

Local Development Plan – Preparatory Studies: Discussion Paper 14: Tourism	21st December 2016
Planning Committee	

Linkage to Council Strategy (2015-19)	
Strategic Theme	Outcome
Leader and Champion	<ul style="list-style-type: none"> • Our Elected Members will provide civic leadership to our citizens working to promote the Borough as an attractive place to live, work invest and visit.
Innovation and Transformation	<ul style="list-style-type: none"> • The Council will embrace new technologies and processes where they can bring about better experiences for citizens and visitors.
Protect the environment in which we live	<ul style="list-style-type: none"> • All environments in the area will benefit from pro-active decision making which protects the natural features, characteristics and integrity of the Borough; • Our citizens will be given the maximum opportunity to enjoy our natural environments.
Lead Officer	Sharon Mulhern
Cost:	N/A

For Decision

1.0 Background

1.1 This is the fourteenth and final topic-related preparatory paper presented to Members, and relates to Tourism. The purpose of this paper is to provide Members with background information relating.

1.2 This purpose of the paper is to provide Members with information on:

- The role of tourism in the Draft Programme for Government;
- The regional planning policy context relating to tourism provision and issues to be addressed in the Local Development Plan (LDP);
- An overview of other regional strategies and plans that relate to tourism;
- Relevant Council publications; and
- An overview of tourism statistics relating to the role of tourism in the Borough.

1.3 This information will be kept under review and will be presented to Members, when necessary, throughout the LDP process.

2.0 Financial Implications

2.1 None.

3.0 Other Implications

3.1 None

4.0 Recommendation

4.1 **IT IS RECOMMENDED** that Members endorse the use of the information contained within this paper in the preparation of the Local Development Plan.

Appendix 1

Discussion Paper 14: Tourism.



Draft Local Development Plan Preparatory Studies

Discussion Paper 14: Tourism

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1.0 Introduction

1.1 The purpose of this paper is to provide Members with information on:

- the role of tourism in the Draft Programme for Government Framework;
- the regional planning policy context for tourism provision and issues to be addressed in the Local Development Plan (LDP);
- an overview of other regional strategies and plans that relate to tourism;
- relevant Council publications; and
- an overview of tourism statistics relating to the role of tourism in the Borough's economy and the levels of existing demand for accommodation in the Borough.

1.2 The report does not generally identify the Borough's various tourist attractions.

2.0 Draft Programme for Government Framework 2016–2021

2.1 The Draft Programme for Government Framework sets out the current priorities that the Northern Ireland Executive will pursue and the actions it will take to address the programme's priorities. The Draft Programme was issued for public consultation from May to July this year. The Draft Programme has fourteen Strategic Outcomes. Strategic Outcome Number 12 is:

'We have created a place where people want to live and work and to visit and invest' (page 39).

2.2 Tourism is seen as one of the key elements, along with encouraging business investment, and creating a local sense of pride, to the success of this outcome:

'It is about encouraging others to come to visit and explore, to be inspired by what we have to offer as a tourist destination and to want to return.' (Page 39.)

2.3 The role of the Executive in the achievement of this outcome is set out as its contributions, which include:

- *Developing an internationally competitive and inspiring tourist destination of which our community can be proud; and*
- *Recognising the economic importance of tourism and the potential to grow the tourism industry into a high-performing export-led sector.* (Page 39.)

2.4 The Draft Framework has forty two indicators which include one that is tourism focused, and others that are inter-related:

- *Improve our attractiveness as a destination;*
- *Increase shared space;*
- *Improve cultural participation; and*
- *Improve our international reputation* (page 40).

2.5 The lead measure associated with the indicator, 'Improve our attractiveness as a destination', (Number 30) is:

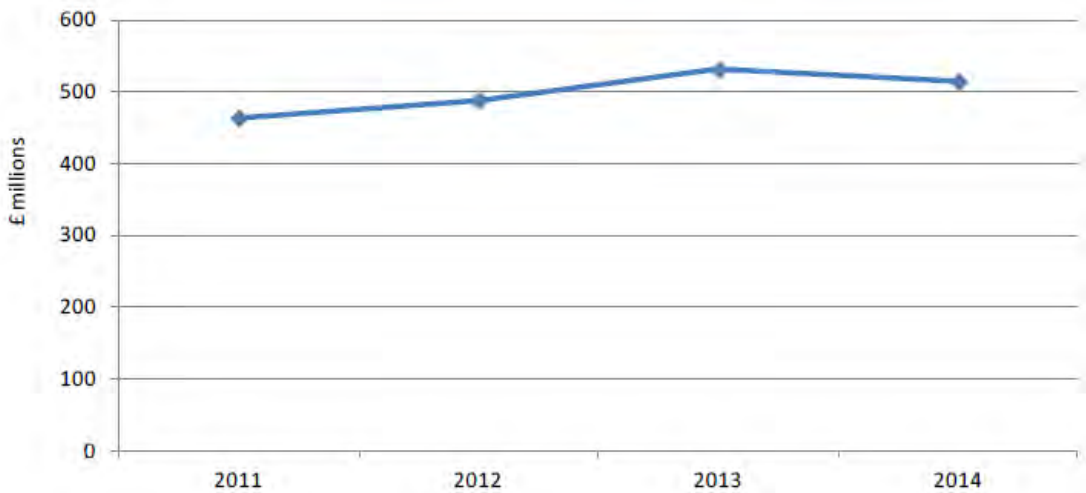
- *Total spend by external visitors.*

2.6 This indicator is considered important as the Executive views the tourism and hospitality industry as one of Northern Ireland's key service sectors and economic

pillars, and offers one of the best opportunities to strengthen the economy. The Programme considers there is huge growth potential in this industry.

- 2.7 Graph 1 below illustrates the growth in the total expenditure of external overnight trips to Northern Ireland since 2011, which stands, at the 2014 figure, at over £500 million.

Graph 1: Total Expenditure of External Overnight Trips to Northern Ireland, 2011- 2014 (£ millions)



(Source: <https://www.northernireland.gov.uk/sites/default/files/consultations/newnigov/draft-pfg-framework-2016-21.pdf>)

- 2.8 In terms of the inter-related indicators, ‘*Increase shared space*’, (Number 31), refers to the use of spaces by Protestants and Catholics, however, the indicator is relevant as it relates to the freedom of movement that those unfamiliar with an area should unconsciously perceive. Indicator Number 27, ‘*Improve cultural participation*’, has potential benefits in encouraging visitors and creating a ‘cultural tourism’ offer. Indicator Number 40, ‘*Improve our international reputation*’, also has a tourism aspect, as it notes that it is becoming increasingly important to understand how Northern Ireland is viewed and thought of by other countries:

Our international reputation will affect people’s willingness to live, study, visit, do business with, and invest in Northern Ireland, and this has a significant impact on our economy’ (Page 111.)

3.0 Northern Ireland Economic Strategy: Priorities for Sustainable Growth and Prosperity

- 3.1 The Executive published its Northern Ireland Economic Strategy in March 2012. The Strategy’s 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 a growing employment and prosperity for all. (Page 9, paragraph 1.5.)

- 3.2 The Strategy identifies the tourism sector as one that has and will continue to make an important contribution to the development of the Northern Ireland economy. Its collective goal for the tourism sector is:

to double the income we earn from tourism by 2020,

recognising there is a continued need for public investment in many areas and across a range of partners, to deliver a distinctive world class tourism product throughout Northern Ireland (page 68, paragraph 5.83).

- 3.3 The Strategy identifies a number of Key Rebalancing Measures that aim to address the overreliance on the public sector by growing the private sector. Two of the Key Rebalancing Measures under Business Growth are to:

- *Increase visitor numbers and revenue to 4.2m and £676m respectively by December 2014; and*
- *Support projects that improve competitiveness, encourage diversification of the rural economy, improve quality of life in rural areas and that protect and enhance the environment, including through the introduction of National Parks. (Page 11.)*

- 3.4 Under its SWOT analysis, the Strategy identifies the following as External Opportunities:

*Attract more overseas tourism; and
Potential for greater East–West and North–South co-operation. (Page 27.)*

- 3.5 The role of transportation in achieving the potential for growth in the tourism sector is recognised:

The tourism sector also provides enormous opportunities for our economy. We have set out ambitious targets to further grow the sector and the revised Regional Transportation Strategy recognises the need to improve connections to key tourism sites. (Page 28, paragraph 2.30.)

- 3.6 The Strategy noted that 2012 was to be a significant year for tourism with a number of events and investment including:

A total of £300m of infrastructure investment will come on stream, including the completion of key tourism attractions at Titanic Belfast and the Giant’s Causeway Visitor Centre. (Page 28, paragraph 2.31.)

- 3.7 The Business Growth: Key Actions that relate to tourism are to:
support the tourism sector, focusing investment on strategically significant areas including developing the capability of the industry and the quality of the visitor experience and delivering sustained marketing programmes to priority customers. (Page 60, paragraph 5.51.)

4.0 Northern Ireland Tourism Strategy and Policy

- 4.1 The Department for the Economy has the responsibility for developing tourism strategy and policy in Northern Ireland. The Department commissioned an independent review (the Hunter Review) in 2013 with the overall aim to ensure that current organisational structures are the optimum necessary to deliver the targets and actions set out in the Economic Strategy and the Programme of Government and are aligned with the work of Invest NI. One of the review’s key recommendations

was the need to develop a Tourism Strategy. The Department is leading on this, working very closely with Tourism NI, Tourism Ireland and other stakeholders. The intention for the new Tourism Strategy is to set the future direction for tourism within the context of a refocused Economic Strategy, as there is a new appreciation of the potential for tourism to contribute to the growth of the economy, jobs and investment. Public consultation on the Draft Strategy is due to take place by the end of this year.

4.2 The Department is also preparing a Draft Tourism Accommodation Policy.

5.0 Regional Planning Policy Context

i. Regional Development Strategy 2035 (RDS)

5.1 The RDS is Northern Ireland's overarching strategic framework and spatial context for development plans and planning policies. The RDS contains strategic planning guidance under its three themes – Economy, Society and Environment.

5.2 One of the RDS's eight aims is to:

Protect and enhance the environment for its own sake.

5.3 The commentary attached to this aim states:

Protecting the environment is essential for enhancing the quality of life of current and future generations. Northern Ireland's environment is one of its greatest assets, with its stunning landscapes, an outstanding coastline, a complex variety of wildlife and a rich built and cultural heritage for the ecosystem it provides, and its sense of place and history for all.

5.4 Members will recall Diagram 2.3: Spatial Framework for Northern Ireland, from the RDS, which is reproduced in Appendix 1. This diagram identifies the following areas within the Borough as Strategic Natural Resources:

- Foyle Estuary;
- Causeway Coast;
- Antrim Coast and Glens; and
- Sperrins.

5.5 Strategic guidance RG4: 'Promote a sustainable approach to the provision of tourism infrastructure' (pages 35-36) refers to the sense of pride that investment in tourism through new facilities can bring to the people of Northern Ireland, and the opportunity to get maximum benefit from our environmental and heritage assets, including health benefits in exploring our tourism assets. RG4 highlights the following three matters:

- **Promote a balanced approach that safeguards tourism infrastructure while benefiting society and the economy.** Sufficient choice of the right type of visitor accommodation in the right place is important, as is an adequate supply of things to do. All new or extended infrastructure required to support and enhance the tourist industry needs to be sensitively sited with proper regard to both the tourism need and the natural and built environment it seeks to serve.
- **Improve facilities for tourists in support of the Tourist Signature Destinations.** Stakeholders need to work together to invest in access, accommodation and visitor facilities in support of such destinations, to ensure all

parties including the public benefit from improved facilities that support our tourism assets.

- **Encourage environmentally sustainable tourism development.** Development of tourism infrastructure needs to be appropriate to the location to ensure that the natural assets are protected and enhanced.

5.6 Strategic Guidance RG2: 'Deliver a balanced approach to transport infrastructure' includes a reference to the role the transport network has in facilitating tourist travel including improved connections to key tourism sites.

ii Strategic Planning Policy Statement (SPPS)

5.7 The SPPS recognises the importance of tourism to the Northern Ireland economy:

Tourism makes a vital contribution to the Northern Ireland economy in terms of the revenue it generates, the employment opportunities it provides, and the potential it creates for economic growth. As well as direct spending on holiday accommodation and use of tourist amenities, tourism plays an important role in helping to support the viability of many local suppliers, services and facilities. It can improve assets and provides infrastructure for local people and tourists, supporting the vibrancy of Northern Ireland's culture and heritage, and sustaining communities. (page 97, paragraph 6.251.)

5.8 The SPPS advises that sustainable tourism development is brought about by balancing the needs of tourists and the tourism industry with conserving the tourism asset. It recognises the planning system has a key role in managing tourism-related development through:

planning policies that provide a framework for identifying appropriate development opportunities and safeguarding tourism assets from harmful development (page 97, paragraph 6.254).

5.9 Planning also has a role in securing high quality design, and integrating tourism provision with necessary infrastructure.

5.10 The aim of the SPPS in relation to tourism development is to:

Manage the provision of high quality tourism developments in appropriate locations within the built and natural environment. (Page 97, paragraph 6.255.)

5.11 The SPPS defines a tourism asset as:
Any feature associated with the built or natural environment which is of intrinsic interest to tourists. (Page 99, footnote 56.)

Regional Strategic Objectives

5.12 The Regional Strategic Objectives for tourism are to:

- Facilitate 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; and
- Ensure a high standard of quality and design for all tourism development.

Regional Strategic Policy

- 5.13 The SPPS advises that councils, as part of the LDP process, shall bring forward a tourism strategy, together with appropriate policies and proposals that must reflect the aim, objectives and policy approach of the SPPS, tailored to the specific circumstances of the area (Page 98, paragraph 6.257).
- 5.14 In the preparation of LDPs (and in the determination of planning applications), the SPPS states the following strategic policy:
- There will be a general presumption in favour of tourism development within settlements, subject to normal planning requirements.
 - In the countryside planning authorities must carefully manage tourism development. This is necessary in the interests of rural amenity, wider sustainability objectives and the long term health of the tourism industry. The guiding principle should be to ensure policies and proposals facilitate appropriate tourism development in the countryside (such as appropriate farm diversification schemes, the re-use of rural buildings and appropriate redevelopment and expansion proposals for tourism purposes) where this supports rural communities and promotes a healthy rural economy and tourism sector. Where there is no suitable site within a settlement a new build hotel, guest house, or tourist hostel may be appropriate on the periphery of a settlement subject to meeting normal planning requirements. Other acceptable tourist development in the countryside may include appropriate self-catering accommodation, particularly in areas where tourist amenities and accommodation have become established or likely to be provided as a result of tourism initiatives, such as the Signature Projects, or a new or extended holiday park that must be a high quality and sustainable form of tourism development.
 - Policies or proposals for major tourism development in the countryside may be provided for in exceptional circumstances. Proposals must demonstrate; exceptional benefit to the tourism industry; and sustainable benefit to the locality, and that a countryside location is required by reason of its size or site specific or functional requirements.
 - The safeguarding of tourism assets, such as AONBs, conservation areas, historical and archaeological sites, and certain beaches, from unnecessary, inappropriate or excessive development is a vital element in maintaining a healthy tourism industry. To allow such development could damage the intrinsic character and quality of the asset and diminish its effectiveness in attracting tourists. Accordingly, planning permission should not be granted for development that would, in itself or in combination with existing or approved development in the locality, have an adverse impact on a tourism asset, such as to significantly compromise its tourism value. (Pages 98-99, paragraphs 6.259 - 6.262.)

Implementation

- 5.15 The SPPS advises that councils, in plan-making, should consider how best to facilitate the growth of sustainable tourism, tailored to the needs and assets of the

council area and informed by relevant stakeholders. The SPPS highlights that the LDP tourism strategy should reflect wider Government tourism initiatives and should address:

- how future tourism demand is best accommodated;
- safeguarding of key tourism assets;
- identification of potential tourism growth areas;
- environmental considerations; and
- Contribution of tourism to economic development, conservation and urban regeneration. (Page 99, paragraph 6.263.)

5.16 The LDP should include policies to safeguard tourism assets, together with policies for tourism development such as tourist accommodation and tourist amenities, along with criteria for consideration of such proposals.

5.17 Given the definition of a tourism asset relates to the built and natural environment, the other sections in the SPPS relating to Archaeology and Built Heritage, Open Space, Sport and Outdoor Recreation, Coastal Development, Transportation, Development in the Countryside, and Natural Heritage are also relevant. As examples, in the Archaeology and Built Heritage section, paragraph 6.2 reads:

It [the RDS] also regards built heritage as a key marketing, tourism and recreational asset that, if managed in a sustainable way, can make a valuable contribution to the environment, economy and society.

The Section: Open Space, Sport and Outdoor Recreation, paragraph 6.200 reads:

Open space can enhance the character of ... civic buildings, conservation areas, listed buildings and archaeological sites. It can also help to attract business and tourism and thereby contribute to the process of urban and rural regeneration.

5.18 Transportation acknowledges the potential role of disused transport routes in the tourism offer (paragraph 6.301).

iii. Planning Policy Statements (PPSs)

a. PPS 16: Tourism (June 2013)

5.19 PPS 16: Tourism highlights the contribution tourism makes to the Northern Ireland economy in terms of the revenues it generates, employment opportunities and the potential it creates for economic growth. The aim of the PPS is to manage the provision of sustainable and high quality tourism developments in appropriate locations within the built and natural environment. Its objectives 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; and

- ensure a high standard of quality and design for all tourism development.

5.20 PPS 16 contains the following tourism policies:

- TSM 1** Tourism Development in Settlements;
- TSM 2** Tourist Amenities in the Countryside;
- TSM 3** Hotels, Guest Houses and Tourist Hostels in the Countryside;
- TSM 4** Major Tourism Development in the Countryside – Exceptional Circumstances;
- TSM 5** Self Catering Accommodation in the Countryside;
- TSM 6** New and Extended Holiday Parks in the Countryside;
- TSM 7** Criteria for Tourism Development; and
- TSM 8** Safeguarding of Tourism Assets.

5.21 These tourism specific policies are complimented by other tourism related planning polices contained within PPS 21, for example Policy CTY 4 (conversion and re-use of an existing building) and PPS 4, for example Policy PED 4 (redevelopment of an established economic use in the countryside).

b. PPS 2: Natural Heritage (July 2013)

c. PPS 6: Planning, Archaeology and the Built Heritage, and Addendum: Areas of Townscape Character

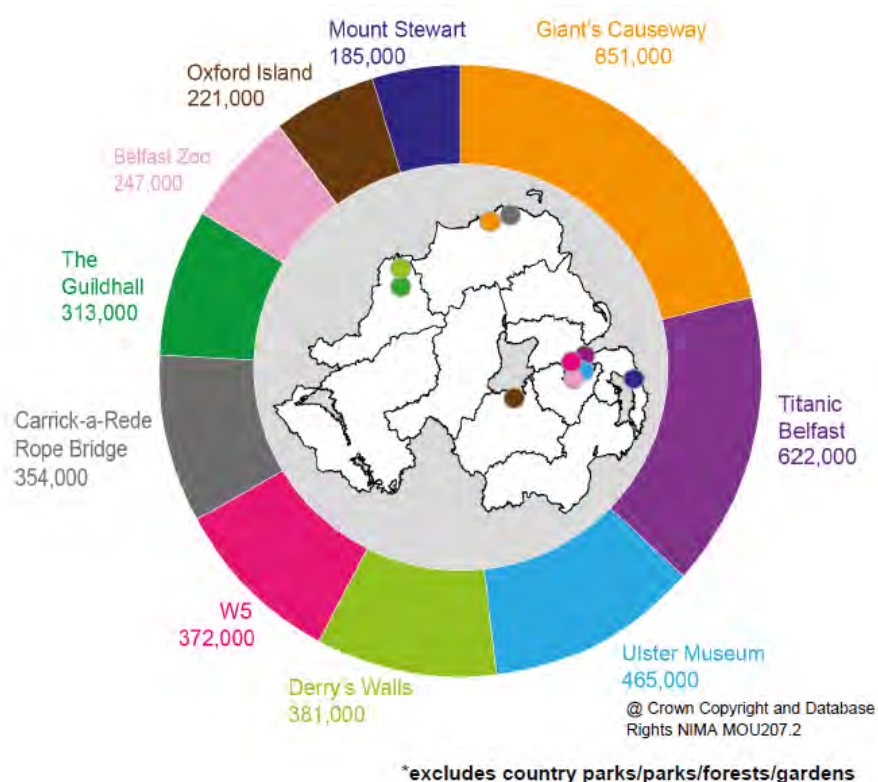
5.22 These PPSs are also highlighted, given the importance of the Borough's natural and built environment to the tourism product.

6.0 Northern Ireland's Top Ten Visitor Attractions 2015

6.1 The Borough contains two of the top ten visitor attractions in Northern Ireland in 2015 – the Giant's Causeway (No. 1) (851,000 visitors) and the Carrick-a-Rede Rope Bridge (No. 6) (354,000 visitors). Both of these attractions are owned by the National Trust.

6.2 The level of visitors to these, and other popular attractions in the Borough, has obvious planning consequences, for example in terms of the physical movement of people to the attractions, the associated on-site facilities required to service visitors, and the potential impact of visitor pressure on the physical condition of the attraction itself and on the overall visitor experience.

Diagram 1: Northern Ireland's Top Ten Visitor Attractions 2015



Source: <https://www.economy-ni.gov.uk/sites/default/files/publications/economy/Local-Government-District-Publication-2015-%28July-2016%29.pdf>

7.0 Tourism Statistics for Northern Ireland and the Borough

7.1 The Northern Ireland Statistics and Research Agency (NISRA) publishes a range of tourism related reports including an annual Northern Ireland tourism statistics by council area. The most recent statistics were published in July this year and relate to 2015. The report includes information on overnight trips, rooms sold in commercial accommodation, visitor attraction visits, tourism employment and cruise ship visits. NISRA states that two key measures of tourism activity are the measures of overnight trips and associated expenditure.

7.2 The tables below were compiled from the statistics in this report.

i. Overnight Trips and Associated Expenditure 2015

Table 1 demonstrates the importance of the tourism market to the local economy, and the dominance of the holiday tourism market in the Borough. Table 2 highlights that 66% of visitors to the Borough are from Northern Ireland, whilst North American and Other European visitors account for only 3% of visitors each. In the Northern Ireland context, local visitors account for 48% of trips, whilst North American and Other European account for 6% and 6% respectively.

Table 1: Overnight Trips and Associated Expenditure 2015

	Trips	Expenditure	Purpose
CC&G	20% (911,000)	18% (£137 million)	68% holiday, 22% visiting friends & family, 4% business
Belfast	29% (1.36 million)	36% (£278 million)	41% holiday, 37% visiting friends & family, 17% business

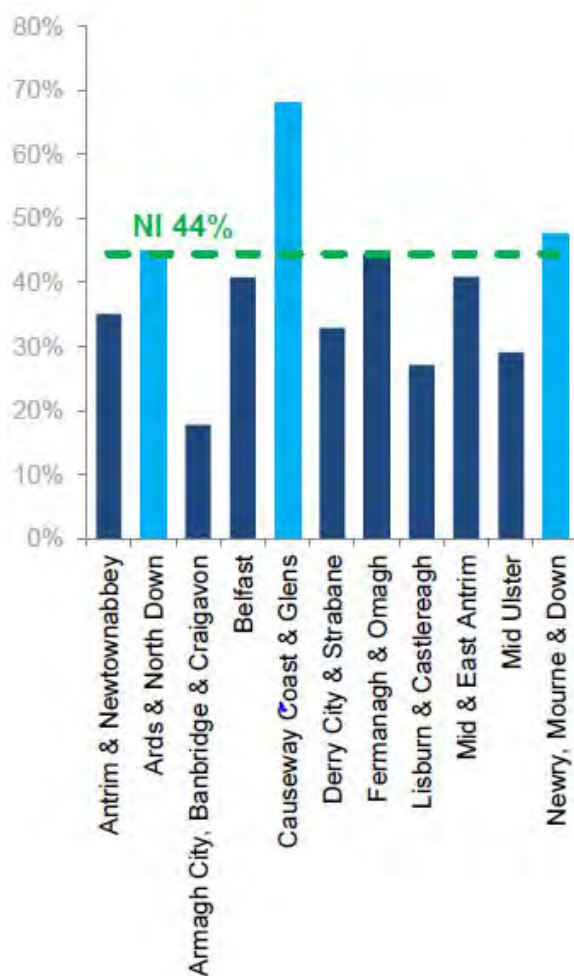
Source: NISRA: <https://www.economy-ni.gov.uk/articles/local-government-district-tourism-statistics>, Additional Tables: Columns 3 & 3 – Table 1: Estimated Overnight Trips & Expenditure, Column 5: Reason for Visit

7.3 Graphs 2 and 3 demonstrate the differing level of importance of the Holiday and Leisure Overnight Trips market and to the Business Trips market to the Borough.

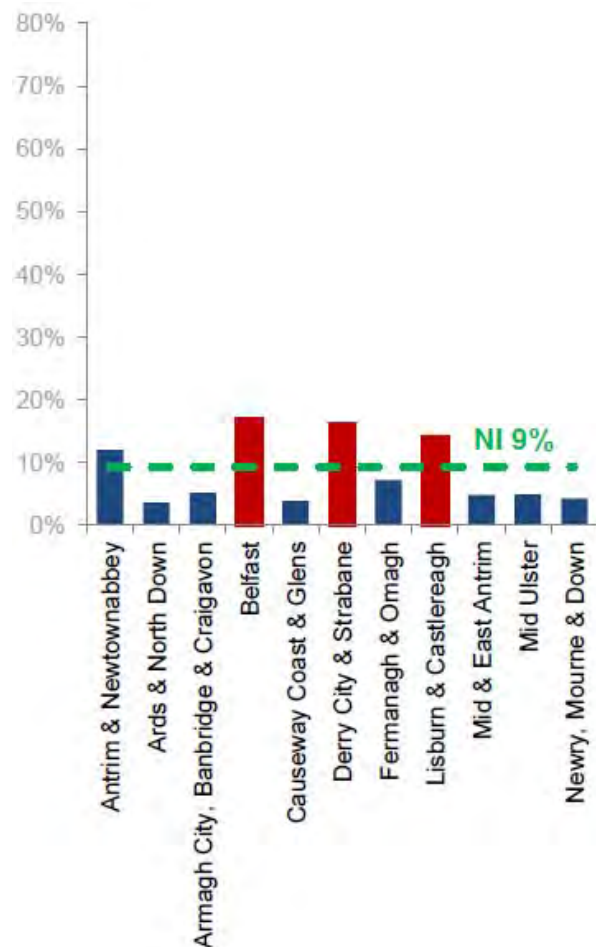
Graph 2: Overnight Trips Associated with Holidays and Leisure (3 Year Rolling Average 2013-2015)

Graph 3: Overnight Trips Associated with Business (3 Year Rolling Average 2013-2015)

Graph 2



Graph 3



Source: <https://www.economy-ni.gov.uk/sites/default/files/publications/economy/Local-Government-District-Publication-2015-%28July-2016%29.pdf>

Table 2: Estimated Overnight Trips by Place of Origin, Three Year Average 2013-2015

	NI	GB	Other European	N America	Other	All
CC&G	520,754	121,785	26,763	23,001	98,638	790,942
NI	2,181,671	1,282,582	296,077	288,169	504,358	4,492,861

Source: NISRA Tourism Statistics Additional Tables, Table 6

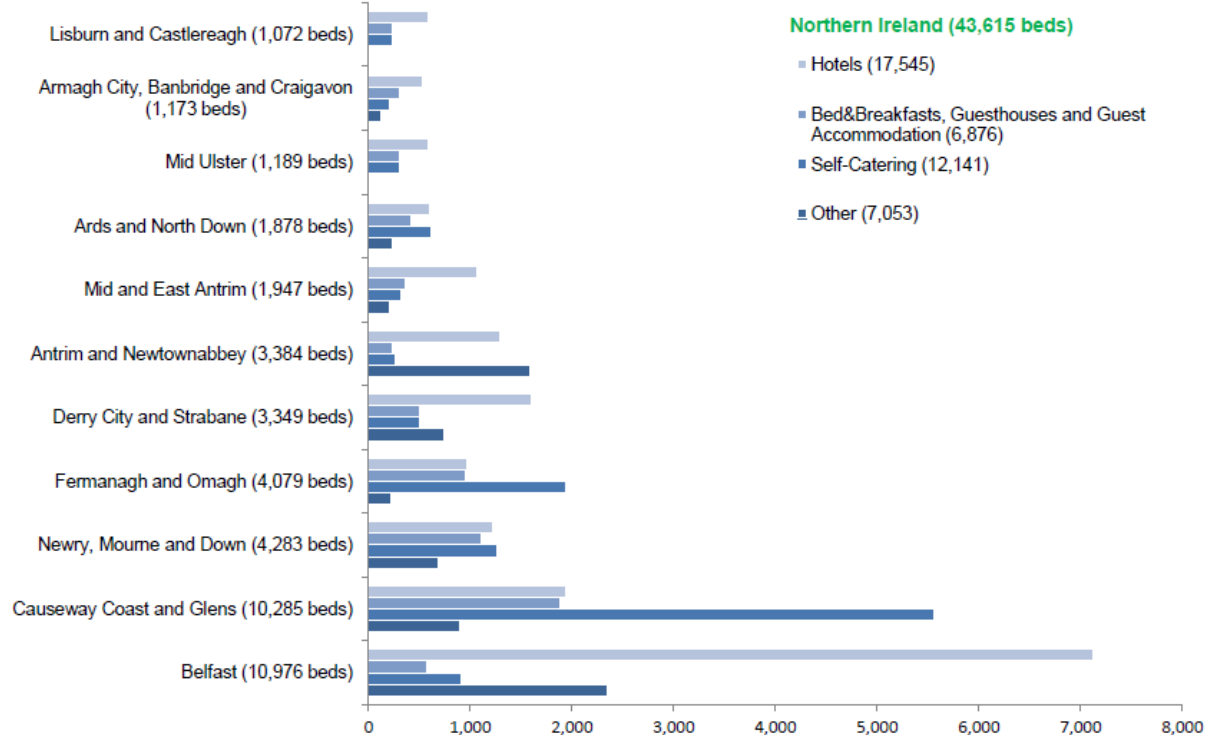
- ii. Licensed Accommodation and Occupancy Rates
- 7.4 Overall, the Borough has 10,285 licensed bed spaces in total, which represents 24% of all bed spaces in Northern Ireland, second to Belfast at 25%. However, the tables below demonstrate the different composition of the bed spaces, and the levels of occupancy rates for each.

Table 3: Composition of Bed Spaces 2015

	Hotel	Guest house	B&B	Guest acc'n	Self-cater	hostel	campus	Bunk-house	All
CC&G	1,942	439	1,412	25	5,563	494	364	46	10,285
Belfast	7,130	84	251	240	919	472	1,880	0	10,976
NI	17,545	1,655	4,240	981	12,141	2,369	4,583	101	43,615

Source: NISRA Tourism Statistics Additional Table 11: Accommodation by LGD 2015

Graph 4: Number of Beds available in Licensed Accommodation by Accommodation Type and Local Government District, 2015



Source: <https://www.economy-ni.gov.uk/sites/default/files/publications/economy/Local-Government-District-Publication-2015-%28July-2016%29.pdf>

- 7.5 The following tables provide information on the occupancy rates for Hotels, Bed & Breakfasts, Guesthouses and Guest Accommodation, and for Self-catering over specified time periods.

Table 4: Hotel Occupancy Rates 2011-2015

	2011		2012		2013		2014		2015	
Occupancy Rates	Bed-Space	Room	Bed-Space	Room	Bed-Space	Room	Bed-Space	Room	Bed-Space	
NI	57%	42%	64%	47%	64%	46%	65%	46%	67%	50%
CC&G	57%	38%	59%	38%	58%	39%	59%	39%	59%	38%

Source: NISRA Tourism Statistics Additional Tables 12-14: NI Hotel, Bed & Breakfast and Guest House. Data at 21/7/16

Table 5: Occupancy Rates for Bed & Breakfast, Guesthouses and Guest Accommodation 2013-2015

	2013		2014		2015	
Occupancy Rates	Room	Bed-Space	Room	Bed-Space	Room	Bed-Space
NI	30%	22%	28%	21%	27%	20%
CC&G	28%	21%	33%	26%	28%	23%

Source: NISRA Tourism Statistics Additional Table- NI Hotel, Bed & Breakfast and Guest House. Data at 21/7/16

Table 6: Occupancy Rates for Self-Catering Accommodation 2011-2015

	2011		2012		2013		2014		2015	
Occupancy Rates	Annual	Peak	Annual	Peak	Annual	Peak	Annual	Peak	Annual	Peak
NI	27%	40%	27%	41%	31%	42%	33%	45%	36%	48%
CC&G	27%	44%	25%	40%	27%	42%	28%	41%	33%	48%

Source: Department for the Economy, Tourism Statistics Table – Self-catering Survey, NISRA. Peak = April- September. Data at 21/7/16

- 7.6 These tables demonstrate that the existing tourism accommodation in the Borough generally has spare capacity. Self-catering stock provides the largest amount of tourist accommodation and, even at peak times, it remains less than half full.

iii. Potential Areas for Tourism Growth.

- 7.7 The NISRA Local Government District Tourism Statistics bulletin 2015 provides commentary on aspects of tourism that may offer the potential for growth in the local area. It notes that the number of cruise ships visiting Northern Ireland has

increased from 32 in 2011, to 67 in 2015, with the associated increase in passenger numbers from 58,000 in 2011 to 123,000 in 2015. Of the 67 ships, 58 docked in Belfast, 6 in Londonderry and 3 in other locations. The bulletin noted:

Many cruise ship passengers will go on trips to other areas (for example from Belfast to the Giant's Causeway). (Page 14.)

- 7.8 NISRA notes that many of the visitors to the Borough do not stay in it:

It is possible that a person could stay in one location in NI, yet day trip in another part of NI or in the Irish Republic. For example, a significant number of visitors influenced to visit NI by the Giants Causeway do not stay in the Causeway Coast and Glens LGD (page 2).

- 7.9 The bulletin notes the influence of other factors on tourism:

Tourism can be influenced by a number of factors. Alongside initiatives from government and tourism agencies, events and trends can have an impact. In 2015, NI hosted world sporting events such as the Irish Open in May and the opening stages of the Tall Ships in July. Local film industries, such as the Game of Thrones, showcased local locations and may also have had an impact on visits to these areas. (Page 2.)

- 7.10 An attempt to retain visitors to the Borough for overnight and longer stays has a potential implication on the level and quality of visitor accommodation. NISRA's tourist accommodation statistics illustrate that there is sufficient capacity in the present main categories of tourist accommodation, even at peak times, to meet demand, although there is no commentary on the quality of the accommodation. Improvement in the quality of accommodation does not, normally, have a particular planning aspect, for example star ratings relate to the range of facilities available to guests such as the level of comfort of rooms, en-suite facilities in hotels and guesthouses, and controlled heating, provision of a washing machine, and colour TV in self-catering accommodation.

8.0 Council Publications

- 8.1 The role of tourism, and the inter-relationship between its contribution to the local economy and the need to protect the various natural and built environmental assets on which much of the Council's tourism base is founded is recognised by the Council in various publications.

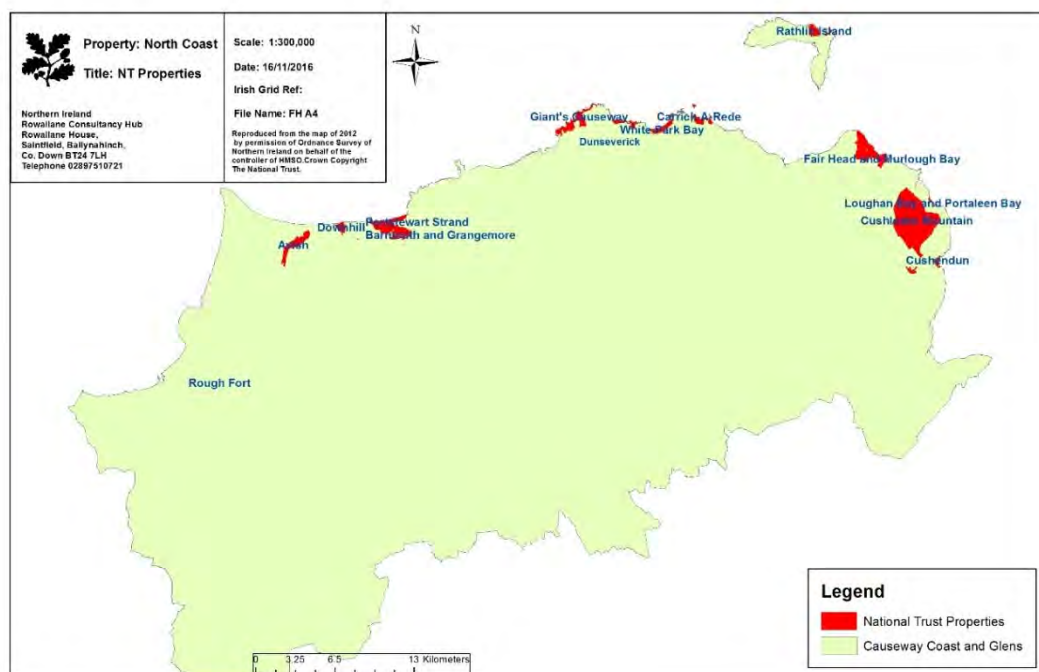
i. Visit Causeway Coast Website

- 8.2 The Council's dedicated tourism website (<https://www.causewaycoastandglens.gov.uk/see-do/visit-causeway-coast-and-glens>) states that tourism is a key economic activity and a major prosperity driver for the area. The website identifies that people come to the Borough to: *enjoy its range of events, resorts, the great outdoors, the scenic beauty, restaurants and nightlife.*

- 8.3 The website recognises the multi-disciplinary nature of tourism provision and highlights the Council's partnerships with the following:
- Causeway Coast and Glens Heritage Trust;
 - Tourism Northern Ireland;
 - Tourism Ireland;
 - National Trust;
 - Central Government; and
 - the private, voluntary and community sector.
- 8.4 The Council's focus on the development of the tourism industry in the Borough is on:
- Generating more visitors, motivating them to spend longer and visit throughout the year;
 - To develop initiatives that will encourage growth in specific sectors and enhance the area's tourism provision;
 - Support our tourist operators and encourage new businesses to be more competitive and innovative;
 - To establish a Destination Management Organisation within the Council area;
 - Carrying out research; and
 - Monitoring tourism activity.
- 8.5 The website lists attractions, activities, what's on, places to stay, visitor information, amongst others. Its 'Must Sees' are:
- The Giant's Causeway,
 - Mussenden Temple and Downhill Demesne,
 - Roe Valley Country Park,
 - Glenariff Forest Park,
 - Old Bushmills Distillery,
 - Carrick-a-Rede Rope Bridge, and
 - Dunluce Castle.
- 8.6 The website also provides brochures for download under the following headings:
- Area Guides;
 - Event Guides;
 - Maps;
 - Tours; and
 - Walks and Trails.
- ii. Causeway Coast and Glens Tourism and Destination Management Plan 2015 – 2020**
- 8.7 The Tourism and Destination Management Plan identifies the economic importance of tourism within the Borough:
- Tourism is worth £110 million per annum by overnight expenditure excluding day visits.
 - 4751 tourism related jobs in the Borough, and about 12% of its employment.

- 8.8 Key issues identified in the Plan include a high dependence on domestic visitors from within Northern Ireland, and a short tourist season confined to the four summer months in which half the visits and value from tourism are experienced.
- 8.9 The plan aims to deliver:
- *Benefit to the economy;*
 - *Support for our local community ; and*
 - *Protection and enhancement of the built and natural environment.*
- 8.10 Under its Issues and Opportunities, the Plan includes the following:
- The need to spread the benefits of tourism through the dispersal of visitors to other areas in the Borough (dispersal) without neglecting the ‘honey pots’;
 - The need to protect and develop the natural and built environment. Improve access and activity opportunities to areas of public space and the area’s natural environment;
 - Product development needs to keep pace with visitor expectations. The assessment of market fit and introduction of new products is needed to sustain existing and attract new markets and deliver on the marketing promises. This includes the presentation of our public realm in towns, villages and countryside; and
 - A co-ordinated approach to destination management to forge links with economic, urban and rural development, coast and countryside management and tourism operators amongst others.
- 8.11 The need for collaborative partnership working is recognised by the Council. As an example, many of the Borough’s coastal related tourism destinations are owned by the National Trust as illustrated on the Map below:

Map 1: Extent of National Trust Ownership within the Borough



Source: National Trust

State Care Monuments

8.12 Another landowner with multiple tourism assets in the Borough is the Department of Communities, Historic Environment Division. State Care Monuments are those in public ownership or guardianship, and represent all periods of human settlement from around 7,000 BC to the 20th century. There are twenty seven State Care Monuments in twenty four locations in the Borough, and around 190 in Northern Ireland overall. The locations of State Care Monuments in the Borough are shown on Map 2: State Care Monuments, and include the:

- Mortello Tower, Magilligan,
- Mountsandel Fort, Coleraine,
- Dungiven Priory,
- Dunluce Castle,
- Lisnaduff Earthworks, Portballintrae,
- Bonamargy Friary, Ballycastle, and
- Layd Church, Cushendall.

8.13 State Care Monuments are statutorily protected as Scheduled Historic Monuments or Listed Buildings, and the Department seeks to provide public access to them. Some of the more popular sites, such as Dunluce Castle, are staffed throughout the year and have dedicated visitor facilities. The provision of visitor facilities at these sites helps to enhance an understanding and appreciation of a monument's historic significance, and increase dwell time at the site, although careful site management is required to ensure the integrity of the historic and tourism asset is not undermined by such development.

8.14 The Council's Tourism and Destination Management Plan identifies the following key objectives to maximise tourism potential:

- *Generate more visitors, motivate them to spend longer in the area and visit throughout the year.*
- *To support tourism operators throughout the council area to start up new business and to grow and be more competitive and innovative.*
- *To develop initiatives that will encourage growth in specific sectors and enhance the areas tourism provision.*

iii. Causeway Coast and Glens Biodiversity Action Plan 2013-2018

8.15 This document highlights the Borough's key habitats and species, why they are important and how they can be conserved or enhanced. The Plan recognises that the Borough is one of the most beautiful and spectacular regions in Northern Ireland and its importance for tourism. The Plan seeks to link with the other Council plans and others, such as the Tourism Action Plan and the AONB Management and Action Plans. Local actions include collaboration with the Council's tourism and education programmes to promote the biodiversity, tourism and educational importance of the marine environment, for example in relation to whale and dolphin watching in the area.

9.0 Other Relevant Publications

i. Rathlin Island Action Plan 2016 – 2020

9.1 The Department for Infrastructure published the Action Plan in September this year, which accompanies the Rathlin Island Policy published in March 2010. The Rathlin Island Policy aims to promote a vibrant sustainable island community while protecting the environment. One of the strategic objectives of the policy is:

- To increase the community's capacity to participate in sustainable economic and tourism development, while protecting the environmental and natural assets.

9.2 Rathlin has an economy where tourism plays a significant role based on its unspoilt environment, wildlife, built heritage and its ability to cater for visitors.

9.3 The Action Plan has five themes:

- Island Connections;
- Access to Services;
- Island community;
- Island Economy; and
- Environment

9.4 Under the theme: Island Economy, tourism and the unspoilt environment is viewed as pivotal to Rathlin's future:

The development and promotion of Rathlin tourism and environmental products has been and will continue to be key to the growth of the Island's economy. The Island's creative industries and its natural capital are prime tourist draws. (Page 18.)

9.5 The Action Plan recognises that remoteness can be positive for economic growth from a tourism and environmental perspective.

9.6 Elements of the Action Plan are common throughout the Borough, for example:

- The need to extend the season;
- Infrastructure provision;
- Its environmental designations;
- Develop and promote the tourism product to improve the tourism experience; and
- The importance of the aesthetic appeal of the area.

ii. Rathlin Island Local Biodiversity Action Plan – The Nature of Rathlin and Its Townlands

9.7 Rathlin community published this local biodiversity plan in November 2015, which emphasises the strong link between tourism and biodiversity. It notes that, in recent years, approximately 30,000 visitors a year have visited, mainly as day visitors, for a range of reasons including for its variety of birdlife. The benefit of the link between biodiversity, tourism and infrastructure in the island's physical connection to the mainland is also highlighted:

The attraction for visitors of Rathlin's rich biodiversity plays a key part in maintaining the frequent ferry service to and from our island. (Tourism section.)

10.0 Causeway Coast and Glens Tourism Assets

- 10.1 The list of partners identified by the Council in its website illustrates the importance of the Borough's built and natural environment in its tourism offer. The following is not an exhaustive list, but highlights some of those that have a potential planning implication, for example in terms of balancing the needs of tourists, including the provision of associated facilities to support visitors to the attraction, with the protection of the quality of the environment:

Natural Heritage

- 10.2 Internationally and nationally recognised environmentally designated sites, such as the Giant's Causeway and Causeway Coast World Heritage Site (WHS), RAMSAR sites, Special Areas of Conservation (SACs), Special Protection Areas (SPAs), Areas of Scientific Interest (ASSIs); AONBs; coastline, waterways, and mountains.

Built and Archaeological Heritage

- 10.3 Conservation Areas, Listed Buildings, Castles, Scheduled Ancient Monuments, standing stones.

Other Major Attractions

- 10.4 Old Bushmills Distillery
Carrick-a-Rede Rope Bridge
Rathlin Island
Filming locations
- 10.5 In relation to the Tourist Signature Destinations outlined in the RDS, the Giant's Causeway, Antrim and Causeway Coast was identified as a Signature Project in the Tourism Strategy for Northern Ireland – Draft Tourism Strategy for Northern Ireland 2020, published by the Department for Trade and Industry in 2010. The aim of the signature project was to develop key tourism sites along the Causeway Coastal Route, including the Giant's Causeway visitor centre, which opened in 2012. The Causeway Coastal Route is a 190 km (120 miles) long designated, way marked drive around the coast of Northern Ireland from Belfast to Londonderry with nine shorter scenic drives. It has its own dedicated website:
<http://www.causewaycoastalroute.com>.

Examples of the Potential Impacts of Tourism on Tourism Assets

a. Game of Thrones

- 10.6 The TV series, 'Game of Thrones', has been a major influence on visitor numbers to the Borough in recent years. Many of the scene locations for the series are within the Borough and there is presently a thriving tourism industry based on the series. The Daily Telegraph reported on 9th June 2015:

A county in Northern Ireland has seen the biggest rise in global interest of anywhere in the UK this year thanks to Game of Thrones (GoT). County Antrim is home to a number of filming locations of the popular fantasy TV series, leading to a huge spike in searches on the TripAdvisor website over the past 12 months. The area in the Ulster province experienced a 65 per cent growth in interest from around the world, nearly double the increase that second place Bristol saw (37 per cent), and a 47 per cent increase from travellers in the UK.

- 10.7 However, the manifestation of tourist pressure and the need for its management has become obvious recently with the success of the Game of Thrones on locations such

as Ballintoy Harbour and the Dark Hedges, where visitor numbers have escalated dramatically and the capacity of the areas to absorb this additional volume of visitors is challenged, for example in terms of parking provision at the harbour and the impact of wear and tear on the Dark Hedges trees and grass verges. The road is the responsibility of Transport NI, and the Dark Hedges Preservation Trust, through the Causeway Coast and Glens Heritage Trust, was established in 2011, with the aim to seek to preserve, enhance and protect the site for future generations.



Ballintoy Harbour experienced a significant rise in visitor numbers associated with the 'Game of Thrones' TV show. This has caused congestion and parking issues for cars and coaches on occasion.



The Dark Hedges, Gracehill, was once little known and off the beaten track. It has recently witnessed a significant increase in visitor numbers and issues associated with site management and visitor infrastructure provision.



This photograph of the Dark Hedges was taken on 25th October 2016.

b. Port Moon Bothy on the North Coast Kayak Trail

10.8 Port Moon bothy is located at Port Moon, Dunserverick to the east of the Causeway Headlands and the Giant's Causeway and Causeway Coast World Heritage Site. It is located within the North Antrim Coast SAC and the Causeway Coast AONB. The building was previously used as a fisherman's shelter, but had become rundown. The building has been restored to its original state and represents an example of a sustainable reuse and refurbishment of a local vernacular building with historic interest. The bothy won the Best New Outdoor Activity Venue at the OutdoorNI.com Awards 2012. The project is an example of how planning policy can benefit both the local historic environment and tourism, by retaining a locally significant building and providing a unique visitor experience on the North Coast Kayak Trail from the sea or for walkers along the Ulster Way from a steep cliff top path.



Source: *CanoeNI website*

11.0 Distribution of Planning Applications in the Borough for New Tourist Accommodation Since 2010

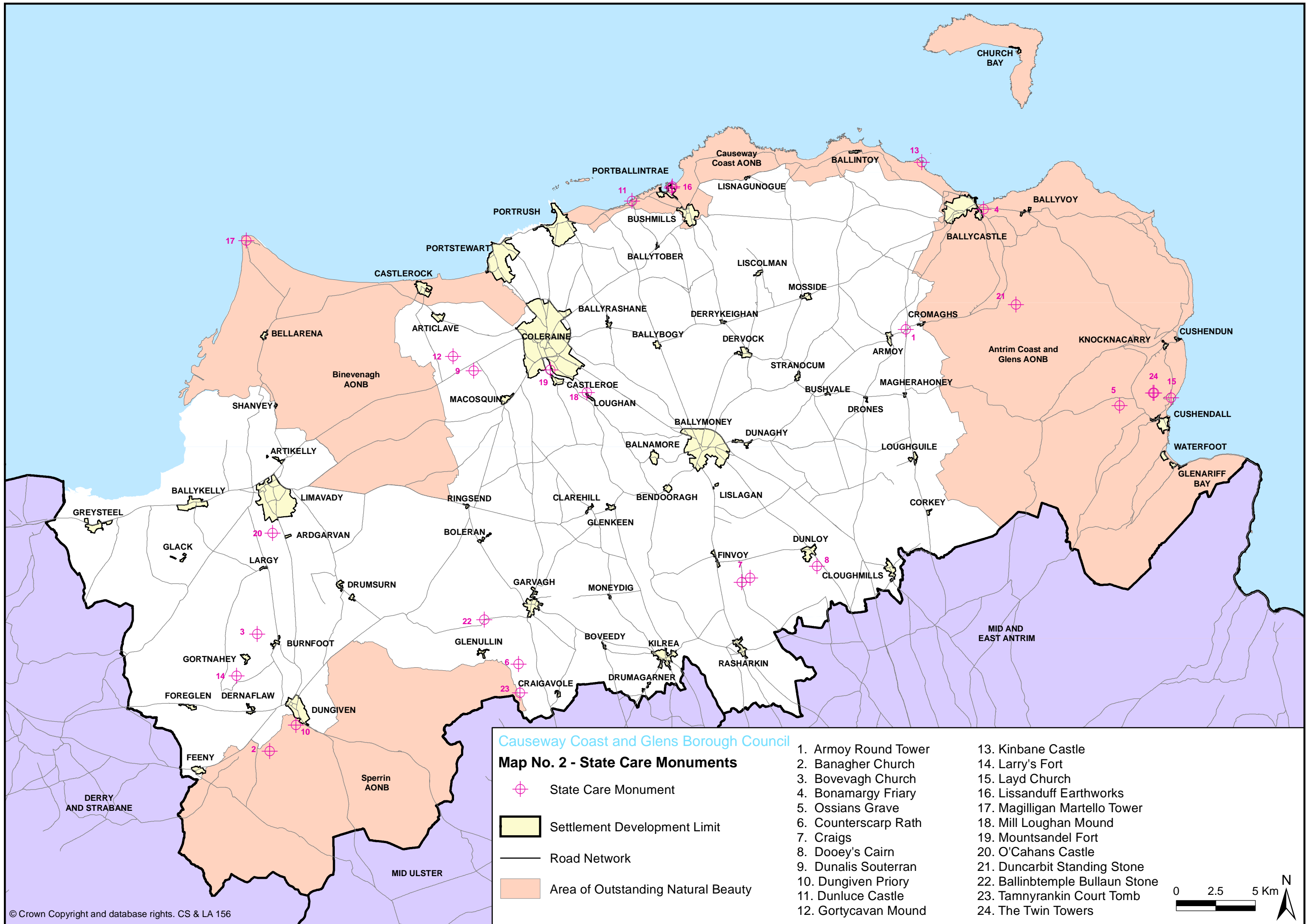
11.1 Information is presented to assist in identifying those areas of the Borough that have experienced recent development pressure for new tourist accommodation. Maps 3 and 3a provide information on the extent of environmental designations in the Borough and the distribution of planning applications for the following range of tourist accommodation since 1st January 2010:

- Hotels;
- Guest houses;
- Guest accommodation;
- Self-catering;

- Hostels; and
 - Camp-sites.
- 11.2 Map 2 illustrates there has been a widespread distribution of applications for tourist accommodation and, as the figures presented earlier in the paper indicated, most pressure applications are for self-catering accommodation. Map 3 also demonstrates the majority of applications have occurred in the coastal area, and around the Portrush – Portballintrae – Bushmills area. Map 3a provides further detail on this area, expanded to include Castlerock to Ballycastle. The maps illustrate that applications have occurred both in settlements and in the countryside, but greater pressure is evident in the countryside. The maps also illustrate that pressure occurs in environmentally sensitive areas, such as in the lower lying parts of the AONBs, as well as in areas with more limited environmental constraints such as south of Ballintoy, to the west and east of Ballymoney and south of Bushmills. Pressure for tourist accommodation is less evident to the west, south and east of Limavady.





12.0 Conclusions

- 12.1 The Northern Ireland Executive's economic strategies view tourism as a key economic growth opportunity. This is supported by regional planning policy which recognises the need to protect and enhance our tourism assets, many of which relate to the built and natural environment, while facilitating development in an environmentally sensitive manner. Tourism assets are defined as any feature that is associated with the built or natural environment which is of intrinsic interest to tourists.
- 12.2 Tourism in the Borough is a significant economic factor to its economy, and the Council's other publications demonstrate how the Borough's attractions are part of a comprehensive overview, seeking to acknowledge and address the issues of tourism provision with appreciation of the environment.
- 12.3 Regional planning policy provides clear guidance as to the future direction of tourism policies and proposals in LDPs. It refers to the focus for tourism development in settlements, and the need to manage carefully tourism development in the countryside. Major tourism development in the countryside is exceptional and benefits must be identified. The SPPS also recognises the need to safeguard tourism assets to ensure development does not compromise significantly their tourism value.
- 12.4 Evidence indicates the level of development pressure for new tourism accommodation in the Borough, while there is significant remaining capacity in the current provision of all types of visitor accommodation in the Borough even at peak times.
- 12.5 The role of planning is to ensure tourism facilities and attractions are located in the more appropriate place to meet visitors' requirements whilst safeguarding the tourism assets they come to appreciate and enjoy.

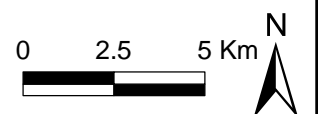


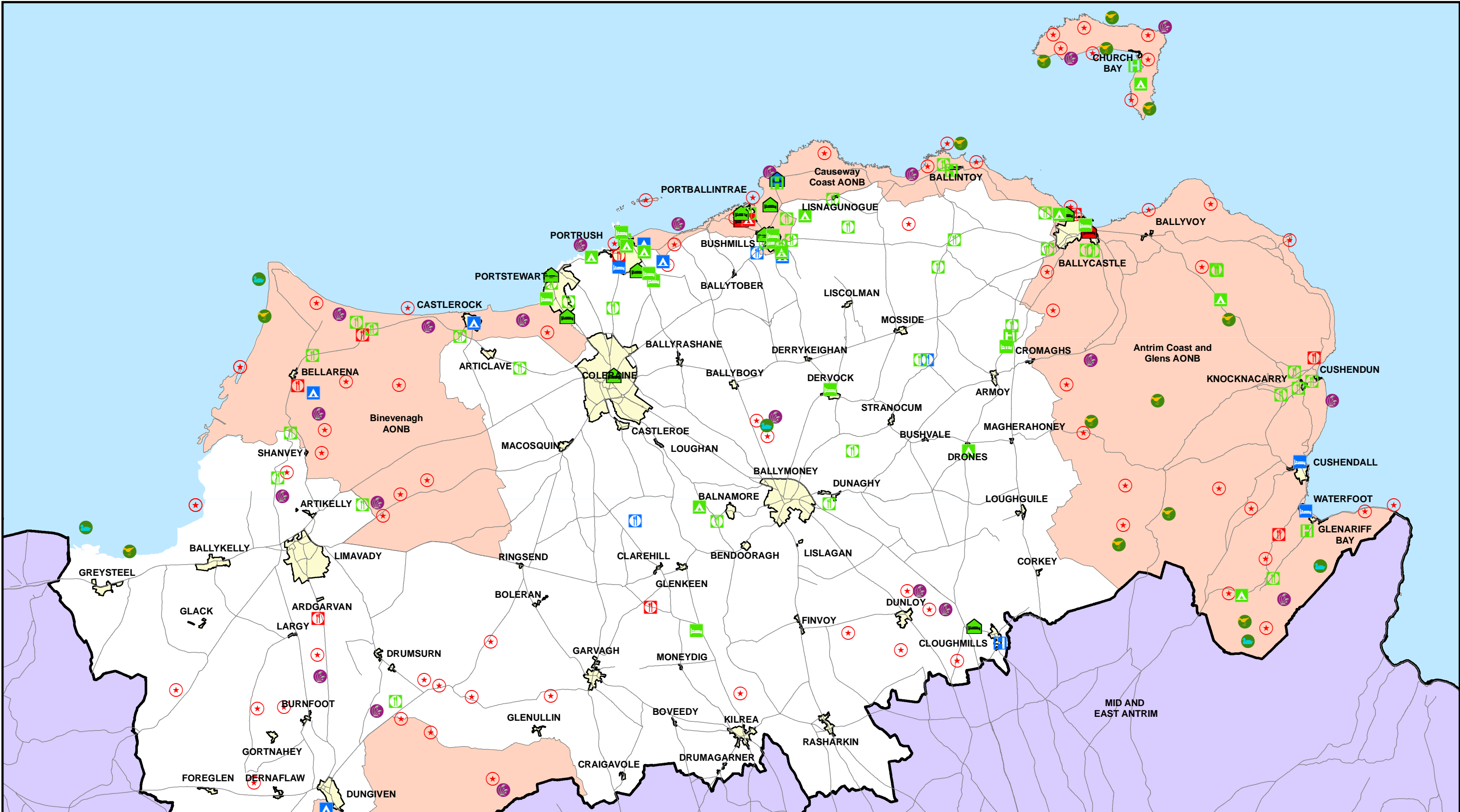
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Map No. 2 - State Care Monuments

-  State Care Monument
-  Settlement Development Limit
-  Road Network
-  Area of Outstanding Natural Beauty

- | | |
|------------------------|--------------------------------|
| 1. Armoyle Round Tower | 13. Kinbane Castle |
| 2. Banagher Church | 14. Larry's Fort |
| 3. Bovevagh Church | 15. Layd Church |
| 4. Bonamargy Friary | 16. Lissanduff Earthworks |
| 5. Ossians Grave | 17. Magilligan Martello Tower |
| 6. Counterscarp Rath | 18. Mill Loughan Mound |
| 7. Craigs | 19. Mountsandel Fort |
| 8. Dooley's Cairn | 20. O'Cahans Castle |
| 9. Dunalis Souterran | 21. Duncarbit Standing Stone |
| 10. Dungiven Priory | 22. Ballinbtempo Bullaun Stone |
| 11. Dunluce Castle | 23. Tamnyrankin Court Tomb |
| 12. Gortycavan Mound | 24. The Twin Towers |





Causeway Coast and Glens Borough Council
Map No. 3 - Tourism Accommodation

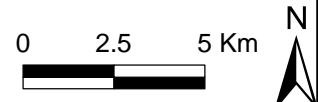
Planning Status (Decisions issued after 01/01/2010)

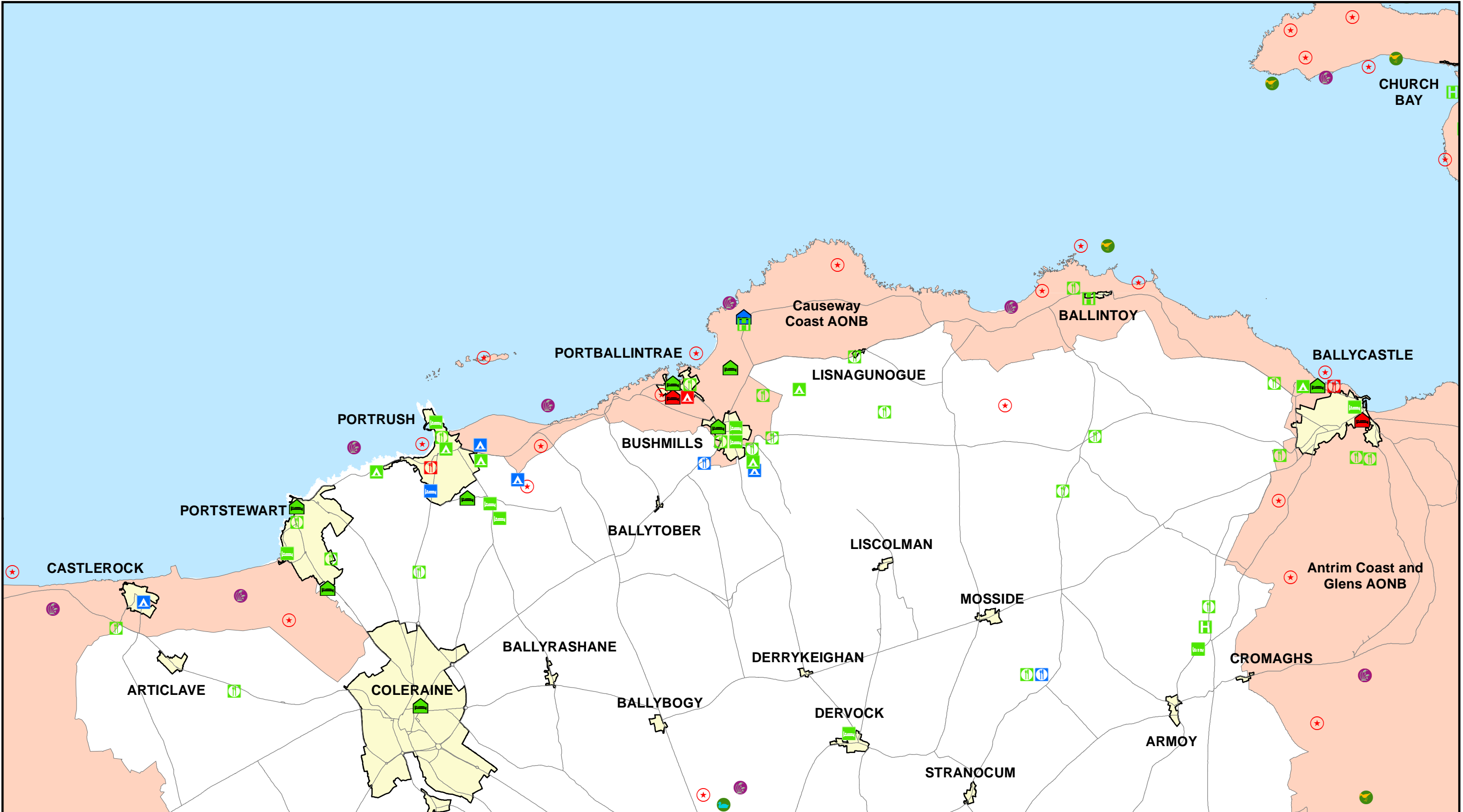
Approved	Refused	Pending	
			Hotel
			B&B
			Self Catering
			Hostel
			Camping

Environmental Designation

- Ramsar Site
- Special Protection Area
- Special Area of Conservation
- Area of Special Scientific Interest

- Settlement Development Limit
- Road Network
- Area of Outstanding Natural Beauty





Causeway Coast and Glens Borough Council
Map No. 3a - North Coast Tourism Accommodation

Planning Status (Decisions issued after 01/01/2010)

Approved	Refused	Pending	
			Hotel
			B&B
			Self Catering
			Hostel
			Camping

Environmental Designation

- Ramsar Site
- Special Protection Area
- Special Area of Conservation
- Area of Special Scientific Interest

Settlement Development Limit
 Road Network
 Area of Outstanding Natural Beauty

0 2.5 5 Km

