGD over this time period - £20.9m. The above figures are skewed by the significant investment provided to the Belfast LGD. If the Belfast figures are removed from the analysis, the overall total investment average decreases to £10.7m across the given time period. The investment of £5.7 in the AND LGD is still low in comparison.

Table 1:20: Invest NI assistance offered to externally owned businesses 2011-2015

LGD	Assistance offered to externally owned business £m							Rank
	2011	2012	2013	2014	2015	2016	Total	
Antrim and Newtownabbey	1.00	0.47	14.29	6.84	0.30	1.45	24.35	3
Ards and North Down	**1.65**	**1.74**	**1.08**	**1.02**	**0.17**	**0.05**	**5.7**	**8**
Armagh City, Banbridge and Craigavon	0.38	2.95	0.55	10.36	2.89	1.17	18.3	4
Belfast	14.68	17.18	26.97	47.47	6.40	10.78	123.49	1
Causeway Coast and Glens	0.01	0.07	0.12	0.06	0.19	0.01	0.47	11
Derry City and Strabane	1.60	3.18	3.15	8.25	2.99	7.41	26.58	2
Fermanagh and Omagh	0.28	2.93	0.46	1.91	2.76	0.19	8.53	7
Lisburn and Castlereagh	0.02	0.39	0.74	0.18	0.42	0.35	2.09	10
Mid and East Antrim	0.68	2.64	3.68	1.31	0.88	0.14	9.31	5
Mid Ulster	1.34	2.30	0.60	2.94	0.71	1.00	8.90	6
Newry, Mourne and Down	0.63	0.13	0.13	1.41	0.06	0.12	2.48	9

Source: NISRA

Table 1.21 identifies the number of jobs promoted based on Invest NI assistance to externally owned companies. These figures demonstrate that again AND is amongst the lowest ranked LGDs.

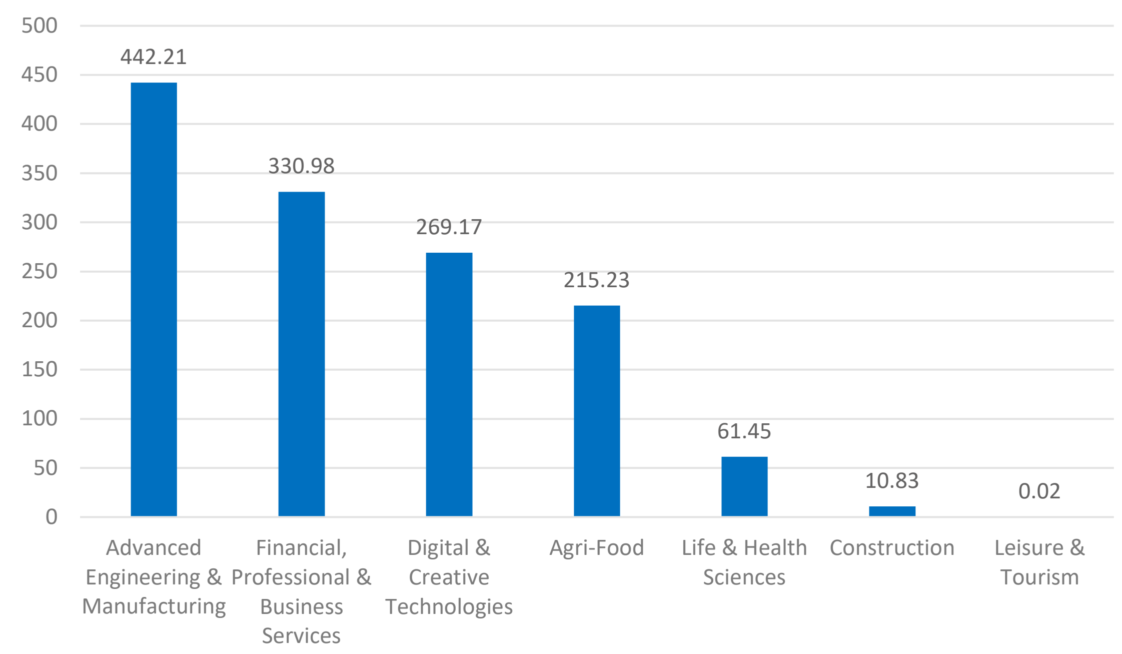
Table 1:21: Jobs promoted within externally owned businesses

LGD	Jobs promoted within externally owned businesses							Rank
	2011	2012	2013	2014	2015	2016	Total	
Antrim and Newtownabbey	54	30	663	87	8	0	842	5
Ards and North Down	**61**	**0**	**0**	**49**	**0**	**2**	**112**	**9**
Armagh City, Banbridge and Craigavon	16	100	40	686	323	2	1,167	4
Belfast	1,167	1,270	3,210	4,151	735	693	11,226	1
Causeway Coast and Glens	0	1	2	7	23	0	33	11
Derry City and Strabane	132	312	574	148	289	1,559	3,014	2
Fermanagh and Omagh	2	272	20	85	812	1	1,192	3
Lisburn and Castlereagh	0	34	6	3	15	42	100	10
Mid and East Antrim	0	416	224	0	0	0	640	6
Mid Ulster	201	128	3	192	2	0	526	7
Newry, Mourne and Down	31	12	8	120	0	4	175	8

Source: NISRA

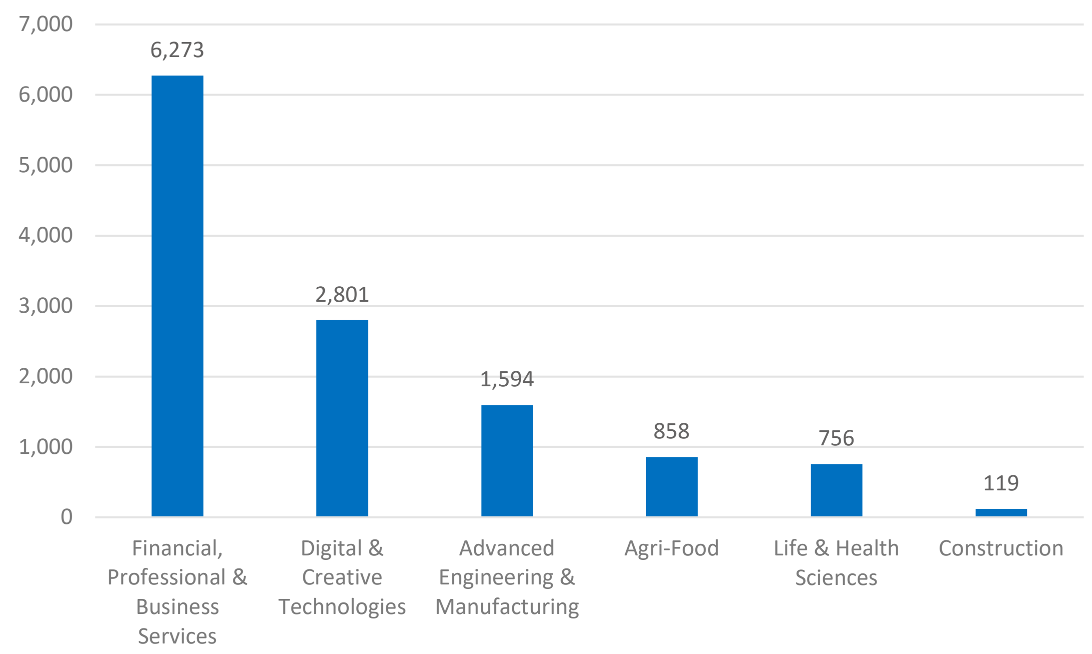
Figure 1.22 and 1.23 illustrate total planned investment (£m) and total new jobs created through FDI to Northern Ireland over the period 2011- 2016, respectively. Advanced Engineering and Manufacturing generated the highest level of planned investment (£444.21m), followed by Financial, Professional and Business Services (£330.98m). The sector performing most strongly in relation to new jobs is Financial, Professional and Business Services (6,273) with Digital and Creative Technologies the next strongest, but with a much lower number of new jobs (2,801).

Figure 1:22: Total Planned Investment (£m)



Source: Invest NI

Figure 1:23: Total New Jobs



Source: Invest NI

A5.0 CONCLUSIONS

Introduction

This Appendix for the Integrated Tourism, Regeneration and Economic Development Strategy has summarised the wide range of policies from both central and local government of particular relevance. It has shaped an understanding of the Borough through a Socioeconomic Profile and has mapped place specific plans and opportunities in tourism, Foreign Direct Investment and for funding.

Drawing upon this information, some initial conclusions are drawn that should be tested through the Stage III consultation process.

Socio-economic

- Population growth projections are significantly lower than NI average – will lead to aging population profile in years to come that may not be attractive to businesses / future investment. How can we address this?
- Overall the average level of deprivation is low however there are some pockets of deprivation across the Borough – success of the strategy will be dependent on targeting areas facing diverse range of issues (rural / urban etc)

Employment / Skills

- Highly skilled workforce Ards and North Down has a higher proportion of its population qualified to Level 4 or higher than the NI average. Ards and North Down also has the second lowest proportion of its working age population with no qualifications – how can we utilise this workforce locally rather than have the talent commute to Belfast
- The four largest employing sectors in the Council area are:
  - Retail and wholesale (22%);
  - Health activities (18%);
  - Education (10%); and
  - Hospitality - accommodation and food services (10%)
- Sectors that are under-performing are:
  - Manufacturing
  - Administrative and Support Services activities

- What can be done to diversify the business offering in the Ards and North Down area?
- Ards and North Down's productivity, measured as Gross Value Added (GVA) per employee (£11,284) is significantly lower than the NI average (£24,505). Ideally the new integrated strategy should focus on attracting high value jobs to the area. What support / services are required?

FDI

- At a European level the UK continues to perform well in terms of attracting FDI, however this statement should be caveated to note that the implications of Brexit are as yet unclear and have the potential to significantly reduce the attractiveness of the UK as an investment location;
- NI is amongst the lowest ranked UK sub-regions when it comes to attracting FDI. Due to NI's geographic location and land border with ROI it is likely that it will become increasingly difficult to compete for FDI opportunities in coming years;
- Whilst new FDI projects to NI increased in 2016 this trend is unlikely to continue due to the implications of Brexit; and
- At a local level, Ards and North Down has ranked amongst the lowest LGDs in NI in terms of assistance offered to external companies seeking to re-locate.

A5.0 CONCLUSIONS

Tourism

- Relative to other Council areas, Ards and North Down is performing strongly in terms of the number of trips and expenditure;
- Ards and North Down has some strong tourism assets at their disposal. Strangford Lough* is key to attracting people to the area;
- Finding ways to facilitate more access to the physical resource base for tourism – the lough, the coast and the countryside – will be an important consideration for the development of the strategy in terms of increasing dwell time and providing opportunities for visitors to enjoy the area's distinctive offer of value; and
- Grow the economic return to the Borough from tourism.

** It should be noted that 'Destination Strangford' research, amongst other sources, is drawn upon for the purposes of this baseline report. 'Destination Strangford' as configured did not include the legacy North Down Council area therefore historic data relating to Destination Strangford does not provide full coverage for the Ards and North Down Borough Council area.*
Regeneration

- Town and Village Masterplans across recognise significant underlying qualities in the natural and built environment of the Borough.
- A number of areas including Holywood, Bangor, Newtownards and Portaferry have a key aspiration of improving their visitor offering and becoming regional tourism destinations.
- In the case of Portaferry, due to its location at the tip of the Peninsula, this requires a major tourism draw which is reflected in the village plan, vision and aims.
- However, several of the Village plans lack a 'theme' focus, concentrating, in most cases, on village improvements for the community (e.g Lisbarnett and Lisbane, Six Roads Ends).
- A consistent aspect across almost all the Town and Village plans is heritage, which could be further explored to emphasise distinctiveness from place to place.
- There is a good range of varying 'themes' across Ards and North Down towns and villages, which alternate well with adjoining/adjacent towns and villages creating a diverse offer across the entirety of the area.
- Important locations for existing 'hubs' are Kircubbin (healthcare) and Ballyhalbert (education). The village plans aim to improve and expand the resources at these locations, which are centrally located on the Ards Peninsula.
- Work is now needed to further align and coordinate place based visions so that a clear, unified strategy for the Ards and North Down Borough is shaped.

Towards an Integrated Approach

These findings highlight challenges that face the Ards and North Down Borough, many of which are shared with other areas of Northern Ireland and influenced by wider economic and political conditions. However, they also indicate clear strengths of the area and the significant potential that is related to them.

While these findings are organised by theme the ITRDS will be required to consider opportunities with a common bearing on Tourism, Regeneration and Economic Development. The research has noted the importance of new outcomes based approaches that have been adopted by the Draft Programme for Government and the Community Plan (the Big Plan). It will therefore be important that the emerging strategy relates to these important policies and augments their outcomes, so that the unique opportunities of Ards and North Down can be fully realised.

ANNEX 1 BASELINE EMPLOYMENT AND BUSINESS PERFORMANCE AND GROWTH PROSPECTS BY SECTOR

Annex 1: Baseline Employment and Business Performance and Growth Prospects by Sector

Sector Grouping	Current Level of Employment in AND/ (LGD ranking)[2]	Current Level of Registered Businesses in AND/ (LGD ranking)[3]	GVA per employee[4]	Growth Potential (projected % growth over 2016 – 2026)[5]
Health	6,856 employee jobs, representing 18% of total jobs in AND. Ranking 9th at LGD level in terms of number of jobs within this sector.	225 VAT and /or PAYE registered businesses, representing 7.8% of all VAT/PAYE registered business in this sector in NI. Ranked 5th LGD in terms of number of VAT/PAYE registered businesses in this sector.	£11,711[4]	7%
Professional, Scientific and Technical	Accounts for 1,470 jobs - 3.9% of total jobs in the AND area. Ranking 5th at LGD level in terms of number of jobs within this sector.	495 VAT and /or PAYE registered businesses, representing 9% of all VAT/PAYE registered business in this sector in NI. Ranked the 2nd LGD in terms of number of VAT/PAYE registered businesses in this sector.	£47,432	41%

[2] Business Register and Employment Survey (BRES) 2015
[3] NI Annual Business Inquiry (ABI) 2016
[4] NI ABI 2016
[5] The Northern Ireland Economic Policy Centre's Skill Barometer 'High Growth' Scenario (2017 update)

Sector Grouping	Current Level of Employment in AND/ (LGD ranking)[2]	Current Level of Registered Businesses in AND/ (LGD ranking)[3]	GVA per employee[4]	Growth Potential (projected % growth over 2016 – 2026)[5]
Accommodation & Food	Accounts for 3,742 jobs - 9.9% of total jobs in the AND area. Ranking 4th at LGD level in terms of number of jobs within this sector.	320 VAT and /or PAYE registered businesses[6], representing 8.6% of all VAT/PAYE registered business in this sector in NI Ranked 5th LGD in terms of number of VAT/PAYE registered businesses in this sector.	£15,875	12%
Arts, Entertainment and Recreation	Accounts for 1,516 jobs - 4% of total jobs in the AND area. Ranking 2nd at LGD level in terms of number of jobs within this sector	375 VAT and /or PAYE registered businesses, representing 8.5% of all VAT/PAYE registered business in this sector in NI. Ranked the 4th LGD in terms of number of VAT/PAYE registered businesses in this sector	£11,711[7]	24%
Finance & Insurance	800 employee jobs, representing 2.1% of total jobs in AND. Ranking 3rd at LGD level in terms of number of jobs within this sector, but substantially behind Belfast which provides 61% of total jobs in the sector, compared to 4% in A&ND.	100 VAT and /or PAYE registered businesses, representing 8.8% of all VAT/PAYE registered business in this sector in NI. Ranked 3rd LGD in terms of number of VAT/PAYE registered businesses in this sector.	n/a	18%

[7] The GVA figure here is from 'Other Services' which includes: education (excluding public education); Human health and social work activities (excluding public health and social work); Arts, entertainment and recreation and Other service activities.

ANNEX 1 BASELINE EMPLOYMENT AND BUSINESS PERFORMANCE AND GROWTH PROSPECTS BY SECTOR

Sector Grouping	Current Level of Employment in AND/ (LGD ranking)[2]	Current Level of Registered Businesses in AND/ (LGD ranking)[3]	GVA per employee[4]	Growth Potential (projected % growth over 2016 – 2026)[5]
ICT	573 employee jobs, representing 1.5% of total jobs in AND. Ranking 7th at LGD level in terms of number of jobs within this sector;	155 VAT and /or PAYE registered businesses, representing 8.9% of all VAT/PAYE registered business in this sector in NI. Ranked 3rd LGD in terms of number of VAT/PAYE registered businesses in this sector.	£46,539	63%
Manufacturing	2,825 employee jobs, representing 7.4% of all jobs in AND. Ranking 11h at LGD level in terms of number of jobs within this sector.	300 VAT and /or PAYE registered businesses, representing 6.5% of all VAT/PAYE registered business in this sector in NI. Ranked 10th LGD in terms of number of VAT/PAYE registered businesses in this sector.	£51,842	10%
Admin and Support	1,938 employee jobs, representing 5.1% of total jobs in AND. Ranking 7th at LGD level in terms of number of jobs within this sector.	160 VAT and /or PAYE registered businesses, representing 6.7% of all VAT/PAYE registered business in this sector in NI. Ranked 9th in terms of number of VAT/PAYE registered businesses in this sector.	£23,018	17%
Construction	1,200 employee jobs, representing 3.2% of total jobs in AND. Ranking 11th at LGD level in terms of number of jobs within this sector.	575 VAT and /or PAYE registered businesses, representing 6.2% of all VAT/PAYE registered business in this sector in NI. Ranked 9th in terms of number of VAT/PAYE registered businesses in this sector	£53,678	13%
Transport and Storage	815 employee jobs, representing 2.1% of total jobs in AND. Ranking 11th at LGD level in terms of number of jobs within this sector.	110 VAT and /or PAYE registered businesses, representing 5% of all VAT/PAYE registered business in this sector in NI. Ranked 11th in terms of number of VAT/PAYE registered businesses in this sector.	£55,160	8%

Sector Grouping	Current Level of Employment in AND/ (LGD ranking)[2]	Current Level of Registered Businesses in AND/ (LGD ranking)[3]	GVA per employee[4]	Growth Potential (projected % growth over 2016 – 2026)[5]
Real Estate/ Property	505 employee jobs, representing 1.3% of total jobs in AND. Ranking 3rd at LGD level in terms of number of jobs within this sector, but substantially behind Belfast which provides 46% of total jobs in the sector, compared to 8% in AND.	165 VAT and /or PAYE registered businesses, representing 8.2% of all VAT/PAYE registered business in this sector in NI. Ranked 6th in terms of number of VAT/PAYE registered businesses in this sector.	£54,046	17%
Wholesale and retail	8,337 employee jobs, representing 22% of total jobs in AND. Ranking 9th at LGD level in terms of number of jobs within this sector.	660 VAT and /or PAYE registered businesses, representing 7.1% of all VAT/PAYE registered business in this sector in NI. Ranked 8th in terms of number of VAT/PAYE registered businesses in this sector.	£34,963	2%
Agriculture, forestry and fishing (excl agricultural labour)	62 employee jobs, representing 0.2% of total jobs in AND. Ranking 5th at LGD level in terms of number of jobs within this sector.	595 VAT and /or PAYE registered businesses, representing 3.4% of all VAT/PAYE registered business in this sector in NI. Ranked 10th in terms of number of VAT/PAYE registered businesses in this sector.	£44,540	1%
Education	3,834 employee jobs, representing 10% of total jobs in AND. Ranking 10th at LGD level in terms of number of jobs within this sector.	55 VAT and /or PAYE registered businesses, representing 8.5% of all VAT/PAYE registered business in this sector in NI. Ranked 4th in terms of number of VAT/PAYE registered businesses in this sector	£11,711[8]	0%

[8] The GVA figure here is from ‘Other Services’ which includes: education (excluding public education); Human health and social work activities (excluding public health and social work); Arts, entertainment and recreation and Other service activities.

Annex 2 - Review of Potential Funding Sources

The following provides a summary of current and potential future funding sources that might be used by the Council and its partners to support projects emanating from the integrated strategy. Given the UKs plans to exit the European Union, the funding landscape for local and regional development is likely to experience a significant level of change over the strategy period (up to 2023). Going forward, the Council and its partners should ensure that sufficient resource is allocated to the monitoring and dissemination of information on future funding opportunities.

Title	Description
INTERREG VA Programme for Cross-Border Cooperation (2014-2020)	The INTERREG VA Programme for Northern Ireland, the Border Region of Ireland and Western Scotland is a European Union supported Structural Funds Programme which seeks to address the economic and social problems which result from the existence of borders. The proposed INTERREG VA Programme budget is €282 million, while the proposed PEACE IV budget is €269 million. Both programme budgets are cross-border budgets comprising 85% EU funding and 15% match funding. Four potential priorities have been identified for INTERREG VA - Research and Innovation, Environment, Sustainable Transport and Health.
INTERREG VB Northern Periphery and Arctic Programme (2014-2020)	The Northern Periphery Programme 2014-2020 aims to help peripheral and remote communities on the northern margins of Europe to develop their economic, social and environmental potential. The success of the programme will be built on joint projects creating innovative products and services for the benefit of the programme partner countries and Europe as a whole. The Northern Periphery and Arctic Programme area comprises the northernmost part of Europe including parts of the North Atlantic territories. In the EU member states, the programme area covers Northern and Eastern Finland, Western Ireland, Northern Ireland excluding the larger Belfast region, Northern Sweden, and Highlands & Islands and Dumfries & Galloway regions in Scotland. Of the Non-EU member states Faroe Islands, Greenland, Iceland, Northern and Western Norway and Svalbard belong to the programme area[9]. The Northern Periphery Programme will focus on the following Thematic Objectives: • Strengthening research, technological development and innovation; • Enhancing the competitiveness of SMEs; • Supporting the shift towards a low-carbon economy in all sectors; and • Protecting the environment and producing resource efficiency.
INTERREG VB North West Europe (NWE) Programme (2014-2020)	The NWE Cooperation Area consists of 8 countries: Belgium, France, Germany, Ireland, Luxembourg, Netherlands, UK and Switzerland. The NWE Member States have started to prepare the content of the future Programme and they have agreed on the following Thematic Objectives:

[9] http://www.northernperiphery.eu/files/archive/Downloads//Programming_process_2014-2020/Public_Consultation_DRAFT_OP/Draft_OP_document_-_chapters_1-4.pdf

Title	Description
	• Strengthening research, technological development and innovation. The Programme will invest in enhancing the capacity of the NWE territory to generate innovation, on the basis of its existing potential and quadruple helix actors. It will seek to reduce the innovation capacity gaps between regions and contribute to the implementation of the smart specialisation strategies of participating regions. • Supporting the shift towards a low-carbon economy in all sectors. The Programme will invest in the area's climate change mitigation potential, reduction of GHG emissions, energy efficiency and the share of renewable energy sources in the consumption and production mix. • Protecting the environment and promoting energy efficiency. The Programme will invest in eco-innovation and resource efficiency. The purpose is to reduce the environmental footprint of human activity on the environment, and decouple the growth curve from the material consumption curve.
INTERREG VC	INTERREG VC or 'INTERREG EUROPE' is one of the instruments for the implementation of the EU's cohesion policy. With this policy, the EU pursues harmonious development across the Union by strengthening its economic, social and territorial cohesion to stimulate growth in the EU regions and Member States. The policy aims to reduce existing disparities between EU regions in terms of their economic and social development and environmental sustainability, taking into account their specific territorial features and opportunities. For the 2014-2020 funding period, cohesion policy concentrates on supporting the goals of the Europe 2020 strategy. Public consultation has recently taken place on this programme and a consultation document is in preparation.
NI ERDF Investment for Growth and Jobs Programme (2014-20)	ERDF is the main EU Structural Fund used to support economic development in countries and regions across Europe. The proposed ERDF Investment for Growth and Jobs Programme is focused on three priority areas: • Strengthening Research, Technological Development and Innovation; • Enhancing the Competitiveness of SMEs (including through improved access to finance measures and Tourism development); • Supporting the shift towards a Low-Carbon Economy.
INTERREG PEACE IV Programme (2014-20)	PEACE IV will focus on one Thematic Objective—Social Inclusion and Combating Poverty. This aligns with the objectives of Together: Building a United Community and proposes activity in a number of areas including – Shared Education, Children and Young People (linking with the United Youth Programme), Shared Spaces and Services and Civil Society.
Rural Development Programme (2014-2020)	The objectives of the NI RDP relate to: • The competitiveness of agriculture; • Sustainable management of natural resources; and • The balanced development of rural areas. Beneath these three broad objectives the EU proposals detail six EU priorities for rural development: 1. Fostering knowledge transfer and innovation in agriculture, forestry and rural areas; 2. Enhancing competitiveness of all types of agriculture and enhancing farm viability; 3. Promoting food chain organisation and risk management in agriculture;

Title	Description
	4. Restoring preserving and enhancing ecosystems dependent on agriculture and forestry; 5. Promoting resource efficiency and supporting the shift towards a low carbon and climate resilient economy in agriculture, food and forestry sectors; 6. Promoting social inclusion, poverty reduction and economic development in rural areas. The objectives of the Priority 6 (Promoting Social Inclusion…) are: • To assist new and existing rural businesses to become sustainable and to grow. To seek to minimise, where it exists, disadvantage, poverty, social exclusion and inequality amongst those living in rural areas and in particular amongst vulnerable groups to enhance their quality of life; • To strengthen the social, economic and cultural infrastructure of rural areas; • To strengthen the rural tourism sector by providing support for projects which are in accordance with the Northern Ireland Tourism Priorities for Growth; • To support and strengthen rural villages and towns to create a vibrant rural community.
European Fund for Strategic Investment	Contributions from the local ERDF Operational Programme are allocated an Urban Development Fund which subsequently invests them in public-private partnerships or other projects included in an integrated plan for sustainable development. Investments and match funding can be equity, loans and or guarantees. The Urban Development Fund usually supports capital investment in projects related to area regeneration and renewable energy.
Horizon 2020	Horizon 2020 is the financial instrument implementing the Europe 2020 flagship initiative 'Innovation Union' and is the principal tool for the promotion of research, development and innovation. It has an €80bn budget. The Horizon 2020 programme consists of three core themes or 'pillars': • Excellent science; • Industrial leadership; • Societal challenges. The Horizon 2020 Excellent Science programme aims to raise the level of excellence in Europe's science base and ensure a steady stream of world-class research to secure long-term competitiveness in Europe. It supports the best ideas, develops European talent and provides researchers with access to a research infrastructure. Dedicated support is available to: • Support talented individuals and their teams to carry out ground-breaking research by building on the success of the European Research Council; • Fund collaborative research to open up new and promising fields of research and innovation through support for Future and Emerging Technologies; • Provide researchers with excellent training and career development opportunities through the Marie Curie Actions; • Ensure Europe has world-class research infrastructures (including e-infrastructures) accessible to all researchers in Europe and beyond. **Industrial leadership** The Horizon 2020 Competitive Industries Programme will make Europe a more appealing location to invest in research and innovation. The programme seeks to stimulate the growth potential of European companies, targeting SMEs in particular. With dedicated support, the programme aims to build leadership in enabling and industrial technologies. Support is available for a range of Key Enabling Technologies:

Title	Description
	• Advanced manufacturing and processing; • Advanced materials; • Biotechnology; • Information and Communication Technologies; • Nanotechnology; • Space. The programme provides support for cross-cutting actions to capture the accumulated benefits from combining several of these technologies. **Access to risk finance** The Industrial Leadership theme also facilitates access to risk finance, stimulating private investment and venture capital in research and innovation; and aims to strengthen the participation of smaller companies by offering support for innovative SMEs across the European Union. **Societal challenges** The Horizon 2020 Societal Challenges Programme reflects the policy priorities of the Europe 2020 strategy and addresses major concerns shared by people across Europe and beyond. This challenge-based approach brings together resources and knowledge across different fields, technologies and disciplines, including social sciences and the humanities. The Societal Challenges Programme covers activities from research to market with a new focus on innovation-related activities, such as pilots, demonstrations and test beds, it includes support for public procurement and market uptake and it helps to establish links with the activities of the European Innovation Partnerships (EIP). Societal Challenges funding will be focused on the following calls: • Health, demographic change and well-being; • Food security, sustainable agriculture and forestry, marine and maritime and inland water research, and the bio-economy; • Secure, clean and efficient energy; • Smart, green and integrated transport; • Climate action, environment, resource efficiency and raw materials; • Europe in a changing world: inclusive, innovative and reflective societies; • Secure societies - protecting the freedom and security of Europe and its citizens.
COSME	COSME: This is the EU Programme for the Competitiveness of Enterprises and Small and Medium Sized Enterprises (SMEs) running from 2014 to 2020 and has the following objectives: • Better access to finance for SMEs; • Access to markets; and • More favourable conditions for business creation and growth.

Title	Description
	COSME will facilitate and improve access to finance for SMEs through two different financial instruments, available from 2014. • Loan Guarantee Facility: The COSME project will fund guarantees and counter guarantees for financial intermediaries (e.g. guarantee organisations, banks, leasing companies) to help them provide more loan and lease finance to SMEs. This facility will also include securitisation of SME debt finance portfolios. • Equity Facility for Growth: The COSME programme will also provide venture capital and mezzanine support to expansion and growth stage SMEs, with a particular focus on encouraging financial intermediaries to operate on a cross border basis.
Creative Europe	Creative Europe has been developed to increase the visibility of Europe's culture and audio-visual sectors, the European Commission supports a variety of actions, initiatives, and prizes. These are designed to reward achievement, highlight excellence, and raise awareness of Europe's culture and heritage. There is a budget of €1.46 billion for 2014-2020. Indicative activities include: • European Capitals of Culture; • European Heritage Days; • European Union Prize for Cultural Heritage; • European Union Prize for Contemporary Architecture; • European Heritage Label; • European Border Breakers Awards; • European Union Prize for Literature; • European Union Prix MEDIA.
Innovate UK - Eurostar's Programme	Eurostars seeks to overcome one of the barriers to the implementation of high-quality SME-led transnational R&D projects, the lack of guaranteed public-sector funding. Eurostars takes a 'bottom-up' approach to project generation. Projects can address any technological civilian area and have the objective to development a new product, process or service. Eurostars will stimulate SMEs to lead international collaborative research and innovation projects by easing access to support and funding. Providing funding and support for market-oriented research and development specifically with the active participation of R&D-performing SMEs. In the United Kingdom only innovative intensive and research-performing SME's are eligible for funding under the Eurostars programme. Academics/universities and large companies are welcome to participate in a Eurostars project, but must fund their own participation or use funds from other sources.
Tourism NI	Tourism NI provides funding for home grown international and national events under the International Tourism Events Fund and the National Tourism Events Sponsorship Schemes, respectively. Currently, the National Tourism Events Sponsorship Scheme offers up to £30,000 (inc VAT) of financial support/sponsorship to events that have total visitor numbers greater than 1,000, where events have a minimum income and expenditure of £50,000. The International Tourism Events Fund provides funding of up to 50% of eligible costs for private, public and voluntary sector events for those events with total

Title	Description
	visitor numbers greater than 5,000, where the requested level of funding is greater than £30,000 and where events have minimum income and expenditure of £150,000. At the time of writing, Tourism NI does not have any capital funding scheme open for application.
Heritage Lottery Fund	The Heritage Lottery Fund invests in the full breadth of the UK's heritage, and through its funding it aims to make a lasting difference for heritage and people. This is reflected in the outcomes for heritage, people and communities which underpin grant-making, and the fund gives extra consideration to projects achieving those outcomes, such as learning, on which the fund places most value. Programmes include: • Sharing Heritage (£3,000 - £10,000); • Our heritage (£10,000 - £100,000); • Heritage Grants (£100,000+); • Young Roots (£10,000-£50,000); • Heritage Enterprise (£100,000 - £5m); • Start-up Grants (£3,000-£10,000); • Townscape Heritage (£100-£2m); • Parks for People (£100,000 - £5m); • Landscape Partnerships (£100,000-£3m).
Big Lottery Fund	The Big Lottery focuses on the skills, assets and energy that people can draw upon and the potential in their ideas. Between £500 and £600,000 of funding is available, depending on the funding programme. The Big Lottery Fund provides funding under a number of different programmes including: • Awards for All Northern Ireland (£500 - £10,000); • People and Communities (£30,000 - £500,000); • Empowering Young People (£100,000 - £600,000); • Village SOS.
Ulster Garden Villages	The Ulster Garden Villages fund allocates funds to Capital and Revenue projects in NI that improve the quality of life in the local community. There is no limit to level of funding which can be obtained. The main objectives to which funds may be allocated are: • Health; • Disadvantaged sections of our society; • Young people; • Culture and heritage; and • Environment.

In addition to the above existing funding streams, two other potential sources of funding that at are early stages of development include:

Title	Description
NI Investment Fund	In November 2017, the Department of Finance appointed a fund manager to manage the NI Investment Fund. The Fund provides debt funding for commercial property, regeneration and low carbon projects in Northern Ireland at highly competitive commercial rates. £100 million will be provided by the Department in three tranches, with the initial £40 million tranche of funding expected to be disbursed in January 2018. Further tranches will then depend on the fund manager meeting certain commitment and disbursement targets. It is expected that the £100 million will be recycled to deliver more than one investment cycle over the life of the Fund and the fund manager is also obliged to deliver at least an equivalent level of private sector leverage. The Fund is open for applications from viable projects that cannot source funding from traditional sources. It will commit capital to opportunities which meet regeneration targets covering; employment, regeneration, floor space and carbon savings outputs. It's target sectors include: • Office; • Industrial; • Warehousing; • Logistics R&D; • Hotel, Leisure and Residential as part of a mixed-use regeneration development; • Development of employment sites, site assembly, remediation, site access and other site related infrastructure; • Other capital investment in physical development and infrastructure that directly supports economic growth, for example, tourism or leisure led projects and the provision of digital infrastructure; • Non-domestic and domestic energy efficiency projects; • Energy generation projects, including photovoltaic, wind, hydro and waste to energy; • Heat network projects; • Energy Storage projects; and • Circular economy projects with a focus on resource efficiency and / or re-use. The fund will not be able to provide finance to public sector organisations. Projects will need to be private sector led or delivered via a public/private sector Special Purpose Vehicle.
Belfast Region City Deal	A City Deal is an agreement between government and a city. It gives the city and its surrounding area certain powers and freedom to: • take charge and responsibility of decisions that affect their area; • do what they think is best to help businesses grow; • create economic growth; and • decide how public money should be spent.

The Chancellor's November 2017 autumn budget highlighted that the Government will *"open negotiations for a Belfast (Region) City Deal as part of our commitment to a comprehensive and ambitious set of City Deals for Northern Ireland".*

In December 2017, six Councils (i.e. Belfast; Antrim & Newtownabbey; Lisburn & Castlereagh; Mid & East Antrim; Ards & North Down; and Newry Mourne & Down) published an emerging proposition paper for a Growth Deal for the Belfast city region. The initial proposition highlights that a deal for the Belfast region would offer a 10-year investment plan to contribute to economic growth. It also highlights that the deal would focus on:

- developing infrastructure to support growth (including tourism, transport and digital infrastructure);
- building the skills base and improving employability prospects;
- focusing on innovation for sustained growth and prosperity in an inclusive way (including digital technologies, creative industries and advanced manufacturing);
- building on strengths and prolonging excellence into the future;
- closing the gap between the most and least productive companies, industries, places and people; and
- positioning the region as one of the most competitive places in the world to start or grow a business.

It is anticipated that a further proposition paper will be developed by April 2018, which will include key outcomes and emerging projects linked to the three themes of infrastructure, innovation and skills with indicative costs. It is anticipated that an agreed Heads of Terms will be in place by November 2018.

B. STRATEGY CONSULTATION FINDINGS

B1.0 INTRODUCTION

The Integrated Tourism, Regeneration and Economic Development Strategy has been informed by an extensive process of stakeholder engagement. In this section we summarise the findings of this process.

B2.0 BUSINESS SURVEY

Annex 1 - Business Survey Analysis

1.1 Survey/ respondent overview

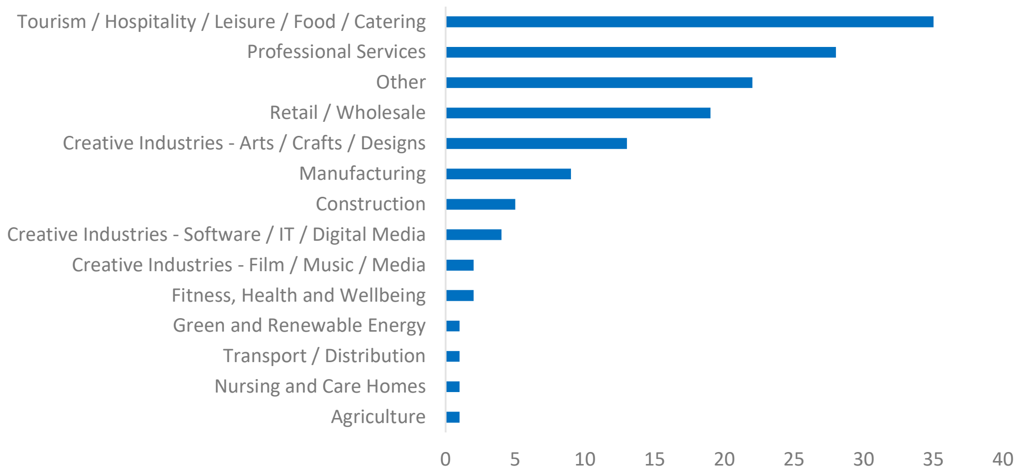
This section provides analysis of feedback obtained from an online survey administered over the period 18th July to 20th September 2017. The survey was completed by 143 businesses who operate within the Ards and North Down (AND) area.

Of the 143 respondents, 62 of the them are located in Bangor (43%), followed by 32 businesses whose main premises are in Newtownards (22%) and Holywood where 13 businesses are located (9%) whilst only one respondent each had their business in each of the following: Groomsport, Crawfordsburn, Balloo and Craigavad.

In relation to the business sectors, 24.5% of respondents operated in the Tourism, Hospitality, Leisure, Food and Catering sector (35 businesses), 19.6% traded in the Professional Services Sector (28 businesses). The sectors with the least respondents were Transport/ Distribution, Nursing and Care Homes and Agriculture with one business respondent in each sector. Note that ‘other’ included sectors such as charity/ volunteering businesses, education, IT support, health and safety and cleaning businesses.

Of the 143 respondents, 63% of businesses (90) are company VAT registered, 37% of businesses (53) are not company VAT registered.

Figure 1.1: Main Business Sector

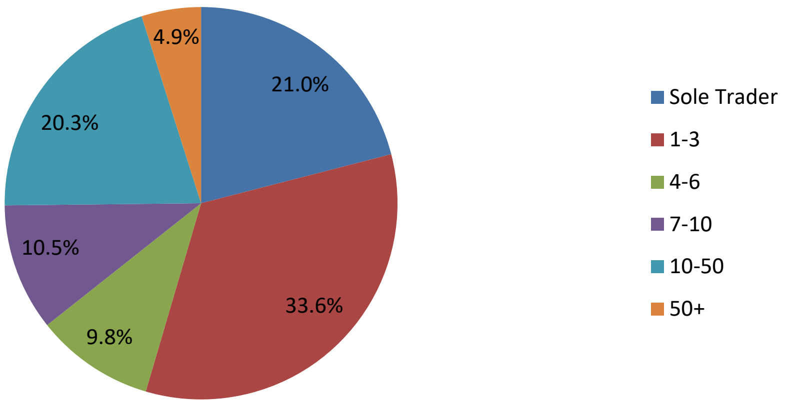


Base: 143 replies

1.2 Current and future employment levels

Full time equivalent employees are those who work 30+ hours a week. 48 of the 143 respondents have 1-3 FTE employees (33.6%) and 30 of the businesses are sole traders (21%). Only 7 businesses (4.9%) have more than 50 FTE employees.

Figure 1.2: FTE Employees



Base: 143 replies

Over half of the respondents plan on recruiting more staff in the next three years to facilitate business growth. The average number of FTE employees that respondents hope to have is c. 4 with outliers planning to recruit 15, 30 and 30-50 employees in the next three years.

Over two thirds of respondents (71%) do not believe that their business has experienced a skills shortage when recently seeking to recruit staff. Of the 29% who did experience skills shortage, the following skills gaps were mentioned:

- Qualified chefs;
- ICT technicians or general ICT skills;
- General work motivation;
- Customer service skills; and
- Those with specific licenses (HGV, towing).

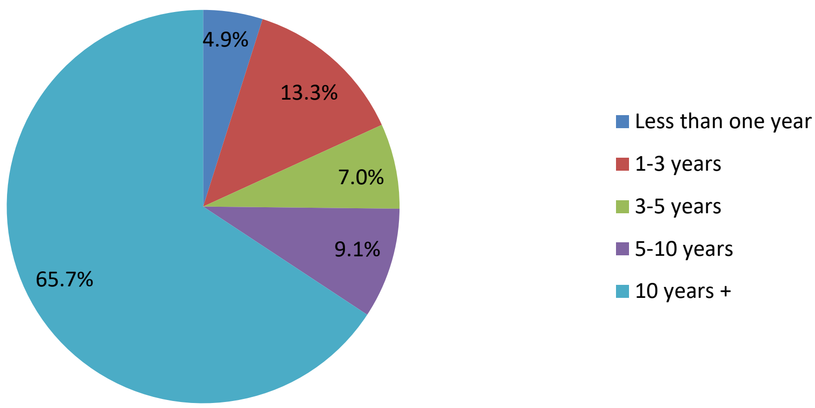
1.3 AND as a business location

The main factors that attracted the respondents to set up their business in Ards and North Down are as follows:

- Live in/ near the area (55 respondents);
- The location i.e. good for transport/commuting (20 respondents);
- They are part of an already established business there (14 respondents);
- Rent prices are reasonable (3 respondents); and
- Heritage (2 respondents).

As already suggested in the above factors, over two thirds (65.7%) of respondents have been located in ANDBC for more than ten years.

Figure 1.3: Number of Years in ANDBC



Base: 143 replies

A significant majority of respondents (90%) see the long-term future of their business within ANDBC. When asked for rationale for their answer, some of the common themes were because AND is ‘home’ and therefore they would not leave it. Another reason given in the feedback is because the businesses are well established and have developed a strong customer base through the local community. The infrastructure, good road conditions, access to motorways/airports and proximity to Belfast were also mentioned.

Among the 10% who do not see the long-term future of their business within AND, was the point that it is not a business-friendly area in terms of business rates – they are too high. Another point made is that commercial growth is in Belfast and it is therefore best to focus business there, as it will open more opportunities.

A number of concerns around the long-term future of retail in Bangor town centre were noted and how it has and will continue to mean a decreased footfall to the area.

1.4 Export orientation & investment plans

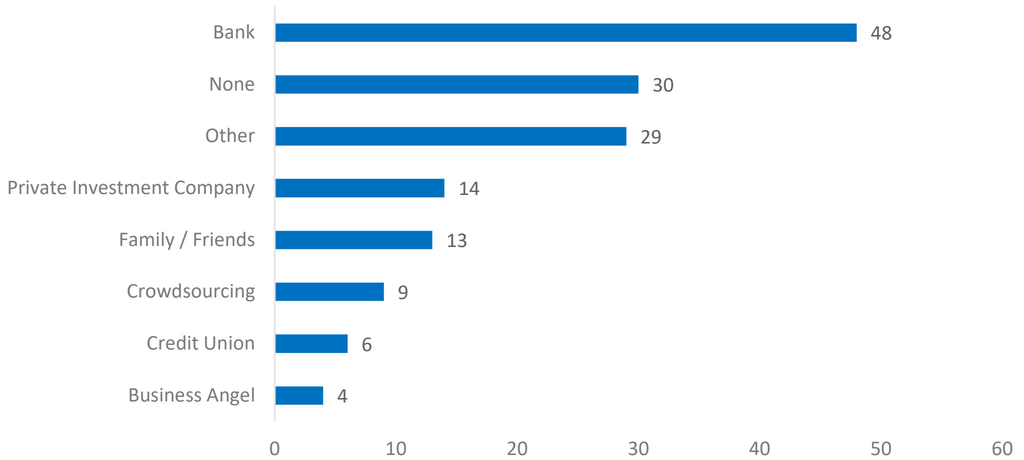
Of 143 respondents, only 29% of businesses (42) export their products outside of Northern Ireland, primarily to the Republic of Ireland. 72% of respondents (103 businesses) believe that the Borough provides a good environment for their business to grow and provided the following reasons for their answers:

Figure 1.4: Factors impacting business growth

Positive	Negative
• The good infrastructure and public transport links • The business opportunities within a 20-mile radius • Support from the council (mixed opinions on this, particularly within small businesses) • Support from Signal • Proximity to regional airport and ferry ports	• Lack of reasonably priced office space • Business rates are too high • Act as commuter towns • Lack of tourism and infrastructure investment • Lack of council initiatives

Of the 80% respondents (115 businesses) who are likely to invest money into their business in the next three years, 48 businesses plan to do so with help from a bank, 13 businesses from family and friends and 30 businesses plan to do so without help from institutions. The 'other' option included support from charitable funds, local grants and trusts.

Figure 1.5: Financial Support



Base: 115 replies

1.5 Council Support

Only 39% (55 businesses) believe that they benefit from tourism or other Council run events directly or indirectly. Types of events highlighted include:

- Food and Drink events;
- Creative Peninsula;
- Markets and craft fairs;
- Sporting events/ tournaments;
- Marine tourism;
- Business events i.e. Big Data Belfast; and
- Various events held in Portaferry.

Such events raise the profile of the area and increase the footfall in that specific town, bringing more customers over the door. However, some of the 61% (88 businesses) who stated that they have not seen benefits from Council run events believe them to be concentrated in one or two areas within the Borough. Overall, these businesses believe more could be done by the Council to encourage the use of local facilities across the whole Council area.

Almost half of respondents (47%) feel that the planning process has a negative impact upon their business and that planning restrictions and time lags associated with securing planning drive businesses elsewhere.

Of the 143 respondents, 113 (79%) stated that they believe that there is currently enough land and/or business premises available to meet their current and/or near future needs. However, feedback highlighted that the cost to rent certain spaces was too expensive and should be re adjusted for more local businesses to trade from.

Of the 143 respondents, 56 (39%) stated that they feel that they benefit from Council regeneration initiatives such as Public Realm Scheme investment, Town Centre Master Plans and Village Plans. They highlighted that the benefits were largely indirect and related primarily to the towns/villages being more attractive to potential jobs applicants, visitors and families. It was noted by a number of representatives that such regeneration can be disruptive and carried out over a along period, which reduces their positive impact.

1.6 Respondent recommendations

Key recommendations offered by survey respondents for the integrated strategy related to:

- **Business incentives and regulation**:
    - the need for lower business rates to boost the ability of businesses to employ more staff/ reduce town centre vacancy;
    - reduction of the amount of ‘red tape’ associated with planning;
    - reduction of the waste recycling charges; and
    - reformation of licensing laws.

- **Infrastructure maintenance/investment:**
    - development of Queen’s Parade in Bangor;
    - improvements in the road network;
    - general maintenance of public areas and signage within the Borough;

  - introduction of free parking and/or multi-storey parking in Grey Abbey, Bangor and Ards, combined with the introduction of pedestrian areas and walkways to improve visitor experience.

- **Council procurement processes** – respondents suggested that the Council procurement policy should favour local suppliers.

- **Tourism development**:
  - the provision of a recreational and tourist infrastructure to enable greater access to Strangford Lough to and from the sea and development of pathways and leisure activities around this that can be promoted nationally and internationally;
  - improvements to existing caravan sites and development of camper van parks;
  - reintroduction of Bangor's Fun Fair; and
  - infrastructure to accommodate visitors with motor homes/ boats.
- **Communication and Coherence:**
  - improved communication with businesses (key stakeholders) within AND, making them aware of strategies and objectives so that the businesses can get involved, know where to help and feel that they are making a difference; and
  - Improved collaboration/cohesion between the council, tourism providers and all other key stakeholders.
- **Learning Programmes and Skills Support**:
  - It was noted in the feedback that the support programmes from Signal have been of significant help and respondents would appreciate similar programmes and mentoring in the future. Respondent feedback highlights a demand for programmes, events and workshops such as 'meet the business' events, one to one mentoring sessions to include business plans and workshops for grant applications. It was also mentioned that the Council should encourage/ ensure that businesses collaborate with others i.e. Exploris in Portaferry could collaborate with other smaller businesses to help their sales and growth; and
  - A number of respondents expressed a concern over skills gap and the need for additional training schemes e.g. within the catering industry.
- **Funding**:
  - Support for small businesses;
  - Provision of more accessible/ easier to complete funding applications; and
  - Increased focus on innovation support.

1.7 Summary of Key Findings

- The main factors that attracted the respondents to set up their business in AND because they live in or near the area and the location i.e. good for transport/commuting;
- A significant majority of respondents (90%) see the long-term future of their business within ANDBC;
- 72% of respondents (103 businesses) believe that the Borough provides a good environment for their business to grow;
- 39% of respondents (55 businesses) believe that they benefit from tourism or other Council run events directly or indirectly. Types of events highlighted include food and drink events, markets and craft fairs, sporting events and marine tourism;
- Of the 143 businesses, 56 feel that they benefit from Council regeneration initiatives;
- Respondent recommendations for the Integrated Tourism, Regeneration and Economic Development Strategy include:
    - **Business Incentives** – lower rates/recycling charges, reforming licensing laws;
    - **Infrastructure Investment** – roads, car parks, pathways, signage, park & ride schemes, supporting tourism as a key driver of job creation;
    - **Council procurement processes** – respondents suggested the Council procurement policy should favour local suppliers;
    - **Learning Programmes and Skill Support** to address skills gaps;
    - **Improved communication with businesses and enhanced collaboration by relevant stakeholder groups;** and
    - **Increased funding** – particularly for small businesses and start-ups and support for innovation development.

Businesses Survey - Ards & North Down Borough Council

1. Please indicate your main business sector. *

- [ ] Retail / Wholesale
- [ ] Professional Services
- [ ] Manufacturing
- [ ] Construction
- [ ] Tourism / Hospitality / Leisure / Food / Catering
- [ ] Agriculture
- [ ] Nursing and Care Homes
- [ ] Transport / Distribution
- [ ] Fitness, Health and Wellbeing
- [ ] Creative Industries - Arts / Crafts / Designs
- [ ] Creative Industries - Software / IT / Digital Media
- [ ] Creative Industries - Film / Music / Media
- [ ] Green and Renewable Energy
- [ ] Other (please specify):

2. Please indicate where your main business premises are located. *

- [ ] Bangor
- [ ] Holywood
- [ ] Groomsport
- [ ] Conlig
- [ ] Cultra
- [ ] Crawfordsburn
- [ ] Balloo
- [ ] Clandeboye
- [ ] Craigavad

- ☐ Helens Bay
- ☐ Newtownards
- ☐ Comber
- ☐ Ardkeen
- ☐ Ballygowan
- ☐ Ballyhalbert
- ☐ Ballywalter
- ☐ Carrowdore
- ☐ Cloughey
- ☐ Donaghadee
- ☐ Greyabbey
- ☐ Killinchy
- ☐ Kircubbin
- ☐ Lisbane
- ☐ Millisle
- ☐ Portaferry
- ☐ Portavogie
- ☐ Six Roads End
- ☐ Other (please specify):

3. Is your company VAT registered? *

- ☐ Yes
- ☐ No

4. Please indicate the number of employees (full time equivalent) in your business. *

- ☐ Sole Trader
- ☐ 1-3
- ☐ 4-6
- ☐ 7-10
- ☐ 10-50
- ☐ 50+

5. Are you planning on recruiting more staff in the next 3 years to facilitate business growth? *

- [ ] Yes
- [ ] No

If yes, approximately how many staff members are you planning on recruiting and in which areas?

6. Has your business experienced skills shortages when seeking to recruit staff recently? If yes, please provide details about specific skills gaps encountered. *

- [ ] Yes
- [ ] No

Details of skills shortages:

7. Does your company currently export products outside of Northern Ireland? *

- [ ] Yes
- [ ] No

If yes, please indicate your main markets outside of NI (ROI, GB, Europe, Other) including approximate % of overall revenue:

8. How long has your business been located within the Ards and North Down area? *

- ☐ Less than one year
- ☐ 1-3 years
- ☐ 3-5 years
- ☐ 5-10 years
- ☐ 10 years +

9. What were the factors that attracted you to set up your business in the Ards and North Down area? *

10. Do you see the long term future of your business within Ards and North Down area? *

- ☐ Yes
- ☐ No

Please provide rationale for your answer:

11. Do you believe that Ards and North Down area provides a good environment for your business to grow? *

- ☐ Yes
- ☐ No

Please provide reasons for your answer - what are the positives/ negative factors that are likely to impact your businesses growth?

12. Are you likely to invest money into your business in the next 1-3 years? *

- ☐ Yes
- ☐ No

13. If you answered yes to Question 12 above, what institutions would you be likely to use to seek financing?

- ☐ Bank
- ☐ Family / Friends
- ☐ Private Investment Company
- ☐ Business Angel
- ☐ Credit Union
- ☐ Crowdsourcing
- ☐ None
- ☐ Other (please specify):

14. Does your business benefit from tourism or other Council run events directly or indirectly? *

- ☐ Yes
- ☐ No

Please provide details below:

15. Does the planning process have any impact on your business? *

- ☐ Yes
- ☐ No

Please provide details below:

16. Do you believe that there is currently enough available land and/or business premises (industrial or office space) to meet your current and/or near future needs? *

- ☐ Yes
- ☐ No

Please provide details below on how this has impacted upon your business:

17. Does your business currently see any benefit from Council regeneration initiatives? e.g. Public realm scheme investment, Town Centre Master Plans and Village Plans. *

- ☐ Yes
- ☐ No

Please provide details below:

18. Does your business receive support from any other organisation? *

- [ ] Yes
- [ ] No

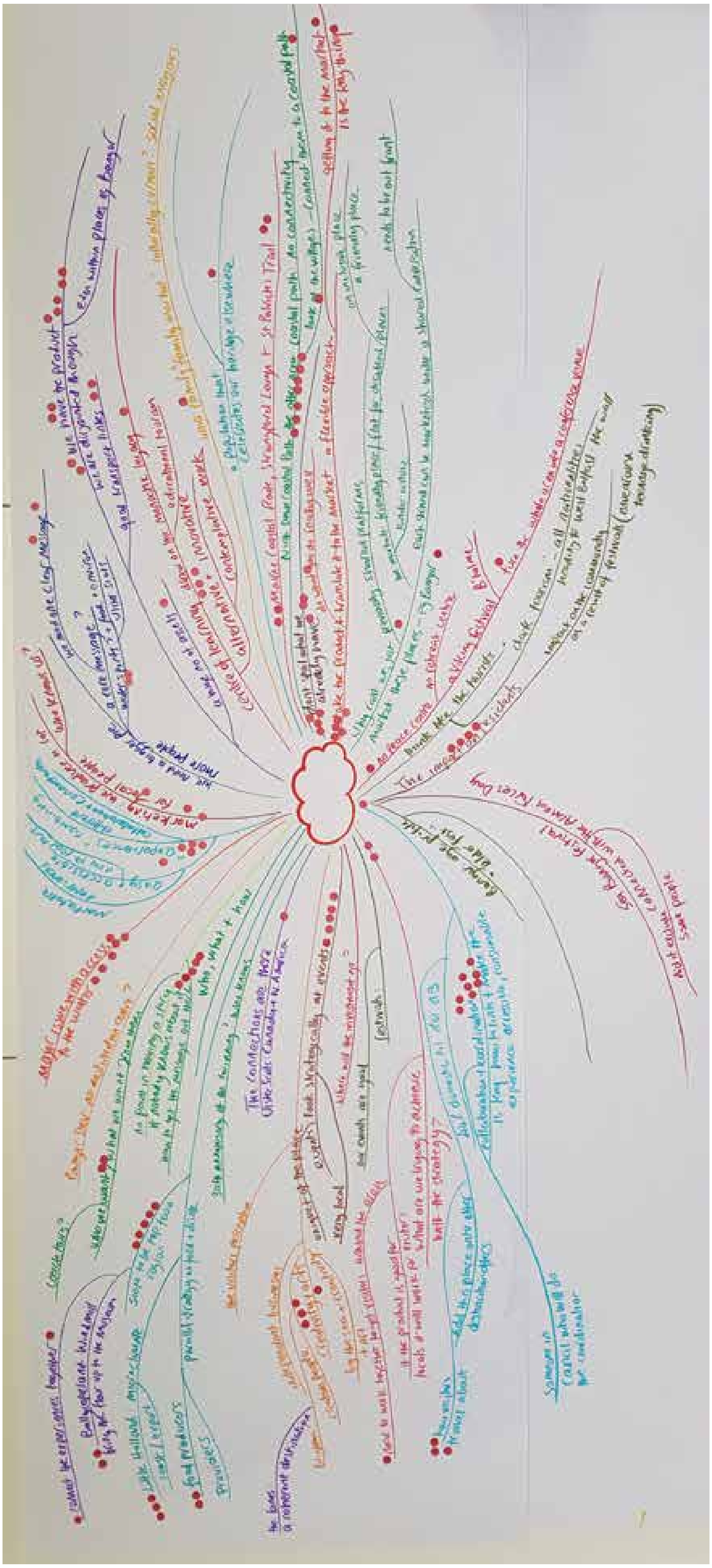
Please provide details and how this benefits your business below:

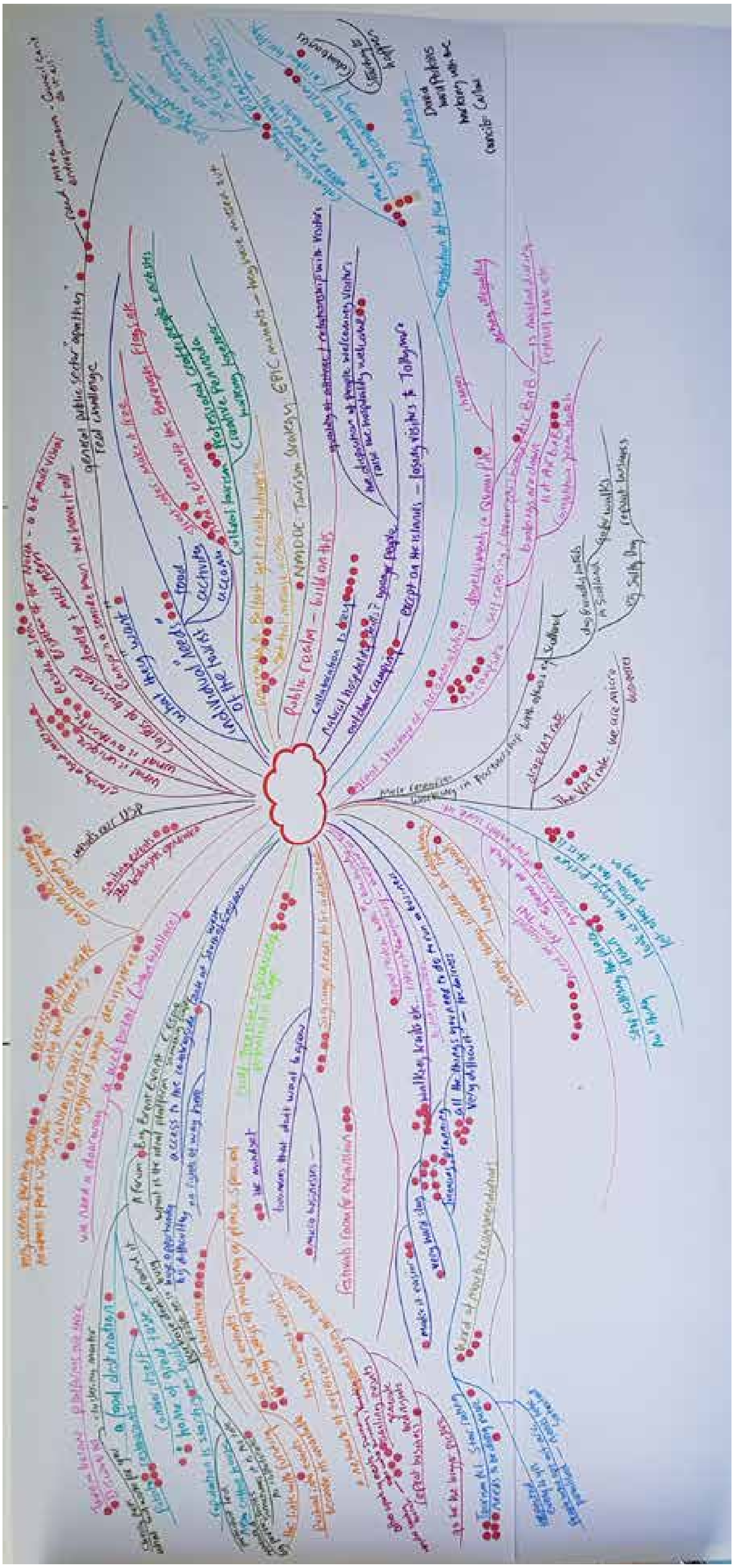
19. What policies and/ or actions would you like to see included within the Council's Integrated Tourism, Regeneration and Developmental Strategy that would better enable private sector growth? *

20. Linked to your specific business sector, is there any strategic investment or support you believe that Ards and North Down Borough Council can undertake to benefit your business sector or the wider Borough area? *

21. Please provide any additional comments that you feel will help to shape the development of the Integrated Tourism, Regeneration and Developmental Strategy.

B3.0 STAKEHOLDER WORKSHOPS





ITRDS TOURISM WORKSHOP OUTCOMES REPORT KEY THEMES HIGHLIGHTED

MORNING SESSION

ACCESS TO THE WATER & THE WATER's EDGE; COASTAL & MARITIME HERITAGE

Off road cycle routes
The arterial route down the peninsula
Will it ever happen
Cycling is going to hit a problem
Safe secure greenway initiative
Greenway is underway
Come here to chill out ...
What are we inviting people to do?
The heritage of the peninsula
Irish history Christian heritage
Getting people to the northern part of the island
Who are we inviting - what message
This area is not on anybody's radar ...
What are you selling
What is the offer
Strangford is there - but access
NT: quite precious about providing access
NT: difficulty trying to access
Linking leisure activities to the coast
What will give the destination standout
Flood Gate Feasibility Study
What will drive visitors here
Access to the water for what
3 destinations - Star Wars ...
Heavily designated

LOOKING AFTER & ENGAGING IN A DIFFERENT WAY WITH OUR CULTURE AND HERITAGE

Could the strands come together?
Heritage and creativity
Within the Dept for Comm.
Knowing what you have - is
Kearney Blue Cheese started here
Pick your hubs around other things
Create bits and pieces of walks
"My mother and other strangers"
The Doors ... 10 Doors ...
Movies being made every weekend
E.g. Dark Hedges
Hitch yourself to a successful thing
Engaging with heritage sites in a different way
Activities that are linked to the vibe of the site
How to make it emotionally captivating
Nendrum is brilliant ... What sort of experience
A lot of cultural assets to be used
It's about experiences
Maintain the heritage moving forward
Timeline - stratification complete by Sept.
Stratifying 190 sites ... Where's the significant potential
Where could we offer - Jedi training?

THE INVITATION TO THE MARKET – WHAT IS THE PROPOSITION

What's the brief - Ambassadors
Repurpose ... bringing art to unusual places
Open house ... using creativity to drive regeneration
Small festival can't market - not the budget
What do you support
Transport linkages between the towns
Separate areas separate identities - not one homogenous product
Local distinctiveness
Portaferry to N'ards £12 return on the bus
Make the best of where you live
A Peninsula ticket ...
The Borough itself - nothing down the peninsula
Access to stunning areas
Everything should start with the community
Holywood Bangor Donaghadee Newtownards
Comber - link the greenways
Create a lovely loop
Comber Farmer's Market >1,000 a month
We undersell ourselves
Community trails - doorstep walking opportunities
The expectations of visitors re transport ...
What is the market?

COLLABORATING TO COMBINE & CREATE LINKAGES

Get people together - Motivate and foster
But into tourism at all levels
Create cooperative climate

Do it
"Region-eration"
Enabling -finance -resources
Who are they champions?
Smart/flexible rural transport
Working better together
Work with Belfast
Link to Belfast understand relationship
Working with Newry Mourne and Down
-Sale Traps -Webinars -WTM etc.
Not just a strategy ... Has to change the noles on the ground
Travel trade independent trade and repeat
Repeat visitors
'Enable' local links to Intl. networks
Infrastructure -Paths -Cycle trails -Greenway
Art Map Argyle -Open studios -Trail
Make the area distinctive vis-a-vis Belfast
Tie to island of Ireland brand architecture

CREATIVE PRODUCTION – FOOD, ARTS, CELEBRATION – THE LAYERS OF EXPERIENCE
Enabling -finance -resources
A strong centre ??? = strong borough Bangor and vice versa
Confidence in our product and sharing it (e.g. food)
Deep experiences
Entrepreneurial support
Close to GTS (Italian Pilot)
Transport links late night and village to village
4< Clusters >5
Audit of empty spaces/ buildings
< cono Musée >encourage
Business support -Serc -NODO -Ards
Enterprise -Signal LEA -Not working together -Competing
Develop themes around industries
Grimsby Trawlermans Museum - Fishing heritage
Exploit seafood
Entertainments license reform
Marina Facilities -toilets -showers -washing
Reform liquor licensing (producers) laws
Creative production

AFTERNOON SESSION

RULES AND REGULATIONS
Tourism registration? - packages/ events
Competition with other organisations who don't get licenses and can afford to charge less!
Outdated liquor licensing law
Planning service very slow and expensive
Too many agencies involved who don't communicate
Lack of communication between local council departments
Confusion over status of Air B+B accommodation
Star rating - very difficult for owners of older but quality accommodation
One-Stop-Shop for council services
Lack of support for entrepreneurs from councils and government depts
Updating liquor licensing laws
Star rating not representative of what is on offer
Charge of nearly £1,000 to get signs up for a heritage centre! Why?! + "subject to rationalisation"!
Tourist Board do not promote accommodation
Remove barriers and red tape
Integrate council departments and services

ACCOMMODATION
Help with guests' interests before arrival?!
NITB no help
No control over Air BnB
Set up common terms and conditions for guests e.g. laundry - washing of working clothes - should a dry cleaners be used instead?
Bookings not taken by tourist board
Student type accommodation - use out of season for summer schemes/ language schools/ youth events
Camping in North Down more accessible
Trades men on contracts when accommodation is booked by firm think they own the property at times!
Assistance for web page maintenance
Bangor needs more B&Bs
Cheap hotels in Belfast
Publish routes out of all ports to connect with main roads
Until the guests have paid
H. Letting and other agencies cannot be contacted by accommodation providers

Set up booking system in each area make bookings personal
B&B's etc pitching into taxi and bus companies
Switchboard operated after 5pm by one person nominated - could be done at home by diverting calls. Tourist info ...
More event spaces - ability to seat 150+
Town Centre Ards B&B's needed
Tourist office open after 5pm
Accommodation providers provide up-to-date info for Discover NI
What of Tidinet, NISCHA discover NI etc?
More hotels - cheap and expensive

ACCESS TO WATER/ COUNTRYSIDE
Picnic places - Kearney, Windmill Hill, Millisle Bay, Tara fort, Ballyquintin
Access to heritage sites like Derry Churches and Millisle Bay rarely easy!
Public transport
Direct flights!
Provide access to lough and countryside
Clearsky wanted a base in Portaferry but told no space!
The Lough itself is an obvious loop - but requires collaboration with NMD council
Ferry and fog issues - makes selling events in Portaferry tricky
Open NIEA monuments and maintain?
Enhance current and new car parks and lay by facilities with picnic tables and bins
Reopen Ulster Way trails

COLLABORATION
Tie in and share info - encourage visits to all rather than compete
Simple platform to network
Fam trips for trade
Shuttle around attractions
Share events well in advance and in planning stages to enable more involvement
Make connections - today useful for networking
Bus drivers have trouble getting passengers back to bus - so do not allow sufficient time at destination!
Passengers from ships. One day - differ the destination please
Key attractions sharing business/ Tour Operators opportunities/ Educational
Reinstate Key of the Lough type scheme
Collaboration with other councils - Belfast, NMD
Could we share contact details of those in session so we can touch base re points of interest
Collaboration between councils
Is any £ support available from council for events that promote Tourism in area - e.g.: Brent Geese
Bi-monthly meetings of attractions - can we work together or ensure we don't clash?
Cross-promotion of attraction via flyer distribution
Billboards at events telling visitors where to go next
Identify major projects/events each year and invite neighbouring towns/groups to "hook" onto it
Look at examples of Open House Festival for local collaboration
Signage - difficult to get more of this - trying to encourage visitors!
Town and village signage i.e. Like France say on sign what shops and attractions available
Into roved access onto Lough via joint council initiatives
Coach operating tours joint ticketing opportunities!
Communication is key - a way to talk to each other

FOCUS ON THE UNIQUE & AUTHENTIC
Back in time -Unspoilt (not much there!) - Millisle bay/ Kearney - olde worldy
Longest coastline in N Ireland
Countryside -Seascapes -Landscapes
Closest point to Scotland and potential sailing - Bangor, D'dee, Scotland, Isle of Man, Portaferry
Copeland Islands
The Lough is what is unique!
History and Heritage -Christianity -Ulster Scots -National Trust -M'Stewart
Beautiful beaches
Accessibility of harbours for visiting boats
Best/ easiest sailing event area in UK? Link for cruising to W. Scotland
Can start with an event ... E.g. Competitions ... as part of what else is going on

How to get in on the cruise ship business
- Welcome is part of our package
Easy reach for 80+ cruise ships calling in Belfast
Nowhere to hire a car in the whole borough
Well-developed local arts and crafts
Shape of the peninsula lends itself to trips -
- Walking, cycling, sailing, golf
Land trains around the coast - 5 miles of coast e.g. Spain
L'Escala Northern Spain
The entrepreneurship - is missing
The coastal paths where are they?
Strangford Lough Cycle Route
High density of artists and crafts people in the peninsula
The "Arts" Peninsula
Sculpture trail down the peninsula ... Re do it?
International designations - shout about it
Pride of place - e.g. Exploris reopening
Friendliness, sociability
Our welcome - we do it well - learning for young ones
The challenge - positive completion between places
Museum can feed into what's happening
An integrated approach - a lot of work to do e.g. The villages and towns
When one business opens up - it can have a knock-on effect
We need to make it easy for people: - a lot of bureaucracy
Think beyond our immediate areas
Take more responsibility for our own areas
Think beyond the box - e.g. Photographs of businesses in Bangor
Year of Food and Drink: - great collaboration
Why not for 3 years
The Italian ... mkt ... natural affiliations with particular
Focus on local people - tourists will pick up on the vibe

THEMATIC TOURISM
Use Tourism NI to find out what events are on/ upcoming
Listing of tour guides (please!) (for professional use)
Share information with partners in related sectors
Accommodation for sporting events - education and promoting of events
New elite/ high performance water sports centre Ballyholme
Package services Accomm. experiences
Fam trips for employees to gain knowledge
Strangford Lough - Iconic attraction. Events: -
Additional attraction- on this location
"Themes" as opportunities for conversations and connections across sectors
The Open 2019!
Visit Belfast - access their information
Belfast +
Centralised platform for networking
Need to promote what we have to offer: - social media and apps
More themed apps for self-guided tours to avoid physical signage
Same type business working together to profit together
Cheap accommodation for youth events
Who are the tour operators and how do we push our products to them?
Network - share dates and INFO. Theme i.e. "Festivals of the Peninsula"
How to attract big businesses to sponsor/ get involved?
Arts events bring tourists
Tourist office offering courses/ self-education -about local attractions -how to sell local attractions
What's on and similar event info
Peer learning / raising the bar
Easy portal to book events
Facilities - flexible, easy to host events, brand
Share tourism funding budget i.e. 4 groups one area Market all under one percentage each Funding pot goes towards one plan
Businesses working together to put on festivals
Encourage new businesses to package/ ease accessibility to water/ countryside
Safe - cycling lanes/ routes
Disabled access/ events for disabled sports people
Sporting groups calendar - link - share - dates - Create. One brochure of events - Market together reduce costs

Community & Voluntary Networks Workshop

Tuesday 4th July 2017, Signal Centre, Bangor

Funding, Attitudes and Uncertainty
Councils role in helping clarity of funding for community and voluntary networks
Lack of security filters down to villages - funding needs to become more manageable
Lack of job security lack of certainty
There are many funding opportunities
sustainability of events is linked to funding
better communication with council needed
Needs to be a management of volunteer groups
retention and recruitment of volunteers, there is a lack of knowledge of process
A lot of groups are successful and survive, but not very active, income directly effected this
value of community and voluntary

Skills, Networking & Social Capital
Volunteer now
sharing of resources for this
Training of volunteers of all ages with different qualifications
Can be very helpful to bring all groups together
Comber regeneration community partnership
opportunity for traders to come together
development of social contact at all levels

Unfulfilled expectations
number of consultations and strategies, with number of priorities, projects and issues, can lead to consultation fatigue

Value
Volunteer hours recognition, how to support this, creating a rewarding experience
Also the councils role and how to get the most out of this.
valuing tools, skills and insurance
Practicality and efficacy of system , removal of barriers between council and community

Leadership & Vision
Seeing this is worth doing, and it can be done
forward thinking of groups wanting to improve, progress and get things done
form of social capital, self sustaining groups
need recognition
Role of risk and reward ('Anti-fragile), stronger than robust, opportunity of tail and error

Asset Role & Transfer
Requires responsibility, managed voluntarily
Holywood as good example

Destination
Quality local produce
marking of this
'Food destinations

Central Facility
'War room' multifunctional, multi-roled facility that provides support and advice
Physical, supportive, practical
All groups to bring problems eg. Educational, healthcare, sports

Exemplar Projects & Businesses
Portaferry Marina example as successful with funding

Planners, Architects & Environmentalists Workshop

Wednesday 5th July, 10pm to 1pm, Londonderry Park, Newtownards

Linkages & Infrastructure
Short medium and longer term deliverables
Improving parts of the infrastructure and linkages
Coastal road and central access road
Footpaths on protected lough area (example of Stairway to heaven in Cuilcagh Way, Fermanagh)
Utilisation of old railway lines Need for low level supportive infrastructure
Linkages of spaces- opportunity to walk, cycle etc.

What do we want this place to be?
What is needed, who are we targeting? - New start ups, proactive response
Bangor offer – not bringing local people in, retail offer is poor
Looking at delivering public realm, for example in phases – sense of change seen
Flexibility and diversity of offer eg. living above the shops
Capturing need for town – flexible approach
Who are we looking to attract, Who is coming here, why are they or aren't they – cruise ships?

Role of Town centres
Economy has gone in paces, eg. Industrial areas, how do we replace this? Where do we look, infrastructure
Retail core – town centre, online shopping, quality and choice, service and offer
Newtownards – contained town centre – south public realm
Buzz of Holywood (coffee shops etc) How to make it more vibrant
Joined up strategy – parking, regeneration

Housing growth for region
There is a high number of people who commute to Belfast from Ards and north down
There is a housing need, where should it be located and what infrastructure needs to be in place for this?

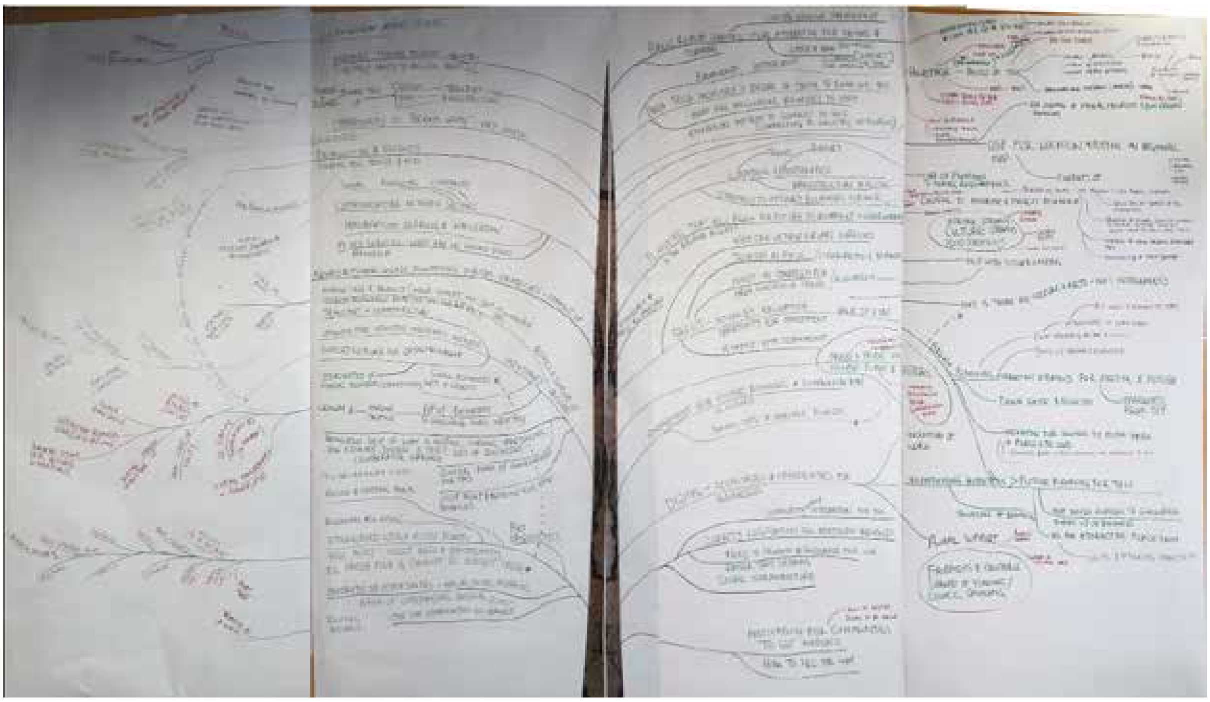
Tourism & Promotion
Public transport is poor in supporting tourism
Council tourism asset video & promotion - assets of Mount Stewart , Scrabo tower, Greyabbey,
Boat journey as a tourism opportunity
Tourism industry having a lower impact than housing industry
Recreational water sports and use of lough (west)
Importance of uniqueness of the setting - Scrabo tower and Strangford lough – capitalising on this.
Land or properties available and feeding down peninsula. Sustainable and environmentally friendly

Balance & Capitalising assets
Wooded areas protected but also used for preventing flooding etc.
Protection of historical assets – ancient woodland
What are the benefits of the remoteness -capitalising on this
Wilderness and natural assets – protection on
There needs to be infrastructure and accommodation to allow this – balance
Diversity of accommodation for example
Capitalising on opportunities – buildings, start up, existing assets.
What helps and hinders these places in terms of growth
Getting people down to Portaferry – current lack of promotion, lack of aware
Age groups, what is provided for age groups or what provisions are required

Exemplar Projects & Businesses
Sea festival in Bangor as example
Ards airfield festival potential - Underutilised spaces
Showcasing these. Examples of working businesses, catalysts eg. Harrison's, Greyabbey antique and businesses, Exploris
Also small businesses eg. Hendersons and Musgraves

Town & Village Regeneration Networks Workshop

Monday 3rd July 2017, 2pm – 5pm, Signal Centre, Bangor



Business, Education & Entrepreneurship
Importance of High tech industry, desire of youth to enter this - better broadband required for this
Education system to connect this to business needs / future business trends/industry networks
What is influencing businesses to stay
Strategy to attract business further
Rural business and farming industries
Planning that will allow for future development and environment
Digital – advantages and opportunities of businesses
Incentive of work, incentivising business, future planning, taxation of business
more needed to encourage start up business - an attractive place
Engagement with existing businesses and communication – eg. Exploris
Respect and support for business
Manufacturing industry, indigenous business
social network for entrepreneurship
danger of missing business opportunities
Small businesses, arts and crafts
Pop up businesses to showcase small industry, improve profile and grow this
Linking entrepreneurs and universities
I.D specific opportunities (e.g. seaweed)
Access to business centres
Sharing knowledge, joining up thinking
Potential of village road shows
Supporting business diversification
Learning from local business champions
Knowledge base of what is existing, working, opportunities, how accurate and diverse is this, list of businesses – collaborative approach
Central point of information
Shop front and incentive for new business
South Down businesses

Marketing & Branding & Tourism
Marketing & product – wider context, not just Peninsula and Arts
Council should market and advertise Peninsula
USP for location and putting it on the regional map – example of why tourists come from abroad to here
Diversity of offer
Opportunity of 'brand name' – very unique (selling point) – examples of Game of thrones, Mourne mountains gateway
Focussing on investment for this specific area
Joining dots of Heritage & Tourism
Newry , Mourne, Lecale, Downpatrick, Tourism strategies – connecting them up

Brexit
Advantages, relocation, opportunity for investment
Invest NI strategy for area, direction of travel, alignment
Tourism NI focus/underwhelming response, help with future and existing businesses
How to be proactive about this
Value of euro
Brexit planning, marketing strategy for existing and future business
Incentive for business to move here and places to live – following Brexit
Interface within departments for this
Brexit opportunities – E.g. Cheese production

Heritage
Range of this – Neolithic, pre 1300 churches, WWI, WW2, Ulster Scots, windmills, beaches

to encourage tourism
Signage, access, locals & knowledge, cannot park and access some sites
disability, access and experience
flexibility of access – ramps, benches, for families

Location & Linkages
Towns, Airports - Infrastructure to and from
Lack of provisions for travel requirements – this is in towns but rural locations
Links and joining these – airport, train, bus, - for tourism and business,
strategically adding to infrastructure then growing it
Cycling and Railway lines – developing these

Strategies
Heritage, culture, food. Literary, Ulster Scots, farming, fishing, tourism, industry
why aren't these integrated
way to include them all, this strategy needs to include them

Public Realm & Town/Village plans
Public realm schemes more attractive for visitors and businesses, but need support for this e.g.
Litter and beach cleaning.
Proud and Pride of Village plans and futures
engagement with community, community development sector

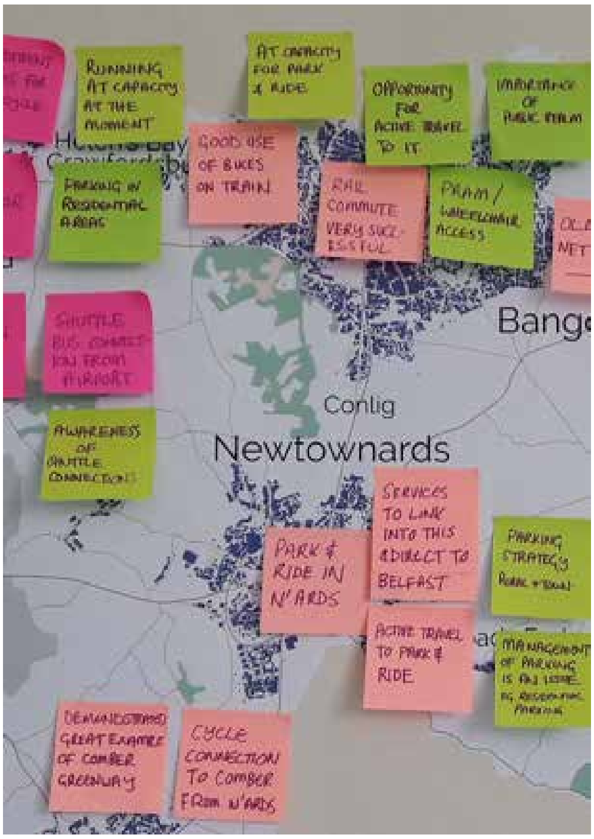
Charity & Support & Services
Rural support
Fairness and equitable spread of funding and council spend
Charity legislation for northern Ireland
Community help and integration for this, need to promote and encourage this use
Motivation for communities to get involved, inspiration
Mixed services – what are we feeding down the peninsula
Support / strategy for dereliction and vacancy
Financial advice and aid needed
Local banking services
Communications between sectors (social, financial, community)
Information sharing and integration

Strangford Lough
Access points, stopping points, accessing all sides
Port opportunities
Huge asset base and opportunities – eg. Fresh fish cannot be bought fresh
Diversity of opportunities – walks, picnic, kayaking, area of outstanding natural beauty
one off opportunities – political influence, strategy as a focus
Enjoy as an asset – paths, hotel, mapping, public landing points, activity holidays, parking, trails, signage, diversify uses, water taxi, boat hire

Exemplar places, projects & ideas
Youghal
New Zealand (Tourism knowledge base)
Swiss bus network
Kinsale
Opportunity of 'brand name' – very unique (selling point) – examples of Game of Thrones, Mourne Mountains gateway
Existing successful business – Exploris
Potential future businesses – Seaweed , cheese manufacture, fresh fish, water-sporting

Transport & Infrastructure Workshop

Wednesday 5th July, 2pm to 5pm, Londonderry Park, Newtownards



Public realm
Belfast bikes has changed demand of use of public realm
environment of the street and how it functions
Improving public realm and spaces for pedestrians/cars and importance of this

Connections & Linkages
Strategic connection from and to airport – importance in raising awareness of shuttle bus connection from airport
Average speed cameras have worked well (Holywood)
Bangor coastal route - Coastal path from Bangor used well for commute to Belfast – more investment in this is needed for walking/cycling
Train use running at capacity at the moment from/to Bangor - Parking in residential areas can be a problem due to this
Good use of bikes on train
Rail commute very successful from Bangor
Pram and wheelchair access could be improved at Bangor
Extend old rail network from Bangor to Donagahadee

Park and Ride facilities
Park and ride at capacity in Bangor - opportunity for active travel to it
Park and ride in Newtownards - Active travel to park and ride
Services to link into this and direct to Belfast.

Parking strategy – public and private transport
Parking strategy needed for town and rural
Management of parking is an issue – eg. Residential parking
Routes of buses based on demand as well as resources - realism versus aspirations
commuters served well on Peninsula, however off peak harder
Promotion of town development to include walk and cycle, sort and long - change of mindset of new and existing developments
needs to be a balance of demand and feasibility
incentive for residential travel card schemes
Commuter difference between eg. Ballygowan / Kircubbin
Active school travel programme – Sustrans
Provision of shared walk and cycle routes
cycle network from Comber to Strangford
cycle connection to comber from Newtownards
demonstrated great example of comber greenway
Impact this has on local business
attractor of off road cycle walks & coastal paths

Cyclists
Cyclists generating tourism business
there is an inland rural cycle network
No goldline service on peninsula – no bikes on bus
what are the cycle provisions in villages?
needs to be a respect for all road users
there are two types of cyclists – those who use main road for speed, and cycle network for slower
future provisions for cycling, being responsive and flexible to meet demands

Water/ Strangford Lough
why don't we use the water more for transport
danger of access to lower peninsula (tidal)
3 public slips in Portaferry
ambulance services across Strangford ferry

Tourism & Ferry
Game of Thrones as tourism driver
from Exploris reopening ferry users have more than doubled
3-4 cruise ships visit Portaferry per year
During summer months visits to Mount Stewart increase
Ferry future – level of realism needed. Can meet demand potential growth could be met
Ferry hours 7.30 – 11/11.30, used by mix of pedestrian & cars & weekend cyclists
No current bespoke tourist buses, proportion of visitors using public transport

Commercial viability of residential spine
More central villages and residents along peninsula do experience less service
Need for better infrastructure down peninsula
Viability of transport demands and level of realism

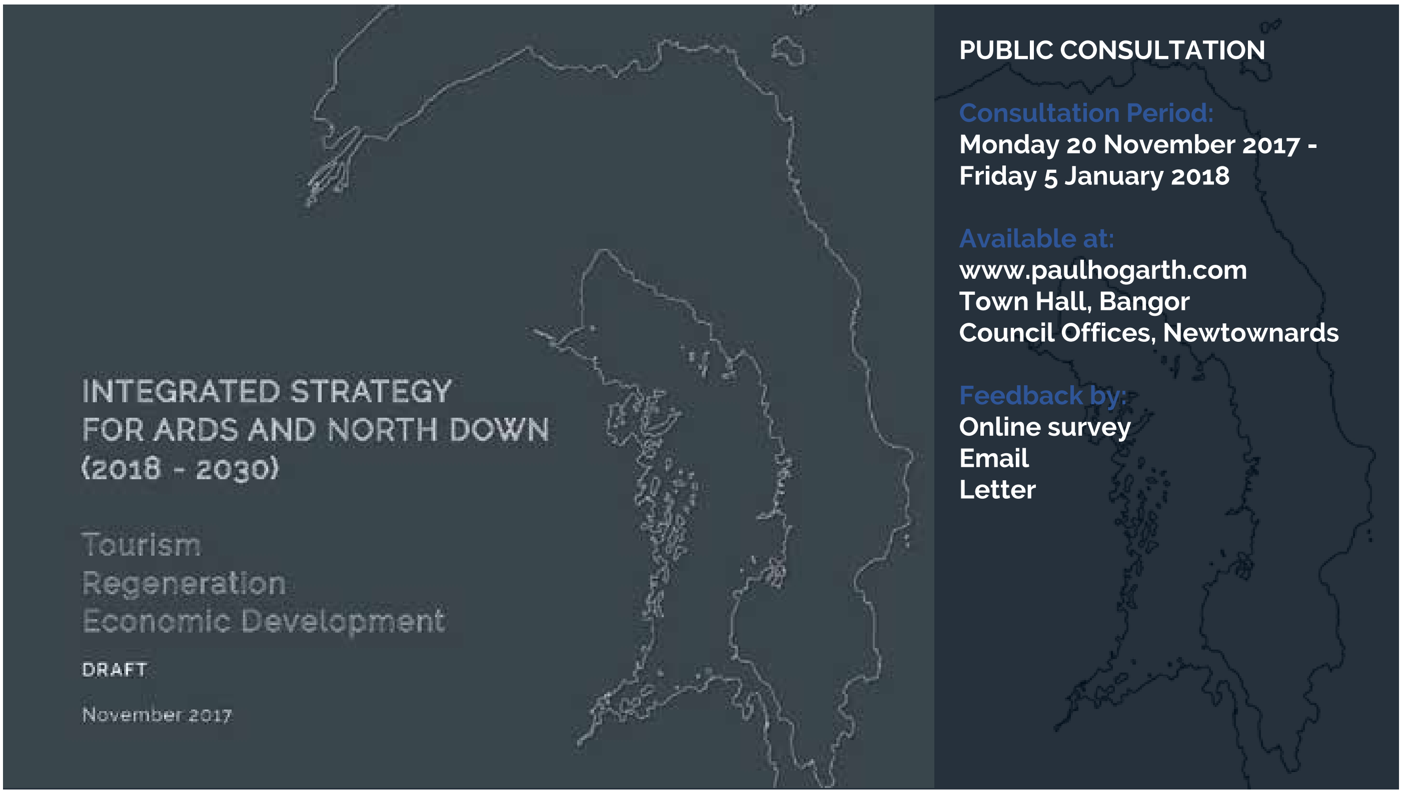
Exemplar Projects & Businesses
High Street as good example of pedestrian public realm for Belfast
Comber Greenway

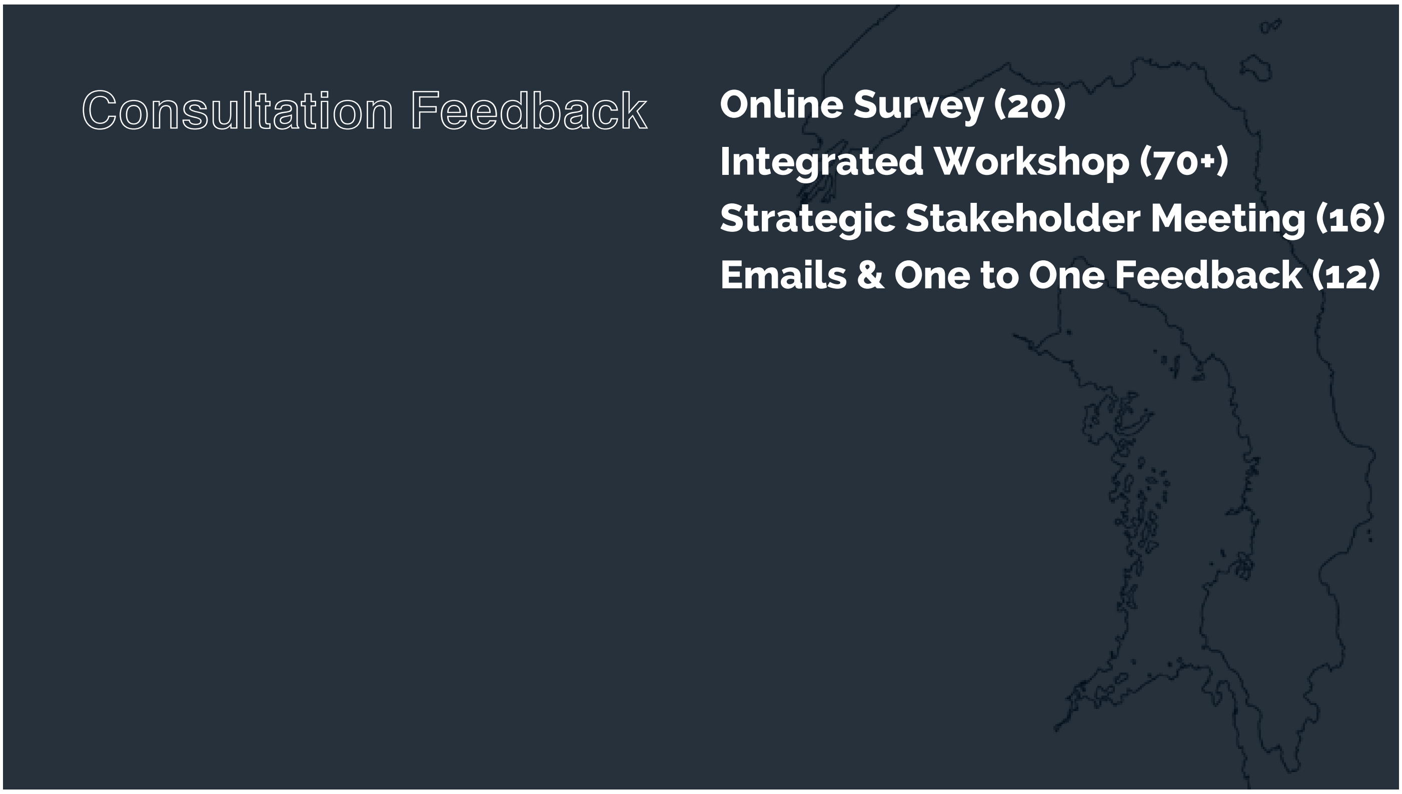





B3.0 STAKEHOLDER WORKSHOPS

B4.0 DRAFT STRATEGY CONSULTATION





	Yes	No	Don't Know
Do you generally support the Draft Integrated Strategy for Ards and North Down?	65%	25%	10%
Do you generally support the vision for the Borough of "Blue : Green, Creatively Connected"?	78%	17%	5%

What do you think are the key strengths of the Borough to be addressed by this strategy?

- Environmental Assets
- Tourism Potential
- People (skills)

What do you think are the key weaknesses of the Borough to be addressed by this strategy?

- Infrastructure & Public Transport
- Low productivity & export / low ambition & imagination
- Communication & connection within & beyond borough

Do you generally support the target outcomes set for the Borough?

	Yes	No	Don't Know
Job Creation	72%	22%	6%
Economic Productivity	72%	17%	11%
Increased Overnight Visitor Trips	89%	11%	0%
Increased Visitor Expenditure	89%	11%	0%

Key Comments

- Use our assets, encourage jobs back to town centres, key to success of borough
- Requires more evidence & analysis, good aspiration but unrealistic/ numbers appear to lack ambition
- Opportunity for tourism & maritime sailing events, with modern travellers has to work
- Need more and mix of accommodation, more detail for areas of prioritisation, require high quality attractions

Are there any other actions you think are needed for the Borough?

- Community hubs to support community
- Greater watersports & recreational activities
- Link to Arts & Heritage strategy, Less focus on Tourism
- More focus on environmental awareness & research & evidence

Do you have any further comments on the strategy and its delivery?

- Too vague. Investment requires quality living developments.
- Need signature projects such as investing in public realm
- Detail required on how actions will be met, timescales and resources
- More evidence & research required.

THEMATIC PRIORITY		INTEGRATED ACTION
NURTURE OUR ASSETS	A	BIODIVERSITY ACTION PLAN
	B	ENVIRONMENTAL AWARENESS CAMPAIGN
	C	CARBON REDUCTION INITIATIVE
	D	BUILT HERITAGE PROGRAMME
UNDERSTAND OUR PROGRESS AND POTENTIAL	A	DATA OBSERVATORY
	B	RESEARCH NETWORK
	C	RESEARCH AND INNOVATION CENTRE
CONNECT PLACES AND PEOPLE	A	BLUE AND GREENWAY NETWORK
	B	COASTAL ROUTE
	C	PENINSULA TRANSPORT STRATEGY
	D	PUBLIC TRANSPORT DRIVE
	E	DIGITAL NETWORK
	F	ECONOMIC DEVELOPMENT FORUM
EQUIP WITH SKILLS AND SPACES	A	BLUE GREEN ACCOMMODATION DEVELOPMENT
	B	SKILLS AND APPRENTICESHIP SERVICE
	C	VOLUNTEER PROGRAMME
	D	QUEEN'S PARADE
	E	INVESTMENT ZONES
	F	TOWN CENTRE WORK HUBS & FLEXI SPACES
EXCEL IN VALUE AND QUALITY	A	BLUE GREEN EXPERIENCE DEVELOPMENT
	B	TOWN AND VILLAGE PUBLIC REALM
	C	TOWN AND VILLAGE ANIMATION FUND
	D	TOWN CENTRE LIVING PILOTS
PROMOTE TO INVEST	A	BOROUGH MARKETING AND COMMUNICATIONS STRATEGY
	B	BOROUGH EVENTS STRATEGY

VERY UNIMPORTANT	UNIMPORTANT	NEITHER	IMPORTANT	VERY IMPORTANT
5.56%	22.22%	27.78%	27.78%	16.67%
5.56%	11.11%	27.78%	44.44%	11.11%
11.11%	16.67%	27.78%	33.33%	11.11%
5.56%	11.11%	16.67%	33.33%	33.33%
11.11%	22.22%	16.67%	38.89%	11.11%
5.56%	27.78%	27.78%	22.22%	16.67%
5.56%	27.78%	22.22%	27.78%	16.67%
5.56%	11.11%	11.11%	44.44%	27.78%
5.56%	0.00%	5.56%	44.44%	44.44%
11.11%	5.56%	5.56%	27.78%	50.00%
11.11%	5.56%	11.11%	33.33%	38.89%
22.22%	0.00%	0.00%	22.22%	55.56%
11.11%	11.11%	11.11%	33.33%	33.33%
5.56%	11.11%	22.22%	38.89%	22.22%
16.67%	11.11%	5.56%	22.22%	44.44%
11.76%	11.76%	23.53%	35.29%	17.65%
11.76%	5.88%	0.00%	29.41%	52.94%
11.76%	0.00%	17.65%	29.41%	41.18%
18.75%	0.00%	18.75%	12.50%	50.00%
11.76%	0.00%	29.41%	41.18%	17.65%
11.76%	5.88%	17.65%	41.18%	23.53%
17.65%	11.76%	35.29%	23.53%	11.76%
17.65%	5.88%	35.29%	29.41%	11.76%
17.65%	0.00%	17.65%	35.29%	29.41%
12.50%	0.00%	6.25%	37.50%	43.75%






Key comments from Draft Strategy Integrated Workshop

BIODIVERSITY ACTION PLAN	- Balance between development & protection, access to Lough
ENVIRONMENTAL AWARENESS CAMPAIGN	- Low & high level projects, volunteering & education programmes, Poor planning compromising coastline
CARBON REDUCTION INITIATIVE	- Public transport, park & ride, renewable energies, new development requirements, small businesses can raise awareness
BUILT HERITAGE PROGRAMME	- Incentives & support, enforcement of planning, new uses for old buildings, volunteers, monuments, signposts & interpretation
DATA OBSERVATORY	- More detail , identify future trends, information gathering, processing, accessible & understandable, targeted, visitor info
RESEARCH NETWORK	- Ards and North Down local info network, IT & info hubs, social networking, need to define sectors, links with universities & SERC
RESEARCH AND INNOVATION CENTRE	- Incubation units, cross over with data observatory, better to aim at new start ups, knowing which businesses available in area
BLUE AND GREENWAY NETWORK	- One peninsula, link towns & villages, audit of access to water, key to attracting visitors, inclusive greenways
COASTAL ROUTE	- More food offers, access for all, clear foot/cycle/car, logo, E-charging,
PENINSULA TRANSPORT STRATEGY	- no central road, must be in keeping with environment, identify & develop key access points, community transport
PUBLIC TRANSPORT DRIVE	- follow best practice, family friendly, sensitive timing for events
DIGITAL NETWORK	- Single digital port, expand & improve WiFi, key to delivery in connecting people & place
ECONOMIC DEVELOPMENT FORUM	- Ensure key players & good structure, crucial to have voice of large & small businesses, inc other stakeholders with experience
BLUE GREEN ACC DEVELOPMENT	- Partnerships with existing businesses, training, invest in capital projects, motorhomes, various acc,
SKILLS AND APPRENTICESHIP SERVICE	- Find out existing business needs, link to blue economies, SERC offer more level 4/5 courses, working with schools,
VOLUNTEER PROGRAMME	- Financial aid/grants, coordination at AND level, mentoring, insurance, policies
QUEEN'S PARADE	– Complete, add acc & hotels, central destination, major public arts venue, why this & not other sites, needs a focus/ focal point
INVESTMENT ZONES	- Link businesses, share resources, support & attract, location incentive, utilise current investment NI land availability
TOWN CENTRE WORK HUBS & FLEXI SPACES	- Public investment, pop ups, encourage creative jobs, refit buildings & upper floors, combat commute, identify sites & demand
BLUE GREEN EXPERIENCE DEVELOPMENT	- Watersports, weekend tourism, village tour guides, encourage & promote range of experiences & packages, heritage
TOWN AND VILLAGE PUBLIC REALM	- Villages need promotion, demolition & signage & environ strategies, flexi living/working space, individuality for villages
TOWN AND VILLAGE ANIMATION FUND	- Rural events & festivals, extending festivals over weekends/weeks, themed, involve schools
TOWN CENTRE LIVING PILOTS	- Low rent town centres, derelict buildings, safe for residents & visitors, increase spend, revitalise centres by condensing retail
BOROUGH MARKETING & COMM STRATEGY	- National & international promotion, inward investment message, what customer needs, connecting with all businesses, digital
BOROUGH EVENTS STRATEGY	- Analysis of existing, wide promotion, sell unique assets, longer events, involve businesses & communities, req framework

Feedback Responses

Email / One-to-Ones

Donagadee Community Development Association
Greater level of detail

Donna Knowles – Housing Supply Unit, Department of Communities
Specific response & opportunity of further engagement with ANDBC

Mark Bleakney - Invest NI
Greater level of detail, connection between other actions & targets requires clarity

Colin McCrossan - Strategic Investment Board
Greater level of detail

Clare Hempsey – NIEA, DAERA, Environment, Marine and Fisheries Group, DAREA
Greater level of detail

Matthew Malcolm – ACNI
Greater level of detail regarding delivery, action plan, collaboration, connectivity

Simon Bridge – Resident & Business owner
Specific response to economic development approach

Brigid Watson – Resident & Business owner
Specific response to tourism skills within Borough

Simon Griffin – Resident
Specific response to coastal paths

Suzie Ferguson – Resident
Specific response to proposed Greenway routes concern

Lorraine Brown – Resident
Shorter document with more clarity & detail on proposals & timescale

Lorna McAlpine – Councillor
Specific response on Tourism markets (Family)

Draft Action Plan (November 2017)

THEMATIC PRIORITY	NURTURE OUR ASSETS	UNDERSTAND OUR PROGRESS AND POTENTIAL	CONNECT PLACES AND PEOPLE	EQUIP WITH SKILLS AND SPACES	EXCEL IN VALUE AND QUALITY	PROMOTE TO INVEST
INTEGRATED ACTIONS	A BLUE GREEN AWARENESS CAMPAIGN	A BLUE GREEN RESEARCH NETWORK	A BLUE AND GREENWAY NETWORK	A BLUE GREEN ACCOMODATION DEVELOPMENT	A BLUE GREEN EXPERIENCE DEVELOPMENT	A BOROUGH MARKETING AND COMM STRATEGY
	B BIODIVERSITY ACTION PLAN	B DATA OBSERVATORY	B COASTAL ROUTE	B SKILLS AND APPRENTICESHIP SERVICE	B TOWN AND VILLAGE PUBLIC REALM	B BOROUGH EVENTS STRATEGY
	C CARBON REDUCTION INITIATIVE	C RESEARCH & INNOVATION CENTRE	C PENINSULA TRANSPORT STRATEGY	C VOLUNTEER PROGRAMME	C TOWN AND VILLAGE ANIMATION FUND	
	D BUILT HERITAGE PROGRAMME		D PUBLIC TRANSPORT DRIVE	D QUEENS PARADE	D TOWN CENTRE LIVING PILOTS	
			E DIGITAL NETWORK	E INVESTMENT ZONES		
			F ECONOMIC DEVELOPMENT FORUM	F TC WORK HUBS & FLEXI SPACES		

Updated Action Plan (January 2018)

THEMATIC PRIORITY	PROMOTE TO INVEST	CONNECT PLACES AND PEOPLE	EQUIP WITH SKILLS AND SPACES	EXCEL IN VALUE AND QUALITY	NURTURE OUR ASSETS	UNDERSTAND OUR PROGRESS AND POTENTIAL
INTEGRATED ACTIONS	A BOROUGH MARKETING AND COMMUNICATIONS STRATEGY	A BLUE AND GREENWAY NETWORK	A BLUE GREEN ACCOMMODATION DEVELOPMENT	A BLUE GREEN TOURISM EXPERIENCE DEVELOPMENT	A BLUE GREEN ACTION INITIATIVE	A ECONOMIC DEVELOPMENT FORUM
	B INWARD INVESTMENT & DIASPORA PROGRAMME	B COASTAL ROUTE	B SKILLS, APPRENTICESHIP & VOLUNTEER PROGRAMME	B TOWN AND VILLAGE PUBLIC REALM & PLACEMAKING	B CARBON REDUCTION STRATEGY	
	C ENTERPRISE PROMOTION & SUPPORT	C SUSTAINABLE TRANSPORT STRATEGY & ADVOCACY	C QUEEN'S PARADE & INVESTMENT ZONES		C BUILT HERITAGE PROGRAMME	
	D BOROUGH EVENTS STRATEGY	D DIGITAL NETWORK	D TOWN & VILLAGE FLEXI SPACES			
		E COLLABORATIVE NETWORKS				

19 Integrated Actions

C. BOROUGH EVENTS APPROACH

C. BOROUGH EVENTS APPROACH

1 DEFINITION

Events encompass a wide range of potential activities. Acknowledging this breadth and the pros and cons of each type will be a key first step to shaping a strategic approach.

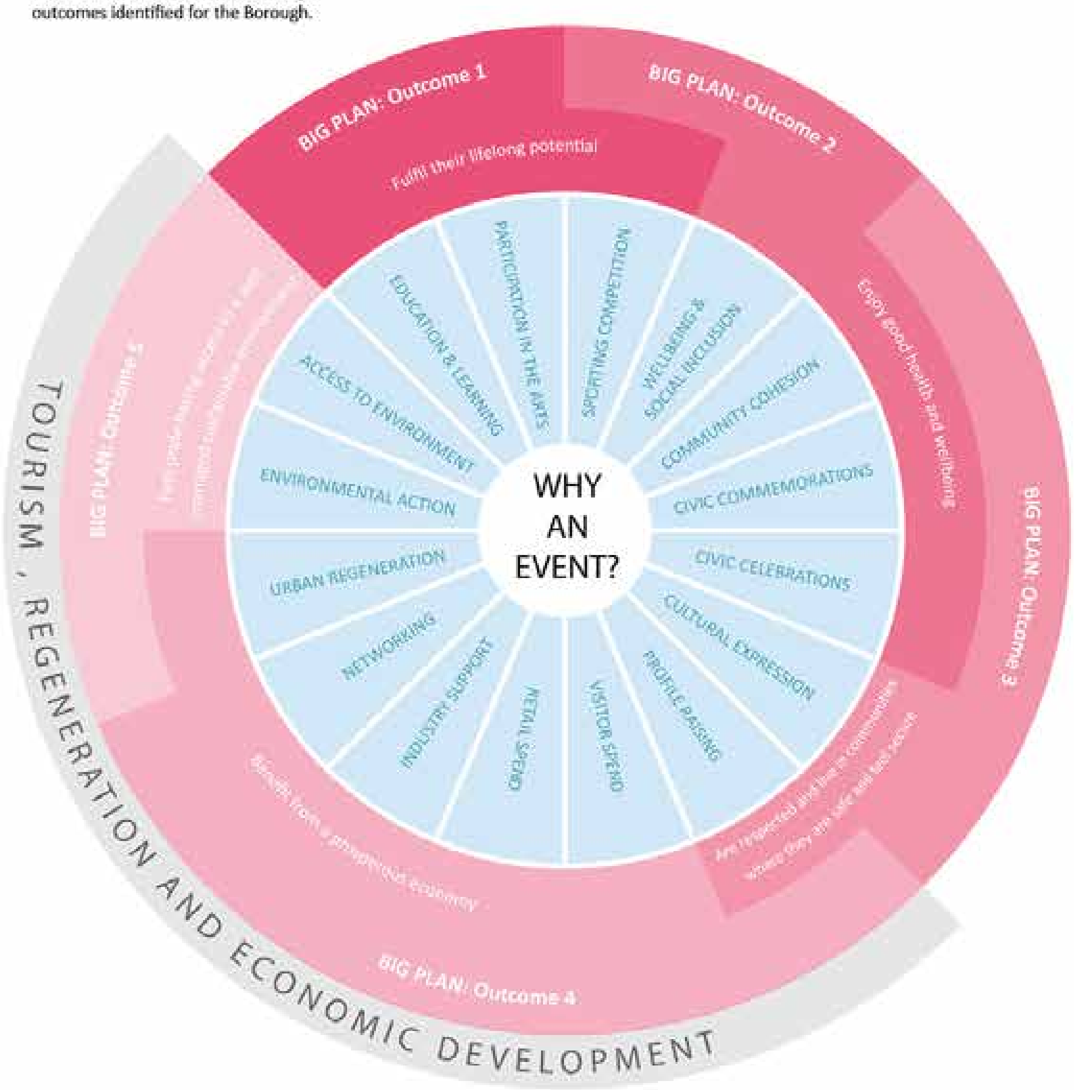
Rallies Walks
Exhibitions Installations
Festivals Shows Regattas

"A planned public or social occasion"

Performances Tours Enactments
Conferences Services Markets
Competitions Lectures
Readings Fairs Parades
Viewings Concerts

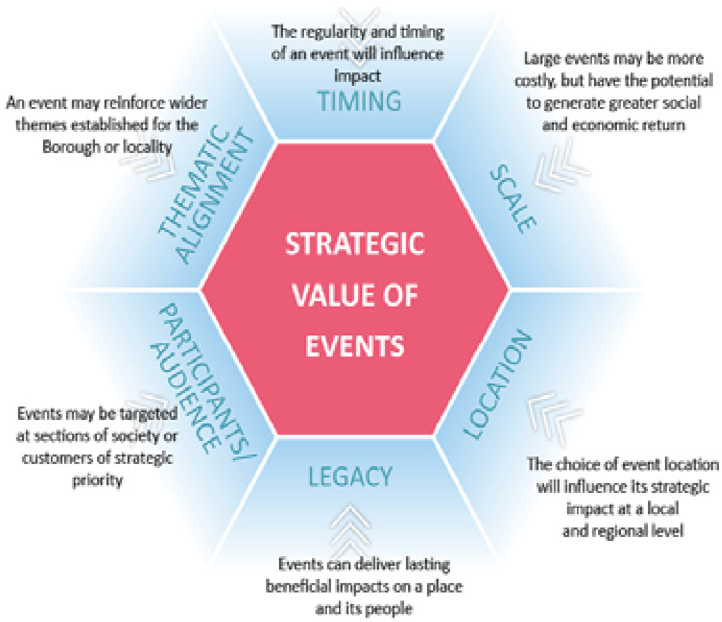
2 OBJECTIVES & OUTCOMES

Events are held for diverse range of reasons. They also bring other benefits, planned or incidental. These require identified and understood in the context of strategic outcomes identified for the Borough.



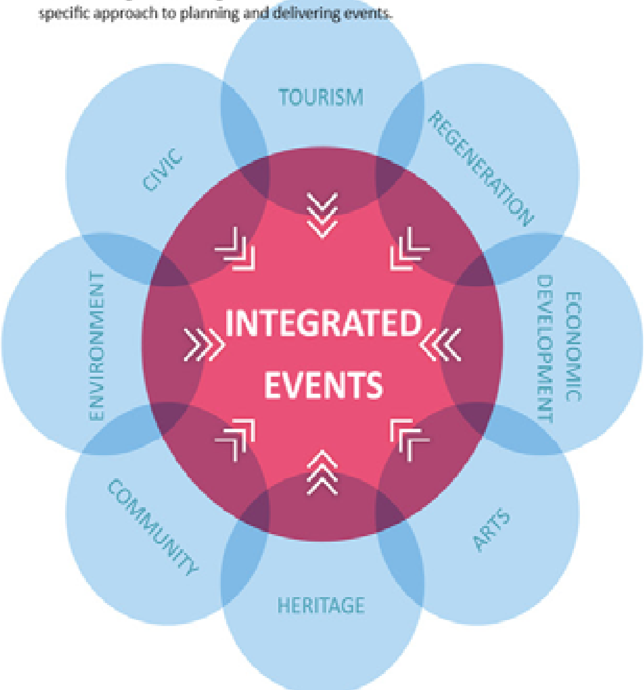
3 FACTORS OF STRATEGIC INFLUENCE

The potential strategic value of an event is influenced by several factors.



4 AN INTEGRATED APPROACH

In the context of limited resources, events that deliver multiple outcomes should be prioritised. This will involve taking a more integrated and less sector specific approach to planning and delivering events.



5 SHAPING A STRATEGY

A methodical assessment of strategic factors, primary objectives and secondary benefits should be used to prioritise and plan events taking place in the Borough.

ARDS & NORTH DOWN ITRDS TOWARDS A STRATEGIC APPROACH TO *Events*

TPHC 19/12/17

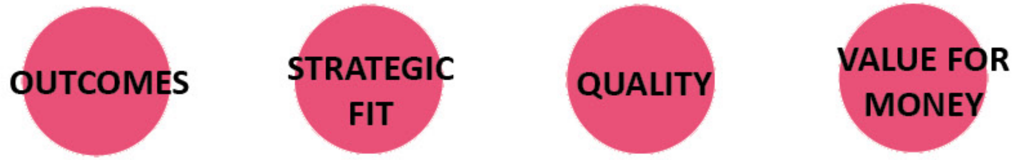
EVENT 1 *VILLAGE MARKET*	EVENT 2 *MAJOR ARTS FESTIVAL*	EVENT 3 *BEACH LITTER PICK*		
HIGH	HIGH	LOW	TIMING	STRATEGIC INFLUENCE
MED	HIGH	LOW	SCALE	
HIGH	HIGH	HIGH	LOCATION	
HIGH	HIGH	HIGH	LEGACY	
MED	HIGH	MED	PARTICIPANTS / AUDIENCE	
MED	MED	HIGH	THEME ALIGNMENT	
		✓	ACCESS TO ENVIRONMENT	EVENT OBJECTIVES & OUTCOMES ✓ Primary, ✓ Secondary
		✓	ENVIRONMENTAL ACTION	
✓	✓		URBAN REGENERATION	
✓	✓		NETWORKING	
✓	✓	✓	INDUSTRY SUPPORT	
✓	✓		RETAIL SPEND	
✓	✓		VISITOR SPEND	
✓	✓	✓	PROFILE RAISING	
	✓		CULTURAL EXPRESSION	
	✓		CIVIC CELEBRATION	
✓		✓	COMMUNITY COHESION	
			CIVIC COMMEMORATION	
✓	✓	✓	W/B / SOCIAL INCLUSION	
			SPORTING COMPETITION	
	✓		PARTICIPATION IN THE ARTS	
	✓	✓	EDUCATION & LEARNING	

6 POLICY CONTEXT

Ards and North Down Borough Council's strategic approach to supporting events must be clearly linked to its policies and responsibilites.

7 CORPORATE PRIORITIES

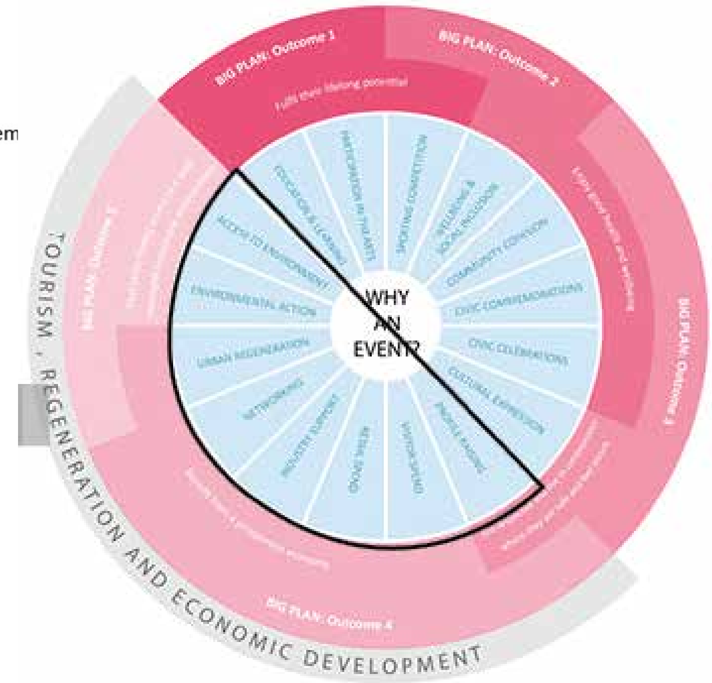
For all events, Ards and North Down Borough Council should seek to maximise the following 4 factors :



8 EVENTS AND THE ITRDS

Where the primary objective of an event is falls under Regeneration, Economic Development or Tourism (see circular diagram No 2), the Strategic Factors of the event **MUST** be closely aligned with the relevent ITRDS Propositions.

For all other events, secondary benefits should be identified and assessed, with a view to aligning them well as possible with the ITRDS Propositions.



C. BOROUGH EVENTS APPROACH

ITRDS PROPOSITION / STRATEGIC INFLUENCE	THEMATIC ALIGNMENT	PARTICIPANTS & AUDIENCES	LEGACY	LOCATIONS	SCALE	TIMING
PLACE	SUSTAINABILITY PRIDE OF PLACE	COMMUNITIES DEVELOPERS	ACCESS TO ENV ENV ACTION URBAN REGEN	T & V CENTRES N'HOODS SPECIAL BUILDINGS AND LANDSCAPES	BOROUGH SETTLEMENT N'HOOD	ALL
VISITOR	WATERS EDGE TIME DEPTH CREATIVE GREAT FOOD	GREAT ESCAPERS CULTURE. CURIOUS	PROFILE RAISING VISITOR SPEND EDU / LEARNING	ROUTES HUBS PORTALS CLUSTERS	INTERNATIONAL REGIONAL BOROUGH SETTLEMENT	HIGH SEASON LOW SEASON SPECIAL DAYS
INVESTMENT	CONNECTED QUALITY PEOPLE ENVIRONMENT	INDIG. BUSINESSES ENTREPRENEURS INWARD INVEST AND DIASPORA	PROFILE RAISING RETAIL SPEND INDUST. SUPPORT NETWORKING EDU / LEARNING	T & V CENTRES TRANS ROUTES CLUSTERS ENT. ZONES RURAL DEV	INTERNATIONAL REGIONAL BOROUGH SETTLEMENT	ALL

C. BOROUGH EVENTS APPROACH