

Strangford Lough & Lecale Partnership County Down Seafood



FINAL REPORT - AUGUST 2015



**Strangford Lough
& Lecale Partnership**



Supported by the European
Fisheries Fund



Department of
**Agriculture and
Rural Development**

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Summary

This report was produced by tourism specialists BTS, supported by fish industry experts Poseidon Consulting. It is a market based business plan, commissioned by the Strangford Lough and Lecale Partnership (SLLP), with funding from the EU and the South East Area Fisheries Local Action Group (SEAFLAG), to provide economic benefit to the South East Area which includes the fishing ports at Portavogie, Ardglass and Kilkeel.

The analysis is designed to help develop the local market for locally caught seafood and local quality agricultural produce within Area. The project examines the opportunities for food tourism in the Strangford Lough and Mourne Mountains destinations, building on the concentration of the Northern Ireland fishing industry in the area, the quality of other local food produce and the number and the quality of local eating places across the area.

The project also aims to provide build year-round local demand, marketing to visitors to the area, providing a stimulus and ideas for business, based on core sea fishing traditions and promoting “artisan” food production.

This is an ideal time to look at this opportunity, with the declaration of 2016 as the NI Year of Food and capitalising on the strategic commitments of agencies and organisations to grow the agri-food sector and enhance visitor experiences and the value of tourism in NI and in the tourism destinations, including Strangford Lough and the Mournes.

The approach to the project has been to explore the supply and demand side of seafood and tourism, through desk research and consultations. An advisory group was established by the SLLP to oversee the project and potentially help with its implementation. Membership of the group comprises the local authorities (Ards and North Down Borough Council and Newry, Mourne and Down District Council), the Seafish Industry Authority, the fish producers associations (ANIFPO and NIFPO), Food NI and the SLLP itself.

Key Messages at a Glance

1. Landings into Northern Ireland ports amount to around 12,000t worth approx. £20 million in first hand sales, with County Down dominating this picture (Ardglass, Kilkeel and Portavogie receive 84% of landed volume).
2. Shellfish account for the largest proportion of landings (60% by volume and 80% by value). Pelagic fish (herring and mackerel) account for 30% of the volume but only 14% of the value of landings, while demersal fish (cod, haddock, plaice, monkfish, etc.) only make up 6% by volume and value. Ardglass accounts for the great majority of pelagic (herring and mackerel) landings, while Nephrops dominates in Portavogie and Kilkeel landings followed by significant scallop and crab landings.
3. The great majority of the Nephrops, scallop and herring are sold to NI processors and traders for subsequent export out of the area. Most exporters would welcome a domestic market for these key landed species if it were viable.
4. Seafood suppliers rely on supplies imported into Northern Ireland, mainly from Scotland, using species and origination to manage seasonal demand and supply.
5. Operators that wish to promote local produce are hindered by poor continuity of supply and have limited support.
6. A small number of Northern Ireland seafood products (e.g. various caught shellfish such as Nephrops and Scallops, Ardglass herring and farmed mussels and oysters) have the volume to enable specific promotion.
7. Buyers in NI are expressing a greater interest in local provenance. Suppliers would welcome support in encouraging consumers to ‘buy local’.
8. 2016 is the ‘Year of Food and Drink in Northern Ireland. It is therefore timely to develop a Seafood initiative that can integrate with and benefit from the wider food sector marketing that is scheduled in 2016.
9. Companies would like support in their efforts to increase NI residents’ knowledge of (and so demand) for seafood. Traders are seeing ageing customers with fewer young customers.
10. The concept and appeal of Food Tourism is growing as an integral part of visitors’ experience and as a motivator for visitors. Tourism NI estimates that 33% of visitors’ spend is on food and drink.

11. There is increasing demand from visitors to sample distinctive local food and to taste traditional cooking.
12. Strangford Lough and the Mourne Mountains already have strong representation of local food producers and processors, with Tourism NI indicating that the Strangford Lough destination has a higher proportion of artisan food producers than anywhere else in NI.
13. Destinations Strangford Lough and Mourne Mountains tourism is characterised by a strong dependence on visitors from within Northern Ireland (79% of visitation) and on the day visitor market.
14. 42 hotels, restaurants and a cookery school (Appendix 1) were interviewed to ascertain the extent to which “locally sourced” is included in menus, their use of seafood in the menu offer, the extent to which their customers seek locally sourced produce, including seafood, and their views about and reaction to the need for additional marketing of the area on the back of locally sourced foods. Almost universally, eating establishments supported the proposition of further marketing of the area on the back of all local food, and not just seafood. (Other outcomes are reported in the full report).

Take-aways

1. Local seafood supply is irregular, both in terms of species landed and seasonality and is supplemented by imports.
2. There is resistance in the NI population to buying, cooking and eating certain seafood, motivating some eating establishments to restrict fish on their menu and its promotion, while offering other local food produce – red meat, pork, poultry, venison, game and local vegetables etc.
3. Eating places that feature “locally caught or sourced” seafood are doing well, with customers acquainted with seafood stimulating demand, demonstrating that the menu offer and reputation can be built up.
4. Marketing and promotion of the area for food should be on the basis of all food rather than a focus on seafood alone.
5. Marketing efforts for the food destination should include a strong focus on residents, where education and awareness of food in the destination should be promoted.
6. There are already many overlapping tourism promotional initiatives in the area and food promotion must align with these, but also be visible in this crowded environment. This requires food promotion to be exciting and standout, to establish a competitive reputation for the area.
7. It is also an extremely crowded marketplace of organisations and agencies engaged in and responsible for food and drink. There is a need to align their interests and gain their support for this initiative, ensuring that this report adds value to stakeholders’ strategies and actions.
8. The 2016 Year of Food offers opportunities to cohere action to deliver the ambition to make the area a fabulous food destination, but the year of Food should be a start, with action carrying on beyond 2016.
9. Many food service businesses are disengaged from tourism promotion. Some are self-reliant and professional, others at risk. Marketing and promotion must include business related initiatives, which require to be resourced. (“Who will do what?”).

The vision for the area is:

To make the Strangford Lough and Mournes area a recognised and strong food destination, based on the strength and authenticity of natural produce and the quality of the environment, in order to stimulate visitation, economic value and memorable visitor experiences.

The full report includes a marketing plan, with indicative costs. This initiative requires a sustained, long term focus on education, behavioural change, stimulation of demand and building the reputation of the Strangford Lough and Lecale area for all food products. The complexity of the supply chain and organisational infrastructure should not deter the need to act. The infrastructure of fishing communities, processors and suppliers as well as the range of restaurants and eating places provide a natural clientele or stakeholder group to participate in, and benefit from, the strengthening of the area’s reputation and visibility for food.

1 Introduction and Background

The Strangford Lough and Lecale Partnership brings together authorities and stakeholders to work collaboratively to manage the heritage of Strangford Lough and Lecale. Its core partners are the Northern Ireland Environment Agency, Newry, Mourne and Down District Council and Ards and North Down Borough Council. The work includes the development of sustainable, heritage based, economic activity and strengthening the vibrancy of local communities¹. Ways in which it does this are, to:

- Raise awareness of Strangford Lough as a special destination to capitalise upon the AONB and thus generate additional visitation and spending;
- Engage with business and stakeholders to unify and grow business capacity and to continue to drive up the quality of the visitor experience;
- Use maritime and other heritage initiatives to help regenerate communities, including fishing communities

Where appropriate and with the support of its core partners the SLLP may sometimes extend its remit beyond the Area of Outstanding Natural Beauty, particularly on collaborative projects with a coastal emphasis relevant to the whole of County Down and the local council areas of Newry, Mourne and Down and Ards and North Down.

Local food production across the area is vibrant and diverse, with fishing ports at Ardglass, Portavogie and Kilkeel. There is, however, a need to strengthen capacity for local food to be promoted and consumed locally by local people and as part of the maritime heritage tourism offering. This sets the context for this piece of work.

1.1 Project Purpose

The SLLP commissioned tourism specialists BTS, supported by fish industry expertise at Poseidon Consulting, to prepare a business plan to develop the local market for locally caught seafood and local quality agricultural produce within the South East Area Fisheries Local Action Group (SEAFLAG) Area, which includes the fishing ports at Portavogie, Ardglass and Kilkeel. The project was funded through SEAFLAG.

The main focus of the project has been on the market and marketing aspects of the seafood industry and supply chain, without overprescribing stakeholder commitments to delivery, because these need to be agreed by stakeholders. The report identifies mechanisms for generating strong market visibility from County Down's food production attributes, through a marketing plan. In this way, this research substantiates the opportunities and provides a baseline for stakeholders and potential partners to work together within their own strategic frameworks.

The project examines the opportunities for food tourism in the Strangford Lough and Mourne Mountains destinations, building on the concentration of the Northern Ireland fishing industry in the area, the quality of other local food produce and the number and the quality of local eating places across the area.

Specific objectives of the commission are to:

1. Develop the local market for locally caught seafood and local quality agricultural produce within the South Eastern Area of the Fisheries Local Action Group (SEAFLAG) covering the fishing communities at Portavogie, Ardglass and Kilkeel and surrounding area.
2. Develop related tourism and hospitality opportunities for people to sample and appreciate our locally caught seafood as part of a quality environment and maritime heritage experience.

An advisory group was established by the SLLP to oversee the project and potentially help with its implementation. Membership of the group comprises the local authorities (Ards and North Down Borough

¹ See www.strangfordlough.org

Council and Newry, Mourne and Down District Council), Seafish Industry Authority, the fish producers associations (ANIFPO and NIFPO), Food NI and the SLLP itself.

1.2 Policy Context

There are several contexts for this project, in addition to those of the SLLP.

1. In 2013, the Agri-Food Strategy Board published its Strategic Plan for the Agri-Food Sector –“*Going for Growth*”, supported and endorsed by the NI Executive in 2014, with ambitious growth targets for the fisheries sector:

Fish and Aquaculture 2020 Targets		
Grow Turnover	By 34%	To £90m
Grow value added	By 45%	To £22m
Grow external sales	By 36%	To £75m
Grow employment	By 9%	To 600 full time equivalents

2. The 2012 NI Executive Economic Strategy (Priorities for Sustainable Growth and Prosperity) catalogues what priorities should be focussed upon to generate a sustainable competitive community in NI. Sectors which should be prioritised include agri-food and tourism, with equal priority given to rural economies and the social economy.
3. The NI Executive’s (draft) Tourism Strategy from 2012 establishes the strategic context for tourism development and delivery. The aim is to:
 - increase visitors in NI from 3.2m (in 2010) to 4.5m by 2020;
 - increase earnings from tourism from £529m to £1 billion by 2020;
 - progressively accelerate spend by visitors;
 - target specific markets and market segments;
 - support indigenous high quality businesses to grow; and
 - be “visitor inspired” in all our actions, by which we mean visitor responsive and aware.

The Draft Tourism Strategy also emphasises the importance of local produce and the need to encourage those involved in food production and hospitality to exploit the opportunities for collaboration.

4. The Strangford Lough and Mourne Mountains area comprises two of Tourism Northern Ireland’s (formerly NITB) 9 tourism destinations and includes the St Patrick Signature Theme. The destinations plans for both destinations were refreshed in 2013. The new Mourne Coastal Route runs through the area and it also features the Lecale Way and the Ulster Way walking routes.
5. Local authorities’ own economic and tourism strategies determine Ards and North Down and Newry, Mourne and Down Councils’ strategic priorities. This market review of the seafood sector is offered as a contribution to local authorities’ deliberations.
6. The declaration that 2016 will be Northern Ireland's Year of Food offers opportunities for food related events to be initiated.

1.3 Methodology

Our approach to the project has been to explore the supply side of the seafood and tourism equation through research undertake by Poseidon and for BTS to focus on demand aspects. In both cases this has involved desk research and consultations (see Appendices 1 and 2) carried out in late spring 2015.

Developing recommendations about the way forward to enhance the tourism offer, based on sea food and other agricultural produce and products, and how to strengthen the seafood sector, has been developed jointly by BTS and Poseidon, looking at other case studies and lessons that can be learnt from them and applying our expertise to develop a costed action plan.

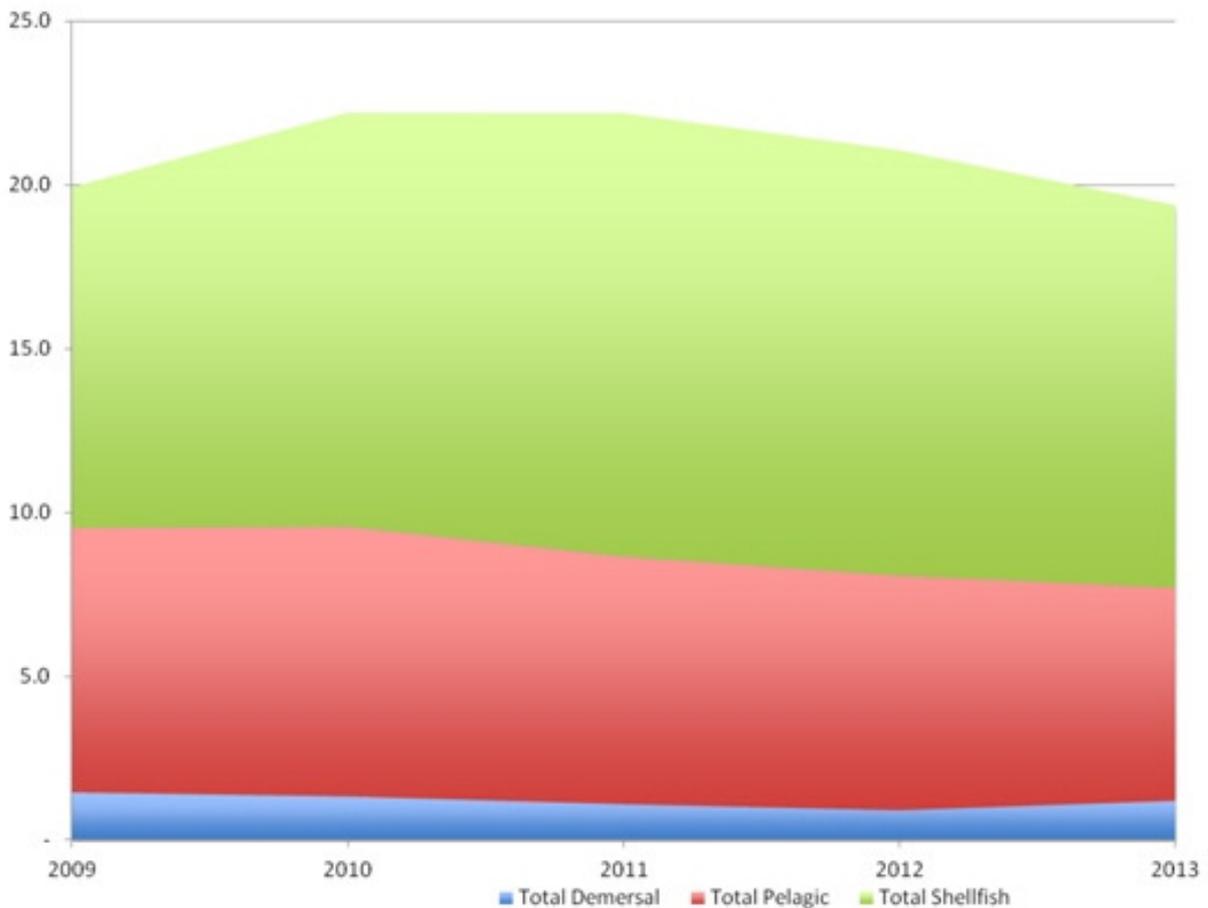
2 Northern Ireland Seafood Supply

Seafood is produced in Northern Ireland from capture fisheries and from aquaculture, mainly from the County Down region as it includes Northern Ireland’s main fishing ports and supports most shellfish production.

2.1 Fisheries

Landings into Northern Ireland ports² amount to around 12,000t worth approx. £20 million in first hand sales. Figures 1 and 2 show recent trends and the type of seafood landed.

Figure 1 Trend in volume of landings into Northern Ireland ('000 tonnes) 2009-2013- Source MMO



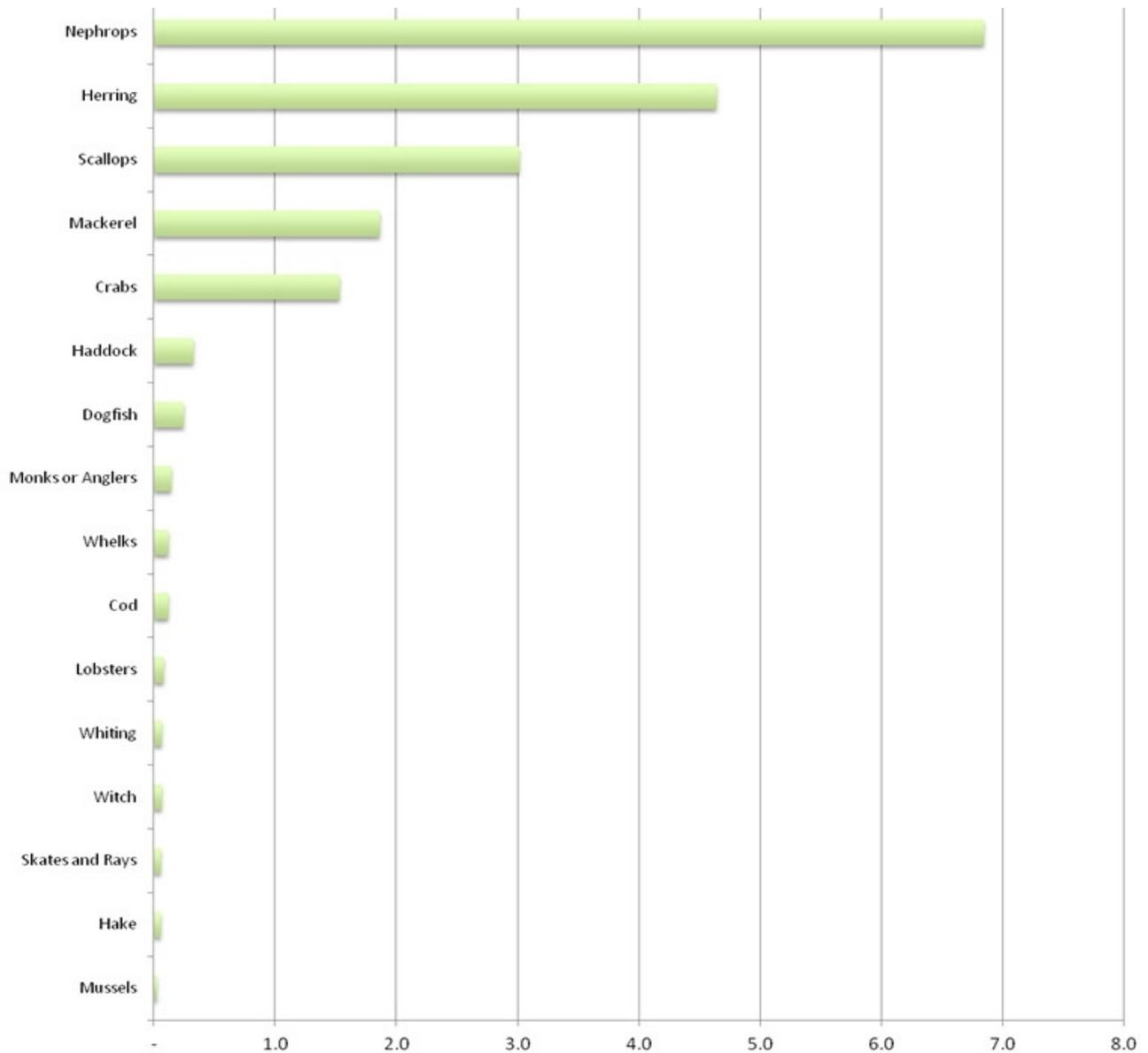
Shellfish account for the largest proportion of landings (60% by volume and 80% by value). Pelagic fish (herring and mackerel) account for 30% of the volume but only 14% of the value of landings, while demersal fish (cod, haddock, plaice, monkfish, etc.) only make up 6% by volume and value. Nephrops (a.k.a. Dublin Bay prawns, scampi or langoustine) is the largest volume and value, followed by herring (by volume) and scallops.

The great majority of landings into Northern Ireland are by NI boats with few visiting vessels contributing to the volume landed.

² Some of the catch by NI-registered boats (e.g. some pelagic landings and some Nephrops catch from the Clyde and North Sea are landed outside NI and are not included in figures.

Ardglass accounts for the great majority of pelagic (herring and mackerel) landings, while Nephrops dominates in Portavogie and Kilkeel landings followed by significant scallop and crab landings.

Figure 2 Volume of NI landings by species, 2013, source MMO



The three main fishing ports of Ardglass, Kilkeel and Portavogie receive 84% of this landed volume. A breakdown of species landed in 2013 at these three main ports is presented (over) in figures 3, 4 and 5.

Nephrops is landed as either whole or as tails, with the proportion landed of each dependent on the size of the animal (with size composition variable by season and fishing location) and buyer demands. Nearly all is trawl-caught with a few tonnes each year are creel caught in Strangford Lough.

The proportion landed whole has increased in recent years with increased buyer demand for whole prawns. Buyers estimate the landings in Live Weight Equivalent (LWE) are now approx. 65% tails, 35% whole³.

³ based on a 3:1 conversion factor for tails.

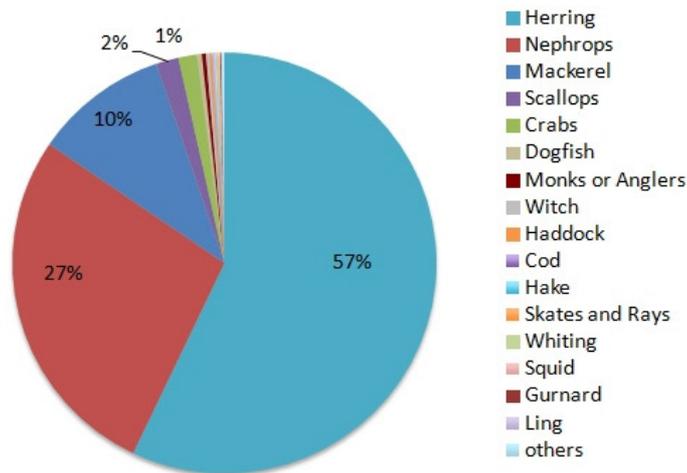
Three pelagic vessels land around 5,000t of Irish Sea herring mostly to Ardglass during a short 6-8 week season. One vessel is too large to land into Ardglass and landings elsewhere such as Killybegs. In 2014 it received the MSC certificate as a sustainable fishery⁴. Nearly 2,000t of mackerel was also landed in 2013.

The many other fish species listed (dogfish, monkfish, haddock, etc.) are mainly bycatch from the Nephrops trawl fishery.

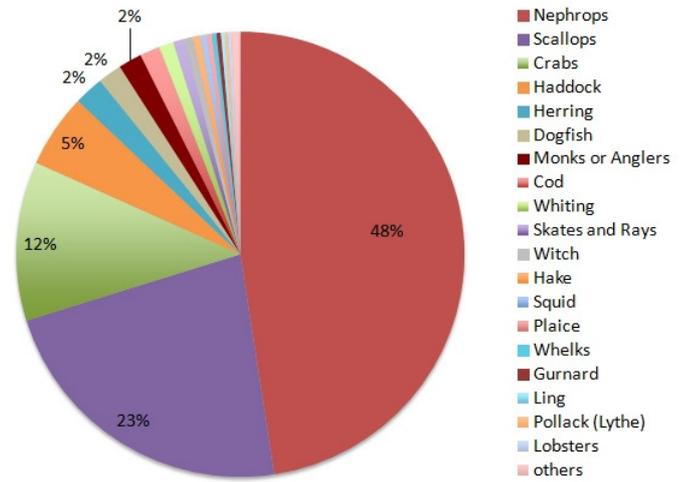
Also noteworthy is that Northern Ireland is home to the largest remaining eel fishery in Europe on Lough Neagh with Lough Neagh eels having protected geographical indication (PGI) status. The fishery sells in excess of 400 tonnes of Lough Neagh eels annually of which approximately 80% are shipped to Holland where they are sold mainly as smoked eel while the remainder goes to Billingsgate in London for sale as fresh eel or are processed for the jellied eel trade⁵. In 2014, the Eel Fishermen’s Co-operative received £400,000 for facilities to add value to its eel production.

Figures 3, 4 and 5 Species landed in 2013 at three main ports

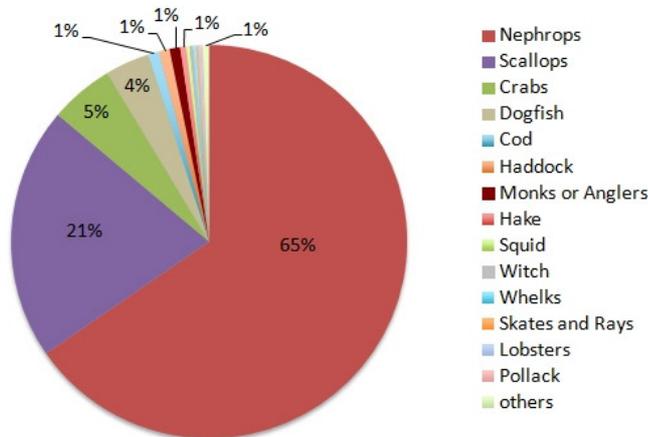
Ardglass landings, 2013 (by volume)
total = 7,851 tonnes, value = £6,967,000



Kilkeel landings, 2013 (by volume)
total = 5,189 t, value = £ 7,661,000



Portavogie landings 2013 (by volume)
total = 3,379t value = £5,551,000



⁴ www.msc.org/track-a-fishery/fisheries-in-the-program/certified/north-east-atlantic/northern-ireland-pelagic-sustainability-group-%28nipsg%29-irish-sea-herring

⁵ www.flavourofityrone.com/food/specific/lough-neagh-fishermens-co-operative-society-ltd

2.2 Aquaculture

Aquaculture production in Northern Ireland amounts to nearly 6,000t per annum of mostly:

- Bottom-grown mussels (MSC certified in 2013) in Belfast Lough, Carlingford Lough and Lough Foyle, supported by a seed mussel fishery off the Ards peninsula, inshore areas in the Republic of Ireland and limited raft-grown production in Strangford Lough.
- Oysters (Pacific cultivated in Carlingford Lough, Strangford Lough, Larne Lough, Dundrum Bay, Killough Bay and Lough Foyle, with some Native in Larne Lough together with a seasonal wild native oyster fishery in Lough Foyle.
- Salmon (via a single producer of Glenarm Organic salmon).
- Rainbow Trout (produced at around 20 licensed freshwater trout farms throughout NI).

In 2012 the aquaculture sector produced 4,920 tonnes of shellfish valued at £4.53 million and over 946 tonnes of finfish valued at £4.12 million⁶. 80% of the shellfish production is from County Down.

There is also seaweed culture at a pilot level in Strangford Lough that may supplement a company's seaweed harvesting activities, primarily for biofuel but potentially for food (www.irishseaweeds.com/about-us).

⁶ <http://www.dardni.gov.uk/index/fisheries/aquaculture.htm>

3 Supply Chain

3.1 First Hand Sales

The great majority of the Nephrops, scallop and herring are sold to NI processors and traders for subsequent export out of the province.

As the supply of whitefish from the Irish Sea declined over the last decade, processors diversified into shellfish. There are no dedicated whitefish processors left in Northern Ireland and the small number of shellfish processors that remain continue to diversify into other (non-quota) shellfish species such as green crab, whelk and Palaemon shrimp or raw material from aquaculture.

Pelagic processors based in Ardglass are operational on a 3-4 month seasonal basis to freeze and process local landings of herring beyond the six-week season. Some added value (e.g. roll-mop herring and kippering) is given to local landings, supplemented with some imported raw material. It is estimated that less than 1% of NI pelagic landings enter the local market.

Around 95% of landings of Nephrops are sold to the processing companies based in Kilkeel⁷. These are either tailed (generally the smaller sizes) for breaching or battering as scampi (around 2/3 of landings) or sold whole (around 1/3 of landings using larger size grades) as langoustine. Scampi is mostly exported to mainland Britain, while whole langoustine is exported to Spain and France, where alongside Scottish langoustine it is recognised as a premium product.

The majority of scallop and crab landings are either exported (around 95% and 98% respectively) either whole/live to European markets and large shellfish processors (Errigal in Donegal) or undergoes processing in NI⁸. A higher proportion of lobster enters the local market live as this can be stored over several months in vivier tanks for a consistent supply. Other shellfish such as whelk and periwinkle are purchased by NI buyers/processors and go to export markets (e.g. France and China).

Most of the whitefish and prime fish landed does enter the local market, but these are small, intermittent volumes limited by small Irish Sea quotas and weather. A number of traders have specialised in supply into the food service sector (hotel and restaurants). These do trade in and promote local produce when available, but do rely on importing fish (from Scotland etc.) to maintain supplies and the necessary product range to customers.

The destination for most aquaculture production is also overseas with mussel and oyster exported for on-growing and/or depuration (filtering for 42 hours in 'A-grade water') in Holland and France respectively. A small amount of salmon is produced by one operator in Northern Ireland and enters niche high value fresh and smoked markets as Glenarm organic salmon (www.glenarmorganicsalmon.com).

3.2 Retail and Food Service

Nephrops sales into Northern Ireland only account for less than 5% of landings of which about 2% is whole/live, 2% hand-shelled and sold as tubs of tail meat and 1% battered by small-scale operators. These are distributed amongst a number of seafood wholesales for sale around Northern Ireland (e.g. St. George's Market, Belfast and stalls at regular provincial markets) and via traders in vans operating throughout the area. These operators also rely on supplies imported into Northern Ireland, mainly from Scotland. These traders work with fresh product and have limited frozen stock.

Local supply entering Northern Ireland retail and food service outlets is limited to the market stalls mentioned above and the higher quality restaurants and hotels where provenance and freshness is a selling point. Some companies, such as Elmore Seafood⁹ (supplying ready-meals to NI Tesco stores) and Sea source are seeking to

⁷ Main prawn processors: Kilkeel Seafoods (breaded scampi), Rooney Fish (whole & meat) and Sea source (whole).

⁸ Main scallop & crab processors: Rooney fish, Henning Bros., & Sea Source.

⁹ Supplying ready-meals into 16 NI Tesco stores (salmon, cod, pollack)

increase a local seafood presence in Northern Ireland's multiple retailers, but currently the availability of local seafood in Northern Ireland supermarkets is extremely limited.

In summary, the large volume domestic landings (Nephrops, herring, scallops and crabs) are mostly exported via processors. Landings of whitefish are limited by low quota availability for the Irish Sea. Poor weather in the Irish Sea will also result in no local landings and further affects continuity of supply.

Local landings entering the local market are estimated to amount to an average of 29 tonnes per week (based on estimates of average weekly landings volumes entering processing and/or exported for species - see Appendix 5 for calculations). This small volume of local landings therefore tops-up imported fish supplies to the NI retail and food service markets.

4 Supplier Challenges & Opportunities

4.1 Challenges

Discussions with seafood suppliers have revealed that:

- Most exporters would welcome a domestic market if it were viable. They are mainly dependent on Eurozone countries and so are vulnerable to exchange rate shifts, increases in transport costs and their trade certainly suffered during the Eurozone crisis¹⁰.
- However operators that wish to promote local produce are hindered by poor continuity of supply and have limited support.
- A great benefit of selling into the larger export markets is the consistency of demand (compared to some local seasonal tourism-driven markets). It was stressed that local markets must be developed on as stable a footing as possible. Ideally building up to larger volumes rather than a big push that cannot be supported with supplies.
- Buyers in NI are expressing a greater interest in local provenance.
- Suppliers would welcome support in encouraging consumers to 'buy local'. A 'buy local' message may be more appropriate than for example a specific 'Irish Sea' branding as supply limitations suggest that this would mean buy from local suppliers and not strictly buy local fish¹¹.

4.2 Opportunities

The following opportunities are proposed for discussion and consideration with the demand-side findings.

Education

- The one area where all respondents appeared to be in agreement was the need to improve the education of Northern Ireland's population in seafood.
- A strong farming heritage dominates throughout the province with limited appreciation of the seafood outside of the main fishing ports.
- Companies would like support in their efforts to increase NI residents' knowledge of (and so demand) for seafood. Traders are seeing ageing customers with fewer young customers.
- Education and awareness-raising should focus on what is available, what can be done with the produce and the heritage associated with the industry.

Product Promotion

- Seafood companies are active with their own promotion and it can be difficult to justify joint promotional activities.
- It is also difficult to undertake product promotion without continuity of supply. Some emphasis on a few iconic (and available) products makes sense.
- A small number of Northern Ireland products (e.g. various caught and shellfish such as Nephrops and Scallops (despite seasonal prohibition from June to October in the Irish sea), Ardglass herring and farmed mussels and oysters) have the volume to enable specific promotion.
- Value-added products could further distinguish NI produce and partly address seasonality and supply volumes (e.g. kippers produced in Ardglass may not require Irish Sea herring, which has a short season).
- Some menu substitution of local products could be explored (e.g. warm water prawns replaced with NI langoustine in some restaurants), but there are price implications as langoustine has a higher price in export markets and imported warm water & cold water prawns are cheaper.

¹⁰ Anecdotal evidence suggest that with the Pound's value being high against the Euro at the time of writing, some fishermen are looking to sell and distribute landed seafood locally, at Sterling prices

¹¹ See the marketing plan below

Agri-Food Developments

- The limited scale of the NI Seafood sector compared to agriculture suggests it should seek involvement in and support from the wider food sector, rather than attempt everything in isolation.
- 2016 is the Year of Food in Northern Ireland. It is therefore timely to develop a Seafood initiative that can integrate with and benefit from the wider food sector marketing that is scheduled in 2016.
- Engagement of a motivated Seafood marketing group with the newly-established Agri-Food Strategy Board should enable the above to be achieved (see below).

The Balmoral Show

- The Balmoral show, which this year saw over 100,000 people visit, should serve to both educate the population and promote NI seafood.
- It provides an intensive promotional event reaching the many thousands of people attending and through media at the event.
- A small number of NI Seafood companies have participated and report positive experiences.
- A number of companies could participate within the Food NI pavilion (preferable to being in a separate seafood-only).

Seafood Marketing Group

- Many small seafood-related initiatives are already occurring throughout Northern Ireland. These are often by individual businesses. However, overall co-ordination and support is lacking.
- There is a growing body of information relating to the seafood sector (mini-films, heritage trail, etc.), but again an overall strategy stating how to link these together and best use this material is lacking.
- Many of those interviewed showed great enthusiasm for Northern Ireland's seafood. Any emerging business plan should be overseen by a small group of enthusiastic individuals that are focused on promoting Northern Ireland seafood within Northern Ireland.

5 Demand

The demand for seafood comes from both domestic residents of NI and from visitors to NI and the Strangford Lough and Mourne Mountain destinations.

5.1 Domestic Demand

People in Northern Ireland eat fish least often than the UK average (1.18), at just 1.01 times a week. Despite this low consumption level, on volume alone, NI landings only cover 73% of domestic consumption. Consumption across the UK is forecast to continue rising from this low level, primarily driven by health concerns as consumers see fish as a healthy option (Sainsburys, 2012¹²), which will further increase the reliance on imports into NI.

There is also an imbalance between the species landed and those currently preferred by NI seafood consumers. As seen elsewhere in the UK and Ireland, NI seafood consumers are generally conservative with the big 5 species (tuna, cod, salmon, prawns, haddock) accounting for 58% of consumption¹³. Sales of alternative species are rising with consumer awareness via celebrity chefs and promotional campaigns.

Assuming the big 5 are derived from imports, 42% of NI consumption could come from local landings. A rough estimate based on average supply and NI weekly consumption indicates that local landings would only cover 10% of the NI seafood demand. Therefore local supplies do not come close to matching demand and local landings 'top-up' or displace supplies of imported fish as and when they are available¹⁴.

It is also notable that shellfish dominates Northern Ireland landings, but more than a third of seafood consumers do not eat shellfish at home. Therefore a focus on the food service sector is as important as any retail promotional efforts targeting residents.

5.2 Food Tourism

The concept and appeal of Culinary or Food Tourism is growing, as it becomes a stronger motivation for visiting destinations and recognised as an integral part of the travel experience. According to the NITB Consumer Barometer, 2013, visitors to NI cited "experiencing good quality, food, drink and dining" as a key factor when choosing the destination for a short break or holiday.

Tourism NI¹⁵ estimate that GB and overseas visitors to Northern Ireland in 2012 spent approximately 33% of their total spend on food and drink, while NI residents on a day out spent 36% of their total spend on food and drink during a day out and just slightly less, 34% if they were staying away from home overnight¹⁶. The estimate is that food tourism is worth £350m to the NI economy.

There is increasing demand from visitors to sample distinctive local food and to taste traditional cooking. Scottish research suggests that¹⁷:

- Consumers prefer to buy food with local provenance (i.e. food sold with an explicit reference to where it comes from). They perceive that food "with a story behind it" is of better quality;
- Visitors are willing to pay up to 15% more for food that they know is of Scottish or regional origin;
- Businesses and events providing local food enhance the visitor experience and typically enjoy higher levels of sales - on average 20% more per year.

¹² Our Future With Fish, Sainsburys & Future Foundation, 2012

¹³ Nielsen retail sales data, 2014 [2012 data quoted in the Sainsbury's report showed the big 5 accounted for 65% of sales]

¹⁴ Many imported species (salmon, rainbows, gilthead bream, bass, mussels and cobbler) offer dependable supply, unaffected by quota or weather. Therefore it is easier for a NI consumer to obtain farmed imported "seabass" than it is to obtain e.g hake from Kilkeel. The influence of this marketing and the swing for these species in TV cookery influences modern markets and demands. "Seabass" for example is prevalent on most menus locally.

¹⁵ Formerly NITB

¹⁶ Source: NITB Naturally NI

¹⁷ Scottish Enterprise, 2009

These motivators underpinned Scotland’s decision to make 2015 the Year of Food and Drink and also highlight the value of the NI Executive’s declaration of 2016 as Northern Ireland’s Year of Food.

Strangford Lough already has a reputation for locally grown produce, catalogued by Taste of Ulster, but also reflected in the latest (2014) Visitor Attitude Survey of visitors¹⁸.

10% of visitors to Strangford Lough were motivated to visit “to enjoy local produce/food”, only superseded by Derry (11%) and followed closely by Causeway Coast and Glens (9%). (The remaining 6 destinations, including the Mournes, had proportions of only between 3% and 7%).¹⁹

The Visitor Attitude Survey also asked about the use of locally sourced ingredients in eating places: Strangford Lough ranked second after the Mournes destination for “excellent” and “very good” reaction to this criterion. However, information on places to eat and drink out was one of the most poorly rated attributes, especially amongst NI visitors to Strangford, Mournes (and Lough Neagh). This is a complex picture and “...highlights what is more probably a failure to promote and utilise what is on the doorstep.”

So, there is a disconnect as perceived across NI, and by implication the experience in Strangford Lough and the Mournes area, between what consumers/visitors say they want and what they get in terms of local food:

“According to NITB research, 68% of RoI consumers and 58% of GB consumers agree that food is an important part of the holiday experience. However, only 28% of GB consumers and 17% of RoI consumers agree that local produce is very apparent in Northern Ireland’s restaurants. This means that there is much that we need to do to ensure our wonderful local produce is reaching our visitor’s plates – and that we tell visitors when they are eating local produce. Food provenance and menu messaging are vital.”²¹

5.3 Strangford Lough and The Mourne Mountains & Ring of Gullion

The area that is the subject of this assessment comprises destinations Strangford Lough and the Mourne Mountains & Ring of Gullion. Destinations Strangford Lough and Mourne Mountains tourism are characterised by a strong dependence on visitors from within Northern Ireland and on the day visitor market. 79% of visitation is from within the domestic (NI) market, with between 5% and 8%²⁰ from the Republic (ROI), between 11% and 7% from GB; around 1% to 2% from elsewhere in Europe and about 3% from North America.

The two destinations have about 16.5% of the NI population and about 15% of NI tourism spend, representing staying visitors, who generate about £91m p.a. through 924,000 trips (23% of NI total) and just under 3.5m nights spent in the destination (25%).

The Tourism Destination Plans were renewed in 2013 and highlighted the strategic opportunities for the destinations, aiming to increase out-of-state visitors (i.e. non NI) and increase the length of time visitors stay²¹. These opportunities revolve around four core strategic themes to drive future tourism in both destinations:

1. Investment & Infrastructure (making access to and within the destination easier; supporting regeneration and public realm improvements and investing in sustainable heritage and other facilities to ensure visitors have a great time);
2. Marketing & Promotion (raising awareness of Strangford Lough as a special destination and generate more visits and spending, particularly in the spring and autumn through creative and innovative marketing and partnerships and building on the brand work to date);
3. Distinctive Visitor Experiences (so visitors experience, enjoy and understand the special natural environment and heritage of Strangford Lough by developing unique and authentic land and water based

¹⁸ Representing over 100,000 face to face interviews

¹⁹ However in contrast ,VisitScotland’s 2011 Visitor Survey found that trying local food was the joint top most popular activity undertaken by visitors

²⁰ 8% being the Mournes statistic

²¹ The tourism vision for Strangford Lough is: “Land and Sea, History and Lough – a fantastically beautiful landscape within which to de-stress, explore and witness our wildlife”; for the Mournes it is “The Outdoor Playground for the North of Ireland – where a sense of wellbeing and freedom comes from the connection with nature, the rolling mountains, seashores and landscapes and the choice of soft and adrenaline adventure.”

visitor experiences that attract visitors and add value to the destination where the visitor can be adventurous and explore or relax);

4. Building Business Engagement and Sustainability (to build a strong industry body with responsibility for the management of industry initiatives, to unify and grow business capacity and to drive up the quality of the visitor experience).

Appendix 11.4 comprises components of the destination plans – it summarises the target markets both destinations should aim for and catalogues the tourism assets of the area.

6 Tourism and Hospitality Operators' Views

A series of telephone and face to face interviews were held with 28 hotels and restaurants across the area (see Appendix 11.1) to ascertain the extent to which “locally sourced” is included in menus, their use of seafood in the menu offer, the extent to which their customers sought locally sourced produce, including seafood, and their views about and reaction to the need for additional marketing of the area on the back of locally sourced foods.

As can be seen from the list of establishments contacted, the range and variety is considerable; they were selected for interview on the basis of their menus, web sites and reputation. People interviewed included chefs, managers, owners, waiting and marketing staff.

The establishments were located throughout the area - from Donaghadee to Greyabbey, Kircubbin, Portavogie and Portaferry on the Ards Peninsula; Newtownards, Comber, Bangor, Lisbane and Scrabo in the north of the area through to Downpatrick, Ardglass, Crossgar, Dundrum, Newcastle and Strangford in the south east and Annalong, Kilkeel, Newry and Warrenpoint in the south west of the area,. Some interviewed establishments are acknowledged as excellent, including:

- The Poachers Pocket, 2015 winner of the NI Tourism Awards for Best Food Tourism Experience and Best Gastro Pub in the Irish Restaurant Awards 2015;
- Taste of Ulster members, including e.g. the Buck’s Head, the Cuan, Harrisons of Greyabbey, Katch 27, McKee’s Country Store and Restaurant, Mourne Seafood Bar, Pier 36, Sugarcane Café Bistro, Poachers Pocket, the Quays;
- Hotel & Catering Review Gold Medal Award winner 2015 (Slieve Donard).

Those interviewed ranged from eating places whose reputation is built on seafood on their menus (Quays, Katch 27, Salthouse Restaurant, Bennett’s Seafood Restaurant, Mournes Seafood Bar, Governor Rocks, Sugarcane Café Bistro) through to others which “only feature fish on the odd occasion” or “feature fish on the menu but not specialist” (Gardeners Rest, Harrisons of Grey Abbey, Northdown House Bar and Grill, Scullery at Scrabo Golf Course).

6.1 Sourcing of Seafood

As might be imagined, sourcing of seafood on menus ranged from the chefs buying directly from boats and fishermen both at the quayside (Quays, Aldo, Pier 36), or directly at the restaurant, through to using fish suppliers – either “the local fishmonger” or specialist seafood suppliers. East Coast Seafoods²² were cited by 10 of our interviewees, while others quoted as suppliers included, variously F.B Mawhinney & Son (Portavogie), Still Waters Fishing (Portavogie), Elmore Seafood, Walter Ewing, Keenans, Bookers and Lynas Food Service, Pallas Foods.

These suppliers range from local seafood suppliers through to large food distributors who might supply seafood as well as meats, vegetables and other requirements of the food service sector in NI. Some provide both locally caught product and product imported into NI from elsewhere (e.g. salmon for Norway and Scotland)²³. Keenan’s Seafoods’ quote usefully encapsulates the seafood sector supply:

“We supply a comprehensive range of fresh and frozen seafood to the food service sector as well as fish and chip shops and contract caterers in Northern Ireland. The company is also a major supplier to the public sector. Fish is sourced on a daily basis from the main Irish ports as well as from Peterhead in Scotland and exotic lines are sourced from all over the world.”

6.2 Locally Caught or Produced Foods

We asked about the extent to which eating places featured “locally caught” on their menus. Several eating places confirmed that they did feature locally caught on their menus, citing Portavogie prawns, Strangford

²² Great Taste Gold Star Award winner in 2013

²³ See reference above at 3.1

mussels, Kilkeel-landed hake and cod, Carlingford Oysters. Included amongst these establishments are Bennett’s Sea Food Restaurant, the Buck’s Head, the Cuan, Lobster Pot, Katch 27, Pier 36, Curran’s Bar – Seafood and Steakhouse, Salthouse Restaurant, Lecale Restaurant and Sugarcane Café Bistro.

Several mentioned the issue of seasonal availability of seafoods and the need to adapt menus to take this into account as well as seek supply of other (imported) products to NI to keep their menu up-to-date.

A number of eating places opened up the conversation themselves about the opportunity to reflect on other local non seafood sourced produce. One cited Taste of Ulster criteria, which include featuring ‘local’ produce on the menu²⁴. Also quoted:

“We built our reputation on seafood but now offer many other dishes using local produce. We would be nervous about our reputation being just about seafood, since many customers are still nervous about fish.”

“(We) do not feature ‘locally caught’ (seafood). Promote local for other things. Fish they serve is not always caught locally – dependent on price/season.”

“Buy fish locally – East Coast. Also buy other items locally- chicken from Palass Foods (Crossgar poultry); Meat – Hannan’s (butchers in Belfast); Vegetables – Arnott’s”

“A local man catches the Fish and drops it off at the restaurant.”

6.3 Customer Demand

We then wanted to know what our interviewees’ perspectives on their customers might be and whether customers cared about or demanded local produce. The overarching view is that those who focus their menus on local produce have customers that frequent their establishments because of their use of all local produce, not just seafood (McBrides, McKees, Port O Call, Sugarcane Café Bistro, Governor Rocks).

“Definitely a demand to source everything locally – gammon, potatoes etc. just not use the term locally caught. (We) promote local ingredients on all our marketing material.”

“Yes. Definitely a demand for local produce.”

Those establishments with a strong seafood emphasis in their menus were also firmly of the view that “locally caught” attracts custom. A small number of eating places also said that they would pre-order (e.g. lobster) if customers themselves pre-ordered (Aldos, Pier 36, Portaferry Hotel).

“There is demand, but price can be a factor. Majority of clients are from within a 6-7 mile radius. (We) do get some visitors.”

“There is a demand especially for shellfish. Customers are mainly local.”

“Most definitely – especially for fish and game. Most of their clients are from Northern Ireland but do get visitors from the caravan park on the peninsula.”

In contrast, eating places that are less likely to feature locally caught or sourced do not think their customers demand it.

6.4 Tourism Promotion of Strangford Lough and The Mourne Mountains & Ring of Gullion

We wanted to understand the marketing and promotion that establishments undertake at present and their views about the effectiveness of current tourism marketing, together with their views about what food related marketing and promotion would be worthwhile to generate stronger visibility and visitation for the area.

While several eating places effectively market and promote themselves, through their web sites, Facebook, awards or events, almost universally interviewees considered that there was a need for more marketing and promotion of the area, to effectively market local seafood, and also, importantly, other local food produce. As well as wanting to encourage local demand, most establishments endorsed the opportunity to be more attractive to visitors and to attract more tourists and stimulate tourist demand for local produce. Additional

²⁴ Only one establishment talked about their ambition to reduce their carbon footprint

markets also mentioned were caravanners in the area (Ards Peninsula particularly), yacht crews and the Chinese Asian market (from Belfast and surrounds and visitors).

“A lot more should be done to promote the area. Emphasise that it is not too far from Belfast”.

“Anything to promote the area and the quality of the food would be a good thing.”

“Make access a bit better. Not on the Tourist Trail so anything to put (us) on the map would be good.”

“Would be good to promote areas away from the Lough.”

“...do something in the winter months to attract visitors.”

“More promotion of Sea Food would be good.”

“Very busy during the summer as a lot of people have holiday homes. Could do more to promote the area all year round.”

There were several interviewees who were at a loss to suggest in what ways the area could be marketed. From our experience, and interviews, this suggests that operators are either self-contained and successful, or disengaged from the tourism marketing structures and processes, or in some cases, businesses are commercially vulnerable.

“No idea what form initiatives should take.”

“General lack of communication and no joint effort so usually (we have to be) self-reliant.”

There were however many suggestions emanating from interviewees for future marketing of the area:

- More Advertising including online advertising
- Getting suppliers involved in marketing and promotion
- Collaboration and working together across eating places
- Trips from the big cruise ships
- Oyster festivals - oyster and Guinness Festival
- Themed evenings - gourmet fish tasting evenings
- Bus tours
- Food trails a possibility
- Phone app – directing visitors to great fish and local produce restaurants
- Piggy back on festivals like the potato festival
- Cookery demonstrations. Get restaurants involved.
- TV programmes
- Involvement of celebrity chefs to raise the profile
- Calendar of taster events/ stalls at the harbourside
- Seafood tours
- A range of seafood educational visits - start them young
- Recipe book with stories about e.g. local fishermen
- Youtube videos of recipes and demos, with new local food producers.

The following quotes from operators offers a wider perspective:

“Northern Ireland is starting to change. More people eating fish...used to be only if you were on the coast.”

“Tried to do a Food Trail in the past but did not get much engagement from the restaurants.”

“Next year is the Year of Food and Drink. (Marketing) activity should not be just city centre. Lots of good restaurants outside the city centre.”

“Who should marketing be aimed at? We need more marketing but it shouldn’t compete with existing brands (Mournes Coastal Route, St Patricks Trail, Ulster Scots Driving Route). If we do a food brand then it must be exciting.”

Visitors can visit ports and not see any fish, neither being landed, processed nor be able to buy it. So people can’t experience the product and the heritage of fishing.”

“If we just market the area just for fish then we’re missing out on a huge range of other products. Need to integrate them.”

“We find schools love to come and visit our Mourne Maritime Museum, RNI Station, Seascope - N Ireland’s first Lobster & Marine Hatchery Research Centre and Mourne Seafood Cookery School.”

7 The Quality of Local Produce

The DETI draft Tourism Strategy highlights the importance of local produce in tourism (for all the reasons above under Food Tourism). The strategy commends:

Exploit the potential of food, drink and local products to enhance the (visitor) experience, through the following actions:

- Enhance training for (tourism) practitioners on use of local produce. Develop local supply chains and increase the use of local produce
- Support award schemes that celebrate use of local produce
- Benchmark visitor feedback and achieve year on year improvement

The Strangford Lough and Lecale Destination Plan identifies authentic food and quality eating establishments as a strength of the area, with the opportunity to develop the reputation of the area for local farm and sea food and authentic eating places, potentially through food festivals and trails.

The potential for food tourism – and our interviewees’ reactions about marketing and promotion on the basis of food produce - presents opportunities for the agri-food sector to meet, or help stimulate, tourism demand and the reputation of the Strangford Lough and Mourne area.

Both Taste of Ulster’s members in County Down and the successful operators who have won Great Taste Awards, organised by the Guild of Fine Food, are indicative of the scale and variety, as well as the quality of local producers and suppliers. Award winners include East Coast Seafoods; Rich Sauces, in Newtownards; Angus Farmshop, Greyabbey; Glastry Farm Ice Cream, Kircubbin; Mash Direct, Comber, to name but a few.

Crucially too, Comber Early Potatoes hold one of only 3 Northern Ireland EU Protected Geographical Indication statuses.

8 Key Issues

This report so far has analysed the market conditions and parameters affecting seafood supply and demand from the tourism and hospitality sector. This section explores key issues that have emerged from desk research and consultations and that have fundamental impacts on being able to tackle business opportunities and capitalise on the goodwill and capabilities of the seafood supply and tourism and hospitality sectors.

There are lessons that can be learnt from elsewhere (Appendix 11.3) and these are integrated into the marketing recommendations below.

Substantive key issues impacting the ambition to grow the demand for locally sourced seafood and build the reputation of the area are:

1. Local seafood supply is irregular, both in terms of species landed and seasonality. The supply chain for seafood sees seafood acquired for export, while imports into NI of other species to broaden the range of species available to consumer, retailer and food service outlets help to meet demand at an acceptable price.
2. There still remains an apparent resistance amongst substantial parts of the NI community to buying, cooking and eating certain seafoods. This results in some eating establishments restricting their use of seafood on menus and offering other local food produce – red meat, pork, poultry, venison, game and local vegetables etc. This characteristic is also likely to limit demand for locally caught seafood from eating places.
3. Meanwhile, those eating places that feature “locally caught or sourced” seafood are doing reasonably well, with customers acquainted with seafood stimulating demand, demonstrating that the menu offer, and reputation, can be built up.
4. The presence of other local grown food produce and products in the County Down and Strangford Lough area is a strong asset that could be further exploited. Many owners, managers and chefs in the consultation programme were of the view that further marketing and promotion of the area (on the basis of food) should be on the basis of all food stuffs rather than a focus on seafood alone, where the thought was that this would unnaturally restrict opportunities.
5. The strong dominance of the domestic visitor market in the Strangford Lough and Mourne destinations suggests that marketing efforts should focus strongly on the resident, where educational activity and alignment of food with the destination (e.g. “reasons to visit”) should be included in any campaigns.
6. The Strangford Lough and Lecale area and the two destinations are already the subject of many tourism and marketing activities, including the St Patrick’s Trail, Mourne Coastal Route, Ulster Scots Driving Tours, www.strangfordlough.org²⁵, www.visitstrangfordlough.co.uk, www.visitmournemountains.co.uk, www.visitardsandnorthdown.com, plus canoe trails, greenway and Strangford Lough cycle trail, Comber/Andrews Titanic Trail . The development of a food related marketing initiative has to align with these initiatives, but more importantly must have visibility in this crowded environment. This may be undertaken by:
 - Local authorities and tourism agencies working together to develop and implement a brand architecture or hierarchy that gives visibility first to Strangford Lough and the Mourne and allows all these initiatives, and the food promotion, to operate effectively, reinforcing each other and emphasising the brand values and attributes of the area.
 - Equally, food promotion in the area must be compelling, innovative, visually exciting to attract attention and, thus begin to establish a competitive reputation for the area, which differentiates it

²⁵ A source of tourism and food related enquiries (e.g. BBC Food Programme)

from other parts of NI and provides additional “reasons to visit”. We’re convinced that a separate food brand does not add value owing to the crowded branded marketplace, the risk of confusion – in separating out e.g. Strangford Lough food suppliers from those from elsewhere and the prevalence of the existing Taste of Ulster marque. However, it is our view that a strong campaign to differentiate local produce will sit comfortably alongside the other activity brands/sub brands i.e. we could transform the reputation via simple and consistent messaging i.e. *Only Local Fish Sold Here/Only Local fish cooked here.....*

7. It is an extremely crowded marketplace of organisations and agencies engaged in and responsible for food and drink. Taste of Ulster and Food NI (of which Taste is a sub brand) provide a strong representative voice for the food sector in NI, with a powerful advocacy role. While it represents food service outlets (that meet its quality threshold) it is under representative of the seafood supply and processing sector. The trade body Northern Ireland Food and Drink Federation aims to support its members through promotion and initiatives. Meanwhile Seafish has a strong presence in NI and is instrumental in co-ordinating and supporting initiatives on the educational, research, promotional and campaign fronts to support the seafood sector.

The fish producer organisations (both of which are on the advisory group for this project) support and represent their members. The local authorities have roles in health and hygiene, marketing and promotion and business development. The key issue here is the need to align the interests of the full range of organisations behind all marketing and promotional initiative, especially in the run up and through implementation of the Year of Food, which will provide an opportunity for collaboration and cross sectoral joint working (see below).

8. The 2016 Year of Food offers opportunities to focus attention on marketing and promotional campaigns, itemised below, and offer ways for suppliers and food outlets to participate. While the Year of Food can help galvanise stakeholders and their engagement, this should provide a start to a longer term focus and promotion of the area for food tourism.
9. The maritime heritage of the area is strong but visitors have limited opportunities to experience it, other than passive watching or observation of the boats in harbours. A range of fish festivals have in the past provided opportunities for visitors, chefs and fishing communities to get together, but the general lack of awareness of the NI community about fish, fish species and cooking and eating seafood provides a compelling rationale for developing mechanisms to engage with residents and use this as leverage to attract visitors.

This will require funds and resources, people to set up and manage initiatives and marketing of heritage initiatives. This report is being produced concurrently with work to develop maritime heritage tourism within fishing communities. The SLLP is working with local authorities and NI Fisheries Harbour Authority to improve public realm, install information panels, produce booklets, install free WiFi and train local maritime heritage guides at the three fishing ports. This work aims to raise the profile of the ports, their produce and sales opportunities, locally and for visitors.

10. Businesses have told us that they would want to see more marketing and promotion of the area, but we identify that there is a general disengagement from tourism promotion. Some businesses are self-reliant and very professional with their marketing, social media, menu development etc. However, a significant effort will need to be made to bring all these businesses on board for any collaborative marketing effort.

Equally, the tenor of any marketing and promotion must include business related initiatives – menu development, supplier introductions, chef/supplier joint working and (for those needing help) marketing and management support to be able to deliver the overall ambition of a successful food economy. There is an obvious need to ensure that business relationships are built up and support offered to encourage engagement.

9 Marketing

The development and delivery of improvements in the understanding of and sourcing of local seafood by consumers and through the food service industry requires a sustained, long term focus on marketing, with the objective of ensuring effective and relevant messaging which will contribute to the development of a collaborative and committed industry partnership (fish supply, Tourism and relevant agencies). This activity should be augmented by education, early success, stimulation of demand and building the reputation of the Strangford Lough and Mourne areas for all food products. The market analysis (on the supply side, above) highlights issues related to seasonality of seafood, species landed and market characteristics of pricing and exporting.

The complexity of the supply chain and organisational infrastructure should not deter the need to act. The opportunity for the Strangford Lough and Mourne area is great, representing such a significant proportion of the NI catch and a major home of natural food. The infrastructure of fishing communities, processors and suppliers as well as the range of restaurants and eating places provide a natural clientele or stakeholder group to participate in, and benefit from, the strengthening of the area's reputation and visibility for food.

9.1 Vision and Objectives

Naturally NI²⁶ provides a basis for tourism experiences by:

- Linking local culture and tourism
- Developing a distinct and quality food experience for the area
- Producing and promoting distinctive regional foods
- Developing the critical infrastructure for food production and consumption
- Creating a sense of taste, place and landscape

These ambitions underpin the vision:

To make the Strangford Lough and Mourne area a recognised and strong food destination, based on the strength and authenticity of natural produce and the quality of the environment, in order to stimulate visitation, economic value and memorable visitor experiences.

The objectives are:

1. To use the 2016 Year of Food as a stimulus to collaboration and action;
2. To bring food and drink interests together to share the vision and objectives to make the area a strong food-based destination;
3. To create a strong and distinctive regional food identity for the area;
4. Using Food as the catalyst to generate awareness for the area, to bring more visitors from within NI and from out-of-state, and through food, motivate them to spend longer in the area, and visit throughout the year to taste the seasons.

9.2 Markets

Tourism NI and Tourism Ireland's research identifies visitors' ideal holiday needs and wants. While not specific to food tourism, it helps understand what motivates consumers and segments domestic and international visitors market. Future Market opportunities lie within the following leisure tourism segments:

- Domestic leisure tourism
- Day visitors
- Out-of-state leisure visitors
- Visiting or staying with friends and relatives

²⁶ Tourism NI's guide to experiential tourism in Northern Ireland

The target markets which best match Strangford Lough destination image, experiences, activities, infrastructure and objectives are²⁷:

- Curiously Cultural (immerse themselves in culture and discover it for themselves)
- Great Escapers (want to get away from the stress of a busy life and retreat to a relaxing rural environment)
- Time Together (couples interested in spending quality Time Together – romance and relaxation are important to them)
- Family Fun (travelling with their children and want to chill out while keeping them amused)
- Mature Cosmopolitans (frequent break-takers interested in quality and value for money)
- Social Energisers (want action-packed days and fun-filled nights, all at short notice)

9.3 Business Opportunities

The action and implementation plan recognises the need for individual business to benefit from participation in any marketing and promotion and in the effort to make the area a distinctive food destination. While we haven't undertaken a review of individual businesses' management, finances etc., we have been able to identify opportunities and needs in the business community, to deliver to the vision. These are:

- Joint working and collaboration between restaurants and hotel owners to contribute and support delivery of the vision and give individual support to the actions to promote the area as a new, exciting and distinctive world food destination;
- Encourage eating establishments to meet Taste of Ulster quality criteria and to enter into membership;
- Encourage Taste of Ulster to extend their reach, using this initiative and Year of Food a to mobilise commitment from the trade;
- Develop a series of active workshops, bring chefs and food (include seafood) suppliers and processors together to identify ways to develop and create new recipes;
- Develop assistance to encourage menu development giving direction and motivation to the hospitality industry to change their food offer to include the use of local and natural produce for consumers;
- Develop marketing support to individual establishments, including enhanced web sites, content development to benefit from key word search, organic search and where required how to use these messages in social media;
- Develop a business development advice line to engage with the industry who require support (online/advice line support can be discreet and nurturing method to engage);
- Big push to encourage participation in the 2016 Year of Food;

Specifically in the seafood sector:

- Development of an online seafood suppliers directory for eating establishments to allow them to identify who to go to for what;
- Potential to develop a seafood box system allowing consumers to buy direct (a model exists in Scotland called Coast and Glens - www.coastandglens.com); a full market appraisal would be required or an existing supplier implement.

9.4 Marketing Plan

The following table catalogues recommended marketing actions and indicative costs and resources to deliver the vision and address the issues identified in this appraisal about the seafood and other food supply chain into the tourism and hospitality sector. Resources catalogued below are indicative and include e.g. management time by the SLLP and integration with the local authorities' own strategies and delivery programmes.

²⁷ For more detail on the market segments see www.nitb.com/Portals/2/pageflip/practicalguide/files/inc/PracticalGuide.pdf

Marketing Plan		
Marketing Actions	Outcomes	Indicative Resources
<p>1. Agree the vision and objectives amongst:</p> <ul style="list-style-type: none"> Agencies and stakeholders Food suppliers and producers Eating establishments 	<ul style="list-style-type: none"> Generate stakeholder commitment to the proposition in this report <p>Commitment can be demonstrated through e.g. seafood related events in the 2016 Year of Food</p>	<p>Management time</p> <p>Management time to recruit and manage</p>
<p>2. Attract and Engage Ambassadors/Food Champions to promote local food, with a passion and belief in Irish food, who can influence and shape the future of food tourism in the area</p>	<ul style="list-style-type: none"> High profile peers, able to generate commitment and press <p>Outcome demonstrated by having champions promoting seafood from and within the area</p>	<p>Allow £15,000 for launch, guest appearances, blogs, and cultural push</p>
<p>3. Heighten the natural food offer on the www.strangfordlough.org, www.visitstrangfordlough.co.uk, www.visitmournemountains.co.uk and www.visitardsandnorthdown.com web sites, with separate pages, what to buy, when to buy, recipes, and potentially a micro site for consumers/visitors, linking to these sites</p>	<ul style="list-style-type: none"> Integration with existing tourism promotion programmes Raise profile of the area for food <p>Success demonstrated by stronger emphasis on these sites of the food offer in the area</p>	<p>£1,000 for each web site</p> <p>£4,000 for micro site</p>
<p>4. Encourage agencies to review the hierarchy of brands for the Strangford Lough area, along with other tourism marketing initiatives and project</p>	<ul style="list-style-type: none"> Establish a context for food marketing of the area Commit to a campaign to raise awareness rather than an additional layer of branding i.e. "ONLY local fish cooked here" <p>Success demonstrated by commitment to brand review and to subsequent campaigns</p>	<p>Identify funding</p> <p>Write advertising brief</p> <p>Budget allowance for creative and media (online) allow £25,000</p>
<p>5. Develop marketing campaign including messaging (local, fresh, seasonal, tasty, and healthy), straplines and marketing content, to concentrate on social media and press and PR.</p> <ul style="list-style-type: none"> Engage with eating establishments to encourage their involvement Develop stories related to food suppliers, seafood and eating establishments 	<ul style="list-style-type: none"> Raise profile for the area for food Ongoing campaign to raise profile Transparency in lead generation via Likes/Followers and thus evaluation <p>Success demonstrated through campaigns, and the number of e.g. "likes" and followers in social media</p>	<p>Social media £2,000/month for 6 months</p> <p>PPC – allow £1,000 per month for 6 months</p> <p>Press and PR £1500/month</p>
<p>6. Integration of Strangford Lough food offer with Tourism NI and Tourism Ireland marketing activity to promote the food tourism offer</p>	<ul style="list-style-type: none"> Raise profile for the area for food <p>Success demonstrated by inclusion of food in tourism campaigns</p>	<p>Management time</p>

Marketing Plan		
Marketing Actions	Outcomes	Indicative Resources
<p>7. Develop online (potentially a mobile app) directory of participating eating establishment for the consumer.</p> <ul style="list-style-type: none"> • Set up with regular incentives • Develop promotional postcard to market the APP for distribution at Ferrys/Airports/TICs. Online version would link into actions under 3 above 	<ul style="list-style-type: none"> • Publicise eating establishments (there's a benefit for them) and reinforce quality of the destination <p>Commitments and quality of mobile app will demonstrate successful achievement of these outcomes</p>	<p>£25,000 to generate commitment and arrange photographic shoot to capture say 10 trophy shots for use across all mediums and in all campaigns</p> <p>£2000 for designing, printing and distribution of postcard.</p> <p>Distribution costs TBC</p>
<p>8. Develop and market online fish supplier directory for eating establishments which could be via daily bulletin of what's caught, how to cook, and could be online purchase</p>	<ul style="list-style-type: none"> • Help familiarise eating establishments with suppliers and species of fish <p>Success would be the achievement of a directory and resourcing this to keep it maintained</p>	<p>Internal resource to SLLP?</p> <p>Development of online portal</p> <p>Price TBC</p>
<p>9. Prepare Year of Food programme for the area, comprising, marketing, events, workshops (see below) and promotions</p>	<ul style="list-style-type: none"> • Provide impetus to the food proposition • Attract consumers and engage businesses <p>Commitment of stakeholders and the scale/quality of programme linked to Year of Food would be how to evaluate successful achievement of this marketing action</p>	<p>tbc</p>
<p>10. Chef workshops, bringing variously owners, chefs and food producers and suppliers together to:</p> <ul style="list-style-type: none"> • Allow chefs to familiarise themselves with species, how to cook, supply, seasonality • Provide fish producers/suppliers with access to new outlets • Potential to link into Taste of Ulster plans for workshops • Consider chef workshops in non-seafood sector 	<ul style="list-style-type: none"> • Increase familiarisation amongst many eating establishments of seafood • Networking opportunities • Enhance supply routes to new outlets <p>Success evaluated through number of workshops, participant numbers and topics addressed</p>	<p>(say) £2,000 per workshop</p>
<p>11. Menu improvements – provide guidance and support to individual</p>	<ul style="list-style-type: none"> • Encourage better presentation of food offer to consumer 	<p>Guidelines (say) £1,500</p>

Marketing Plan		
Marketing Actions	Outcomes	Indicative Resources
<p>establishments on how to improve their menus to make them more attractive, more geared to “fresh, seasonal, local produce”:</p> <ul style="list-style-type: none"> • Prepare guidelines for eating places • Hands on support for those seeking it 	<ul style="list-style-type: none"> • Encourage eating establishments to offer local produce on menu • Reinforce the quality of the Strangford Lough food offer <p>Success judged by achievement of outcomes</p>	<p>Hands-on support, say £500 per business</p>
<p>12. Food/ Drink Toolkit - develop to provide businesses with information and support on benefit of using local produce, where to source, how to tell story</p> <ul style="list-style-type: none"> • Development of toolkit • Delivery of business briefings on the toolkit 	<ul style="list-style-type: none"> • Use for businesses to encourage buy-in to local, natural, fresh produce • Motivate eating establishments to participate in the visitor market <p>Delivery of toolkit, but more importantly participant numbers in business briefings would be best way to assess these outcomes</p>	<p>Toolkit £,000 Business briefings (say) £1,000 each</p>
<p>13. New food map of the region with eating places and producers/supplier, linked to web sites (3 above) and e.g. mobile apps</p>	<ul style="list-style-type: none"> • Reinforce the food offer of the area <p>Successful achievement of this and its distribution should be assessed</p>	<p>Enhanced map of the area £7,000 for preparation (printing costs dependent on numbers) Distribution TBC</p>
<p>14. Farmers markets – encourage more farmers markets and use to reinforce and support the quality of food on offer in the area, including “things to do” when visiting</p>	<ul style="list-style-type: none"> • Support distribution routes to market • Encourage consumers to view the area positively <p>Commitment to new farmers markets and their frequency would be how these outcomes would be assessed</p>	<p>Project Management time</p>
<p>15. Food Trail – best delivered on line, with linkages to 3 6 and 7 above</p>	<ul style="list-style-type: none"> • Mechanism for encouraging distribution of visitors (to eating places and food producers, including harbours) • Fuse with mobile app <p>These outcomes evaluated on basis of successful delivery and market/visitor use</p>	<p>tbc, but up to £20,000 to prepare and £10,000 to publicise</p>
<p>16. Food heritage and tourism experiences – the need to promote “taste and touch” as opposed to “look and see” experiences, especially related to the marine heritage of the area requires consideration of:</p> <ul style="list-style-type: none"> • Encourage food operators to 	<ul style="list-style-type: none"> • Help consumers and visitors to familiarise themselves with the traditions and history of the fishing industry • Encourage food and seafood related businesses to engage with the visitor 	<p>Cost to scope the project £10,000 Implementation costs tbc</p>

Marketing Plan		
Marketing Actions	Outcomes	Indicative Resources
<p>innovate with ways to encourage the visitor/consumer (e.g. Mourne Seafood Cookery School, Kilkeel)</p> <ul style="list-style-type: none"> Encourage fish suppliers to open their doors to the consumer and market themselves to demonstrate fish species, processes and ways to cook them Continue to promote heritage stories and tours in harbour areas 	<p>and keep traditions alive</p> <ul style="list-style-type: none"> Reinforce and support the reputation of the area for good food <p>Success evaluated on basis of businesses making innovations and their (financial) sustainability as well as linkages with the history and heritage of the area</p>	
<p>17. Innovation Fund, designed to encourage operators to innovate and implement many of the recommendations contained here, especially in terms of product development and heritage, less to do with marketing and promotion</p>	<ul style="list-style-type: none"> Encourage innovation and product development to reinforce food reputation Help delivery of many of the objects of the project <p>Actually achieving the set-up of an Innovation Fund is the primary KPI; the fund would have its own KPIs including e.g. economic impact, businesses supported etc.</p>	<p>Set up and prepare criteria £5,000</p> <p>Pilot project (say) £20,000</p> <p>Annual management</p>
<p>18. Events & festivals:</p> <ul style="list-style-type: none"> Develop programme of sustainable community events which have tourism and building the reputation of the area as their motivators. Some events already successful, but introduce stronger food theme and market to potential visitors from outside the area (cf Down DC events strategy) Generate a Strangford Lough food presence at other events (e.g. golf²⁸, yachting, sports etc.) 	<ul style="list-style-type: none"> Events “animate” a destination and help reinforce the reputation of the area Tie in with local events in Ards and North Down and Newry, Mourne and Down <p>Success assessed by number of events that feature food components and food-specific events; further evaluation of visitor numbers, impact on visitors’ perceptions of the area (for food) etc.</p>	tbc
<p>19. Seafood and wider food sector to evaluate whether it has the appetite and ambition to establish PGI (Protected Geographical Indication) status foodstuffs e.g. Portavogie prawns, Ardglass herrings, Strangford Lough mussels</p>	<ul style="list-style-type: none"> Successful PGI will support marketing and visibility of the area as well as reinforce perceptions of the area as quality food based <p>Success judged by whether this outcome achieved</p>	Management costs

²⁸ See www.niopen.co.uk/event-festival (with partner Food NI)

10 Way Forward and Next Actions

We are recommending a series of actions that will require cohesion, passion and commitment from the management and staff of public agencies and food producers, suppliers and eating establishments, all working in partnership with each other. The project therefore needs buy-in and investment to materially change the fortunes of the supply chain and substantially change the food perception of NI

We acknowledge that there may be restricted budgets and therefore the allocation of resources, priorities and evidence of success are important to address marketing, communication and business development opportunities that are central to establishing and enhancing the food reputation of the Strangford Lough and Mournes area. The marketing plan has been structured to reflect these priorities Potential sources of funding support, dependent on the engagement and commitment of agencies are:

- European Maritime and Fisheries Fund (EMFF), 2014-2020
- Rural Development Programme, 2014-2020
- Other DARD support
- Tourism NI events funding (for Year of Food)
- Invest Northern Ireland
- Ards and North Down Borough Council
- Newry, Mourne and Down Borough Council
- Northern Ireland Environment Agency

The industry (potentially through Taste of Ulster) could be motivated and incentivised to contribute financially to campaigns.

The delivery of the project will be dependent on the engagement and commitment of a number of agencies and organisations; it would be appropriate to sustain the momentum achieved with the advisory group to this evaluation project by establishing a strong steering group to support and help drive the food marketing initiative that emanates from this report. On this should be individuals identified for their passion for the area and the topic, together with food, tourism and other agencies either with operational responsibilities or a funding interest in developing the food project and marketing and promotion of the Strangford Lough and Mournes area.

We have costed the actions we consider essential to meet the objectives and realise the future potential of the area, on the basis of food and drink. But we also need to agree the priorities and the demarcation or allocation of responsibilities for implementation. This raises some sensitive issues about agency demarcation, the experience partners in this delivery exercise have to fulfil the actions, about the allocation of resources and accountabilities (who does what), as well as the need for sustained commitments over the medium to long term (a frequent concern amongst interviewees).

Next actions and timetable for implementation are:

Actions	Timetable
1. Agree the vision and objectives for this project.	Summer 2015
2. Identify individuals and organisations to participate in the proposed steering group for the project.	Summer 2015
3. Identify LA and agency reactions to the proposition that the area become a distinctive and strong food destination.	Summer 2015
4. Develop programme and proposition for the Year of Food 2016	Summer/Autumn 2015
5. Identify funding opportunities for the Year of Food programme.	Autumn 2015
6. Prepare funding submissions where required	Autumn 2015
7. Find a credible Champion to support the initiative	Autumn 2015
8. Communication to stakeholders to advise of the ambitions and seek their engagement – food and seafood producers and suppliers, and eating places.	Autumn 2015
9. Detail the marketing and communications plan, routes to market etc., for implementation in late 2015 through 2015.	Autumn 2015
10. Hold workshops for seafood and wider food industry to determine its appetite to progress with Protected Geographical Indication foodstuffs.	Autumn 2015

11 Appendix

11.1 Consultation Programme

1. Aldos, Ardglass – Niall Vinaccia, Partner
2. Als Diner, Crossgar – Aidean Rogers, Supervisor
3. Art Bar Funkel, Newry – Anthony Ferguson, Chef
4. Balmoral, Restaurant 23, Warrenpoint – Fiachra Donnelly, Manager
5. Bennett’s Sea Food Restaurant, Warrenpoint – Paula, Restaurant Manager
6. Buck’s Head Inn, Dundrum – Allan Smith, Bar Manager
7. Burford Lodge, Ardglass – Tom and Ann Wills, Owners*
8. The Cross Square Hotel Restaurant, Crossmaglen – Glen Trainer, Front of House
9. Cuan Licensed Guest Inn and Restaurant, Strangford – Peter McErlean, Chef and Owner*
10. Curran’s Bar – Seafood and Steakhouse, Ardglass – Jenish Stephen, Manager
11. Denvir’s Coaching Inn, Downpatrick – Darrel Rice, Chef
12. Dundrum Inn, Dundrum – Karen Malone, Waitress
13. Fusion, Warrenpoint – Mark O’ Kane, Owner
14. Gardner’s Rest, Gilnahirk - Lesley Harrison, Supervisor
15. Georgian House, Comber – Jason Docherty, Manager
16. Governor Rocks, Donaghadee – Aimee McAlister, Owner/ Manager
17. Harbour Inn, Annalong – Lenore Hamilton, Partner
18. Harrisons of Grey Abbey – William Harrison, Manager
19. Katch 27, Kircubbin - Leigh Gamble, Owner
20. Lecale Restaurant, Downpatrick – Andy Fitzpatrick, Chef
21. Lobster Pot, Strangford – Stephen Kilgore, Chef and Owner*
22. McBrides, Comber – Iris McBride, Owner
23. Mckee’s Restaurant, Newtownards – Colin Mckee, Owner
24. The Moat Inn, Donaghadee – Lesley Hackwith, Waitress
25. Molly Brown’s, Newtownards – Daley Carnduff, Assistant Manager
26. Mournes Seafood Bar, Dundrum – Bob McCoubrey, Owner
27. Mournes Seafood Cookery School, Kilkeel - Pamela Houston, Roger, Chef and Kathleen Turner, Tourist Office²⁹
28. Northdown House Bar and Grill, Comber – Nick Caughey, Manager
29. The Old Mill Restaurant, Newry – Marissa, Front of House
30. Parlour Bar and Restaurant, Newtownards – James Cook, Director
31. Paul Arthur’s restaurant and Bella Bar and Bistro, Kircubbin - Paul Arthur, Chef and Owner*
32. Pier 36, Donaghadee – Sarah Cochran, Marketing Manager*
33. Poachers Pocket, Lisbane – Victoria Patton, Marketing Manager (also for Balloo House, Killinchy, and the Parson’s Nose, Comber)*
34. Portaferry Hotel, Portaferry – Martha Tumelty, Manager*
35. Port o Call, Kilkeel – Steven Morris, Chef/Owner

²⁹ Kilkeel Development Association

36. Quays, Portavogie – Mark Hannan, Chef and Co-owner*
37. Salthouse Restaurant, Portaferry – Colm O’ Neill, Owner
38. Saltwater Brig, Kircubbin – Joe Carthy, Owner*
39. Scullery at Golf Course, Scrabo – Rebecca Robinson, Waitress
40. Slieve Donard - Brian Donnelly, Head Chef
41. Sugarcane Café Bistro, Comber – Barry Burns, Manager
42. The Whistle Down Restaurant, Warrenpoint – Shirley Fitzpatrick, General Manager

Supply Contacts

43. ANIFPO and Seasource - Alan McCulla*
44. G. Cully & Sons - David Cully*
45. Denholms Fish Selling - Sam Mawhinney*
46. Kilkeel Seafoods - Daniel Whittle* and Jack Cowden*
47. NIFPO - Dick James**
48. Rooney Fish - John Rooney*

Agencies and Organisations

49. Ards and North Down Borough Council - Christine Mahon, Director** and Sharon Mahaffy, Tourism Manager**
50. Food NI – Michele Shirlow, Chief Executive**
51. Invest Northern Ireland, Belfast – Shelley Pinkerton and Alastair Higgins, Food team*
52. Michelle Lestas, Lestas Consulting and the Good Food and Wine Company
53. Newry, Mourne and Down District Council – Mark Mohan, Tourism Initiatives Manager and David Patterson, Economic Development Manager**
54. Taste of Ulster, Belfast – Sharon Machala, Membership Manager*
55. Tourism Northern Ireland, Belfast – Rosemary Lightbody*
56. Seafish NI - Lynn Gilmore **
57. Strangford Lough and Lecale Partnership – Caroline Nolan, Manager**

*Face to face interviews

** Advisory Group members

Figure 6 Location of Businesses Consulted



- | | | |
|---|--|---------------------------------------|
| 1. Pier 36 | 16. Saltwater Brig | 31. Mournes Seafood Bar |
| 2. Governor Rocks | 17. Katch 27 | 32. Slieve Donnard |
| 3. The Moat Inn | 18. Quays | 33. Harbour Inn |
| 4. Molly Brown's | 19. Portaferry Hotel | 34. Mourne Seafood Cookery School |
| 5. Mckee's Restaurant | 20. Salthouse Restaurant | 35. Port o Call |
| 6. Parlour Bar and Restaurant | 21. Lobster Pot | 36. Bennett's Sea Food Restaurant |
| 7. Scullery at Scrabo Golf Course | 22. Cuan Licensed Guest Inn and Restaurant | 37. The Whistle Down Restaurant |
| 8. Sugarcane Café Bistro | 23. Als Diner | 38. Balmoral, Restaurant 23 |
| 9. Georgian House | 24. Denvir's Coaching Inn | 39. Fusion |
| 10. McBrides | 25. Lecale Restaurant | 40. Art Bar Funkel |
| 11. Northdown House Bar and Grill | 26. Curran's Bar | 41. The Old Mill Restaurant |
| 12. Gardner's Rest | 27. Aldos | 42. The Cross Square Hotel Restaurant |
| 13. Poachers Pocket | 28. Burford Lodge | |
| 14. Harrisons of Greyabbey | 29. Buck's Head Inn | |
| 15. Paul Arthur's Restaurant and Bella Bar and Bistro | 30. Dundrum Inn | |

11.2 Sources

1. 2 Seas magazine – TourFish: Responsible Tourism, Food and Fisheries: New Opportunities for Sustainable Development, August 2014
2. Agri-Food Strategy Board - Going for Growth, Strategic Plan for the Agri-Food Sector (2013)
3. Barclaycard – Tourism Dynamics report, May 2014
4. Belfast Telegraph, re Barclaycard report Where's Britain Spending? (24th November 2014)
(www.belfasttelegraph.co.uk/news/northern-ireland/northern-irish-top-dining-charts-30770022.html)
5. Destination Mourne Mountains Tourism Plan, 2013 – 18 (2013)
6. Destination Strangford Lough Tourism Plan, 2013 – 18 (2013)
7. The European Agricultural Fund for Rural Development - Examples of Food projects (2011)
8. European Maritime and Fisheries Fund (EMFF) 2014 - 2020 United Kingdom SWOT and Needs Assessment Analysis (Prepared by Epsilon Resource Management Limited) (2013)
9. Experiencing Scotland - Why offer Scottish food and drink? (www.experiencingscotland.com)
10. FoodNI – Producers Guide, 2015
11. FoodNI – Taste of Ulster Guide, 2015
12. Food Standards Agency & Department of Health, Social Services and Public Safety in Northern Ireland - National Diet and Nutrition Survey. Results from Years 1-4 (combined) of the Rolling Programme (2008/2009 – 2011/12): Northern Ireland (2013)
13. Gov.uk – Protected food names: guidance for producers (www.gov.uk/protected-food-names-guidance-for-producers)
14. NI Executive - Economic Strategy (Priorities for Sustainable Growth and Prosperity), 2012
15. NISRA – Local Government District Tourism Statistics in Northern Ireland 2011-2012 (2013)
16. Northern Devon Fisheries Local Action Group - Understanding the Market and Supply Chain for Fish Caught and Landed in Northern Devon, (2013)
17. North Norfolk FLAG - Delivery Plan (2011),
18. North and West Cumbria FLAG -Local seafood supply and demand study (2012)
19. Northern Ireland Fishery Harbour Authority - www.nifha.co.uk
20. Sea Management Organisation - UK Sea Fisheries Statistics 2013 (2014)
21. South East Economic Forum - The Food and Fisheries Programme (2009)
22. Strangford Lough and Lecale Heritage Management Strategy and Action Plan 2013-2018
23. Tourism Intelligence Scotland – Food and Drink Experience in Scotland (2010)
24. Tourism NI – Our Food So Good - A practical toolkit to developing food related visitor experiences
25. Tourism NI - Naturally NI: A practical guide to experiential tourism in Northern Ireland (2013)
26. Tourism NI - Revisiting Food Tourism, Business Insights Series 2011/2012 (2012)
27. Tourism NI - Visitor Attitude Survey 2014 (through Millward Brown Ulster)
28. Tourism NI - A practical guide to experiential tourism in Northern Ireland
29. Tourism NI - Submission by Northern Ireland Tourist Board on call for evidence to developing a strategic plan for the agri-food sector in Northern Ireland (2012)

3 Wild Atlantic Way, Ireland (<http://www.failteireland.ie/Wild-Atlantic-Way.aspx>)

The Wild Atlantic Way is a long-distance (2,500km) tourist route that is supported by a large tourism campaign involving signage, website and smartphone apps.

The project has grown to encompass various maritime aspects along the route, such as watersports, heritage and food (inc. seafood). The project involved 6 stages:

Stage 1: Develop brand proposition and identity, and key market segments

Stage 2: Identify the route

Stage 3: Way-finding strategy including directional signage

Stage 4: Delivery of 'Discovery Points'

Stage 5: Selling Wild Atlantic Way experiences

Stage 6: Marketing and communications

Food secrets

<http://www.wildatlanticway.com/get-inspired/themes/food-secrets/>

Food stories

<http://www.wildatlanticway.com/stories/food/food-stories-of-the-wild-atlantic-way/>

Fáilte Ireland WAW info:

Useful lessons for Co. Down Seafood:

- An integrated, step-wise process building on wider tourism initiative.
- Provides a branded identity that can encompass (existing and new) specific initiatives, i.e. food and heritage
- Discovery points (156 in total) enable the promotion of nearby products and businesses



4 Scotland's Seafood Trail (<http://theseafoodtrail.com>)

The current seafood trail centres on mid-Argyll and involves 8 participating seafood restaurants offering fresh seafood.

It is supported by a website with interactive map, some branding of the trail at participating restaurants and an accompanying book.

The Seafood Trail model is being replicated with new projects on the East Coast of Scotland and given wider promotion in 2015 as part of Visit **Scotland's Year of Food and Drink**.

A range of organisations met in August 2013 to discuss developing an East Scotland Seafood Trail, possibly stretching from Shetland to the Borders and tie in with the Year of Food and Drink 2015.

The **Seafood – See Here!** project is a new strategy developed by the Moray Firth Partnership, which is working with businesses and the public around Highland, Moray and Aberdeenshire to raise the profile and availability of locally landed seafood.

Before promoting a seafood trail, preliminary work was needed to make local seafood more easily available, and increase the amount and quality of seafood offered in local restaurants and shops. "Sea Food – See Here!" is a capacity building project, prior to a major seafood drive and marketing activity as part of the East Scotland Seafood Trail.

The Seafood-See Here! Team has attended food events in the region, letting



people see how quick and easy it is to cook seafood and enjoy trying lesser known varieties. The project will shortly launch a new website with interactive mapping showing where one can buy and eat locally landed seafood. It is also developing three trial “hubs” to increase local demand, encourage local entrepreneurial activities and develop the “net to plate” concept.

The “**East of Scotland Seafood Project**” was established in 2014 following a £25,000 grant to help regions work together and promote high quality seafood experiences for locals and visitors. Initial activities have included setting up a collaborative network, undertaking asset mapping, commissioning a brand identity and video footage, and building a website. The filming and formal launch was planned for spring 2015 (still to be launched).

Similar to the Seafood - See Here! project, the overall aim is to increase the accessibility and consumption of seafood, and promote the area’s reputation, historical links with seafood, and related events. It will provide easy access to information about where to eat, try and buy the best local seafood.

The Moray Firth Partnership feasibility study concluded “ before any mainstream work is done to promote the Moray Firth and North Coast areas as part of a seafood trail, groundwork has to be done to make sure that more varieties of locally landed seafood of known provenance are readily available to buy, and are being served in local restaurants. Some of the wide-ranging measures proposed to achieve this include:

- Engage with more young people and promote positive actions, timed to enhance and support existing initiatives like Seafood in Schools & Fish for Health.
- Develop more mobile demonstration facilities and enhance local staff training to promote seafood at local events etc.
- Encourage and support existing businesses and entrepreneurs, destination management and tourism organisations etc. to combine forces and be more creative in finding ways to interest people in coming, trying and buying.
- Develop materials including some new film footage and images of traditional artisan fishing methods from the Moray Firth, including hand-lining, net and coble, creeling etc., to include as part of displays and information events.
- Link the seafood trail to other activities including walking trails, yachting, dolphin spotting, etc.
- Encourage more “end to end” initiatives, combining and managing activities “from net to plate”.
- Gather more data on fisheries without catch quotas to determine catch and effort levels, sustainable yield levels, best practice guidelines based on Responsible Fishing.
- Support smaller scale artisan fisheries, day-boats marketing fish “off the boat” at local harbours, to provide more and better quality local supplies, as well as forming tourist attraction.
- Work together with local fish suppliers, chefs, trainers etc. and create more opportunities for local people to learn about handling, cooking and enjoying seafood. This will include demos and taster sessions at already planned events, harbour days, festivals etc.
- Encourage sales of under-utilised and sustainable varieties of fish.

Useful lessons for Co. Down Seafood:

- The feasibility study in the Moray area identified many of the same issues highlighted here in relation to local seafood supply in the Co. Down region. Many of the ideas listed above may be transferable to the Co. Down

<p>context.</p> <ul style="list-style-type: none"> • In contrast, the amount of seafood landed in the Moray region & nearby may well be sufficient for local demand if it were not exported and made accessible to local buyers. Local landings of the smaller volume species from the Co. Down ports are already integrated into local distribution chains. • Some of the Seafood trail elements (recipe book, NI Women in Fishing cookery demonstrations) are already in place for Co. Down • The seafood trail is a readily expandable format, e.g. 8 restaurants can be increased, along with the geographical scope of the trail. <p>There is the opportunity for linkage into wider promotional activities (Year of Food and Drink)</p>	
<p>5 North West Cumbria Local Seafood Supply</p> <p>The North and West Cumbria FLAG commissioned a study to examine the demand for and ability to supply Cumbrian caught fish and seafood into the Cumbrian hospitality sector. The study found that:</p> <ul style="list-style-type: none"> • the current supply side inability to meet the basic and fundamental demand side needs of catch quantity, quality and consistency is preventing establishments from acting upon their desire to use more locally caught fish. • Current quota restrictions have created a ceiling where catch quantity growth is virtually impossible and there is little current appreciation or knowledge of seasonality amongst the demand side, meaning there is frustration when adverse weather or lack of seasonal availability affects consistency of supply. • Fish and seafood does not enjoy natural links with Cumbria in general, with both meat and artisan foodstuffs enjoying closer natural ties. • The amount of high value catch is too small / infrequent to warrant a sustainable week-in, week out direct fisherman to restaurant relationship, which relies on consistent delivery of particular sizes of fish; • Assurances on quality, reliability, delivery and price are considered the top reasons for supplier choice and this is delivered most robustly by larger national suppliers or those operating from nearby Fleetwood and beyond; • There is a difference in how chefs define and understand 'locally sourced' and 'locally caught'. The word 'sourcing' is much less transparent, and whilst support and use of Cumbrian based seafood suppliers is beneficial for the region's economy, it does not necessarily imply an establishment support for locally caught fish and seafood. E.g. 'Cartmel Valley smoked salmon' might have value added in Cumbria, but does not necessarily mean that the base product is Cumbrian caught or landed; <p>Useful lessons for Co. Down Seafood:</p> <ul style="list-style-type: none"> • The Cumbria region faces similar supply-side constraints to Co. Down i.e. limited landings of species other than Nephrops and scallops, and these are bought in bulk by processors. • The distribution chain into local markets is less developed than in Co. Down. • The study proposed a range of different initiatives to create a local market for regionally-branded fish 'Cumbrian caught'. Many of these are promotional tools and do not, however, directly address the supply constraints the study identified. • Diversion of some of the larger-volume landings (Nephrops and scallops) into the local market is not explored. 	 <p>THE SEAFOOD TRAIL <i>A Culinary Journey</i></p>

11.4 Destinations Strangford Lough and Mourne Mountains Tourism Plans 2013 - 2018

Target Markets

Based on the NITB (2012) market segmentation study, the target markets which best match Strangford Lough destination image, experiences, activities, infrastructure and objectives are:

- Curiously Cultural (immerse themselves in culture and discover it for themselves)
- Great Escapers (want to get away from the stress of a busy life and retreat to a relaxing rural environment)
- Time Together (couples interested in spending quality Time Together – romance and relaxation are important to them)
- Family Fun (travelling with their children and want to chill out while keeping them amused)
- Mature Cosmopolitans (frequent break-takers interested in quality and value for money)
- Social Energisers (want action-packed days and fun-filled nights, all at short notice)

Geographic Target Markets

Both destination Strangford Lough and the Mourne Mountains tourism plans identify the following target geographic markets:

- Domestic: Overnight and Day Visits
- International: Ireland, UK, USA, Germany, Netherlands, France

Strangford Lough and Mourne Mountains & Ring of Gullion Tourism Assets

Strangford Lough Tourism Assets		The Mournes & Ring of Gullion Tourism Assets	
<ul style="list-style-type: none"> • Adventure • Beaches • Birdlife and Coastline • Canoeing • Christian heritage • Crafts & Creativity • Routes and trails for car, cycle and kayak • Flora & Fauna • Gardens • Golf • History & Heritage and historic houses • Landscape • Local food • Mountstewart & Other NT Properties • Outstanding beauty and natural heritage • St Patrick 	<ul style="list-style-type: none"> • Strangford Lough • Exploris • NI Aquarium • Castle Espie • Gardens & Homes • Outdoor Activities <ul style="list-style-type: none"> ○ Canoeing / Kayaking ○ Wildlife watching ○ Walking ○ Horseback riding ○ Pony Trekking ○ Golf 	<ul style="list-style-type: none"> • Saint Patrick and Christian Heritage • Mourne Mountains • Ring of Gullion • Scenery • Coastal Routes • Geo-Tourism • Landscapes • Homes and gardens • History & Heritage • Traditional Music • Events • Literature (C S Lewis) • Meetings & Conferences • Newry City 	<ul style="list-style-type: none"> • Outdoor Activities <ul style="list-style-type: none"> ○ Walking ○ Hiking ○ Mountain Biking ○ Cycling ○ Golf ○ Canoeing / Kayaking ○ Wildlife watching ○ Sports fishing ○ Horseback riding & pony trekking

11.5 Landings and Supply in Northern Ireland's Three Main Fishing Ports

Ardglass				Supply chain	tonnes	weekly		
Species	Quantity (tonnes)	Value (£ '000)	amount to... processors	local wholesalers/traders	local market (t/yr)	supply (t/week)	seasonality	
Herring	4,475	1,553	99%	1%	45	0.9	August-September.	
Nephrops	2,151	4,175	96%	5%	97	1.9	year round	
Mackerel	803	711	99%	1%	8	0.2		
Scallops	134	219	95%	5%	7	0.1	winter and spring fishery	
Crabs	110	91	98%	2%	2.2	0.0	most summer/autumn	
Dogfish	30	6	Landed for pot bait					
Monks or Anglers	24	49		100%	24	0.5	year-round (prawn bycatch)	
Witch	22	8		10%	2	0.0	year-round (prawn bycatch)	
Haddock	15	7		100%	15	0.3	year-round (prawn bycatch)	
Cod	13	19		100%	13	0.2	year-round (prawn bycatch)	
Hake	12	13		100%	12	0.2	year-round (prawn bycatch)	
Skates and Rays	10	9		100%	10	0.2	year-round (prawn bycatch)	
Whiting	7	2		100%	7	0.1	year-round (prawn bycatch)	
Squid	6	18		100%	6	0.1	Oct-December	
Gurnard	6	3		100%	6	0.1	year-round (prawn bycatch)	
Ling	6	3		100%	6	0.1	year-round (prawn bycatch)	
Others	13	40		100%	13	0.3	year-round (prawn bycatch)	
Total	7,851	6,967		total	273	5.3		

Kilkeel				Supply chain	tonnes	weekly	
Species	Quantity (tonnes)	Value (£ '000)	amount to... processors	local wholesalers/traders	local market (t/yr)	supply (t/week)	seasonality
Nephrops	2,468	4,846	96%	5%	111	2.1	year round
Scallops	1,173	1,104	95%	5%	59	1.1	winter and spring fishery
Crabs	600	561	98%	2%	12.0	0.2	most summer/autumn
Haddock	277	279		100%	277	5.3	year-round (prawn bycatch)
Herring	110	22	98%	2%	2	0.0	Aug-Sept
Dogfish	90	12		100%	90	1.7	year-round (prawn bycatch)
Monks or Anglers	88	197		100%	88	1.7	year-round (prawn bycatch)
Cod	75	163		100%	75	1.4	year-round (prawn bycatch)
Whiting	55	46		100%	55	1.1	year-round (prawn bycatch)
Skates and Rays	41	42		100%	41	0.8	year-round (prawn bycatch)
Witch	32	13		10%	3	0.1	year-round (prawn bycatch)
Hake	29	40		100%	29	0.6	year-round (prawn bycatch)
Squid	22	62		100%	22	0.4	Oct-December
Plaice	19	8		100%	19	0.4	year-round (prawn bycatch)
Whelks	18	17	100%				
Gurnard	17	9		100%	17	0.3	year-round (prawn bycatch)
Ling	14	9		100%	14	0.3	year-round (prawn bycatch)
Pollack (Lythe)	12	18		100%	12	0.2	year-round (prawn bycatch)
Lobsters	12	121	95%	5%	0.6	0.0	mostly export, some to NI market
Others	34	90		100%	34	0.6	
Total	5,189	7,661		total	962	18.5	

Portavogie				Supply chain	tonnes	weekly		
Species	Quantity (tonnes)	Value (£ '000)	amount to... processors	local wholesalers/traders	local market (t/yr)	supply (t/week)	seasonality	
Nephrops	2,208	4,375	96%	5%	99	1.9	year round	
Scallops	702	640	95%	5%	35	0.7	winter and spring fishery	
Crabs	177	185	98%	2%	3.5	0.1	most summer/autumn	
Dogfish	122	30	Landed for pot bait				0.0	
Cod	30	63		100%	30	0.6	year-round (prawn bycatch)	
Haddock	30	29		100%	30	0.6	year-round (prawn bycatch)	
Monks or Anglers	29	60		100%	29	0.6	year-round (prawn bycatch)	
Hake	16	17		100%	16	0.3	year-round (prawn bycatch)	
Squid	10	24		100%	10	0.2	Oct-December	
Witch	9	3	90%	10%	1	0.0		
Whelks	8	7	100%		0	0.0	spring summer	
Skates and Rays	7	5	70%	30%	2	0.0	year-round (prawn bycatch)	
Lobsters	6	54	95%	5%	0.3	0.0	mostly export, some to NI market	
Pollack	6	9		100%	6	0.1	year-round (prawn bycatch)	
Others	17	50		100%	17	0.3	year-round (prawn bycatch)	
Total	3,379	5,551		total	280	5.4		



Strangford Lough & Lecale Partnership

This project was funded by the EU and the Department of Agriculture and Rural Development Northern Ireland through Axis 4 of the European Fisheries Fund, aimed at encouraging sustainable development across the fishing dependent communities of Ardglass, Kilkeel and Portavogie, administered by the South East Area European Fisheries Fund.



Supported by the European
Fisheries Fund



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