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Ards and North Down Integrated Tourism, Regeneration and Economic Development

Strategy

2018-2030

INTEGRATED STRATEGY FOR
TOURISM | REGENERATION | ECONOMIC DEVELOPMENT
Ards and North Down 2018–2030

Ards and North Down Borough Council

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Welcome and Agenda - Paul Clarke, Compere

9.30-9.40am	Mayoral Welcome
9.40-9.50am	Chief Executive, ANDBC, Stephen Reid
9.50-10.15am	Director, The Paul Hogarth Company, James Hennessey
	Director of Regeneration, Development & Planning, Susie McCullough
10.15- 10.45am	Associate Director, Oxford Economics, Neil McCullough

BREAK

11.00-11.30am	Chief Executive, Tourism NI, John McGrillen
11.30-12noon	Chief Executive, Centre for Local Economic Strategies, Neil McInroy
12noon-12.30pm	Director, Work and Wellbeing, Department of Communities, Sharon Russell
12.30pm-1.00pm	Interactive Panel

LUNCH

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Agenda Afternoon Session – Department for Communities

- 1:45pm – 2:00pm – Arrival/Tea/Coffee
- 2:00pm – 2:10pm – Sharron Russell Director, Work and Wellbeing, Department for Communities
- 2.10pm – 2.30pm – Overview of Labour Market Issues in NI & AND
- 2.30pm - 3.30pm – Group Discussion Exercise
- 3.30pm - 4.00pm – Next Steps

CLOSE

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Mayor
Ards and North Down Borough Council
Cllr Robert Adair

Welcome

INTEGRATED STRATEGY FOR
TOURISM | REGENERATION | ECONOMIC DEVELOPMENT
Ards and North Down 2018–2030

Ards and North Down Borough Council

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Chief Executive
Ards and North Down Borough Council
Stephen Reid

Background and Context of the Integrated Tourism, Regeneration and Economic Development Strategy

Ards and North Down Borough Council

Strategic Context:

- Draft Programme for Government
- Community Plan
- Corporate Plan
- Integrated Tourism, Regeneration and Development Plan

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INTEGRATED STRATEGY FOR

TOURISM | REGENERATION | ECONOMIC DEVELOPMENT

Ards and North Down 2018–2030

Ards and North Down Borough Council

Corporate Plan

People

Ensuring we engage with, and support, all local communities to deliver real social benefits.

Place

Ensuring we make the very best of the natural, cultural and environmental assets in our borough.

Prosperity

Ensuring the borough's towns and rural localities are prosperous, vibrant and attractive.

Performance: Ensuring we take time to understand our customer's need and manage our people, money and assets effectively so we can deliver on our objectives for the borough.

The purpose of the Integrated Tourism, Regeneration and Economic Development Strategy :

- **Maximise return on Investment**
- **Priorities for Economic Growth**
- **Influence the Local Development Plan**
- **'USPs' in an innovative and sustainable space**
- **Maximise opportunities to deliver on wider strategies**
- **Stakeholder Participation and Agreement**


TOURISM
INTEGRATION
REGENERATION
ECONOMIC DEVELOPMENT

Outcomes and targets

By 2030...

ECONOMIC

To grow the number of jobs and business productivity within the Borough

7,500 JOBS CREATED | **GVA*** ACHIEVE MIN NI AVERAGE

Key Markets

- Arts and Entertainment
- Professional, Scientific and Technical
- Information and Communication Technologies

*Gross Value Added

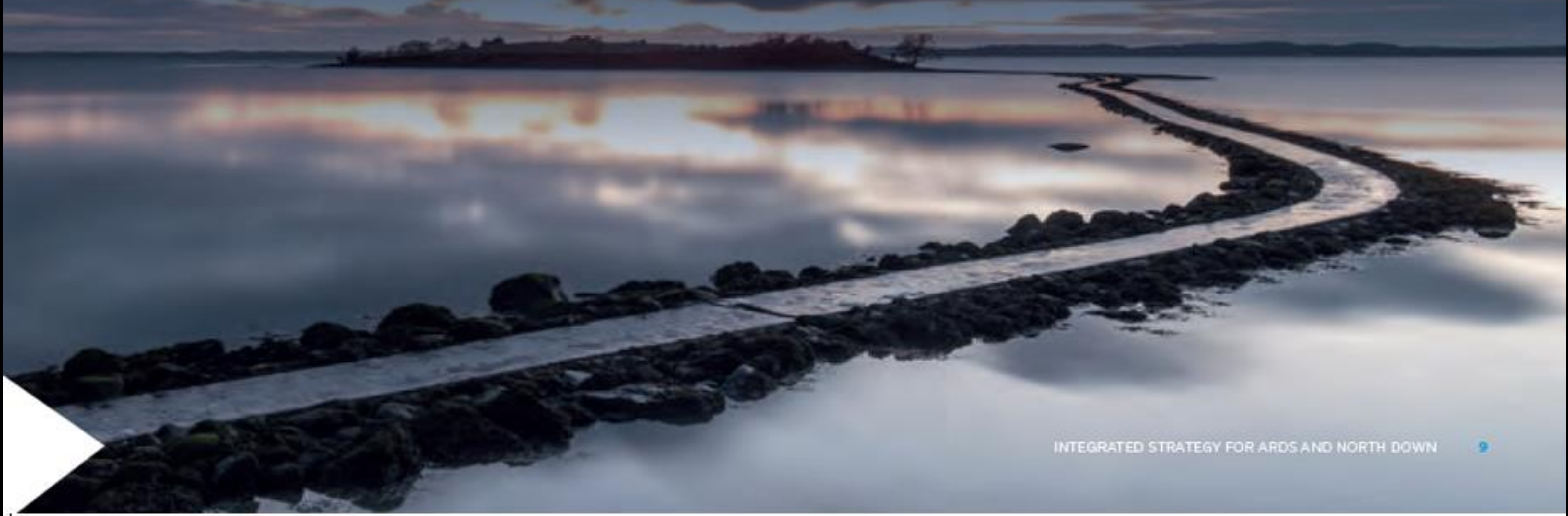
TOURISM

To grow visitor spend and overnight stay within the Borough

INCREASE SHARE OF OVERNIGHT NI TRIPS TO **10%** | **£82m** VISITOR EXPENDITURE

Key Markets

- The Domestic Market
- Non-Domestic Markets
- The Republic of Ireland Market



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Director of The Paul Hogarth Company James Hennessey

Blue : Green Creatively Connected Process

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INTEGRATED STRATEGY FOR
TOURISM | REGENERATION | ECONOMIC DEVELOPMENT
Ards and North Down 2018–2030

Ards and North Down Borough Council

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thepaulhogarthcompany

Louise Browne Associates

RSM

INTEGRATED STRATEGY FOR

TOURISM | REGENERATION | ECONOMIC DEVELOPMENT

Ards and North Down 2018-2030

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TOURISM

REGENERATION

ECONOMIC DEVELOPMENT

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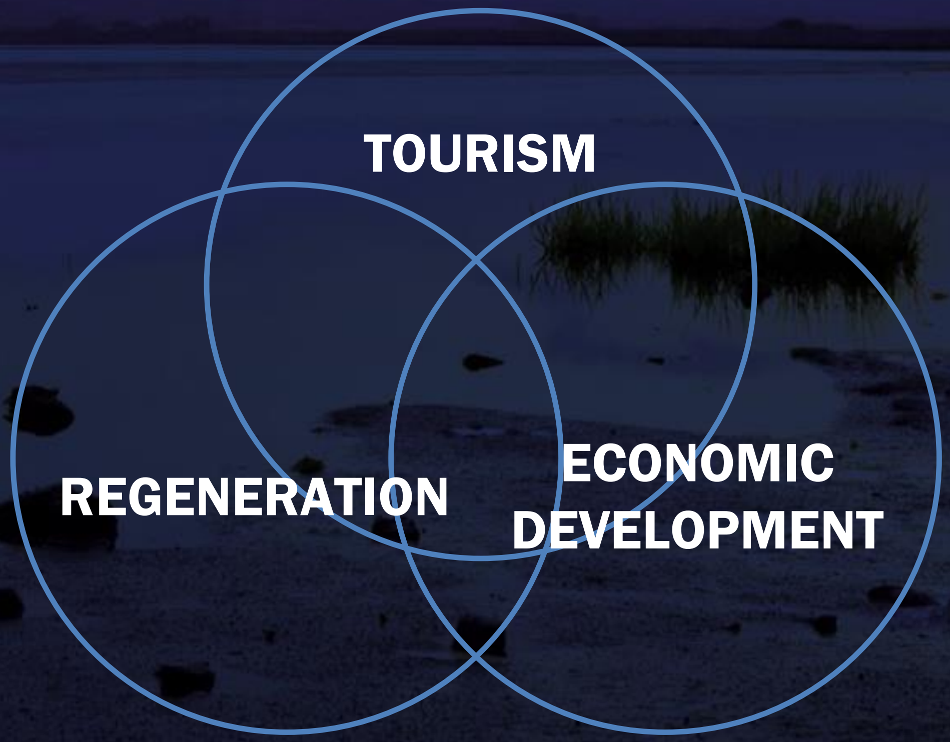


TOURISM
INTEGRATION
REGENERATION
ECONOMIC DEVELOPMENT

Baseline Analysis: Key Data

3/4
Of all NI Marine Species in Strangford Lough
Environment

2nd
Ranked 2nd among NI LGDs re % of population with higher level skills
Skills

8
Of NI's top 30 Manufacturers
Creativity

10 Miles
To City Airport & Docks from Bangor & N'Ards
Proximities

5.3%
employee jobs increased by (+1,924) over the period of 2012 – 16
Employment level

30% employed in low growth sectors
9% employed in high growth sectors
Sectoral Composition

89%
Businesses with less than 10 employees
Small Businesses

63%
Of the NI Average GVA (Gross Value Added)
Productivity

52%
Travel to work outside Borough
Commuting

6%
Of NI's Overnight Trips
Visitors

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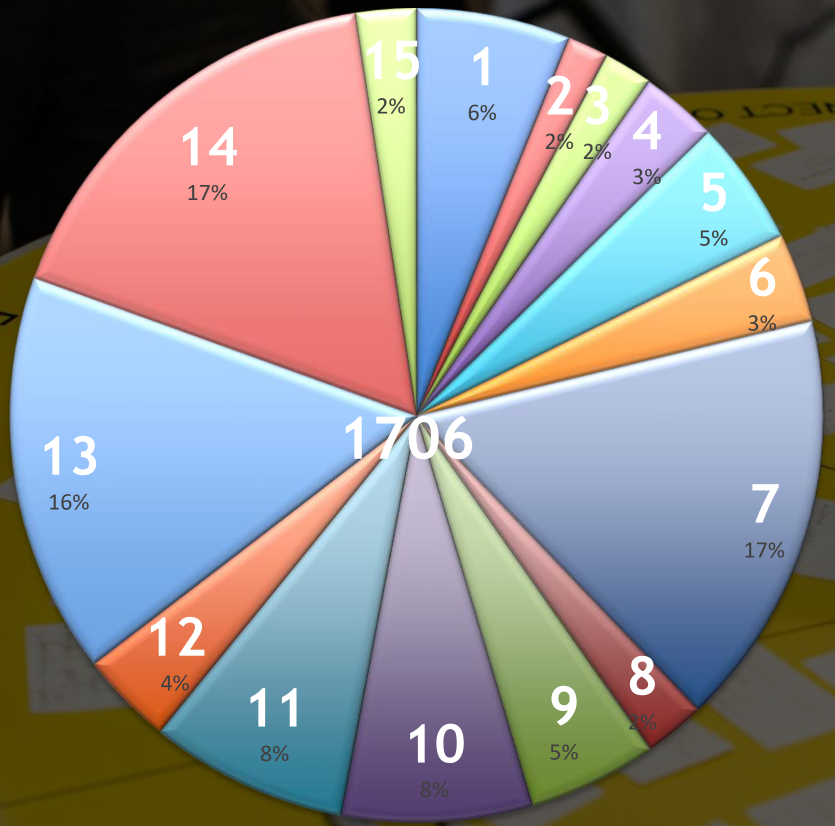

1. Trails, Tours, Walks
2. Built Heritage
3. Schools, Child, Youth
4. Invest, Incent, Fund
5. Inclusion, Access
6. Dereliction, Vacancy
7. Infra, Trans, Parking, Cycling
8. Public Art, Realm
9. Events, Festivals
10. Visitor Accom
11. Regs, Policy, Processes
12. Collab, Link
13. Marketing, Promo, Comms
14. Skills, Train, Volunteer
15. Jobs, Employment


Blue:Green
Creatively
Connected


Blue:Green
Creatively
Connected


Blue:Green
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Director of Regeneration, Development & Planning
Susie McCullough

Strategy Actions and Targets

INTEGRATED STRATEGY FOR
TOURISM | REGENERATION | ECONOMIC DEVELOPMENT
Ards and North Down 2018–2030

Ards and North Down Borough Council

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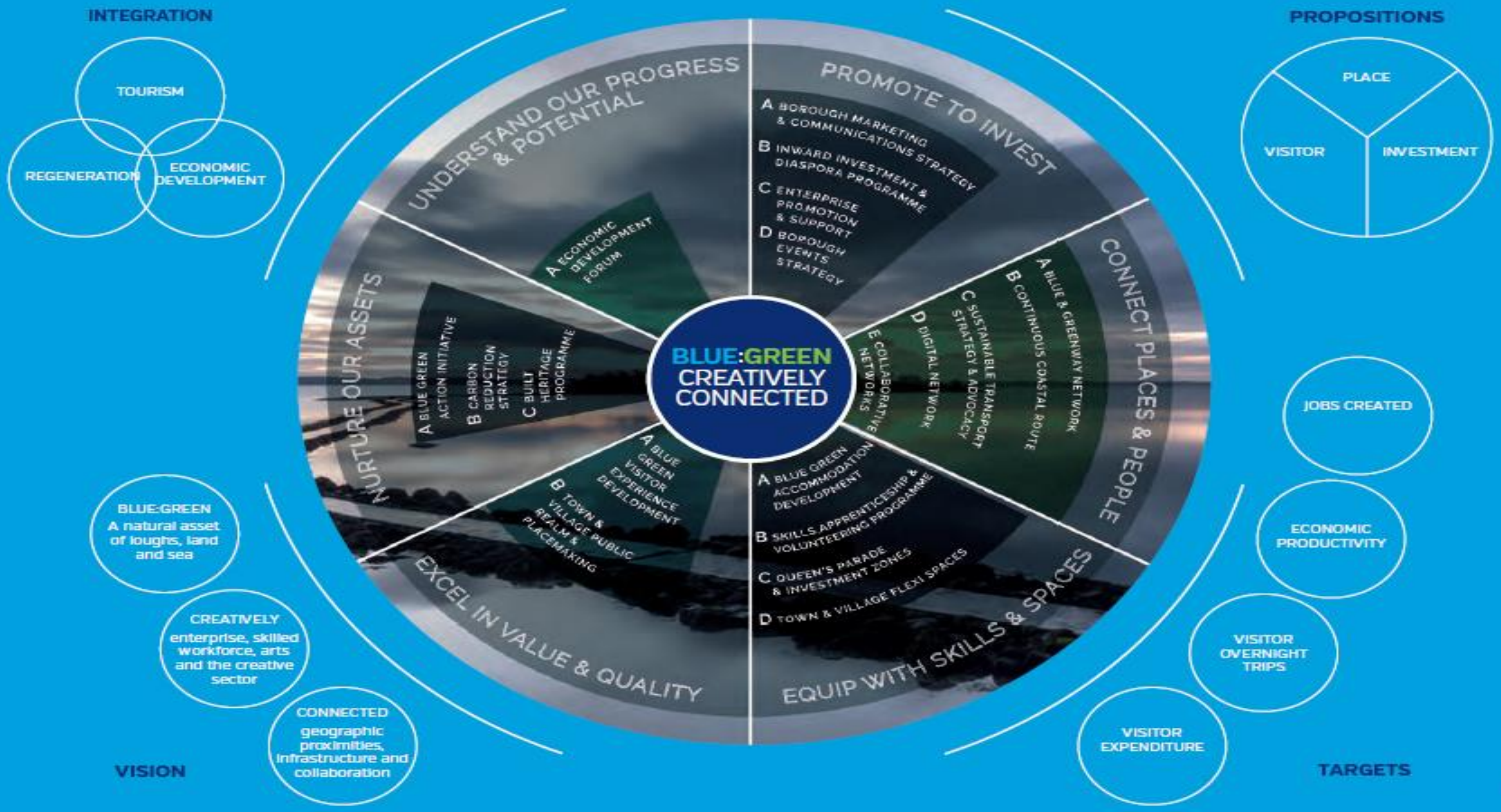
INTEGRATED STRATEGY FOR

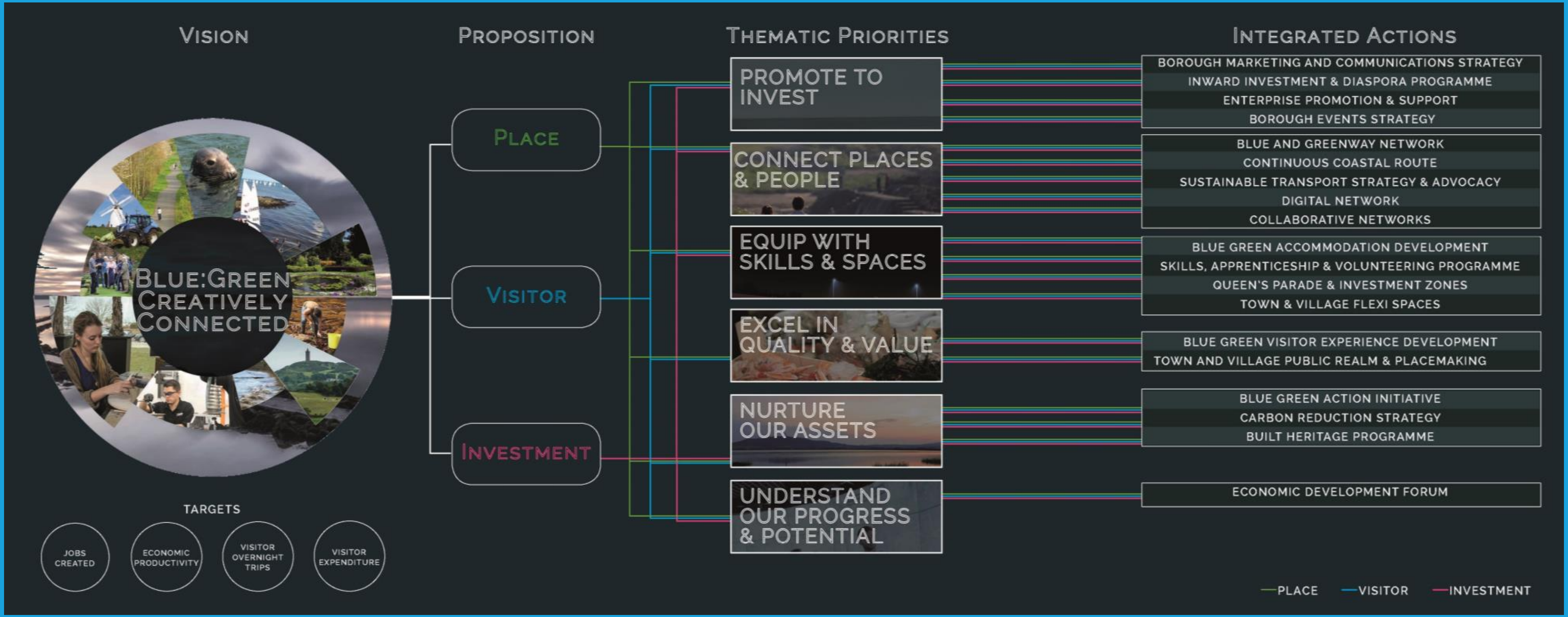
TOURISM | REGENERATION | ECONOMIC DEVELOPMENT

Ards and North Down 2018–2030

Ards and North Down Borough Council

Strategy At A Glance




VISION
PROPOSITION
THEMATIC PRIORITIES
INTEGRATED ACTIONS
BLUE:GREEN CREATIVELY CONNECTED
PLACE
VISITOR
INVESTMENT
PROMOTE TO INVEST
CONNECT PLACES & PEOPLE
EQUIP WITH SKILLS & SPACES
EXCEL IN QUALITY & VALUE
NURTURE OUR ASSETS
UNDERSTAND OUR PROGRESS & POTENTIAL
BOROUGH MARKETING AND COMMUNICATIONS STRATEGY
INWARD INVESTMENT & DIASPORA PROGRAMME
ENTERPRISE PROMOTION & SUPPORT
BOROUGH EVENTS STRATEGY
BLUE AND GREENWAY NETWORK
CONTINUOUS COASTAL ROUTE
SUSTAINABLE TRANSPORT STRATEGY & ADVOCACY
DIGITAL NETWORK
COLLABORATIVE NETWORKS
BLUE GREEN ACCOMMODATION DEVELOPMENT
SKILLS, APPRENTICESHIP & VOLUNTEERING PROGRAMME
QUEEN'S PARADE & INVESTMENT ZONES
TOWN & VILLAGE FLEXI SPACES
BLUE GREEN VISITOR EXPERIENCE DEVELOPMENT
TOWN AND VILLAGE PUBLIC REALM & PLACEMAKING
BLUE GREEN ACTION INITIATIVE
CARBON REDUCTION STRATEGY
BUILT HERITAGE PROGRAMME
ECONOMIC DEVELOPMENT FORUM
TARGETS
JOBS CREATED
ECONOMIC PRODUCTIVITY
VISITOR OVERNIGHT TRIPS
VISITOR EXPENDITURE
PLACE
VISITOR
INVESTMENT

Implications for Key Sectors

<table>
<tr><th>KEY SECTOR DEVELOPMENT REQUIREMENTS</th><th>PRIORITY SECTORS</th><th colspan="2">RELEVANT ACTIONS</th></tr>
<tr><td rowspan="4">ATTRACT/ESTABLISH INCREASED NUMBERS OF HIGH ADDED VALUE AND HIGH GROWTH BUSINESSES</td><td rowspan="4">• ICT
• Professional, Scientific and Technical
• Finanicial/Insurance
• Administration/Support sectors</td><td>Investment promotion</td><td>• Marketing and Communications Strategy
• Inward Investment and Diaspora Programme</td></tr>
<tr><td>Business support</td><td>• General and targeted enterprise promotion
• Pre-enterprise support
• Start-up and business growth support</td></tr>
<tr><td>Infrastructure development</td><td>• Development of Investment Zone*
• Development of flexible workspace of towns and villages
• Digital network development</td></tr>
<tr><td>Private sector engagement /partnership development</td><td>• Establishment of EDF to support effective engagement with private sector</td></tr>
<tr><td rowspan="3">SUPPORT EXISTING SECTORS OF STRENGTH THAT PROVIDE OPPORTUNITIES FOR EXPORT/NEW PRODUCT DEVELOPMENT AND HIGH PRODUCTIVITY</td><td rowspan="3">• Manufacturing
• Agri-food</td><td>Business Support</td><td>• Development of sector collaborative networks
• Skills, apprenticeship and volunteering programme
• Horizon Scanning and Research Network to support RDI activity</td></tr>
<tr><td>Infrastructure development</td><td>• General and targeted enterprise promotion
• Pre-enterprise support
• Start-up and business growth support</td></tr>
<tr><td>Private sector engagement /partnership development</td><td>• EDF providing effective engagment on private sector support needs</td></tr>
<tr><td>INCREASE BUSINESS START-UP AND GROWTH OF LOCAL BUSINESSES SUPPORTING ENHANCED TOURISM PERFORMANCE</td><td>• Arts, Entertainment and Recreation
• Accommodation/Food</td><td colspan="2">As above (except *) and development of Queen's Parade</td></tr>
</table>

Outcomes and targets

In order to realise the vision set by this strategy, a series of outcomes and targets have been identified. Effective delivery against the identified targets will require focussed and collaborative effort by all relevant stakeholders and delivery organisations. More detailed targets are likely to be identified against the implementation of specific actions and agreed with partners.

By 2030...

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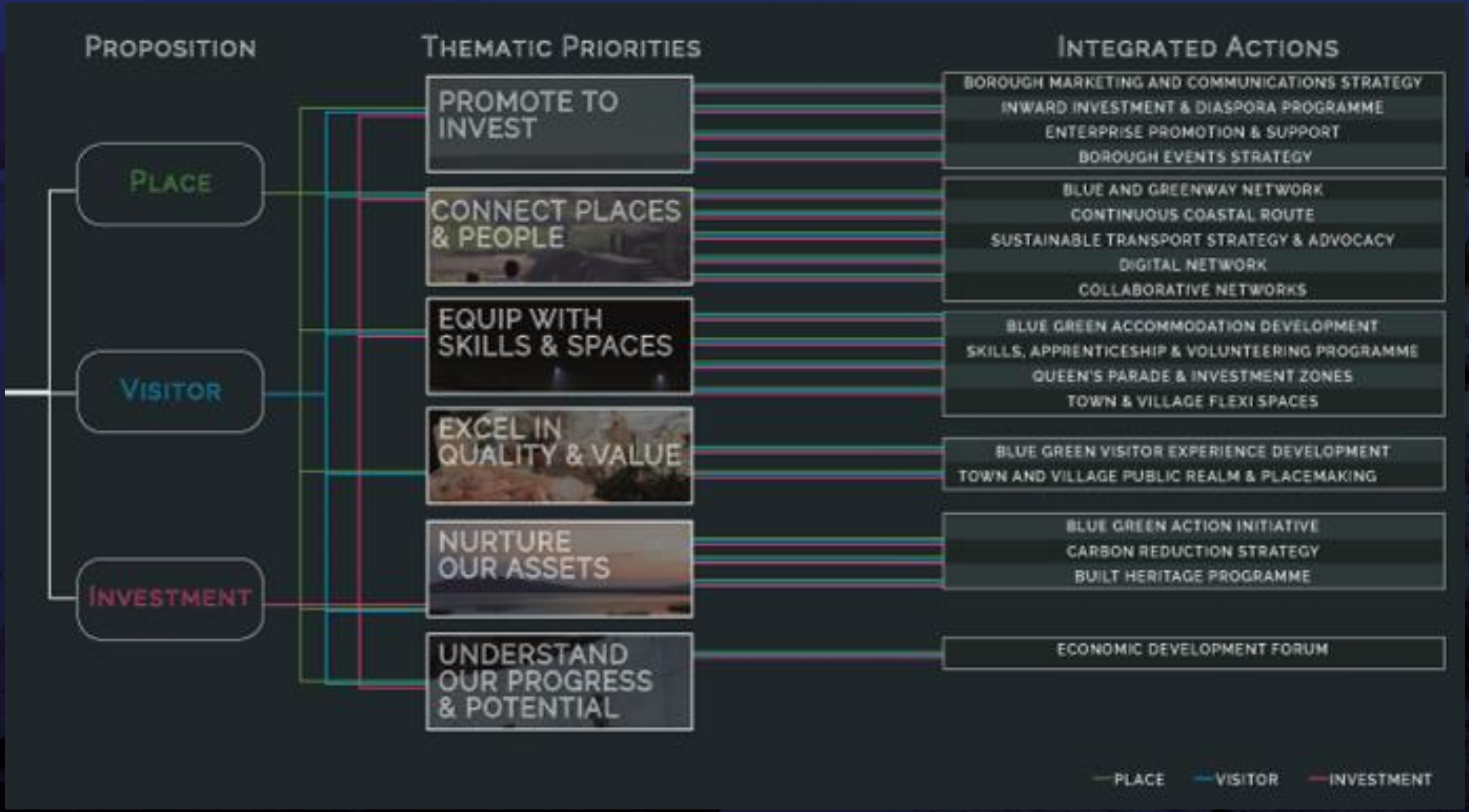
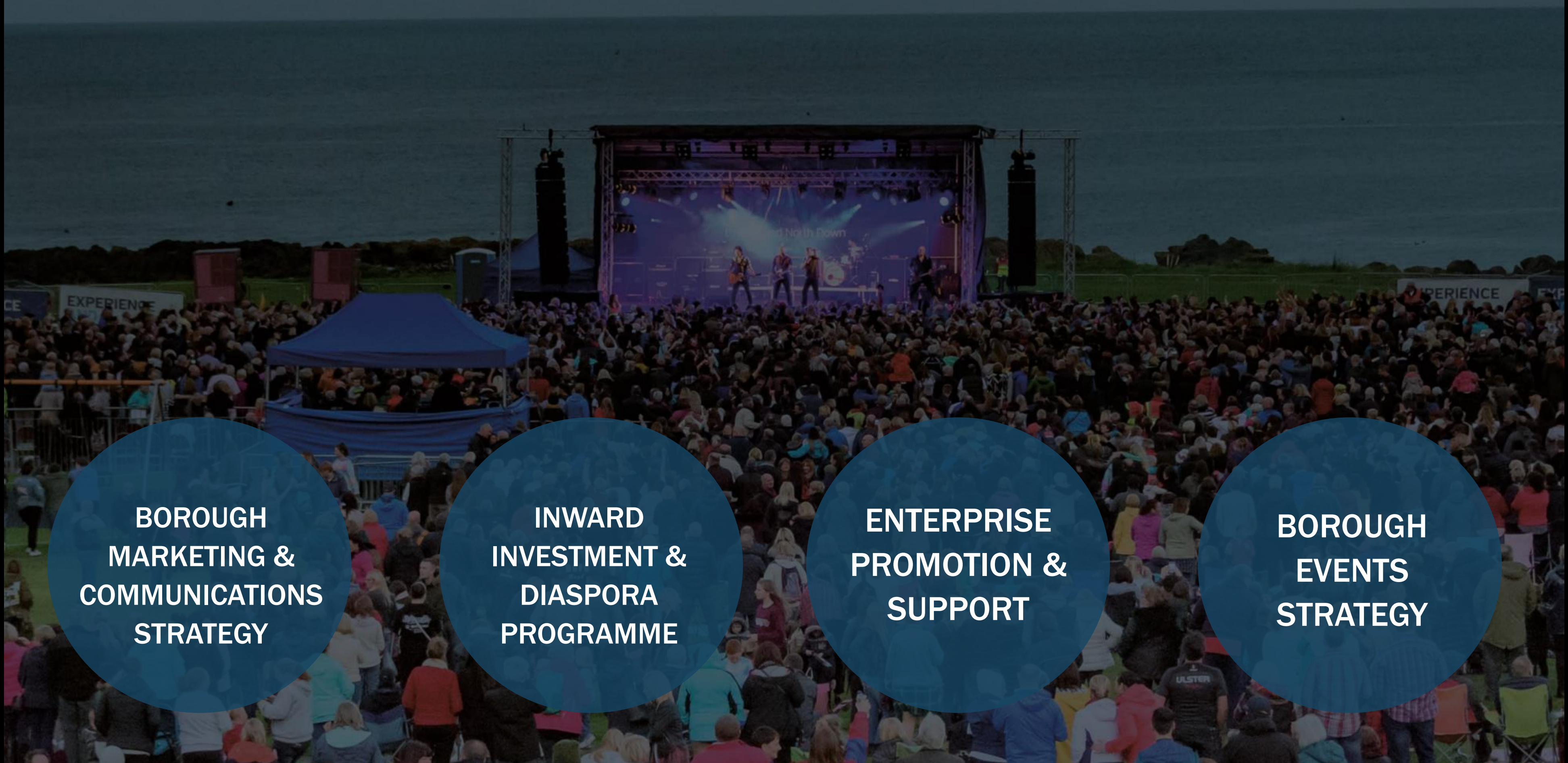


PROMOTE TO INVEST



BOROUGH MARKETING & COMMUNICATIONS STRATEGY

INWARD INVESTMENT & DIASPORA PROGRAMME

ENTERPRISE PROMOTION & SUPPORT

BOROUGH EVENTS STRATEGY


CONNECT PLACES
& PEOPLE
BLUE AND GREENWAY NETWORK
COASTAL ROUTE
SUSTAINABLE TRANSPORT STRATEGY & ADVOCACY
DIGITAL NETWORK
COLLABORATIVE NETWORKS

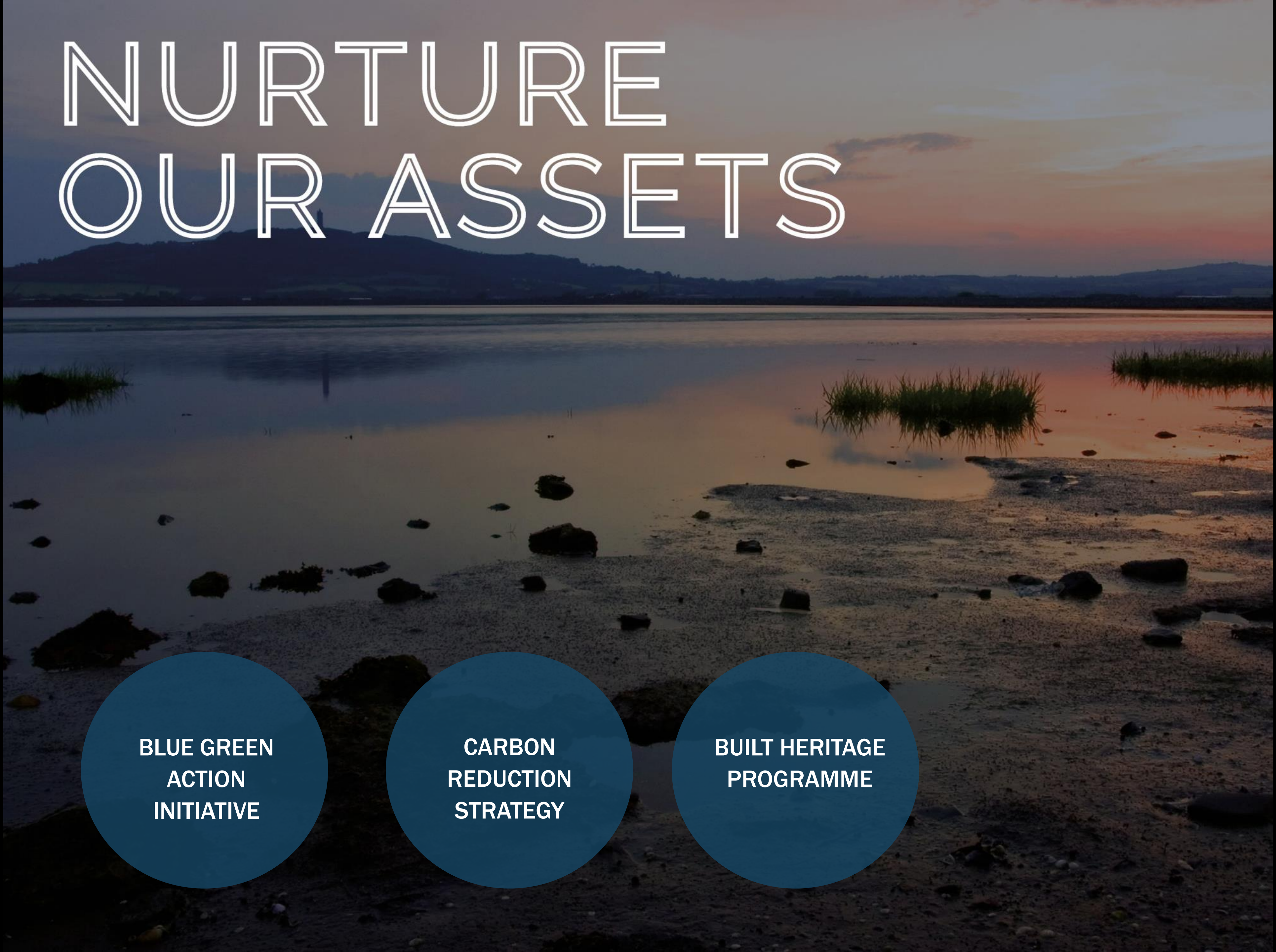
EQUIP WITH SKILLS & SPACES

EXCEL IN QUALITY & VALUE

BLUE GREEN VISITOR EXPERIENCE DEVELOPMENT

TOWN AND VILLAGE PUBLIC REALM & PLACEMAKING

NURTURE OUR ASSETS



BLUE GREEN ACTION INITIATIVE

CARBON REDUCTION STRATEGY

BUILT HERITAGE PROGRAMME

UNDERSTAND OUR PROGRESS & POTENTIAL

ECONOMIC DEVELOPMENT FORUM

Integrated Actions – Steps to Delivery

1. Identify and agree partners and stakeholders.
2. Establish project specific baseline data.
3. Develop detailed strategic approach.
4. Agree, prioritise, resource and deliver sub actions.
5. Monitor progress against baseline.

Associate Director
Oxford Economics
Neil McCullough

Overview of Global Macro-Economic Trends, Threats and Opportunities

OXFORD ECONOMICS

OVERVIEW OF GLOBAL MACRO-ECONOMIC TRENDS, THREATS AND OPPORTUNITIES

Neil McCullough
Associate director of cities and regions at Oxford Economics

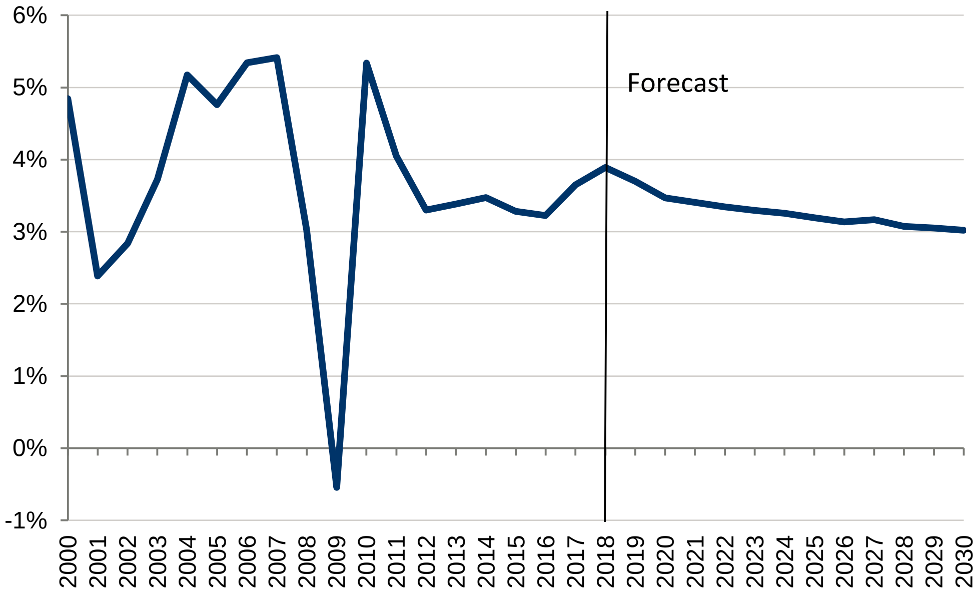
April 2018

- Global trends
- Brexit and UK trends
- Northern Ireland
- Ireland

GLOBAL TRENDS

- **Steady GDP growth forecast.**
- **Though lower than pre-2007 levels for most advanced nations**
- **Global equilibrium is restored**
- **Government balances improve**

World real GDP growth (PPP exchange rate)



Source: Oxford Economics

World GDP Growth % Change on Previous Year						
	2016	2017	2018	2019	2020	2021
US	1.5	2.3	2.9	2.5	1.6	1.5
Japan	0.9	1.7	1.6	0.9	0	0.9
Eurozone	1.8	2.5	2.3	1.8	1.5	1.3
Germany	1.9	2.5	2.4	1.8	1.3	0.9
France	1.1	2	2.1	1.9	1.8	1.7
Italy	1	1.5	1.5	1.1	0.9	0.8
UK	1.9	1.7	1.8	1.6	1.9	1.9
Ireland	5.1	7.8	4.7	2.2	2.2	2.2
China	6.7	6.9	6.4	6	5.7	5.4
India	7.9	6.4	7.5	7	6.8	6.6
Other Asia	4.4	4.3	4.3	4.2	4.1	4.1
Mexico	2.7	2.3	2.2	2.4	2.4	2.4
Brazil	-3.5	1	2.2	3.3	3.2	2.7
Other Latin America	-0.3	0.8	1.9	3	3.2	3.1
Eastern Europe	1.4	3.1	3	2.4	2.2	2.2
MENA	2.8	2.8	3.2	3.5	3.7	3.7
World (PPP)	3.2	3.7	3.9	3.7	3.5	3.4


Cyclical recovery in world trade (20%)
The pickup in world trade gathers pace, fuelled by near-term resilience in China and the US
Optimism increases globally, prompting a sustained rise in import-intensive investment and EM capital inflows
Rapid growth ensues in the open economies of Asia and Europe and policy tightening is brought forward
US protectionism (12%)
The US ends NAFTA participation and raises tariffs on China, S.Korea and Taiwan
The US is hit by retaliatory tariff hikes
Business and household confidence drop globally, while equities fall sharply amid deteriorating market sentiment
Growth falters in the US and globally
US fiscal stimulus (8%)
US business and consumer spending surges as the fiscal package provides a greater-than-expected stimulus to the US economy
Fed policy normalisation is brought forward, resulting in a further rise in bond yields and broad-based dollar appreciation
More buoyant US activity spills over internationally, fuelling further robust global growth in the near term
But the stronger dollar and higher rates weigh on more vulnerable EMs
Market turmoil (10%)
The market sell-off intensifies amid rising US inflation and more rapid Fed tightening
Emerging markets bear the brunt of the shock as the dollar strengthens and the sell-off broadens
Tighter policies in China (10%)
Chinese authorities scale back growth targets, supported by structural reforms
Weaker Chinese growth weighs further on EM activity, but a hard landing is avoided
Global triggers
Policy brakes

BREXIT AND UK TRENDS

- The impact of Brexit on the UK and NI will depend on
  - what deals the UK government strikes with the EU and with other countries

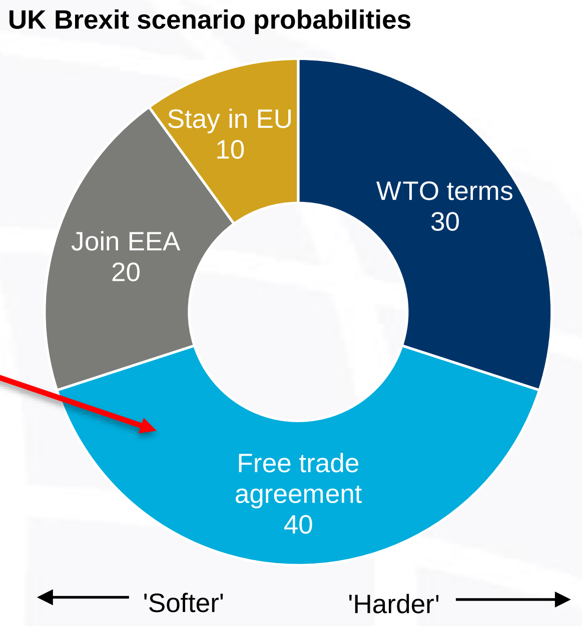
	Keep EU regulations	Open EU migration	Contribute to EU budget
European Economic Area	Yes	Yes	Yes
Customs Union	Yes	Probably	Probably not
Free Trade	Some	Maybe	No
Bilateral deals	Some	Probably not	No
Most Favoured Nation	No	No	No

  - the post-Brexit policies of the UK government
  - whether Brexit causes UK businesses to 'up-their-game' – most obviously by focusing more on the growing markets of Asia and elsewhere, and less on slower-growing EU markets.

OUR BASELINE ASSUMPTIONS

- UK leaves the EU in early 2019, there will be a transitional period to the end of 2020:
  - which is similar to the status quo
  - ultimately giving way to a free trade agreement.

- Assume government takes a 'populist' approach to policy, particularly in terms of reducing immigration.

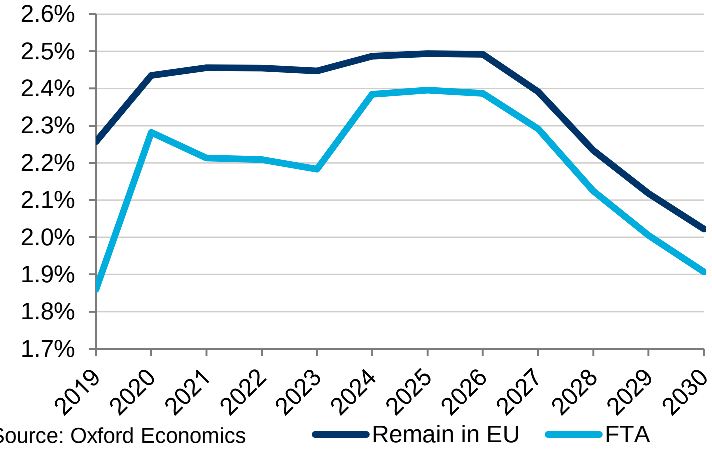


Source: Oxford Economics

Impact on GDP by 2030	UK		Ireland	
	Best case	Worst case	Best case	Worst case
FTA	-0.8%	-3.1%	-0.4%	-0.8%
WTO	-1.5%	-3.9%	-1.6%	2.2%
EEA	-0.1%	-1.8%	0.1%	0.0%

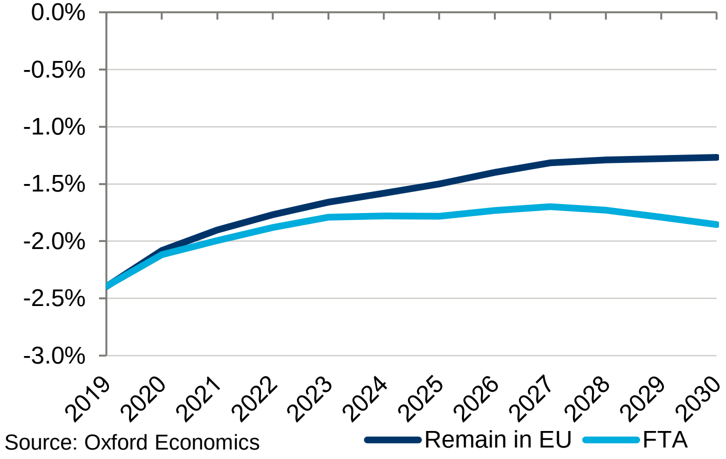
Source: Oxford Economics

GDP GROWTH, 2019-2030 (%)



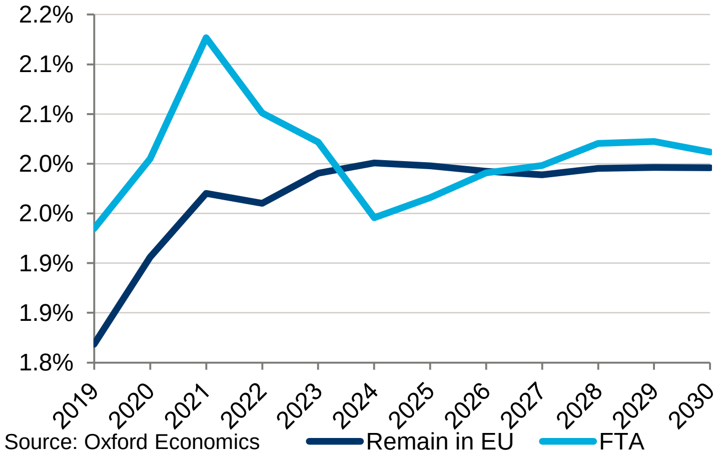
Source: Oxford Economics

Current account balance, 2019-2030 (% of GDP)



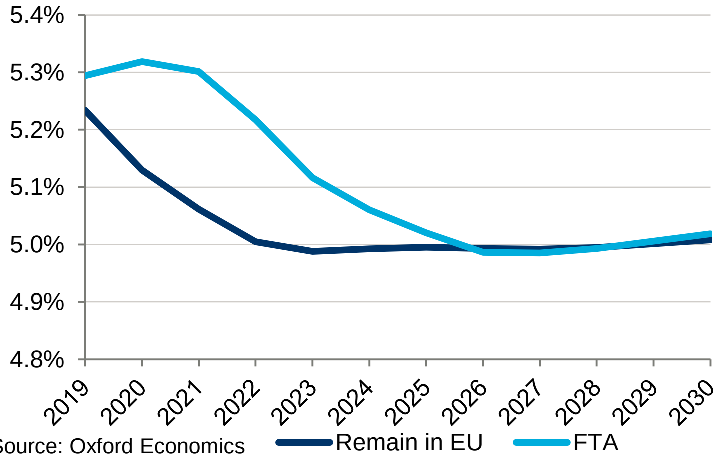
Source: Oxford Economics

CPI Inflation, 2019-2030 (%)



Source: Oxford Economics

ILO unemployment rate (%), 2019-2030

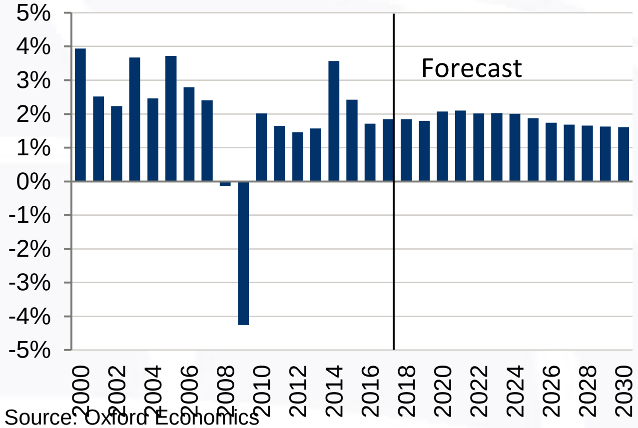


Source: Oxford Economics

BASELINE: SUBDUED GROWTH EXPECTED

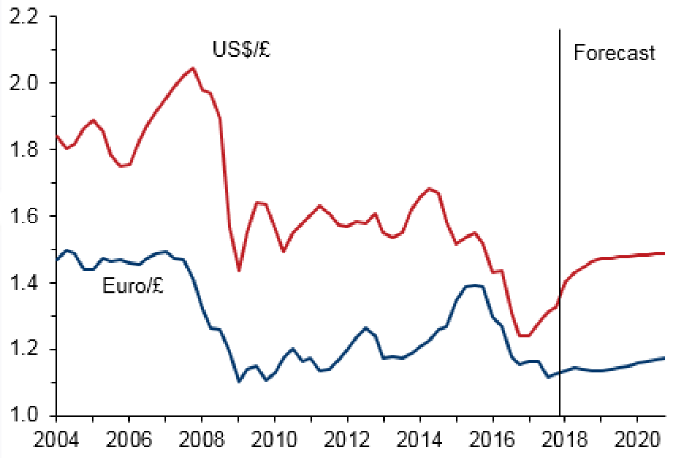
- **Recent data indicate a robust jobs market**
- **However, we expect economic growth and jobs growth to slow**
- **Rising inflation and slow wage growth to restrict consumer spending**
- **Businesses wary of investing**
- **Fiscal austerity**

UK annual GVA growth, 2000-2030 (%)



Source: Oxford Economics

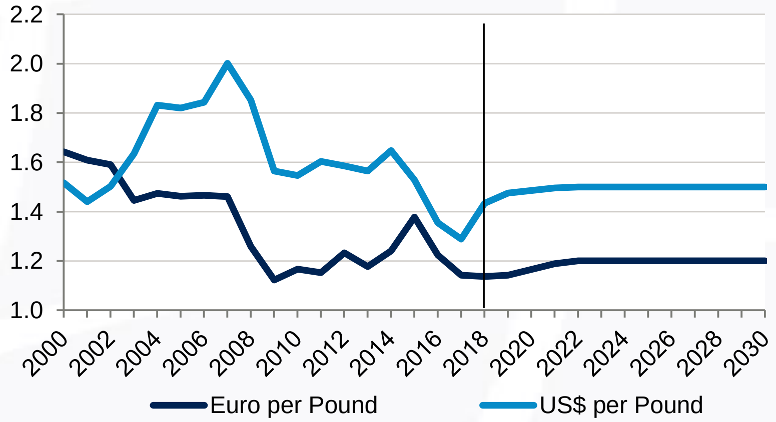
Sterling exchange rate 2004-2020



Source: Oxford Economics

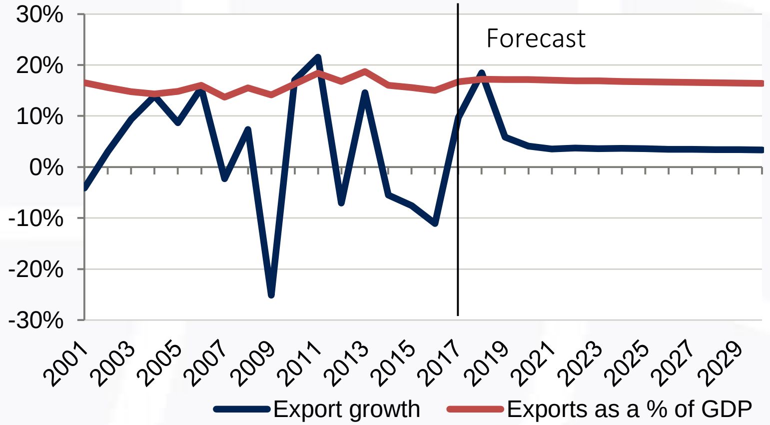
- **UK exporters have fared particularly well since the referendum**
- **Benefitting from the combination of a weaker pound and a pick-up in world trade.**
- **We expect this to continue to boost GDP growth in the early part of 2018 but the support is then likely to fade, with sterling continuing to rally, eroding some of the recent gains in competitiveness.**

Exchange rates, 2001-2030



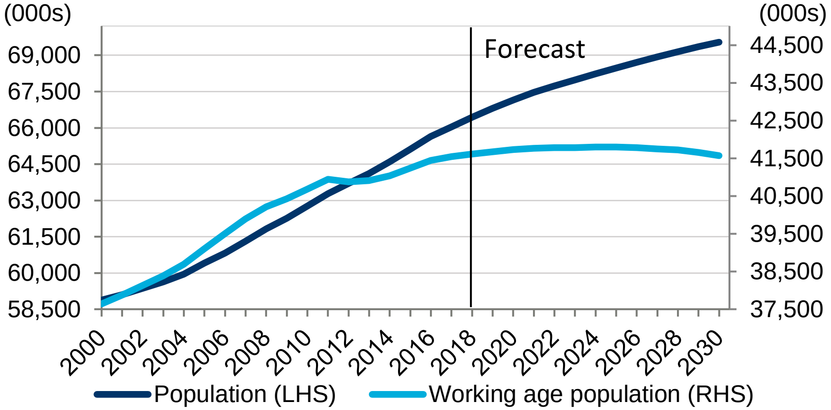
Source: Oxford Economics

UK exports, 2001-2030



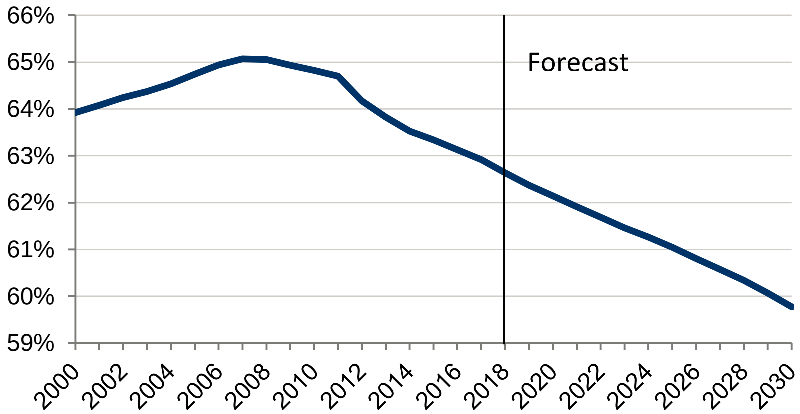
Source: Oxford Economics

Population, UK, 2000-2030, 000s



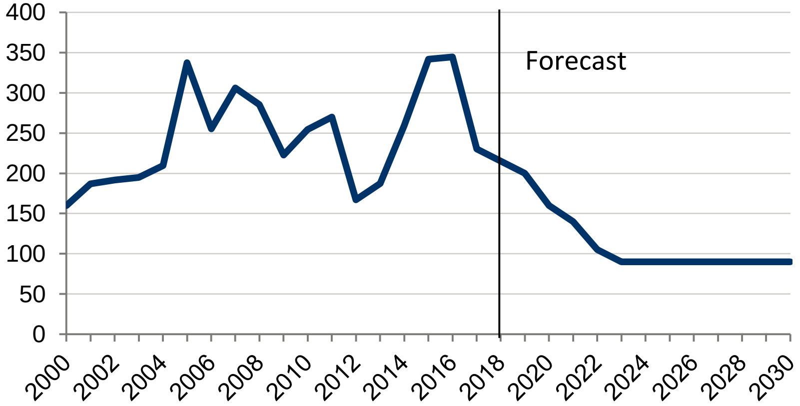
Source: Oxford Economics

Working age pop share of total, 2000-2030



Source: Oxford Economics

Net migration, UK, 2000-2030, 000s



Source: Oxford Economics

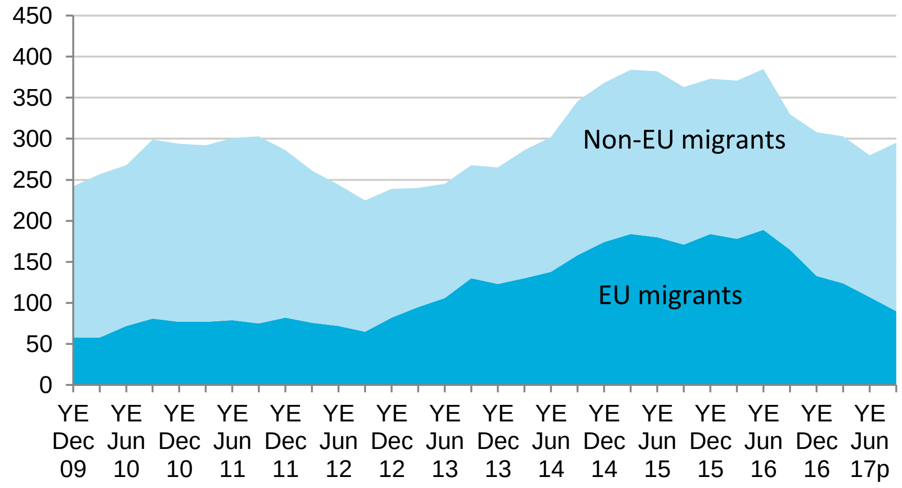
- **Population will continue to grow**
- **However, the share that is working age will fall**

- Net inflows from non-EU countries relatively stable over past decade
- A significant increase from the EU

- The bulk are of working age - 2011 census - half of those who had migrated in previous year were under 25
- LFS suggests employment rate is substantially higher than domestic born population

- Increase in inward migration helped offset the impact of an ageing indigenous population
- Also supported growth in labour supply - making a sizeable contribution to potential output growth

Long-term international migrants (rolling annual total)



Source: Oxford Economics

NORTHERN IRELAND

- **A standstill transition deal on Brexit:**
  - **existing trading arrangements in place until end-2020**
  - **rights of citizens who migrate during the transition**
  - **period to negotiate future relationship, not to implement it**
  - **UK ability to sign trade deals with others during transition, albeit without EU agreement they would not come into force until 2021.**

- **Transition deal part of wider withdrawal agreement but need agreement on a 'backstop' solution for the Irish border.**

"nothing is agreed until everything is agreed"

- **There is no solution to this problem in sight, unless the UK drops one of its red lines.**

- **UK will come under increasing pressure to accept the border cannot be soft if:**
  - **it insists on being outside of the single market**
  - **not being part of a customs union and**
  - **not allowing NI to remain inside the single market or a customs union**

- **The specific impact on NI will additionally depend on:**
  - **sectoral structure**
  - **propensity to export**
  - **reliance on the EU as an export market and as a source of inputs into the local supply chain**
  - **its dependence on inward migration to fill jobs**
  - **on how companies respond to the challenges and opportunities presented by the vote to leave.**

NI'S OUTLOOK MUCH WEAKER THAN THE UK

2018-2028 regional growth, (annual %)

	Employment	GVA	Population
London	1.0	2.5	0.9
East	0.5	1.8	0.6
South East	0.5	2.0	0.5
East Midlands	0.4	1.7	0.4
North West	0.3	1.7	0.2
South West	0.3	1.7	0.4
West Midlands	0.2	1.6	0.3
Scotland	0.2	1.6	0.1
Yorkshire & the Humber	0.2	1.5	0.2
Wales	0.2	1.5	0.2
Northern Ireland	0.1	1.4	0.1
North East	0.0	1.4	0.1
UK	0.4	1.9	0.4

Source: Oxford Economics

UK:

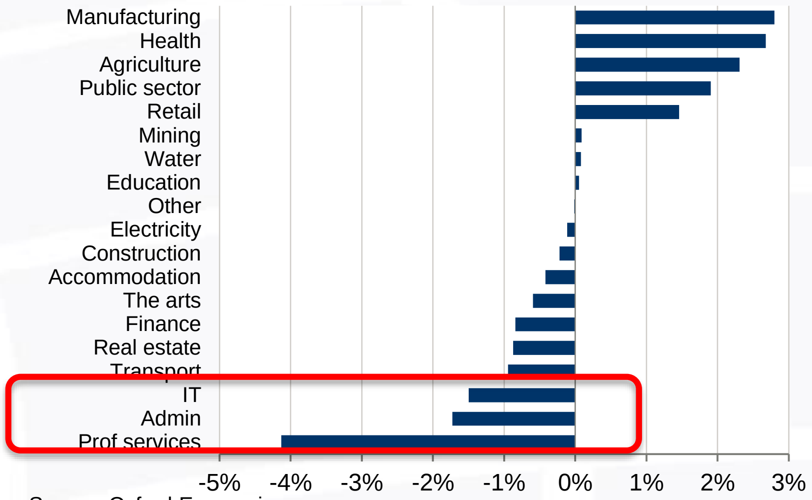
- **Population growth – 2,712,200**
- **GVA increase - £363.3bn**

NI:

- **Population growth – 20,620**
- **GVA increase - £5.5bn**

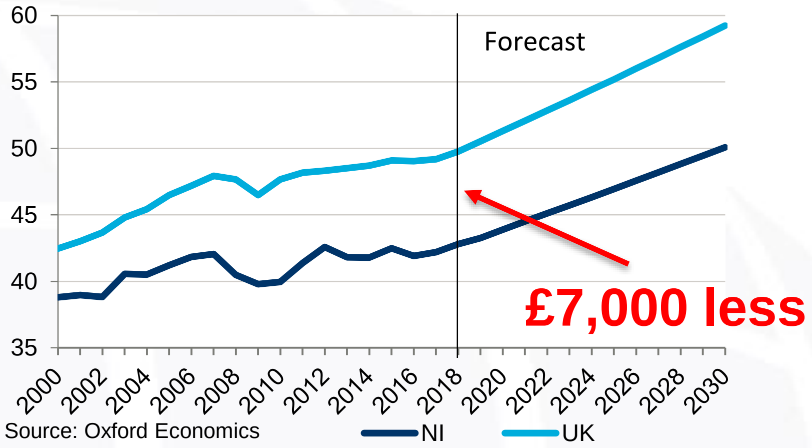
SECTORAL STRUCTURE PLAYS A KEY ROLE

Difference in sectoral employment shares (NI – UK), 2018



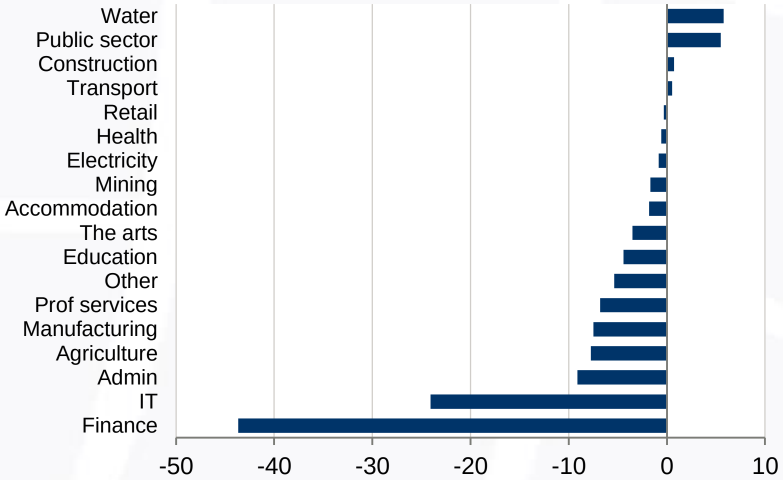
Source: Oxford Economics

Average productivity (£000), 2000-2030



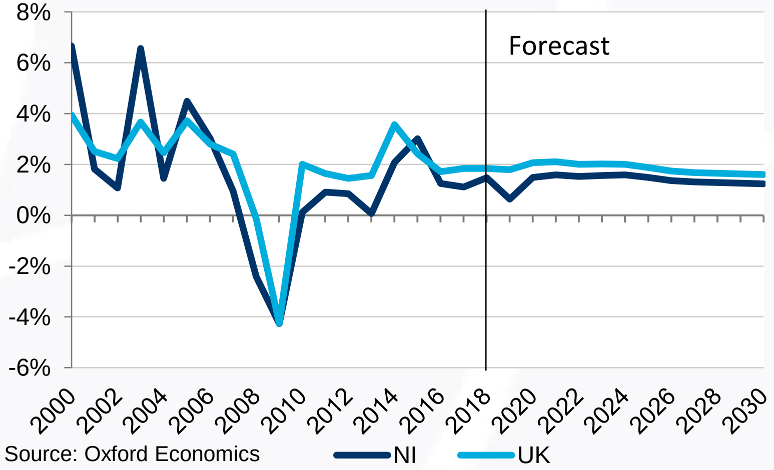
Source: Oxford Economics

NI – UK productivity per worker, 2018 (£000)



Source: Oxford Economics

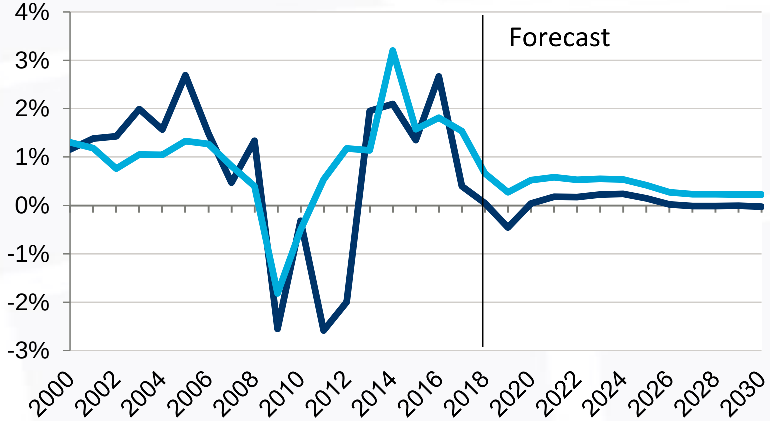
Annual GVA growth NI and UK, 2000-2030, (%)



Source: Oxford Economics

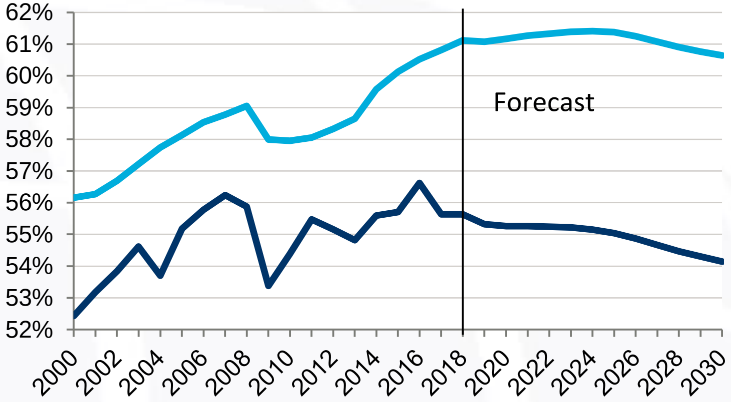
LABOUR MARKET OUTLOOK

Employment growth, 2000-2030 (%)



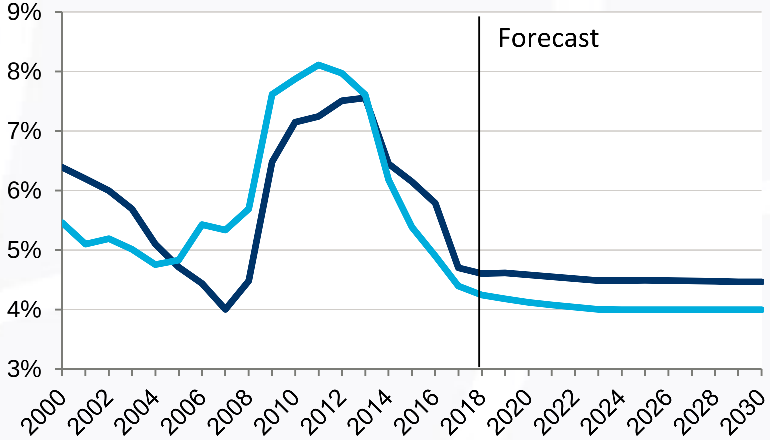
Source: Oxford Economics

Resident employment rate, 2000-2030 (%)



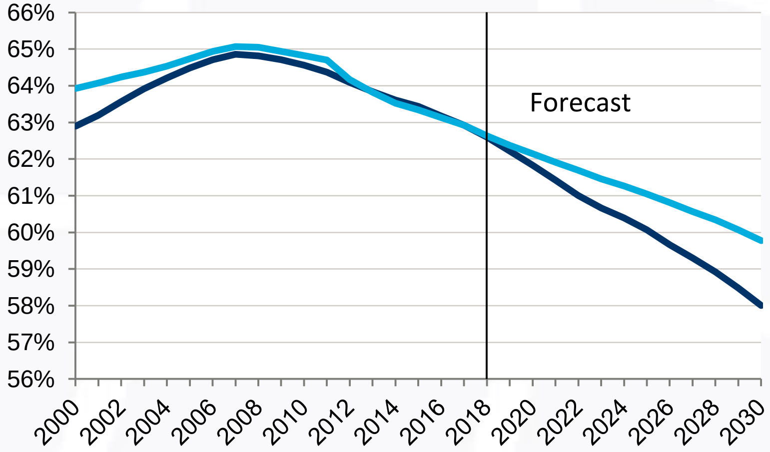
Source: Oxford Economics

ILO unemployment rate, 2000-2030, (%)



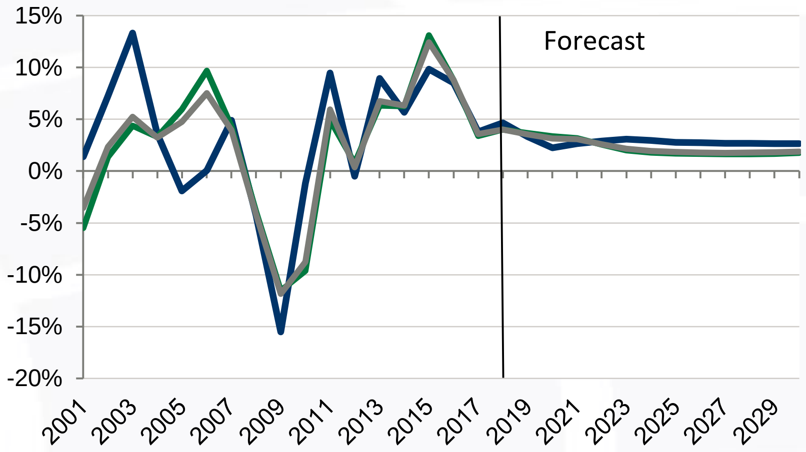
Source: Oxford Economics

Working age / total population , 2000-2030, (%)



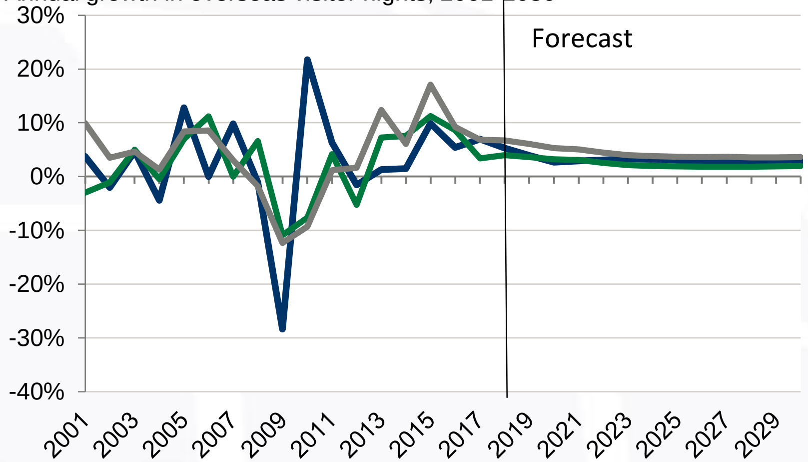
Source: Oxford Economics

Annual growth in overseas visitors, 2001-2030



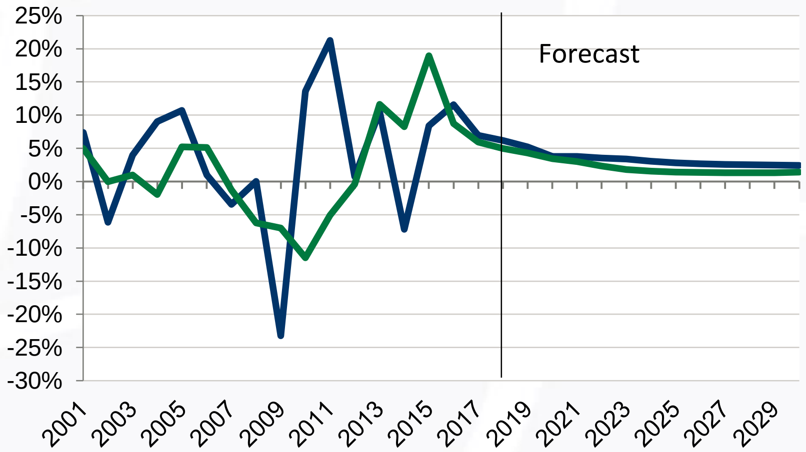
Source: Tourism Ireland — NI — ROI — Island of Ireland

Annual growth in overseas visitor nights, 2001-2030



Source: Tourism Ireland — NI — ROI — Island of Ireland

Annual growth in overseas visitor revenues (real 2014 prices), 2001-2030



Source: Tourism Ireland — NI — ROI

- **Irish outlook is solid**
- **Growth is forecast for visitor numbers, nights stayed and revenues**

Origin of visitors to NI	2018 Share	2030 Share	Change in share
Great Britain	62.5%	57.1%	-5.5%
Mainland Europe	17.7%	20.3%	2.6%
North America	12.5%	12.2%	-0.2%
Other Areas	7.3%	9.1%	1.8%

Source: Oxford Economics

Overseas visitors to NI 2018	Average nights stayed	Average spend (£)
Spain	9.4	288.7
Australia	8.4	358.5
Canada	8.4	474.9
Other Areas	7.3	413.0
North America	7.1	403.9
Other Europe	7.0	425.5
France	7.0	258.7
US	6.7	383.9
Mainland Europe	6.3	318.5
Netherlands	5.5	364.3
Germany	5.4	252.3
Total	5.0	279.7
Italy	4.0	243.0
Great Britain	4.0	228.4
Nordics	2.1	285.4

Source: Oxford Economics

IRELAND

STRONG RECENT GROWTH

- Ireland’s Q4 2017 GDP delivered a storming performance, with a 3.2% quarterly rise giving full-year growth of 7.8%

- But as has long been the case, the headline numbers present a distorted picture.

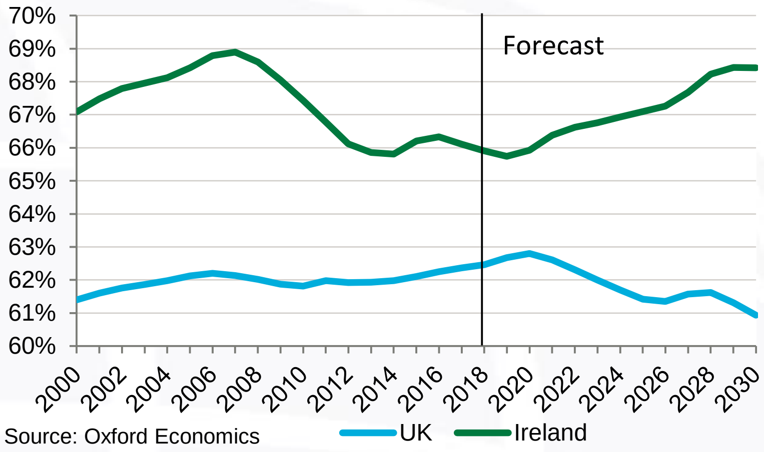
- Growth in consumer spending slowed to a three-year low of 2.1% in 2017, down from 3.1% in 2016 and half the 2015 rate).
- 2017 GDP growth almost entirely a net trade story, driven by a very unusual 6.2% drop in imports (largest since records began in 1995).
- Both the services and manufacturing PMIs point to some loss of momentum in February, though they remain historically strong.
- The jobless rate dipped further to 6.1% in the same month, while retail sales volumes started 2018 on a strong note, rising 1.2% m/m in January.

- GDP growth expected to average 3% p.a. in 2018-20, after growing by over 7% p.a. over the period 2011-16
- The latter figure was heavily inflated by the 26% surge in 2015

GVA growth	2016	2017	2018	2019	2020	2021
Ireland	5.1%	6.0%	3.1%	2.4%	2.2%	2.2%
UK	1.9%	1.7%	1.8%	1.6%	1.9%	1.9%
EU	1.9%	2.5%	2.3%	1.9%	1.7%	1.5%

- **Prospects will be significantly affected by Brexit negotiations**
- **Other key drivers of the forecast:**
  - **household debt-to-income ratio has fallen from nearly 230% to around 140%, which should provide consumers with more scope to spend**
  - **reduced fiscal restraint over long term should mean less of a headwind for the economy**
  - **the working-age population is set to expand strongly due to natural increases and inward migration.**

Working age population / total population, 2000-2030



Source: Oxford Economics

Risk warnings		
GDP growth	●	Ireland should enjoy decent growth
CPI inflation	●	Sterling weakness is tempering price pressures
Current account balance	●	Irish current account balance should remain in surplus
Government balance	●	Deficit on track to fall
Government debt	●	Debt levels on a downward trajectory but remain high
External debt	●	External debt has fallen but remains high

Source : Oxford Economics

OXFORD ECONOMICS

APRIL 2017

The modeling and results presented here are based on information provided by third parties, upon which Oxford Economics has relied in producing its report and forecasts in good faith. Any subsequent revision or update of those data will affect the assessments and projections shown.

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BLUE:GREEN CREATIVELY CONNECTED

Chief Executive
Tourism NI
John McGrillen

Strategic Overview of Tourism Trends

INTEGRATED STRATEGY FOR
TOURISM | REGENERATION | ECONOMIC DEVELOPMENT
Ards and North Down 2018–2030

tourism northernireland

Ards and North Down Borough Council

John McGrillen

Chief Executive

Tourism Northern Ireland

Northern Ireland

Tourism 2030

Goal	Double the value of NI Tourism by 2030 and create 20,000 new jobs
Through the development and marketing of	An internationally compelling *Proposition of Scale* built upon our Landscape, Heritage & Culture, renowned for *World Class 3-5 day breaks*
Core markets	NI; RoI; GB; France; Germany; North America; Australia; China
Focusing on these segments	Culturally Curious; Social Energisers; Great Escapers; Golf; Screen Tourism; Cruises; Conferences & Incentives
Consisting of	World class products, visitor experiences & events → driving → Regional dispersion; Year round business
Delivered by	An internationally competitive industry → with access to → An available, skilled labour pool
Enabled by	Timely consumer insight/ market intelligence; Tourism Growth Fund; Quality transport, accommodation & digital infrastructure; Increased access to NI & easier access from Dublin/ RoI; Agency/ Industry/ Government/ Local Authority collaboration; Travel Trade; Supportive policy environment
Underpinned by	SUSTAINABILITY

The Goal

Northern Ireland

x2 by 2030

Double the value of NI Tourism to £ 1.7bn by 2030 and create 20,000 new jobs

Core Markets

Northern Ireland

NI	The domestic market (£237m - 28% of revenue) will continue to make a significant contribution – key for regional and seasonal dispersal - average spend per trip £120 in 2016
RoI	£942m market, NI share in 2016 – 3% of IoI holiday trips and 4% holiday spend – huge potential – RoI Taskforce target of £140m by 2025 – strong for regional dispersal – av. £154 per trip in 2016
GB	Our single largest market – 51% revenue in 2016 (15% growth on 2015) – imperative that GB is a core focus – 29% of visitors to IoI come to NI - av. £227 per trip in 2016
France	NI attracted 12% of French visitors to IoI spending £14.2m (6%) in 2016 – av. £228 per trip in 2016
German	11% of IoI's visitors came to NI spending £15.3m (6%), an increase of 28% on 2015 – av. £221 per trip in 2016
North America	14% US visitors to IoI come to NI – visitors from NA grew by +10% in last 2 years – high spenders – av. £336 per trip in 2016
Australi	£18.3m revenue in 2016 – 30% growth on 2015 – av. £360 per trip in 2016
Chin	World's largest outbound market & the fastest growing - <10% population have a passport – high spenders – 65,000 visitors to IoI in 2016, estimated 2/3 coming to NI

ROI Market

Target

£140m by 2025

Doubling value to NI from this market by 2025 increasing to £155 million by 2030

Tourism 2030

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Underpinned by	SUSTAINABILITY

Market Segments

Northern Ireland

	Culturally Curious (23%)	Great Escapers (16%)	Social Energisers (11%)
	• Broadening my mind • Immerse in local experiences • Meet locals	• Take 'time out' • Spend quality time with loved ones • Enjoy experiences / activities off the beaten track	• Enjoy 'buzz & excitement' of new places • Every minute packed with things to see /do • Be spontaneous
	14% - 4.7m	**16% - 5.6m**	**10% - 3.4m**
	15% - 21.6m	**10% - 14.9m**	**16% - 23.0m**
	35% - 16.0m	**14% - 6.5m**	**9% - 4.2m**
	27% - 14.8m	**23% - 12.7m**	**9% - 5.2m**

Would you consider taking any of the following types of holiday or short-break in Ireland in the next three years? – Ireland Holiday Behaviour Survey

	%
A **city break to two or more cities** on a single trip	90
A **city break** to a single city destination	87
A **touring** holiday	85
A holiday in a **rural destination**	84
A **walking/hiking** holiday	73

	%
A **city break** to a single city destination	87
A **city break to two or more cities** on a single trip	86
A **touring** holiday	83
A holiday in a **rural destination**	81
An adventure or activity holiday	73

A **city break to two or more cities** on a single trip	92
A **city break** to a single city destination	90
A **touring** holiday	83
Celebrate a **special occasion**	76
An **adventure** or activity holiday	75

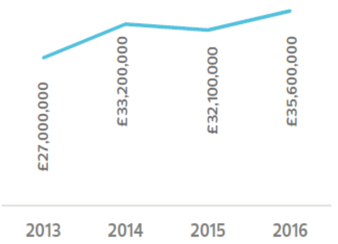
Source: Tourism Ireland GTI Survey and Ireland Holiday Behaviour Survey 2016

Market Segments

Golf Tourism

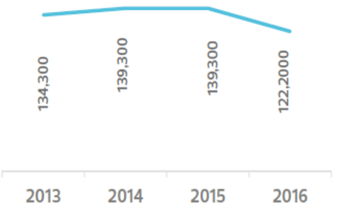
The Economic Impact of golf tourism for Northern Ireland in 2016 remaining in Northern Ireland is:

2016 = £35,600,000
2015 = £32,100,000
2014 = £33,200,000
2013 = £27,000,000



The number of golfing visitors to Northern Ireland is:

2016 = 122,200
2015 = 139,300
2014 = 139,300
2013 = 134,300



On track to achieve target to achieve £50 million per annum by 2020.

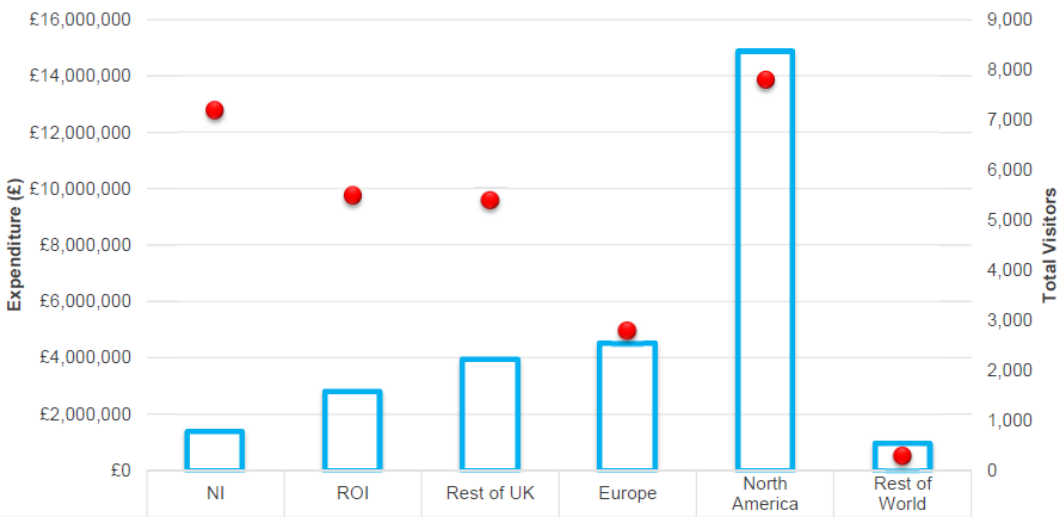
Assume inflationary growth beyond that due to capacity

Image courtesy of Royal Belfast

Market Segments

Golf Tourism

TOTAL EXPENDITURE 2016 – OVERNIGHT VISITORS



	NI	ROI	Rest of UK	Europe	North America	Rest of World
Total Expenditure	1,397,000	2,832,000	3,958,000	4,533,000	14,894,000	975,000
Number of visitors	7,200	5,500	5,400	2,800	7,800	300

Total Expenditure   Number of visitors

Market Segments

Screen Tourism

In NI, current core screen tourism is valued at approx. £18 million – with potential to grow to £33 million if:-

- There is development of activities and merchandise that will provide additional value
- A legacy project is created to provide additional

Case Study

New Zealand - data for the year ending June 2015 show that 12% of all visitors and 17% of holiday visitors said the *Hobbit* series had been a factor that influenced their initial interest in New Zealand. Moreover, 19% of total visitors and 26% of holiday visitors visited a film location in New Zealand

Northern Ireland

Market Segments

Cruise Tourism

- Economic value of Passenger & Crew spending to the Island of Ireland in 2015: € 23. 1 million
- Visitor & Crew spend for NI in 2016: approx. £7 million
- Belfast rated third most attractive port in UK & Ireland
- Key source markets USA, GB and Germany
- 76% likely to return for General Holiday (67% on another cruise)
- Cruise Ireland targeting 11% growth per annum for next 5 years

Market Segments

Business Tourism – Conferencing & Incentive Travel

- Conferences
  - Approx. 100,000 bed nights per annum
  - Economic impact of approx. £50m per annum

- Create a corporate meetings and incentive sector worth £10 million per annum

- Provide a Market Access Fund for NI industry to attend platforms overseas

- Provide a Support fund for site inspections and marketing support with DMC's

Image courtesy of Hastings Hotels

Northern Ireland

Tourism 2030

Northern Ireland

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Underpinned by	SUSTAINABILITY

The NI Experience Brand

- Northern Ireland **needs to compete** with the Wild Atlantic Way, Dublin and Ireland's Ancient East
- Northern Ireland has a compelling natural landscape, culture and heritage and a warm welcome
- Northern Ireland has **much to be proud of**
- However, knowledge **relatively limited in the international marketplace**
- The visitor offer needs to get **stronger**, be presented in a **more coherent and connected** manner
- A **catalyst** in driving the next phase of growth across all of Northern Ireland

World Class Visitor Experiences

Northern Ireland

International Market Research	• International market screening of product concepts to identify stars, supporting acts and niche offers
Experience Development framework	• Overarching framework (themes, signature, supporting & wraparound experience) • Visitor experience plans (geographic and thematic)
Animating landscape, culture and heritage	• Culture and Heritage (C&H) Strategic Framework • Activity Development Framework • A vibrant cultural calendar and evening economy
Strategic partnerships	• Cross sectoral partnerships – C&H Leadership Group, Causeway Coastal Route Forum, Food, Activity. • Other – National Trust, TFL, NMNI, …….

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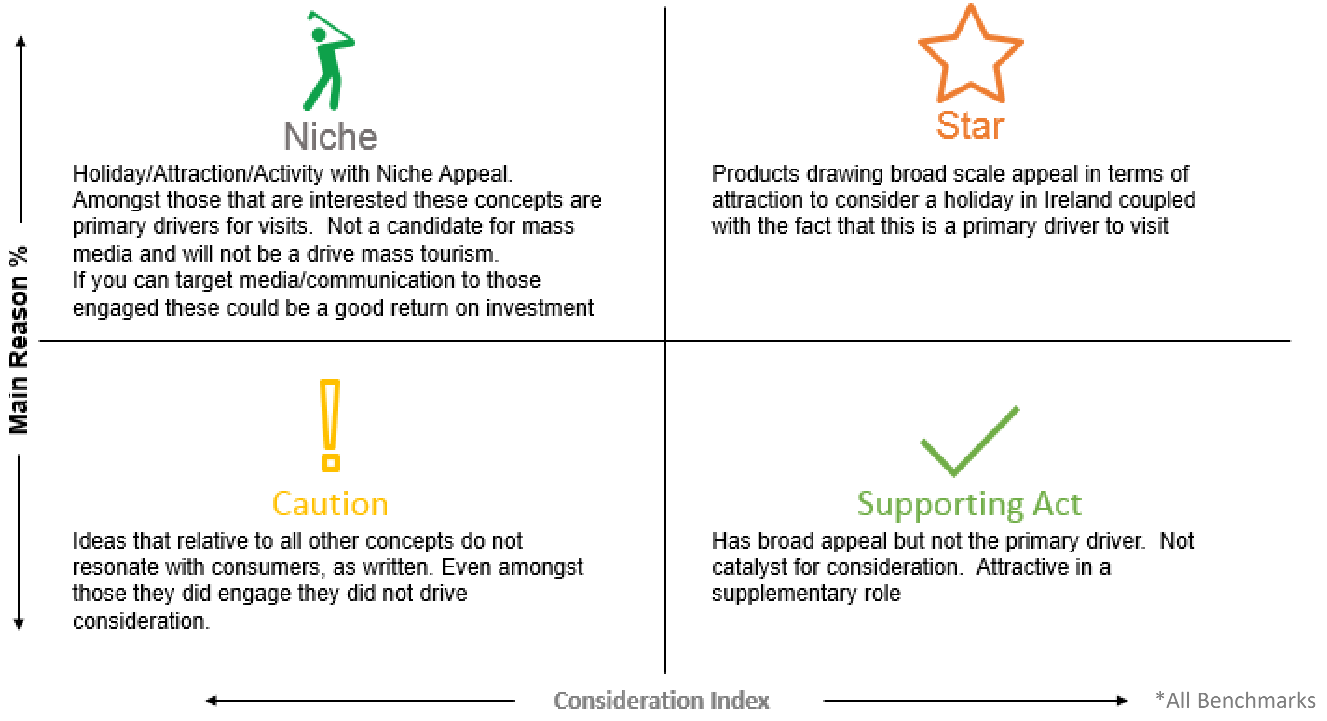
World Class Visitor Experiences

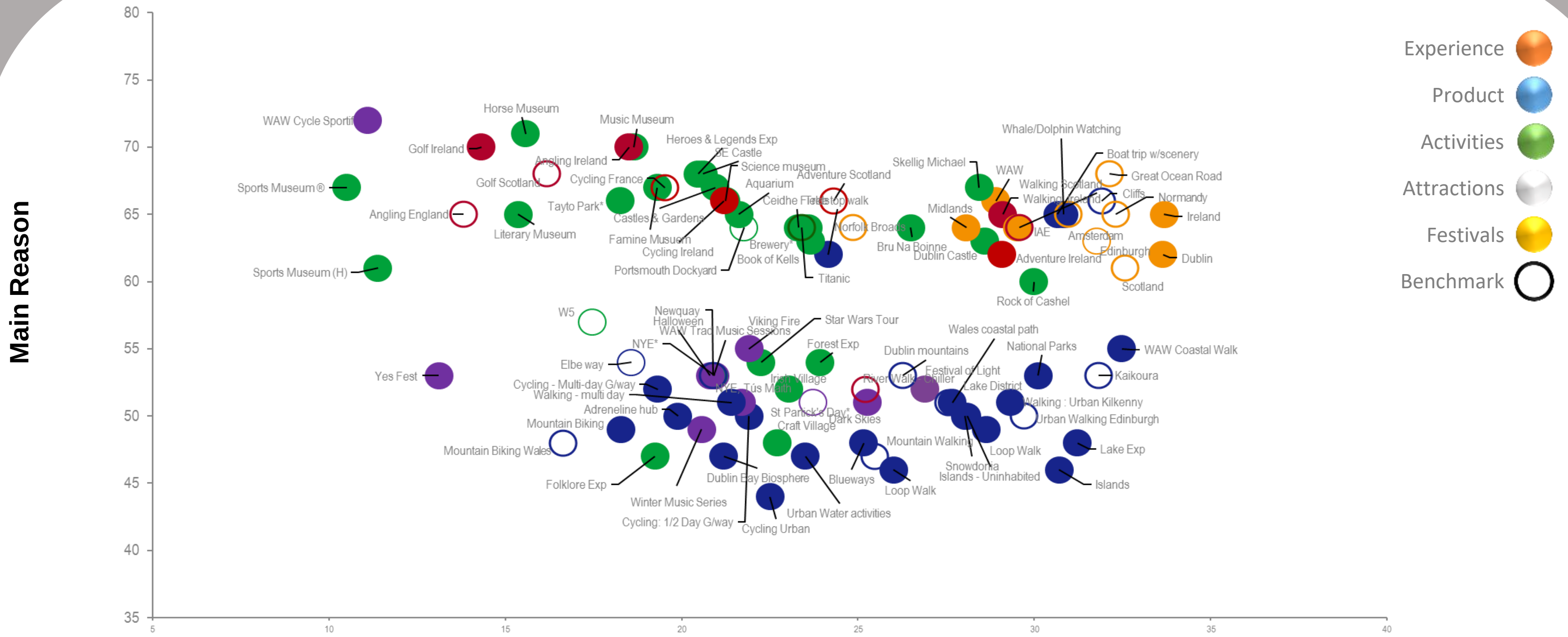
Consideration index vs. main reason to visit



Northern Ireland

World Class Visitor Experiences

All Concepts – Overseas (94 concepts)



Proposition of Scale

Experience Development - Switching on the latent power of our offer

Market Led Developmental themes

- Belfast+ and Derry/Londonderry+
- Titanic/Maritime
- Industrial Heritage
- Giant's Causeway
- Causeway Coastal Route
- The Walled City
- Contested histories/People, place, politics
- Identity and belonging (Diaspora, American Connections, Ulster Scots)
- Literature/Northern Literary Lands
- Game of Thrones
- Castles, Houses and Gardens
- Saints and Scholars

Consumer themes

Northern Ireland

World Class Events & Festivals

Northern Ireland

- Annual programme of ‘Distinctly Northern Ireland Festivals’ that will focus on attracting 25-30% out of state visitors per event

- Attraction of major events with the capacity to deliver high numbers of overnight international visitors, increasing bed nights and spend

- More sustainable Events/Festival Industry demonstrated through higher levels of private income/investment/support

- Significantly increased levels of return on investment

Dispersion

Regional Dispersion & Year Round Business

- Develop experiences in regions that do not currently have high visitor numbers or spend to address capacity and promote dispersal
- Themed visitor experience plans, clusters and itineraries connect otherwise isolated, remote or unidentified product to wider NI offering and leading attractions
- Identification of a number of strategic hubs to support faster growth of the visitor economy outside Belfast
- Support visitor experience development (day and night) across regions and seasons including developing the evening economy across key strategic hubs.

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The Industry

Northern Ireland

An internationally competitive industry

Priority Actions

- Apply a three tier client approach to business support
- 1 to 1 support – high growth businesses
- 1 to many – cluster and sectoral support
- Online Hub - all tourism businesses – customer service team
- Develop a Business Growth Programme
- Develop a Tourism Leadership Programme
- Encourage alternative business models

Business Growth Programme

Key aspects to include:

- Sales & Marketing, including B2C, B2B and channel management capability; market access programme
- Digital Capability – Sales, Service and Operational
- Revenue & Cost Management
- People Management including recruitment, retention and talent management
- Service Excellence
- Business of Tourism

Labour Pool

An available, motivated & skilled labour pool

Five key development themes are identified as critical to success. These are:

1. Maximising the promotion of sector	2. Ensuring those entering the tourism sector have the relevant skills	3. Maximising the competence and performance of the existing workforce	4. Increasing business capacity and performance	5. Equipping the non-tourism workforce with essential tourism-related knowledge and skills

Deliver a Skills Action Plan to:

- develop career pathways
- address shortages and skills gaps
- attract talented people into the industry
- maximise the productivity and competitiveness of the industry

Enabling Environment

Northern Ireland

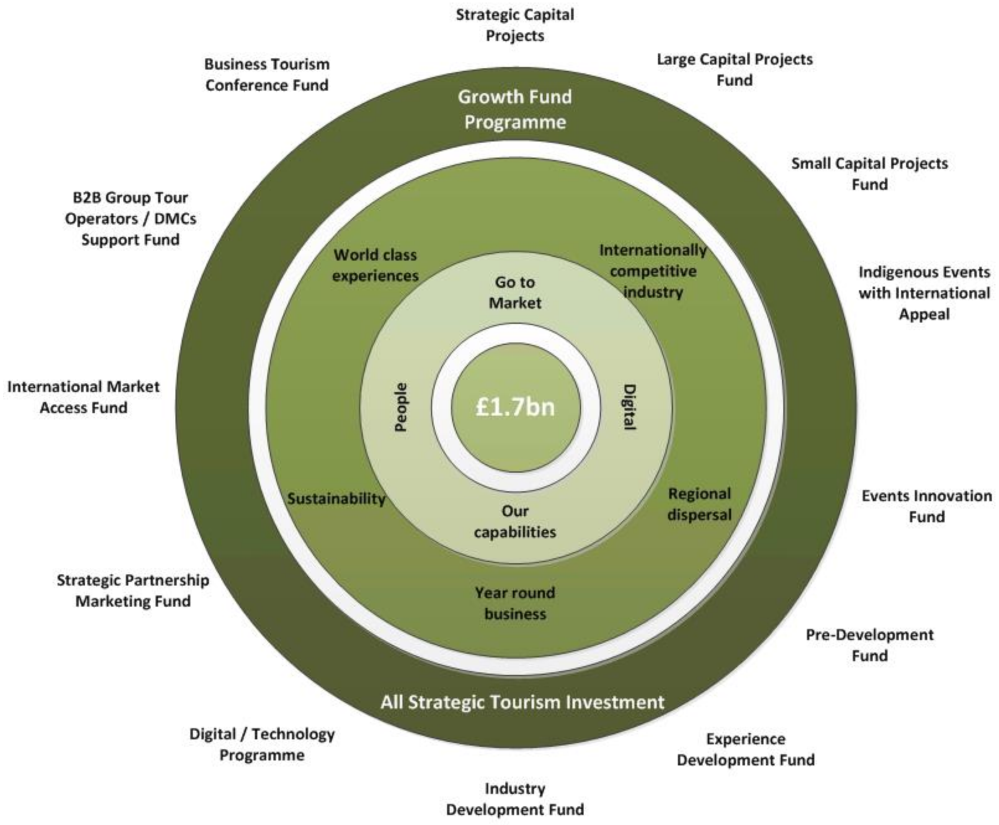
Timely Consumer Insight/ Market Intelligence	• Establishment of an Insights and Intelligence Service for the industry, stakeholders and Government • Real time data optimising digital technologies • Data analytics approach • IoI consumer CRM system
Quality Transport, Accommodation and Digital Infrastructure	• Belfast Rapid Transit, A5, A6, Belfast Transport Hub • BRT extension to GBBCA • Hourly Rail Service Dublin – Belfast – Derry/L'derry • Sustainable Transport Management along CCR • Develop and Promote Hotel Investment Prospectus with Local Authorities • Fibre to the premises for all tourism related businesses
Improved Air and Sea Access to NI/from Dublin Airport	• Competitive Air Route Development Fund • Rail Link from Dublin Airport to Belfast – Dublin Railway Line • Cruise Terminal Facilities which meet customer expectations • Work with Airports and Airlines to support existing direct routes and support potential new routes

Enabling Environment

Northern Ireland

Agency/Industry/ Government and Local Authority Collaboration	• Bi –monthly meetings with Tourism Ireland and Failte Ireland SMT's • Create Tourism CEO Deliver Forum to include NITA, TI, NMNI, NT, HED, Invest NI, Forestry Service, NI Water, Translink, BHC, GBBCA, BIA • Bi-monthly Meetings between 11 Council Directors and TNI SMT
Tourism Friendly Policy Environment	• Tourism Friendly, Fit –for –Purpose Licencing Legislation • Tourism VAT reduced to compete with RoI and other non UK destinations • Retention of the joint UK/RoI Visa Scheme • UK remaining part of Open Skies Agreement • Commitment by EU/UK Govt to Open Border on Island of Ireland • Visa Scheme to support the retention and recruitment of labour • Develop the Case for the Abolition of Air Passenger Duty • Registration, Certification and Classification Schemes which support the needs of Industry and the Visitor • Develop a One- Stop – Shop Approach to DfE support and advisory services to Tourism Businesses • City Deals for Belfast & Derry/ Londonderry city regions

Tourism Growth Fund



Northern
Ireland

Chief Executive, Centre for Local Economic Strategies

Neil McInroy

The Future of Local Economic Development
Building Local Wealth and Knowledge

CLES Centre for Local Economic Strategies

The Future of Local Economic Development: Building Local Wealth

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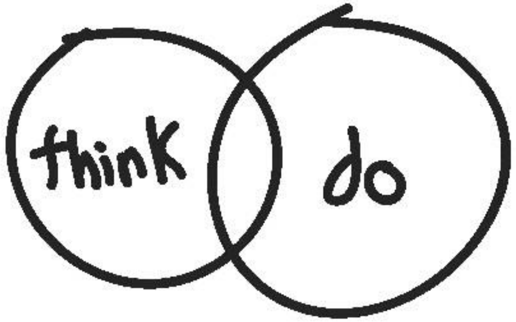
Chief Executive
@nmcinroy



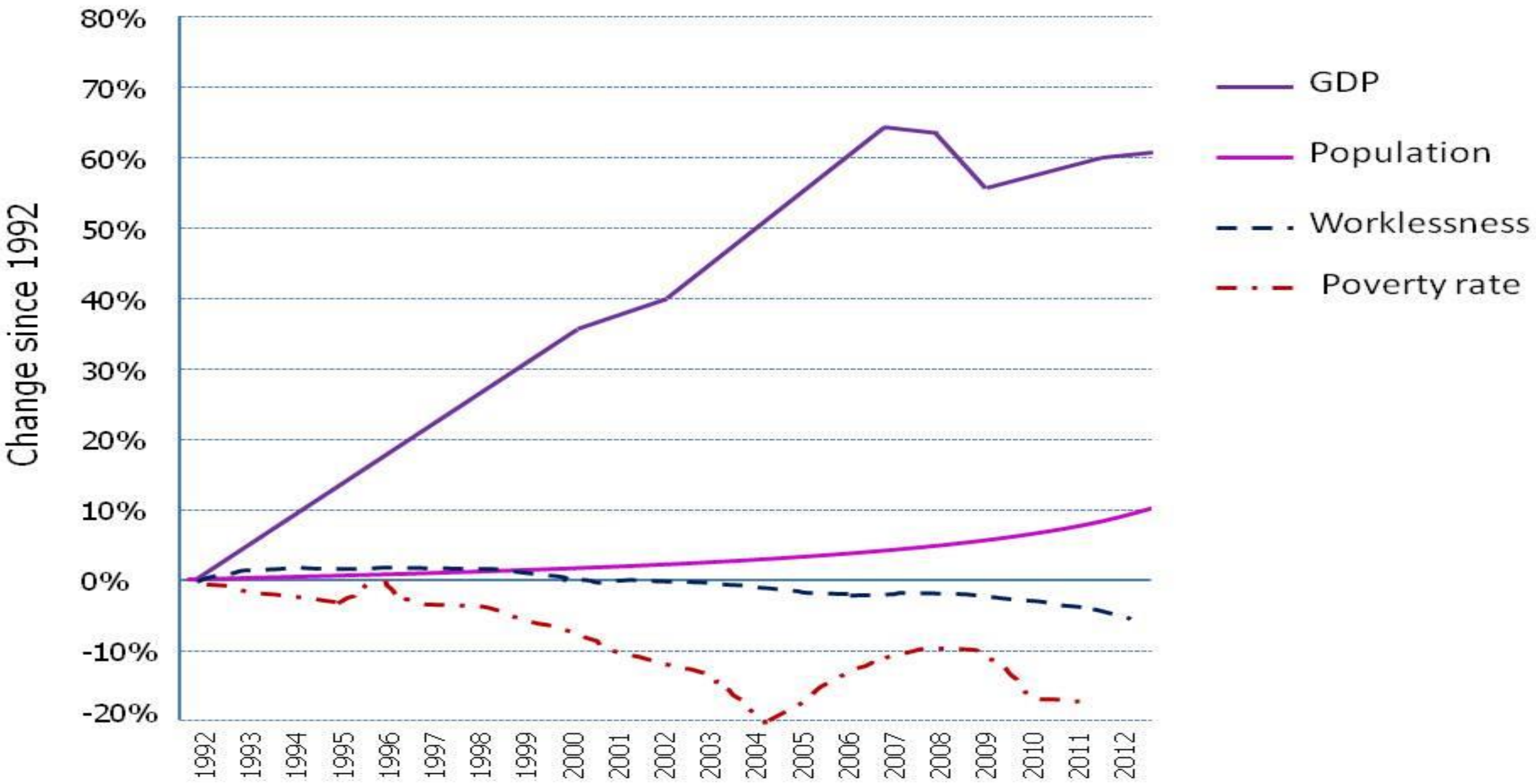
What CLES does?

Leading independent member and research organisation, realising **progressive economics for people and place.**

32 years old.

Our aim is to achieve social justice, good local economies and effective public services for everyone, everywhere.

We have a economic problem!



Source: ONS, DWP

‘Inclusive growth’

- Emerged from World Bank, OECD, IMF
- Part driven by post Global Financial Crisis, and a new ‘questioning of economics,

….the economics profession (has) downplayed inequality for too long. Now all of us have a better understanding that a more equal distribution of income allows for more economic stability, more sustained economic growth and healthier societies with stronger bonds of cohesion and trust. [….] What is less clear is how we achieve more inclusive growth in practice’.

Christine Lagarde, Director, IMF 23rd Jan 2013.

Background to 'Inclusive growth' as a term/concept

- Comes from notion that there are different types of growth.
  - Inclusive growth where benefits are shared evenly across society
- In short - Need to join social with the economic
- Scottish Government
  - Comprehensive. Multi dimensional.

'Growth that combines increased prosperity with greater equity; that creates opportunities for all and distributes the dividends if increased prosperity fairly'

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So what does IG entail/not entail?

- Traditional growth (sectors, investment, innovation, internationalisation, competitiveness, labour markets, employment).
- Total factors of production (labour, Capital, Place)
  - Labour-mostly people into jobs – problem?
  - Weak on ownership of capital – capital increasing extracted?
  - Weak on place and specificities of local context

There are 3 economies

CLES

A new economics

Who owns wealth, who influences it, who benefits from it – defining features of all economies.

The aim is to create an economy where wealth is broadly held, with local roots, so income is recirculated.

Economic and social life are two sides of same coin

A new economic ecosystem

- Economic strategy
  - Global AND Local approaches. Resilience. Building Networks.
- Economic system and networks
  - Community Wealth Building. Social Value. Collaborative economy. Circular economy. Foundational economy. Shortening supply chains. Local wealth capture.
- Economic policy
  - Corporate Citizenship. Social enterprise. Innovation districts. Urban Villages/Eco districts. Maker Movements. Fab Labs. Social innovation Zones. BIDS

Making wealth stick

CREATING GOOD CITY ECONOMIES IN THE UK

FRIENDS PROVIDENT Foundation | CLES | NEW ECONOMICS FOUNDATION

Struggling
Neighbourhoods and communities

Thriving local places

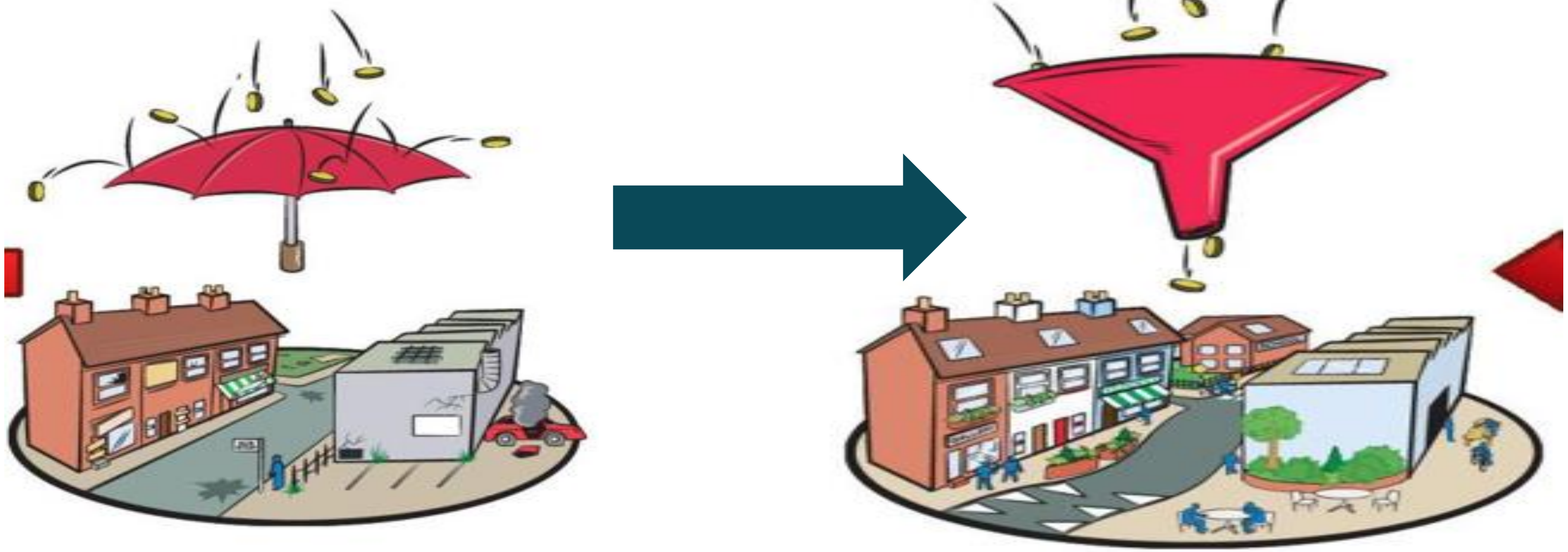

Image adapted from illustration by Rory Seaford of The Creative Element,
www.pluggingtheleaks.org/resources/plm_ptl_images.htm

Local Wealth Building

We have worked with dozens of Local Councils and there are a currently a number places where CLES are working:

12 years

- Manchester
- Preston
- Birmingham
- Oldham
- Calderdale
- Salford
- LB Islington
- Southampton
- Bury
- Barcelona
- 10 European Cities
- And growing….

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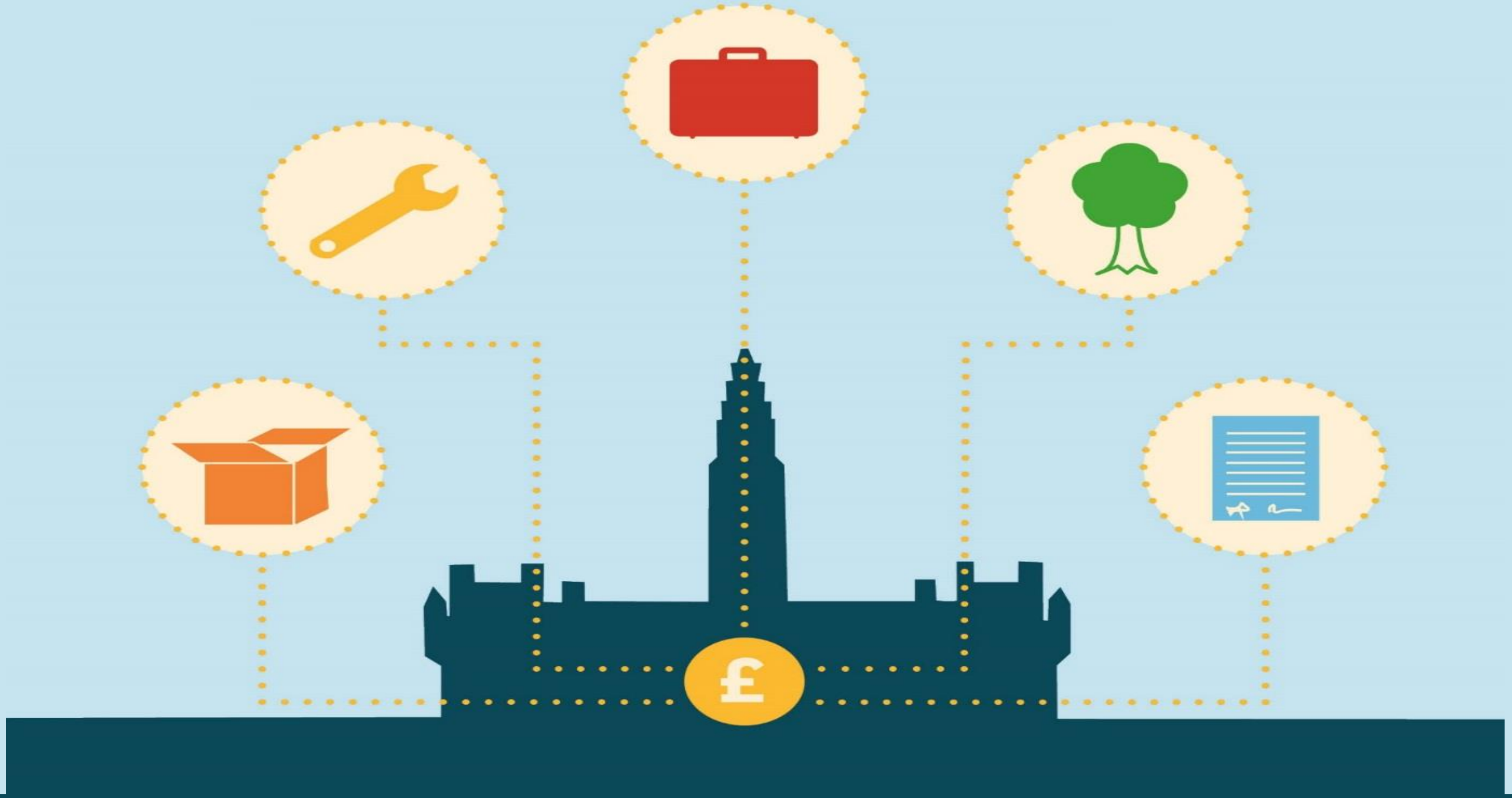
4 Elements to Local Wealth building

1. **The spend of public, private or social anchors**
   - Get wider social and local economic value from procurement, commissioning

2. **Employment activity of anchors and suppliers**
   - Deliver on local employees, real living wage, decent work

3. **Ensure land value, property and investments benefit local economy**
   - Democratic capture of financial return and land and property appreciation. Not extractive.

4. **Develop diverse economy with more local ownership**



Preston 2012-
A 6 year journey.....

Preston’s Local Wealth Building: A new economic ecosystem

- Growing local businesses (5 years in)
- Lancashire Bank (in development)
- Use of local pension funds for local investment (in development)
- Local food networks (established)
- Platform cooperative (established)
- Local energy company(in development)

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The local matters!

- More value is being placed on local services, local products.
- Small local firms generate 58% more benefit for local economies than large local firms.


WHEN YOU BUY
FROM A SMALL
BUSINESS, YOU'RE
NOT HELPING A
C.E.O BUY A 3RD
HOLIDAY HOME.
YOU'RE HELPING A
LITTLE GIRL GET
DANCE LESSONS,
A LITTLE BOY HIS
TEAM JERSEY, MAMS
& DADS PUT FOOD
ON THE TABLE.
SHOP LOCAL.
KING PRAWN
CURRY

Local Wealth building: Anchor Institutions

Anchor Institutions: Sticky Capital! Play a significant and role in a locality - Size & scale – **Purchaser/procurer, employer with land, property and assets**

Housing providers

Voluntary and community sector

Private Businesses

Education providers

Hospitals

Local government

Police

BOROUGH
OF
SOUTH SHIELDS.

THE WATCH COMMITTEE
ARE READY TO RECEIVE

TENDERS

For the Supply of the Borough Police Constables with

14 TOP COATS, Of dark blue Pilot Cloth;

14 PAIRS OF TROUSERS,

Of dark blue Pilot or Police Cloth, and

14 HATS.

Patterns of the Cloth and Hats, together with Sealed Tenders, addressed to the Town Clerk, and endorsed "Tender for Police Clothing" to be sent in to Superintendent BUGLASS, at the Police Station, on or before Thursday next, the 10th instant.

The lowest Tenders will not necessarily be accepted.

By order of the Watch Committee,

THOMAS SALMON,

TOWN CLERK.

Town Clerk's Office,
5th November, 1853

Preston: Starting point

Total spend of all 6 anchors 12/13

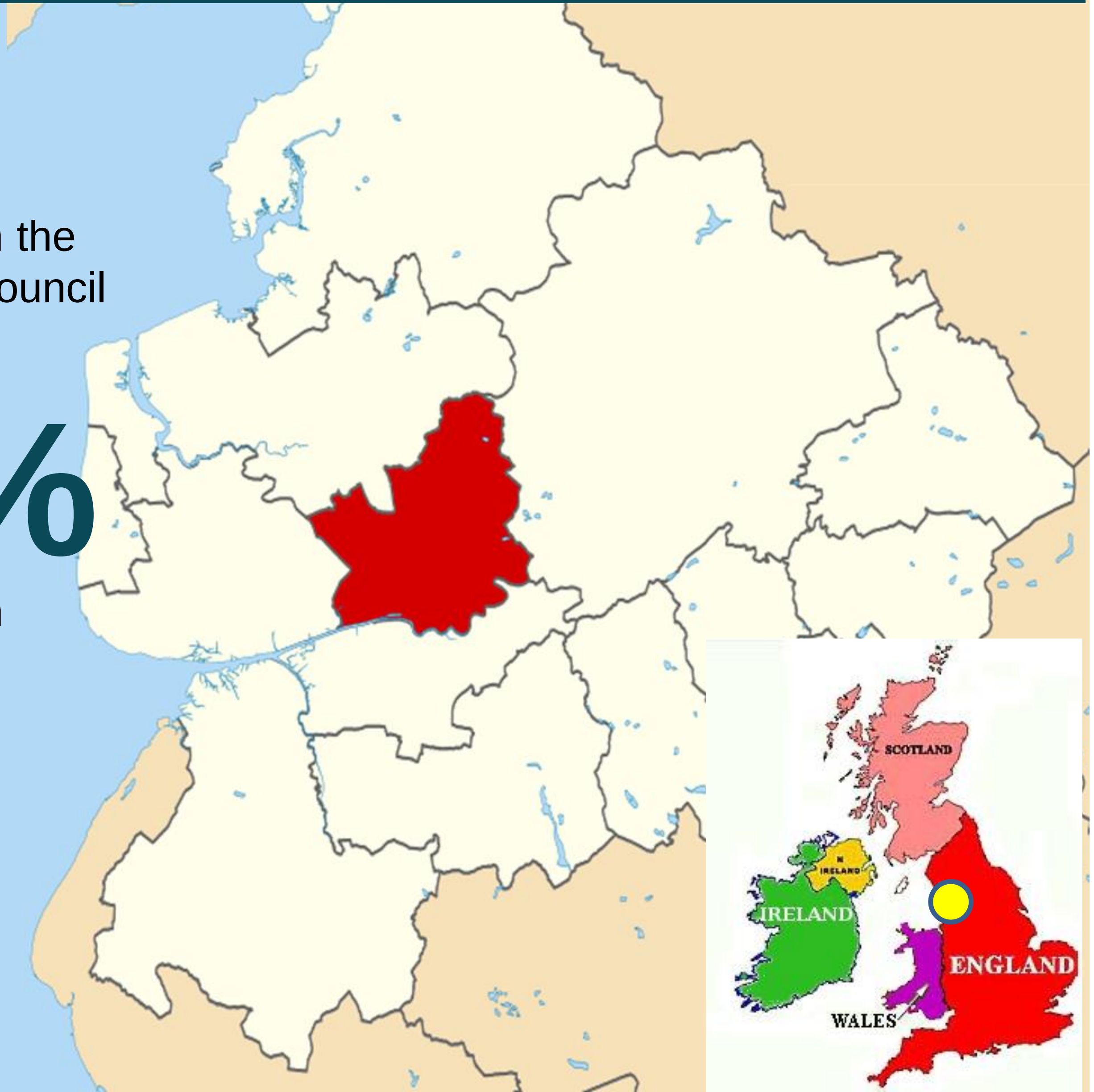
£750m

5%

of spend within the Preston City Council boundary

39%

of spend within the Lancashire economy



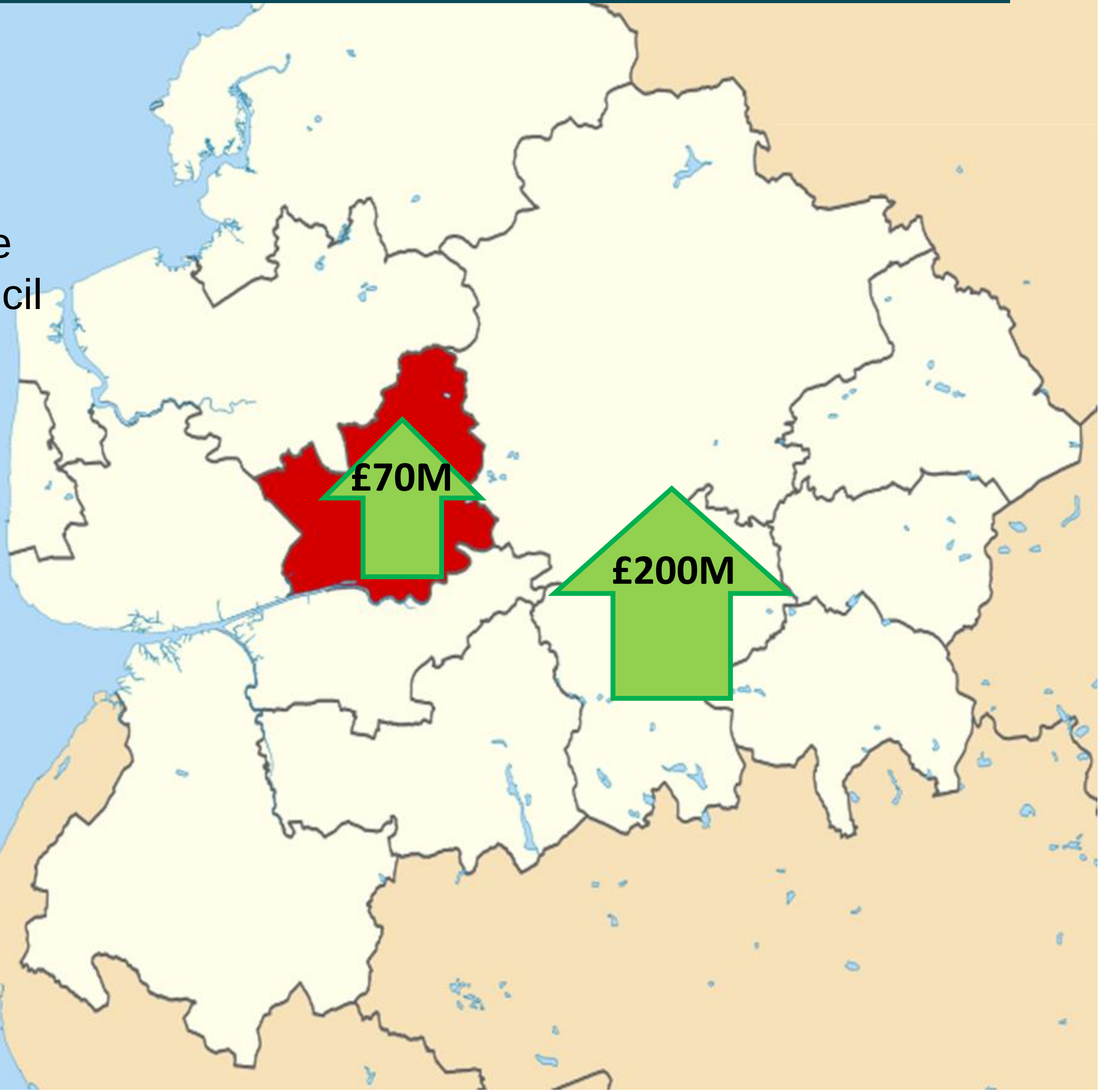
The change: Preston and Lancashire county

18%

of spend within the Preston City Council boundary

80%

of spend within the Lancashire economy



Final Thoughts

- Strategy into action.

- Role of strategy is about creating contexts for good things to happen

'The essence of strategy is choosing what not to do'

Michael Porter, Economist.

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think do

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Director of Work and Wellbeing
Department for Communities
Sharron Russell

Delivering Social and Economic Outcomes

INTEGRATED STRATEGY FOR
TOURISM | REGENERATION | ECONOMIC DEVELOPMENT
Ards and North Down 2018–2030

DfC
Department
for Communities
www.communities-ni.gov.uk

Ards and North Down Borough Council

Our Role in Delivering Social & Economic Outcomes through Good Work

Sharron Russell

Director, Work & Wellbeing
Department for Communities

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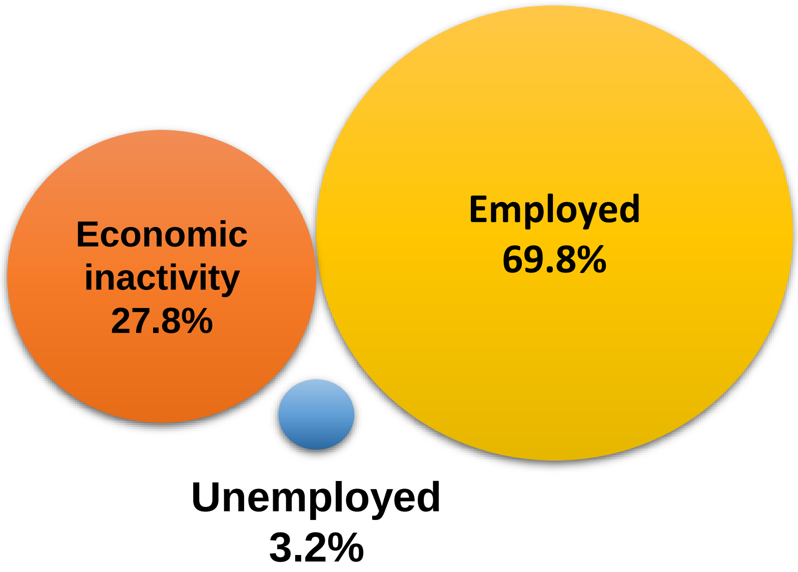
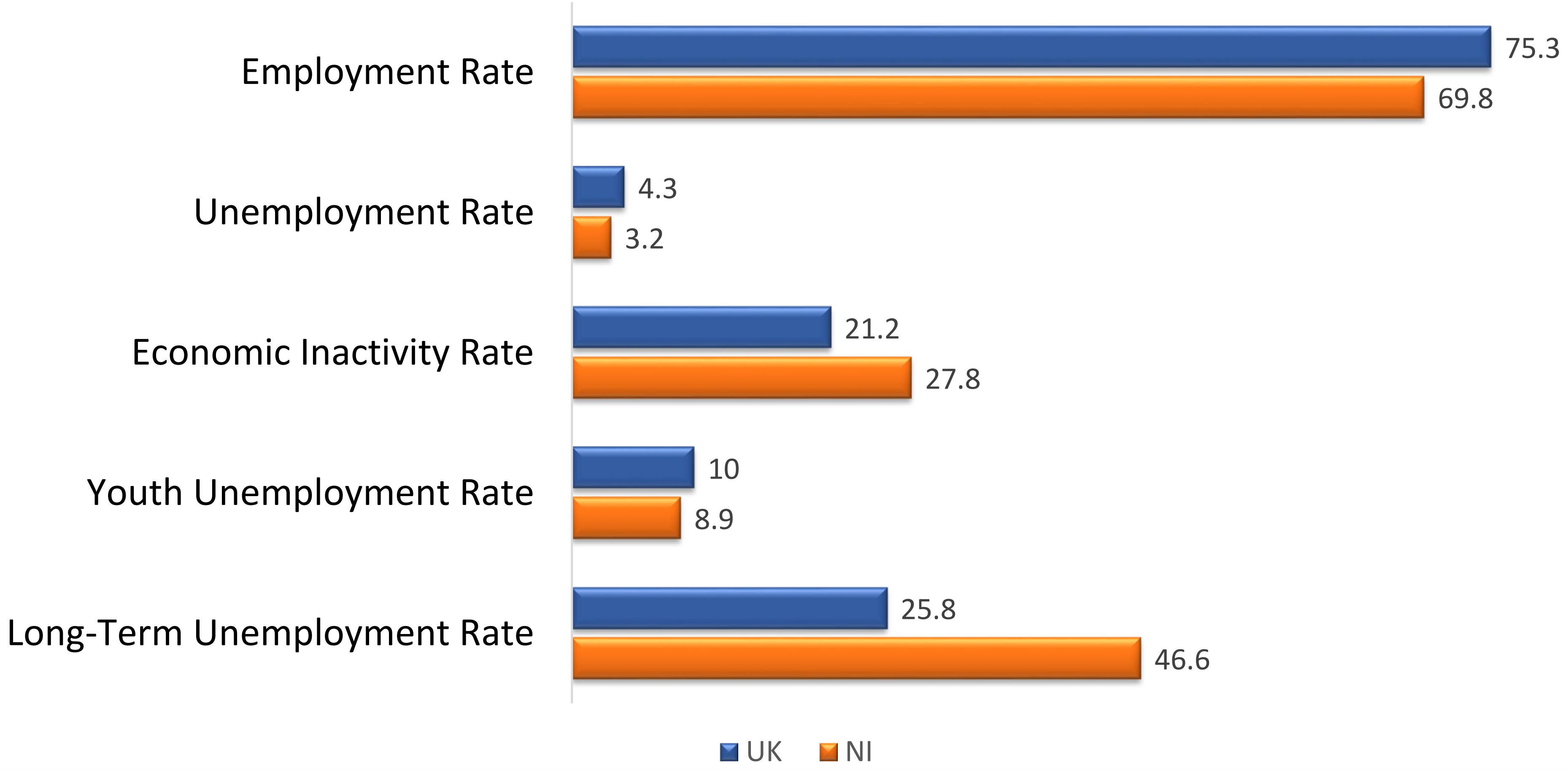
Northern Ireland Labour Market – quick glance



Labour Force Survey Nov – Jan 2018

Northern Ireland Labour Market Challenges

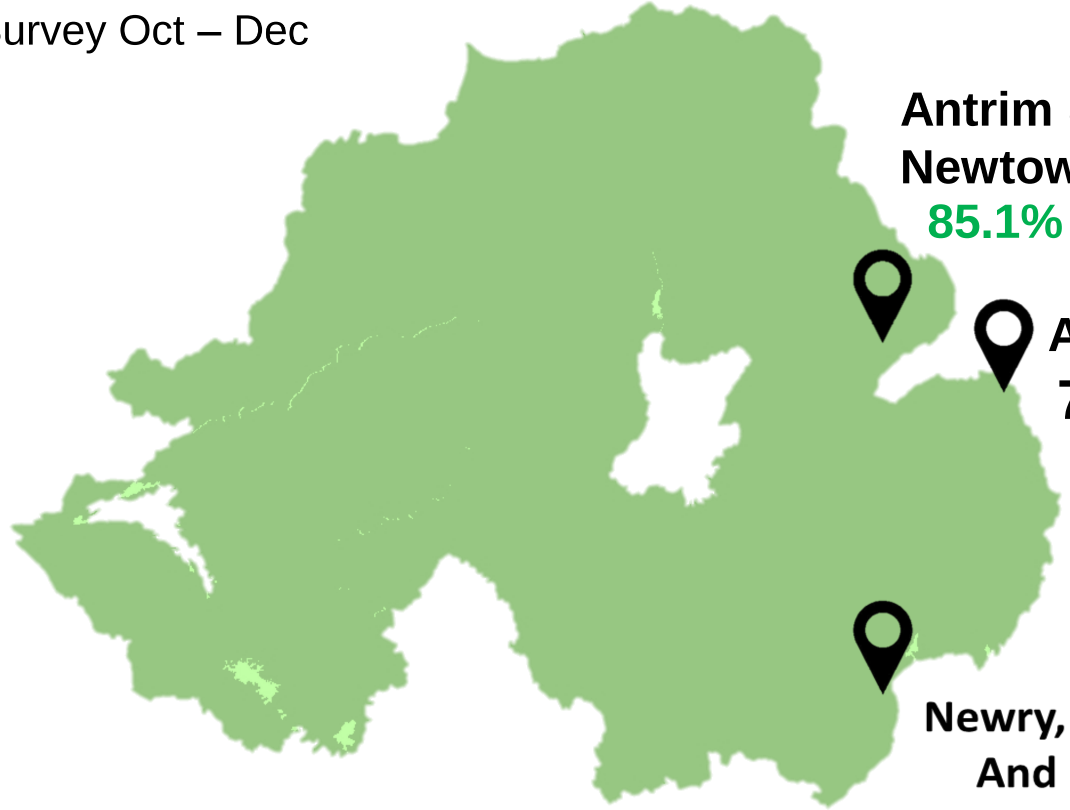


Source: Labour Force Survey Nov-Jan 2018

DfC Department for Communities www.communities-ni.gov.uk

Employment Rates in Northern Ireland

Labour Force Survey Oct – Dec 2017



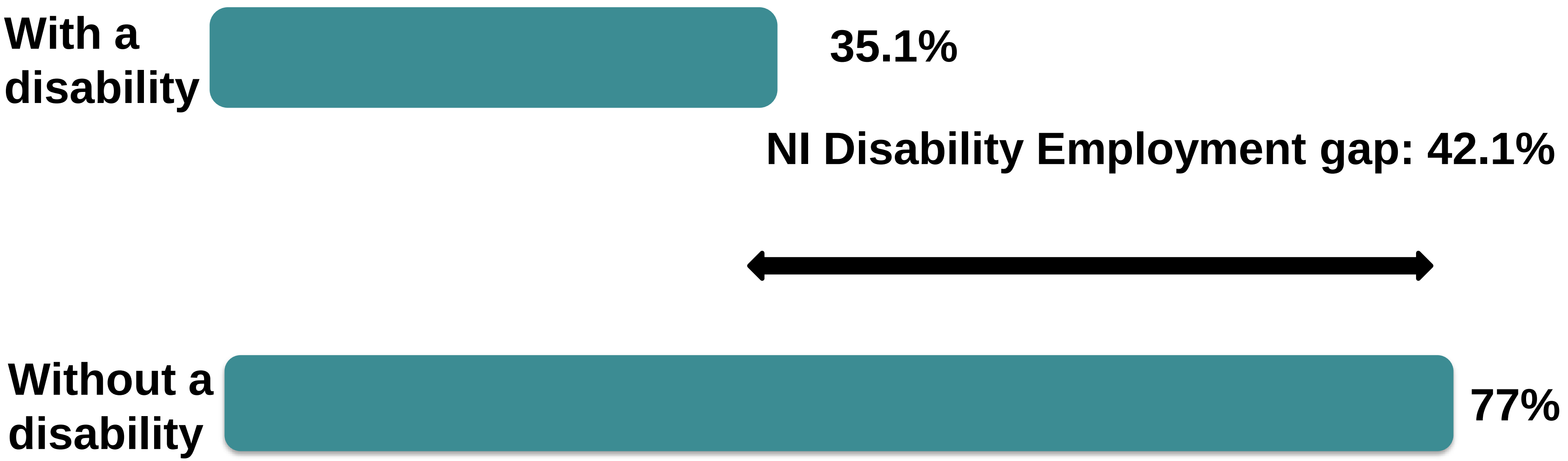
Antrim & Newtownabbey
85.1% Highest employment rate

Ards & North Down
71.4%

Newry, Mourne And Down
59.1% Lowest employment rate

Disability Employment Gap: Northern Ireland

Employment rate for people:



Source: Quarterly Supplement to the Labour Market Report July – September 2017

DfC
Department for Communities
www.communities-ni.gov.uk

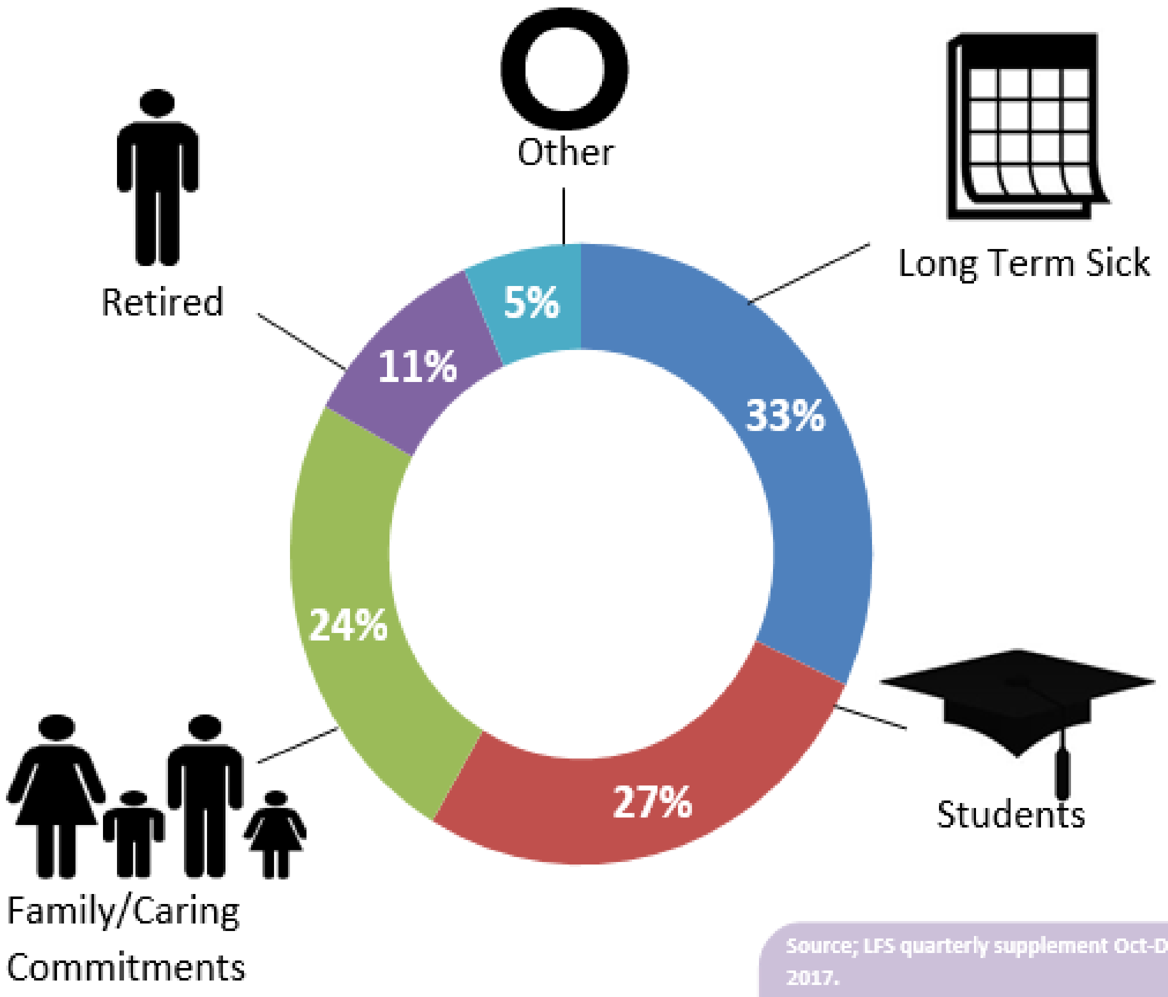
Economic Inactivity in Northern Ireland (Age 16-64); Labour Force Survey, Oct-Dec 2017

333,000

People in Northern Ireland Economically Inactive (Age16-64)

- **110,000** Long Term Sick
- **90,000** Students
- **80,000** Family/Caring Commitments
- **37,000** Retired
- **16,000** Other

*Calculated from LFS percentages



Source; LFS quarterly supplement Oct-Dec 2017.

Icons are creative Commons, labelled for reuse.

Percentages may not sum to 100% due to rounding.

What We Know

- Work is good for our health (particularly our mental health) – needs to be the right work.
- Work remains the best route out of poverty.
- 30,000 (approx.) people claim sickness benefits for the first time each year - between **45 and 50%** come directly from a job.
- Low unemployment v high economic inactivity - a limited future labour supply (economic and social costs)
- Link between worklessness, poor health outcomes, poverty and disability.

Draft Programme for Government

Outcomes

Indicators - Performance Measures

- **Indicator 17,** Economic inactivity rate excluding students;
- **Indicator 19,** % population living in absolute and relative poverty (before housing costs);
- **Indicator 32,** Employment rate of 16-64 year olds by deprivation quintile;
- **Indicator 33,** % of people working part-time who would like to work more hours.

Draft PfG Commitments

New Policy Commitments

- **Work & Wellbeing Service including Health & Work Conversation:** engaging in first weeks of claim to Employment Support Allowance
- **Work-focused rehabilitation**: extend Condition Management Programme to GPs (social prescribing)
- **Public awareness campaign** - health and wellbeing benefits of work: “Work Works!”
- **Local Works!** - Employability Forum in each council area to better match supply and demand, creating pipeline / pathways
- **Improving in-work support and formal mentoring** (in and out of work)
- **Policy & Programme Review** (reporting in late 2018)

Local Works!

Community Planning

Employability Forum, Ring Fencing Local Job Opportunities – Buy Social

Developing Employability Pathways

Hospitality & Tourism, Health & Social Care & Retail

Bringing together our collective funding, re-shaping existing policies, programmes and services, addressing gaps

Buy Social

EURES

JobCentre Online
visit www.jobcentreonline.com

Redundancy Clinics

Employer Engagement Service

Employers Online

EURES CROSS BORDER PARTNERSHIP

Factors Impacting Employability

- Recruitment & selection procedures
- Identification & articulation of skills needs
- Specific nature of skills required
- Training & development strategies

- Employer Attitude & behaviours
- Benefit & tax credit levels
- Real & perceived wage levels
- Infrastructure
- Childcare
- Variable working patterns

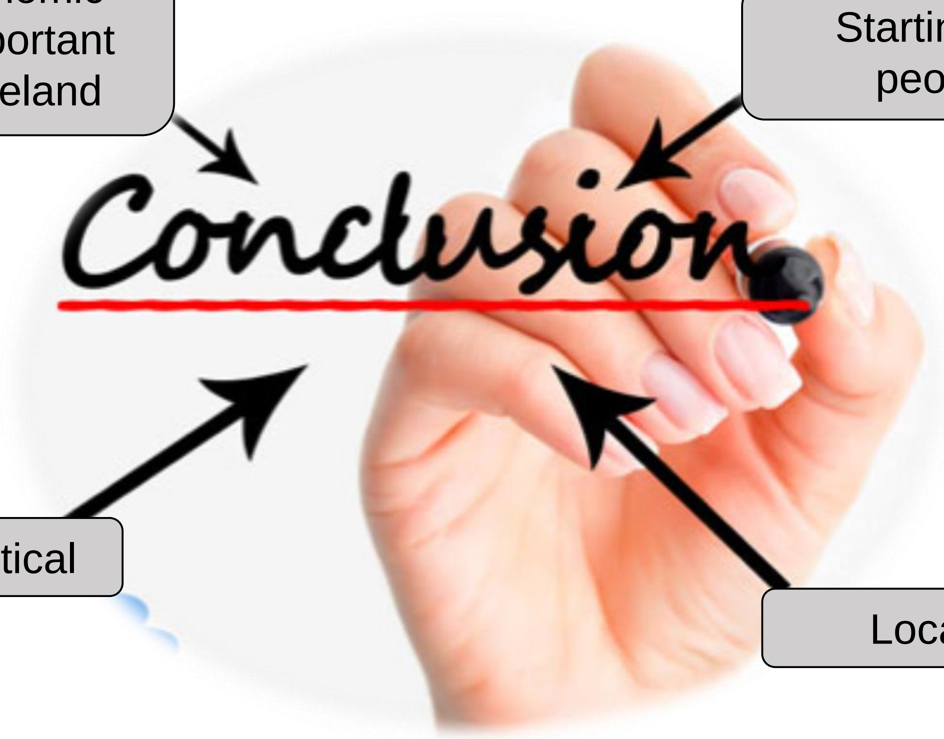
Improving Lives –The Future of Work, Health and Disability

Improving and joining up across the three key settings:

- the welfare system;
- the workplace; and
- the healthcare system

Reducing economic inactivity is important for Northern Ireland

Starting from where people are now



Culture change critical

Local Works!

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Interactive Panel

INTEGRATED STRATEGY FOR
TOURISM | REGENERATION | ECONOMIC DEVELOPMENT
Ards and North Down 2018–2030

Ards and North Down Borough Council

Thank You

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Ards and North Down Borough Council

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Department for Communities
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Delivering Social and Economic Outcomes

Pre-Consultation Workshop on Employability Programmes and Services by the Department for Communities