



The Erne Recreational, Tourism and Commercial Product Identification Study

Main Report

Final Draft
June 2011



Prepared for

Waterways Ireland in conjunction with Fermanagh District Council, Fermanagh Lakeland Tourism and Northern Ireland Tourist Board



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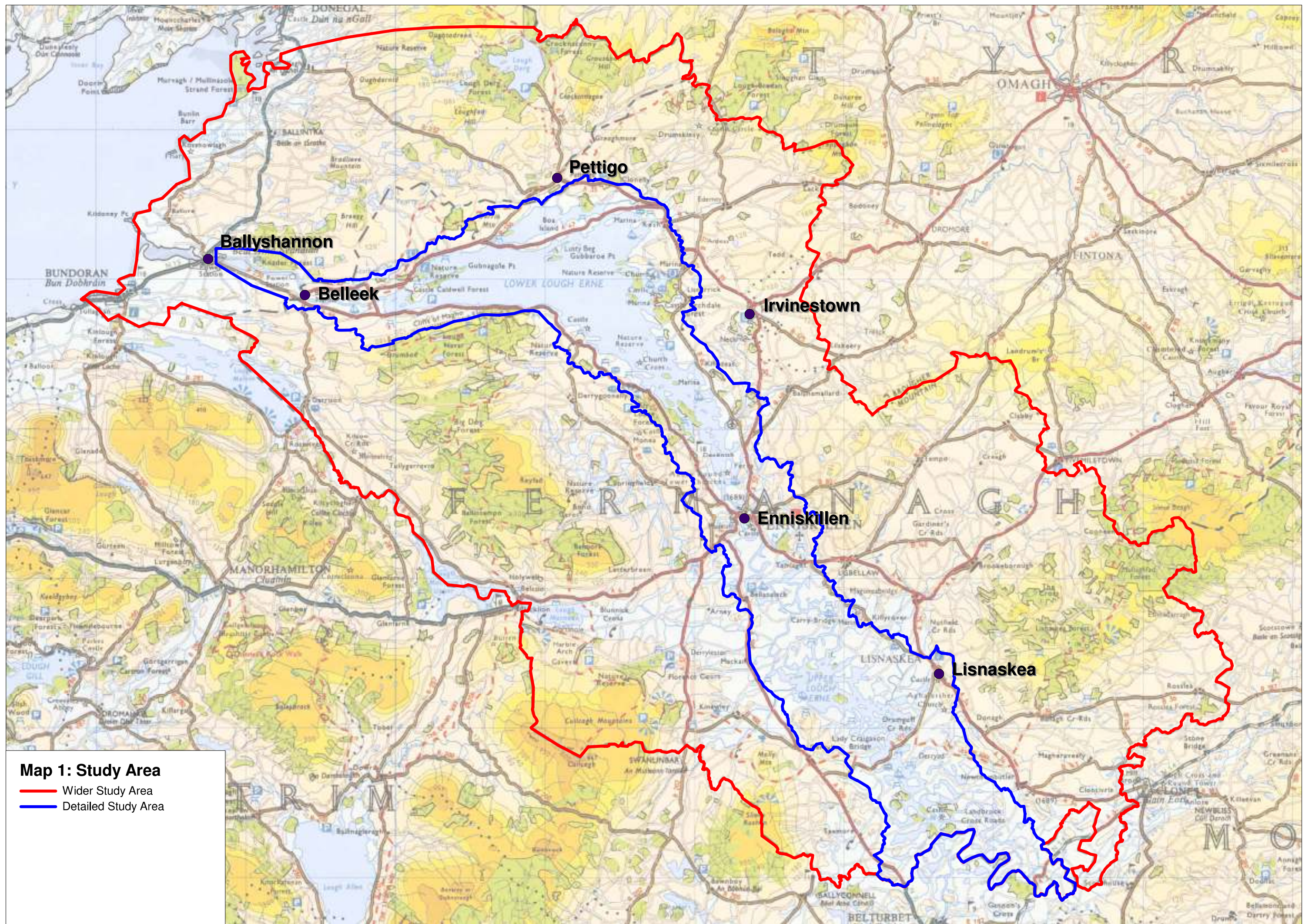
1 Background and Terms of Reference

Scott Wilson was commissioned by Waterways Ireland in conjunction with Fermanagh District Council, Fermanagh Lakeland Tourism and Northern Ireland Tourist Board in June 2010 to undertake a study with a view to refining the identification of the recreational and tourism potential within the Erne System.

The area covered by this study is set out in Map 1 and broadly covers the Erne System from Ballyshannon to the Fermanagh / Leitrim border. There are two clear study areas identified on Map 1, these are:

1. Wider Study Area: This area has been identified as being County Fermanagh extending to the West Coast of Donegal and including Lough Derg. The main emphasis of the wider study area is for the tourism and recreation product audit and the product development recommendations.
2. Detailed Study Area: This area has been identified as the immediate area around Upper and Lower Lough Erne extending into Ballyshannon. The area is based on the three Northern Ireland Landscape Character Areas; 'Lower Lough Erne, Enniskillen and Upper Lough Erne'; and was the focus of the detailed ecological and landscape studies.

The Erne System which comprises Lower and Upper Lough Erne as well as the River Erne, is a bustling, colourful navigation. Once a major commercial waterway on the island of Ireland and main method of transport for goods and people the Erne is integral to the heritage and history of Ireland as a reminder of times past and as an important recreational outlet today providing a green corridor through Fermanagh to be enjoyed for its unique ecology and as a destination for boating, walking and cycling.



Map 1: Study Area

- Wider Study Area
- Detailed Study Area

2 Literature Review

A considerable body of information and recommendations has already been prepared for the study area and its context.

The consultancy team has therefore taken into account previous intents, recommendations and the context of the area.

The most relevant documents are summarised below:

2.1 Leisure and Tourism

2.1.1 A Tourism Strategy for Northern Ireland to 2020 (DETI) (Draft)

The draft Tourism Strategy for Northern Ireland sets out a range of priorities which fall under four key themes:

People

- Inspire the people of Northern Ireland to discover and share our stories with visitors
- Inspire the tourism industry to use storytelling in their messages
- Make our visitors welcome personal
- Create immediate impact at major gateways
- Attract talented people into the industry
- Provide a training and development system that is fit for purpose
- Foster high growth, high quality businesses
- Create an environment that encourages entrepreneurs and developers

Product and Places

- Complete the development of the 5 Signature Projects
- Define, develop and manage agreed key tourism areas across Northern Ireland
- Make it easy for the visitor to get to and get around Northern Ireland
- Create more opportunities for visitors to spend money
- Invest in infrastructure to support specific development opportunities
- Develop year round events to extend the season
- Exploit the potential of food, drink and local products to enhance the experience
- Ensure that we remain competitive through benchmarking and continuous quality improvement
- Encourage a suitable range of quality of accommodation provision
- Demonstrate commitment to taking care of the environment
- Commit to high quality destination development
- Upgrade interpretation at visitor sites in line with Northern Ireland Tourism brand and best practice
- Focus on the visitor of the future when planning development

Promotion

- Know the visitor and respond
- Identify the visitor of the future and their needs
- Grow income from visitors through targeted marketing
- Exploit the potential of new media to reach and persuade relevant visitors
- Implement the Business Tourism Action Plan
- Use events to grow out of season business and bring new visitors to Northern Ireland

Partnership

- Achieve cross border commitment to achieving economic growth through tourism
- Define monitoring and reporting arrangements for the Tourism Strategy for Northern Ireland
- Define the critical role of local authorities in creating quality places for residents and visitors
- Develop an agreed structure for working collaboratively with industry and local authorities
- Develop an approach for working collaboratively with public and private sector in key tourism areas
- Establish a partnership with planning to deliver high quality development
- Ensure that the delivery of the strategy is monitored and success communicated
- Invite the tourism industry in Northern Ireland to take a leadership role
- Become champions of tourism

2.1.2 Destination Fermanagh – The Vision for Tourism 2016

Destination Fermanagh – The Vision for Tourism 2016 was produced by Fermanagh District Council and the Northern Ireland Tourist Board. The initial research and consultation was undertaken in 2005 which involved a number of conferences and consultation papers.

The result was a long term Strategy for the period 2006-2016 which aims to guide the development of tourism in Fermanagh. The vision is that *'By the end of 2016, Fermanagh will again be the 3rd largest tourism destination in Northern Ireland with a tourist spend exceeded only by Belfast and the Causeway Coast'*. The key to achieving this will be investment in Fermanagh's tourism products to complement the Lakeland experience.

Fermanagh has an established tourism sector with over 200 registered accommodation establishments and a variety of attractions and facilities. The core tourism products include cruising, angling and walking.

Fermanagh's Strengths and Weaknesses have been noted:

Strengths

- A natural product based on an outstanding natural environment
- A loyal and well satisfied existing customer base
- A wide range of potential activities which are at present unutilised or underutilised
- A strong focus on distinctive products not available elsewhere in Northern Ireland; and
- Recent substantial private sector investment and continued strong interest in investing in the sector and in the County

Weaknesses

- Overdependence on the domestic Northern Ireland market
- Low percentage of visitors from the Republic of Ireland
- Distance from the main centres of population
- Over concentration on cruising and angling, despite the range of other activities and visitor attractions available
- Poor presentation of tourism assets
- Weaknesses in management and inflexibility of service provision ; and
- Confused responsibility for tourism development in Fermanagh – at present no one organisation can take an overview of what Fermanagh needs and deliver a strategic approach

The strategy highlights a list of tourism opportunities for Fermanagh which are summarised in the table below:

TOURISM OPPORTUNITIES
Access
<ul style="list-style-type: none"> Action is required from government level to improve access from Dublin and Belfast. Enniskillen currently suffers from major traffic congestion, which has limited its potential to develop as a major tourism centre – provision of the proposed southern by-pass would substantially assist the renewal and development of the town Measures are also required to improve internal access within Fermanagh through signage, road surfacing and provision of alternative means of transport
Spatial Strategy
<ul style="list-style-type: none"> Clear priorities for the distribution of tourism and areas requiring investment are required Enniskillen, Lisnaskea and Irvinestown are noted as tourism centres which require investment
Enniskillen – A major Opportunity
<ul style="list-style-type: none"> Strong potential for urban tourism in Enniskillen and the opportunity to establish as a destination in it's own right Action is required to improve the presentation of the town, reduce traffic congestion, create a space for staging major events, animate streetscapes and create a signposted heritage trail
Irvinestown and Lisnaskea
<ul style="list-style-type: none"> Further investment to improve their overall attractiveness and visitor appeal
Events and Festivals
<ul style="list-style-type: none"> A strong programme of events and festivals has many economic and social benefits for an area and the aim will be to develop Fermanagh's existing programme to draw visitors from domestic, ROI and overseas markets Investment will be required in core infrastructure, as well as other equipment, which could be used to support events elsewhere in the county Preparation of an events strategy is required which will identify themes and events that are compatible with the overall strategic thrust of Destination Fermanagh. It is also necessary to assess the feasibility of a major events venue, identify resource requirements and sponsorship opportunities and evaluate the costs and benefits of the strategy
Development of new and existing tourism products for Fermanagh
<ul style="list-style-type: none"> New tourism products need to be developed and investment directed towards the enhancement of existing products
Product Initiatives
<ul style="list-style-type: none"> Fermanagh's natural and built environment is the core tourism product and there is the opportunity to promote distinctive, high quality activity holidays The county's cultural and heritage endowment is currently under exploited and there is a need to provide packaged offerings for the specialist short break market Facility operators in the county need to be supported and encouraged to reinvigorate their product and to align their opening times and seasons with the needs of the market – failure to take these actions will cause dissatisfaction for short break and shoulder season visitors and declining demand Potential for further development of the short break market through development of appealing urban and rural environments, easily accessible outdoor activities and cultural heritage based activities and entertainment - these must be supported by a strong range of accommodation and catering sectors
Activity Tourism
<ul style="list-style-type: none"> Opportunity to create the conditions to present Fermanagh as the outdoor capital of Northern Ireland Traditional activities of cruising and angling require new approaches to positioning and promotion in the market, in addition to investment in facilities and support services Establish as a golf destination – helped by the growth in the domestic and international golf markets and the Castle Hume project

<ul style="list-style-type: none"> Potential for further development of canoeing and other watersports Cycling tourism currently operating on a small scale can achieve growth through the provision of additional traffic free routes and the encouragement of packaging arrangements and support services Develop a more extensive network of way marked routes which would enable the substantial UK and mainland Europe walking market to be targeted Marketing of the county's outdoor activities under the eco-tourism initiatives such as the Marble Arch Caves European Geopark and the Green Box Continually explore new business opportunities and research ways of supporting new initiatives in their initial phases of operation
Existing Product Development
<ul style="list-style-type: none"> Demand for higher standards of products and service Need for continued investment in Fermanagh's tourism products Essential that issues relating to inflexibility of provision, unwillingness to respond to changing customer expectations, as well as deficiencies in management and quality standards, be addressed. Investment in the skills of core staff will enhance the visitor experience Action required to support new business creation, to drive an investment and quality enhancement strategy and to develop tourism skills
Partnership, Promotion and Positioning
<p><i>Destination Fermanagh – a new partnership structure for tourism in Fermanagh</i></p> <ul style="list-style-type: none"> This will co-ordinate at a strategic level the currently fragmented approaches to tourism development and marketing in the county Key issues to be dealt with include: <ul style="list-style-type: none"> Protection of the natural and man-made environment Advocacy role for tourism interests Need to work with service providers to ensure high quality Positioning Fermanagh as a premium tourist brand and hub of a strategic cross border region Destination Fermanagh will be a high level partnership, comprising of partners such as Fermanagh District Council, Fermanagh Lakeland Tourism, NITB, DETI and cross border agencies <p><i>Promotion and Positioning</i></p> <ul style="list-style-type: none"> Destination Fermanagh will take responsibility for strategic marketing, adopting a new promotional approach in the light of the changed market environment and the need to attract new visitors New images of Fermanagh and Enniskillen as a gateway and hub of a cross border tourism region will increase awareness and acceptance in the Greater Dublin and other markets Destination Fermanagh will drive development and innovation in the whole Fermanagh tourism offering

2.1.3 Erne Lakeland Recreation and Tourism Study (May 1993)

The Erne Lakeland Recreation and Tourism Study was undertaken in 1992/1993 by the Centre for Leisure Research.

The Erne Lakeland in County Fermanagh is recognised as an internationally important wildlife area as well as possessing outstanding scenic qualities. Lough Erne is a major economic and environmental resource. It is in the interests of all those who use it, that future development does not endanger the very qualities that give it such value and appeal. The Recreation and Tourism Study provided information on the levels and type of recreation in the context of other interests on Lough Erne. The impact of tourism on the area and management issues were also examined.

2.1.4 Lough Derg Sustainable Marina, Recreation and Tourism Development Study / Lough Ree and Mid Shannon Recreational and Tourism Development Study / North Shannon and Erne Recreational and Tourism Development Study

Waterways Ireland view the proposed Erne project as an extension to the completed Lough Derg, Lough Ree and Mid Shannon and North Shannon and Shannon Erne Waterway Catchment with particular focus on the potential areas for development and an action plan. The previous studies, carried out by Scott Wilson in association with Judith A Annett Countryside Consultancy identified vulnerable landscapes where marina, tourism and recreation development would not be appropriate and set out an action plan for development and management of the resource for tourism based on the following objectives:

- To encourage the development of more opportunities for visitors to enjoy and learn more about the natural beauty, wildlife and heritage of the area.
- To build on existing activities and services and develop new businesses and services to produce and bring a comprehensive set of active holiday products
- To improve the function of settlements around the lake / waterway as tourism destinations from land or water
- To develop master plans to improve the function, capacity and sustainability of some settlements to service water recreation and tourism
- To develop a comprehensive system of visitor trails for walking, cycling, riding and canoeing in the area
- To provide and promote products featuring the natural beauty and heritage of the area
- Enhance the reputation viability and capacity to provide active holiday packages
- Increase the opportunities for visitors to engage in activities on land or water

The previous studies also provided recommendations on recreation and tourism management to ensure that activity remains sustainable given the extensive designations.

The North Shannon and Shannon Erne Waterway Catchment which is still underway is a key consideration in the development of the Erne System Study as the study areas are directly connected and some overlap occurs. Scott Wilson will ensure that the two studies are cross referenced and that they compliment each other.

2.1.5 Enniskillen Integrated Development Plan

The Enniskillen Integrated Development Plan was prepared by Ferguson McIlveen (Scott Wilson) in 2001 on behalf of Fermanagh District Council.

The key objectives of the plan were identified as follows:

- To identify the current strengths of the town; the opportunities for developing the town as a vibrant place to live, work and visit

- To address urban design issues, people and vehicular movement; landscaping; public art integration and commissioning; environmental and economic sustainability
- To make recommendations to include relevant targets within specific timeframes
- To carry out extensive consultation with statutory bodies, the community, the private and public sectors and other interested parties

The plan sets out the Vision for Enniskillen by 2010:

“Enniskillen 2010 will be a bustling, thriving town with a real quality image, having both courts and alleys, and a bold waterfront with a strong recreational emphasis. By day and night the town will be a place to be proud of its history and welcoming to its renaissance as a lively place to live, work and visit without the constraint of traffic congestion. Its harbour will be the hub for boating events in the region and a focus for social activities. It will be easily accessed by a network of walking/cycling routes throughout the Town.”

In order to achieve the vision the plan highlights several key proposals. These are summarised below:

1. The Promenade – Proposed to run from the Castle past the Erneside link footbridge to the road bridge. Should be a 5-6m wide uniform surface for easy use providing lighting, street furniture, improved access for boating uses and landscaping
2. The Broadmeadow – Develop as a land based tourist attraction with improved parking, a range of new facilities and events space
3. The Boulevards – Improvement to the environmental quality of the roads. Sets out specific proposals for Queen Elizabeth Road and Wellington Road
4. Streetscape EI Scheme: Belmore Street to Anne Street – aim to create an attractive pedestrian friendly street for informal entertainment
5. Market Square and Buttermarket – Aim to attract more visitors to the Buttermarket area with the creation of a town square and improving accessibility
6. Car Parking – To develop multi storey car parks within the immediate town centre for example Eden Street and Cross Street
7. The Harbour – development of Derrychara Lough / Erneside Basin as a key marina destination with improved facilities and links to the town centre
8. Waterbus – To promote a ‘waterbus’ service around the town to link key destinations
9. The ‘Point’ – Highlights this site as being one of the most prestigious in Enniskillen and suggests the need for various development options to be considered
10. Queen Elizabeth / Johnston Basin – this area is highlighted as a possible development area for housing, holiday village, hotel or mixed use. This would be assisted by a new road bridge from Queen Elizabeth Road to land between Convent Grammar School and Erne Hospital
11. Racecourse Lough Park – Promote as a tourist facility with improved car parking, walks and cycle paths

12. Waterways Ireland Headquarters – Consideration of various sites for the location of this prestigious building
13. Approach Road Corridors – Improvement of the ‘gateways’ to the town building on the dramatic transition from the Ulster Countryside to Island location.
14. Back Lough – Improvement to recreational potential including fishing and nature walks and cycle route links to the town centre.

The Integrated Development Plan also identifies a number of specific projects and development opportunities within the town as well as highlighting various policy controls and strategies. Strategies should be developed to address lighting, public art, signage and nature conservation.

2.1.6 Inland Cruising Market Development Strategy 2007-2010

The Cruise Market Development Strategy was published in December 2006. It looked in detail at the market for inland cruising in Ireland and the nature and appeal of the product on offer. The inland cruising market in Ireland had declined by 20% during the period 2000-2005 as shown in the table below¹:

	2000	2001	2002	2003	2004	2005
Annual Capacity	514	525	528	472	436	410
Boat Weeks Sold	9,310	9,229	9,510	8,573	7,842	7,424

A combination of factors have contributed to this sharp decline, including changes in consumer expectations, holiday patterns, distribution channels, growth in private craft ownership and the increasingly sophisticated nature of tourism marketing. The decline has not only been experienced in Ireland but also elsewhere in Europe, with France having seen a greater decline than Ireland.

The report identified that consumer research shows a number of key drivers for destination selection including: a desire for more authentic experiences; the desire to relax, rejuvenate and belong; a search for locations that deliver ‘more than just a trip’ but deliver a memorable and quality-based experience. The report considers that Ireland has not fully seized the opportunities through:

- under investment in marketing;
- inconsistent quality in the boat fleet;
- lack of focus on market segments;
- changes in traditional distribution channels (from tour operator to internet)
- inadequate shore facilities for a relatively expensive holiday.

The report sets a target of a rise from 7,500 boat weeks per annum to just under 9,500 weeks by 2010, achieved through investment in increased marketing, infrastructure and improving the overall customer experience to reflect changing consumer expectations.

The report recommends primary markets for investment as:

Germany
Britain

Switzerland
Ireland

With marketing orientated towards 2 primary consumer segments. These are ‘Sightseers and Culture Seekers’ and ‘Family and Loved Ones’.

More detail of the needs of these two markets appears in the table below:

Segment	Needs
Sightseers and Culture Seekers	An inland cruising holiday enables the ‘sightseer & culturalist’ to travel through the heart of Ireland, taking a real journey of experience, meeting a variety of people (including sub-cultures), and engaging with the island’s heritage
Family and Loved Ones	‘Family & loved ones’ like to spend time with people closest to them, they like to visit friends and relatives and prefer to go to destinations they have been to before. They like to relax, take in the scenery, have some fun and importantly enjoy the time that they have together during their holiday. What they see, do and experience is important but ultimately is just a backdrop for being together and creating treasured, shared memories.

Secondary segments also identified include ‘Relaxers’ and ‘Outdoor Actives’ based on similar criteria but are of less importance in overall scale and size.

Main actions recommended in the strategy are:

Strategy	Recommended Action
Optimise marketing budget effectiveness through the development of a multi-agency approach to marketing programme development.	Develop agreed cross agency plans. The Marketing Advisory Group (MAG)
	Reprioritise the efforts and resource allocation of inland cruising into Tourism Ireland’s general marketing activity plans and promotions.
Develop a consumer brand identity for all waterways	Using the core concept of ‘Freedom’ develop a consumer brand identity.
Develop a suite of marketing collateral that captures the essence of an inland cruising experience	Dedicated consumer website that in addition to acting as a planning tool contains highly motivational content based on the needs of our primary and secondary audiences. Dedicated content focussed on sightseers/culturalists as well as families should be developed as a priority.
	Develop an over-arching ‘brand brochure’.
	Produce a selection of inland cruising ‘experience books’ that support the overall proposition

¹ This decline has continued during the following 3 years

Strategy	Recommended Action
	Develop an industry standard 'captain's handbook' that contains a broad range of functional, safety and motivational tips and guides for planning purposes once a trip has been booked.
	Pilot a monthly 'what's on' guide information on what to see and do
	Develop an industry standard 'chart and maps' for use by boat hire users when on the ground.
Develop tactical marketing campaigns	Co-operative marketing fund for joint activities with overseas operators Upweighted media visits for general lifestyle and travel publications from target source markets. - Develop a comprehensive online advertising strategy Target third party promotional activity offers with closed user groups such as affinity card holders, loyalty club members and/or large scale consumer databases. Comprehensive consumer PR programme based around iconic events and festivals taking place on inland waterways. Attendance at key consumer shows in primary target markets. Develop a range of programmes with related product activities in particular fishing, walking and watersports. Database development
Retain industry activity classification rather than change to accommodation.	The quality of hire-boat fit out is below consumer expectations of modern land based accommodation
Align inland cruising proposition to changing consumer holiday and lifestyle patterns.	Offer greater flexibility, particularly in shoulder months, around minimum booking periods, flexible pricing and transparent pricing.
Develop improved planning capability for targeted boat hire customers at home and overseas.	Consolidate consumer information about activities, facilities and routes for easier access by all target audiences. Subsequently develop a comprehensive range of planning tools
Improve transfer facilities between major arrival points and key base locations.	Develop a proposal for improved transfer facilities looking at public and private transport options. Ideally a maximum queue guarantee time should be given to the customer if a shared transfer is provided.
Ensure that Ireland's reputation as a quality destination for in-land cruising is maintained.	Develop an industry led boat grading system that allows consumers distinguish between the different standards of craft available for hire.
Consolidate consumer information about all on-	Ensure the TCS database is updated to reflect all existing amenities for the purposes of journey planning and website / marketing collateral

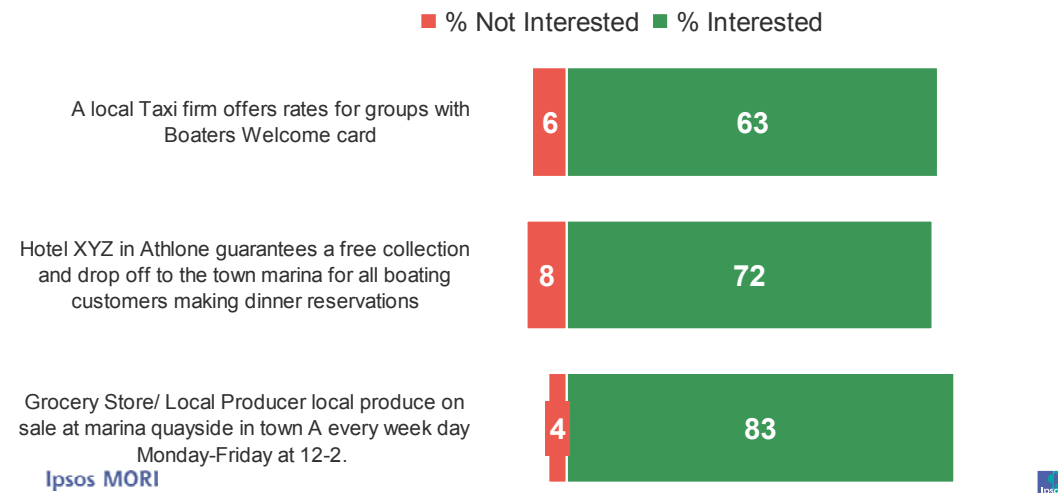
Strategy	Recommended Action
shore facilities and activities.	development.
Develop an ethos of innovation within the sector focussed on improved customer experience design.	Develop a series of initiatives designed to enhance the customer experience for targeted segments Themed routes based on culture and heritage, the development of dedicated activity zones (walking, angling and watersports), good food villages and farmers markets, all supported with relevant marketing support.
Focus development plans on programmes that are equally appealing to the private boater as to the hire cruise sector.	Develop a 'Boaters Welcome' initiative whereby a range of added value benefits are provided by a range of facilities and services to hire boat customers.
	Identify 5 festivals along Ireland's waterways that will be prioritised for initiative development with the needs of the boating community in mind.
Build the industry's capacity to respond to the changing environment in which they operate.	Conduct a training skills analysis of boat hire operators to identify the skills needed to allow them respond to the changing environment in which they operate.
Improve our understanding of the inland cruising sector and customer	Develop a co-ordinated market research programme
Support Ireland's 'green' positioning in key overseas markets by ensuring the hire cruise sector is positioned at the leading edge of good environmental practice.	Develop a strategic approach to 'green' issues on behalf of the industry both in co-operation with other agencies and on a stand alone basis.

Interest in Scheme Elements

Q. How interested would you be in each of the following suggestions?

Base: All respondents (590)

High levels of interest in each of the suggestions, particularly for quayside services and free transport to a hotel for dinner



The research also included the response of service providers to the idea of a boaters welcome scheme was mixed. Many were unaware of the cruising market in any detail or thought it was a small niche and preferred to provide a service to all customers. Providers felt that the main gap was in information on the services available along the Shannon rather than anything else and that the priority was to plug the information gaps.

2.2 Corporate and Economic Policy

2.2.1 Waterways Ireland – Corporate Plan and Marketing Strategy

The statutory function of Waterways Ireland is to manage, maintain, develop and restore the inland navigable waterways system on the island, principally for recreational purposes. The organisation is committed to providing high quality recreational services for its customers and as such seeks to develop the recreational potential of the waterways it manages. WI provides visitor facilities (such as showers, toilets and pump outs) for boats using the navigation and publishes the charts and navigation information for the waterway.

The Corporate Goals highlighted in the Corporate Plan 2008-2010 are:

1. manage and maintain a reliable and high quality waterways network
2. develop and restore the waterways network
3. enhance the existing waterways network to widen its appeal to users
4. promote increased use of our waterways resource principally for recreational purposes
5. assess, manage and develop the assets of Waterways Ireland
6. develop an organisation of excellence

WI has been looking at the feasibility of restoring the North East and South West sections of the Ulster Canal to provide a major inland waterway for the border region. Funding has been secured to commence work on the restoration of the canal from Upper Lough Erne to Clones.

Waterways Ireland's remit includes the following:

'In the discharge of its management and development function, principally for recreational purposes, the body will engage in promotion, including marketing and development of the tourism and commercial potential of the inland waterways for which it has responsibility'

The organisation accordingly produced a marketing strategy in 2004 with the mission: 'to increase awareness and promote greater use of Ireland's navigable inland waterways'.

The strategic objectives of the strategy can be summarised as follows:

- Generate an increased awareness of Ireland's inland waterways by communicating their attractions and uniqueness for holidaying, leisure pursuits and other activities nearby;
- Communicate a distinctive image and identity for Waterways Ireland, reflecting its role in developing, maintaining and restoring inland waterways, mainly for recreational use;
- Promote greater use of the inland waterways;
- Work in partnership with product and user groups, associations, and state agencies and local authorities; and
- Build a solid platform for sustained market development through research and planning.

The principal partnerships were seen as the product groups and associations, tourism, recreation and leisure organisations, local authorities and councils as well as fisheries boards, organisations and clubs.

Specific types of action set out in the plan included:

Advertising and Sponsorship

- Establishment of all-island and international print media library;
- Management and evaluation of consumer advertising in key markets; and
- Management and evaluation of sponsorship in key markets.

Event Management and Event Assistance

- Sponsorship of suitable events at regional, all-island and international level;
- Management of attendance and / or organisation of seminars / conferences; and
- Assistance with hosting of events along / on waterways.

Media Management

- Establishment of press cutting and video library;
- Management of pro-active media
- Management including press briefings and liaisons; and
- Management of press launches.

Press Familiarisation Visits

- Management of regional / all-island and international press visits in association with relevant bodies.

Market Research and Evaluation

- Annual programme of consumer and product research;
- Dissemination of results; and
- Establishment of linkages with 3rd level institutions.

Distribution

- Establishment and management of Waterways Ireland website and electronic newsletter; and
- Management of consumer/user database and establishment of recording procedures.

Information Programme

- Review of existing materials and packs;
- Production of supplementary materials; and
- Management of domestic and international programme.
- Trade and Consumer fairs
- Development of exhibition stands, programme and team; and
- Development of joint initiatives.

Brand Identity Development and Implementation

- Creation of identity and guidelines manual on correct usage;
- Launch of identity; and
- Integration of identity on all materials and publications.

Joint Promotional Activities

- Establishment and management of joint promotional initiatives with other companies and agencies.

Archive Development

- Development and management of photographic and informational archive;
- Undertake audit of materials; and
- Update materials.

Promotional Materials

- Undertake audit of print materials and update materials; and
- Management and production of other promotional materials.

Visitor Services

- Development of Visitor Centre; and
- Assessment of visitor requirements and evaluation of other visitor options.

Education Programme

- Development and implementation of programme; and
- Development of relationships and linkages with other organisations.

Waterways Ireland has provided high profile marketing of holiday opportunities along its waterways and within a broad corridor on either side. Since 2004 the organisation has led waterways marketing with a suite of marketing materials which Included:

- A Glimpse of Ireland's Inland Waterways – aimed at whetting the appetite for a holiday on the waterways
- Navigating Irelands Waterways – guide for users of the waterways managed by Waterways Ireland
- DVDs and promotional films of the waterways
- Promotional materials such as mousemats, pens etc
- The Georgina Campbell Guide to eating out on the waterways
- Trade show attendance
- Other international marketing activity.

All of Waterways Ireland waterways had an equal profile in these materials.

Waterways Ireland sponsored or will be sponsoring the following tourism and recreation events in or close to the area in 2010

April

- Waterways Ireland Classic Angling Competition

May

- The Lakeside Triathlon
- ISA National Powerboat Championship
- Fly Fishing Ulster Lakes Championships 2010
- Angling for Beginners

June

- From the Erne
- Lough Erne Relay
- Lisnaskea Water Festival
- 'Me Too' Fun Days
- Mid Summer Solstice Rituals
- Waterways Ireland Loughfest & Family Fun Day

July

- Lady of the Lake Festival

August

- Irish Long Distance Swimming Championship
- Lough Erne Classic Yacht Regatta

September

- Enniskillen Arts Festival

October

- Waterways Ireland World Pike Fishing Classic 2010-09-21

Lakelands and Inland Waterways Strategic Plan 2010-2013

In 2007 the new Lakelands and Inland Waterways Initiative, established by Waterways Ireland and Fáilte Ireland brought a new focus to the Lakelands area and provided an effective set of mechanisms to reach both the domestic (home holiday and day visit) market and overseas visitors.

The plan is based on cooperation between a number of marketing and product development agencies north and south. This includes Fáilte Ireland Regional Authorities, Fermanagh Lakeland Tourism, Tourism Ireland, the Northern Ireland Tourist Board, Shannon Development, Waterways Ireland and the Irish Boat Rental Association/IMF.

To date achievements have included:

- High profile launches of the initiative at Clonmacnoise and at the World Travel Market in London in 2007
- Distribution of over 100,000 Lakelands guides in English, French, Italian, Spanish German and Dutch
- Distribution of over 300,000 promotional DVDs
- Use of Lakelands logo, image and branding by wide range of parties including Irish Boat Rental Association
- Development of a dedicated website linked to the main country website www.discoverireland.ie/lakelands

- Over 30 press and trade familiarisation trips
- National television campaigns
- Billboard advertisements
- Accommodation and cruising special offers
- Promotional activity on Aer Lingus international flights
- Development of detailed zone leaflets – e.g. Lough Ree and Mid Shannon
- Urban hub awareness activity – discover Athlone
- Stand at London Boat Show, Dublin Boat Show and 'Boot' (Hamburg Boat Show).
- Plans for marketing and product development assistance in 2009 include:
- Building on the success of the Lakelands Brand including launching in GB and EU markets
- Strategic emphasis on Great Britain, France, Germany and the Netherlands as key markets
- Allocation of 2.65 million Euros for marketing
- Worldwide exposure (20 million people) to Lakelands and Inland Waterways brand
- Extensive home holiday advertising, radio, TV, press and media and content within Failte Ireland's Discover Ireland 09 campaign
- Support for 2 to 3 lakelands events and festivals
- Staging of 4 'discover days' for development and support of the industry with partners.
- Promotion of the urban hubs in the Lakelands and Inland Waterways area Enniskillen, Athlone, Carrick-on-Shannon, Mullingar, Limerick
- Specific cruise hire initiatives – e.g. 3 day cruise, 4 day land packages in addition to normal 7 day hire.
- Fly drive breaks with airlines
- New language editions of the Lakelands and Inland Waterways Brochures and website.

The Lakelands and Inland Waterways marketing consortium anticipates that years 2009 and 2010 will be difficult years, in particular in terms of the transatlantic long haul markets.

The area covered by the Lakelands and Inland Waterways marketing campaign is shown in the map below.



Waterways Ireland, Failte Ireland, Shannon Development, Fermanagh District Council and other partners in the Lakelands and Inland Waterways Marketing Initiative have recently prepared a strategic plan to drive marketing, product and destination development in the Lakelands and Inland Waterways region. This is a cross border strategic plan.

The joint vision for tourism to the region is of

- A visitor journey both on and off the water that delivers a complete, authentic and unique Irish experience. Here will be found a freedom to relax and renew, balanced by a host of sustainable activities that will refresh the body and soul and encourage the visitor to return.

The mission of the Lakelands and Inland Waterways Strategic Plan is

- Throughout the Lakelands and Inland Waterways Region, to increase domestic and overseas visitors in number and revenue, while supporting existing sustainable tourism enterprises and encourage emerging tourism businesses through a series of practical business supports.

The main objectives of the Lakelands and Inland Waterways Strategic Plan are:

1. **Sustain and Grow:**
To continue to grow the number of visitors and market share for the Lakelands and Inland Waterways in order to sustain the tourism, hospitality and recreational businesses base
2. **Improve the Visitor Experience:**
Working with the tourism and hospitality trade to provide a more coherent visitor experience through improved quality and stronger linkages between attraction and services in the area
3. **Build Shared Brand Awareness:**
To focus marketing through the Lakelands and Inland Waterways brand and to ensure that the tourism and hospitality trade have opportunities to participate in and benefit from the Lakelands and Inland Waterways promotions.
4. **Secure New Investment:**
To grow new and incremental investment in tourism infrastructure and through the product development process provides a wider range of recreation and activity opportunities and tourism products and services.

Strategic Plan Action Plan - Product Development Summary

The key focus for product development aimed at *Sightseers and Culture Seekers* will be:

- Development of **activity hubs** with a particular focus on activities that can be booked on the day, or at short notice
- Development of products based on the **literary heritage** of the area and on related events and festivals
- Identifying the feasibility of developing a scheduled **waterbus service** and or more linkages between existing boat trips to allow the visitor to travel the Shannon and Erne systems without a car.
- Development of a **coordinated events programme** and provision of more high-profile events
- Implementation of a **‘choice of things to do each day’** programme associated with the main activity hubs.
- Further development of **waterways infrastructure** to support recreation and tourism
- To further develop cycle, walking and equestrian trails
- Development of the Lakelands and Inland Waterways **website** to allow easier self-packaging by visitors.
- Working with the cruising sector to increase **flexibility** and provide for shorter stays and **combined interest** holidays
- The development of a visitor route through the area presenting the best of the **historic houses, castles and gardens**. Improving the capacity of some attractions to host visitors.
- The development of a **Christian heritage visitor route** with a hub at Clonmacnoise and which runs from Lough Derg in Co Donegal to Lough Derg on the Shannon and to Limerick. Investigation into the feasibility of providing more access to Christian Heritage sites from the water and the development of a water route through the area.

- Development of the capacity to access and enjoy the **natural heritage** of the area. Key hubs at Marble Arch Global Geopark and Lough Boora with secondary sites elsewhere. Provision of guided experiences at sites.
- To review the match of accommodation supply with the needs of the primary market

The initiative has an active marketing plan and suite of marketing collateral for the area

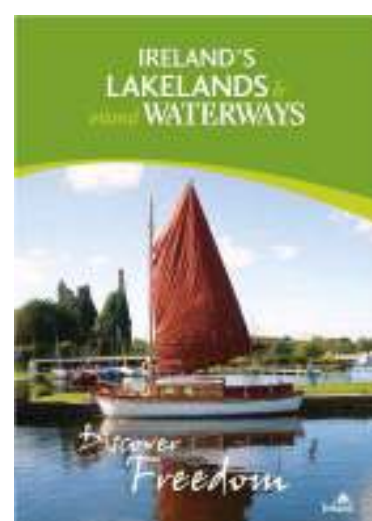
Strategic Plan -Action Plan - Marketing Plan Summary

Over the five year period covered by the Strategic Plan the following actions will be undertaken. Detailed planning will take place for each year.

- **Brand Profile** - Further development of Lakelands and Inland Waterways Brand and brand awareness
- **Partnership Marketing**- Higher profile and leverage for the Lakelands and Inland Waterways within Tourism Ireland international marketing campaigns. Brand launches in target markets
- **Trade and Consumer Programmes** – attendance under the Lakelands and Inland Waterways brand at a range of general and specialist tourism trade and consumer events
- **Advertising and E –Marketing** – Further development of the Lakelands and Inland Waterways website with links to and from www.discoverireland.com/lakelands and develop an ezine for customers and potential customers. Continue campaigns in association with ferry and air operators and search engines
- **Print productions** - Lakelands and Inland Waterways Super Region Guide – supported by sub regional map based guides presenting the product available in each part of the area.
- **Advertising** – continue radio, billboard and press campaigns including advertisements in relevant special interest press
- **Sales Calls** – Programme of GB market sales calls
- **Familiarisation** -Tourism trade, journalist and travel writer familiarisation trips to the Lakelands
- **Direct marketing** – Marketing via membership lists and affinity publications to canoeists, boaters, anglers, and people with an interest in heritage and wildlife.
- Continuation of **‘Discover Days’** programme to improve familiarisation with the products available in the Lakelands and Inland Waterways area
- **Merchandising** – further development of Lakelands and Inland Waterways merchandising to support special promotions.
- Continuation and development of a **Lakelands and Inland Waterways Events Programme** including high profile, international events.
- Further development of the **‘Captains’ Handbook’** to include information about the tourism product available close to the waterways
- Examine the feasibility of further development of the **‘Taste of the Waterways’** guide presenting the best of local fare and hospitality.
- Development of a similar guide presenting the best **accommodation** in the area.
- Development of materials under special themes e.g.

- Heritage
- Activity
- Natural
- Literary
- Family

The marketing plan will also include the development of further measures to assist in **monitoring** the success of the Lakelands and Inland Waterways Initiative.



Strategic Plan Action Plan - Destination Development and Management Summary

This action plan will be taken forward with a wider set of partners and addresses the need to ensure that the destination of the Lakelands and Inland Waterways fulfils the expectations of tourists and recreational visitors. It addresses issues of:

- **Development** of local guides, skills to provide and lead activities, new attractions based on the natural heritage of the area, new access routes and trails and of new events capable of drawing people to the area. Development of new visitor routes and journeys that present the best of the area
- **Promotion** of sustainable approaches to tourism, of local food dishes and production linked with tourism, of opportunities to experience and share local culture, of authentic local events with a strong sense of places and of the arts and crafts of the area
- **Enhancement** of aspects of the area such as the quality of the settlements, infrastructure for recreation, availability of local food, signage and visitor routing, language skills in the main markets for the Lakelands & Inland Waterways amongst hospitality providers
- **Protection** – of the landscape, water quality, natural and built heritage and key views

Market Intelligence for Lakelands and Inland Waterways area:

Most holidaymakers to the Lakelands regions (ROI counties) travel in the May-August period; with on average more than two-thirds arriving in these four months. This visitor period is more focussed than for the remainder of the country. Nevertheless 20% of all visitors to the Lakelands and Inland Waterways region arrive between January and April.

A slightly higher proportion of Lakelands and Inland Waterways holidaymakers arrive by sea than for the country as a whole. They also tend to stay longer than average with two in five staying nine or more nights. Lakelands and Inland Waterways holidaymakers are also much more likely to hire a car with around half doing so. Only around one third do not use a car at all during their holiday in Ireland. They tend to be more mobile, i.e., tend to stay in more than one region during their stay. On average people visiting the Lakelands and Inland Waterways area also visit two or more other regions.

Hotels, Guesthouses and B&Bs are particularly popular among holidaymakers to the Lakelands and Inland Waterways Region, whilst staying in self-catering accommodation, camping and hostels tend to be less popular.

Not surprisingly fishing and cruising are more popular among Lakelands & Inland Waterways holidaymakers than the average for people visiting the country.

Historical and cultural visits and visits to museums castles and gardens are more popular in visitors to this region than for all holidaymakers.

Holidaymakers to the Lakelands and Inland Waterways are more likely to travel using a package with between a quarter and a third travelling as part of a package.

Around half of Lakelands and Inland Waterways holidaymakers travel as part of a couple. Holidaymakers to the Lakelands and Waterways region tend to be older than average for the rest of Ireland, with more than a third aged 55+ years.

Perceptions of value for money are similar across holidaymakers in all regions of Ireland. Research to show the numbers of visitors for the Lakelands and Inland Waterways as a whole is not yet available. Developing this information is part of the action plan for the next five years. Only one

county, Fermanagh falls completely within the regions. This area received 174,430 trips, 555,044 bed nights and £32.9m spend in 2008 (source NITB Local Authority Tourism Estimates).

2.2.2 Northern Ireland Tourist Board Corporate Plan 2008-2011

NITBs Corporate Plan identifies a range of factors which are essential for the successful development of tourism in Northern Ireland. These are noted in the table below:

Critical Factor	Success	Strategy Driver
Unique Proposition		Further investment in product development, with delivery of Signature Projects as a priority. There is scope to further exploit key distinctive elements of our identity, cultural and heritage in development and implementation of a branding strategy
Industry and Government Engagement	Cross	Only through increased leverage of investment funding, smarter working and improved collaboration between the public and private sectors will we deliver a step change in tourism growth
Capacity		Development of sufficient accommodation capacity to service demand, increase competition and grow the market
Planning Policy		Appropriate planning policy is urgently required to facilitate tourism growth
Innovation		Presenting unique, individual and compelling experiences for visitors
Regional and Seasonal Extension		The development of a product portfolio that will grow business outside the main season and link rural and urban offerings
Research Evidence	and	Continued focus on consumer trends as key drivers for product and marketing development and campaigns. Effective dissemination of insights to improve performance management and decision making throughout the tourism sector
Consumer Service / Skills Development		Investment in skills development and quality assurance schemes to ensure the consistently highest standards of service and customer experience
Environmental and Social Impacts	and	Taking responsibility for the impact of actions and recognising sustainable development considerations in all aspects of tourism development
Technology		Exploiting developments in electronic communications and technology and discovernorthernireland.com as a vital information and communication channel

Developing and Managing the Tourism Product

This section of the Corporate Plan identifies the key areas for development and delivery of tourism in Northern Ireland. The key areas are as follows:

- **Brand Positioning**
- **Developing the Product Portfolio** – four key product areas have been identified based on Northern Ireland's superb natural assets. The areas are defined as:
 - Cities
 - Culture and Heritage
 - Sports Tourism Activities and Waterways – the natural landscape provides opportunities to develop products in the key areas such as golf, soft adventure, walking and cycling as well as

niche areas such as cruising, canoeing and angling – investment is required to develop the range, quality and access to activities; suitable transport; facilities in accommodation.

- Business Tourism
- **Signature Projects**
- **Tourism Infrastructure** – developing new facilities, accommodation, attractions, activities, shops and restaurants will stimulate tourism growth. Investment is required in the following key area: Accommodation, Golf Resorts, Conferencing / exhibition competitive positioning

Developing Markets

The Corporate Plan highlights that 50% of Northern Ireland's visitors and revenue come from the Republic of Ireland and Northern Ireland Markets. It is critical to make Northern Ireland's tourism product more accessible to the visitor. It stresses the need to focus on key markets including NI and ROI and overseas visitors. It is critical to build on the gateways to the Region with Belfast and Dublin having the greatest significance. In terms of visitors from the ROI, Fermanagh is noted as a gateway. It is also essential to provide visitors with appropriate information, signposting and orientation in order to encourage them to stay longer, do more and visit again.

Delivering World Class Visitor Experiences

Northern Ireland's success as a visitor destination will depend on its ability to deliver a world class experience. A key element of meeting revenue targets will be increase visitor spend. Growing the evening and weekend economies will be key to achieving this and will enhance visitors positive experience of Northern Ireland.

2.3 Past Research

2.3.1 Waterways Ireland user and usage data

2.3.1.1 Survey of Facilities 2005

The Waterways User Survey Report was undertaken by MORI Ireland in 2005 on behalf of Waterways Ireland. The main objective of the research was to determine the facilities required by users of the waterways and their preferred locations.

The survey consisted of 644 interviews in total were conducted in over the seven waterways. The key results and findings relating to the Erne System are outlined here (117 interviews undertaken):

Top five activities undertaken on the Erne System:

- Private Cruiser / Barge (18)
- Boat Trip (16)
- Angling (24)
- Walking (44)
- Water-skiing (20)

Participation in activity (Across all Waterways): Most activities were conducted as part of a family group with the exception of walking and angling which are predominantly individual activities

Main facilities used on the Erne System:

- Mooring Facilities (41)
- Picnic Areas (52)
- Toilets (69)
- Car Parking (59)

- Pathways / Walkways (64)

Main facilities needed on the Erne System:

- Public Marinas / Moorings (17)
- Showers (19)
- Electrical Points (11)
- Picnic Areas (12)
- Toilets (26)

Generally it was noted that there is less of a need for facilities on the Erne System in relation to other waterways.

Location of facilities needed: Generally a majority of respondents stated that in most instances the new / improved facilities should be beside the waterway as opposed to the nearest village.

Quality of facilities: a majority of respondents stated that facilities should be of a high or medium quality.

Access to facilities: the majority of respondents felt that there should be public access to the new / improved facilities. One in ten felt that there should be 'access by car' to public marinas / moorings.

Additional Improvements (Erne System):

1. Café / Restaurant / Shop / ATM
2. Bigger play area / adventure play ground / facilities for children
3. Improved moorings / more moorings / public pontoons / over night moorings

2.3.1.2 Survey of Waterways Users 2004

This research was undertaken by the Tourism Research Centre (TRC) at the Dublin Institute for Technology on behalf of Waterways Ireland. The aim of the research was to provide detailed market profile of the waterway users and their awareness of Waterways Ireland.

The research project was undertaken by conducting face-to-face surveying with a representative sample of 1,640 waterway users at 23 agreed points over the seven waterways.

Reports were carried set out relating to each of the individual waterways. The key findings for the Erne System are as follows:

Profile of Waterway Users

The majority of Waterway users interviewed on the Erne System were male (68%) and 76% were 35 years of age or older (note interviewers did not target those aged under 16 years of age).

The majority of respondents interviewed on the Erne System were regular users (49%) or there for a holiday (37%). The majority were resident in Northern Ireland (70%), 11% were from the Republic, 11% from Britain and the remainder from overseas.

The party compositions for respondents were very similar to the overall sample of waterway users for the seven systems i.e. 27% were with a group of friends, 23% couples and 17% were alone.

Activities

The main activities undertaken by respondents on the Erne System were **private boating** (24%), **angling** (21%) and **walking** (16%). Generally users were very experienced or experienced in the activity they were undertaking with the exception of hire boating and those taking boat trips.

Length of time spent on the Erne

The average length of time spent on the Erne was 3.4 days, however closer examination reveals that the majority of respondents were either using the Erne for a short period (i.e. half day or less) or were spending a week there.

Rating experience of the Erne System & facilities

Overall respondents rated the Erne highly with 95% rating it as good or very good. The main reasons for rating it highly were because there were lots to see and do in the area; it's a nice area with plenty of space and good fishing.

A relatively high percentage of respondents rated the following facilities as very good or good: car parking (88%), pubs (76%), availability of information (75%), signage for the waterway (72%), waterway restaurants (71%) and guidebooks and maps (71%).

However, a significant proportion of respondents rated ship chandlery (48%), children's playground facilities (47%) and pump out facilities (41%) as poor or very poor.

Facilities that need to be developed

The main facilities respondents feel need to be developed on the Erne are more and new public jetties/more and better mooring facilities (16%), more and better shops (5%), public toilets (4%) and more bars and restaurants (4%). It should be noted that many respondents rated restaurants, bars and shops as good or very good, however they were also in the top five facilities that need to be developed. This would suggest that the restaurants, bars and shops that are there are of a sufficient standard however more are needed.

Accessing and sharing the waterways

Just 2% of respondents said they had difficulties accessing the Erne (with each respondent identifying over crowding as the main reason for the difficulty) and 12% said they encountered difficulties sharing the amenity with other users. Of those who encountered difficulties, the main difficulties were sharing the waterway with jet skiers (28%), users travelling too fast (33%), overcrowding (16%) and inexperienced users (12%).

Waterways Ireland

Seventy percent of respondents had heard of Waterways Ireland, and the main sources were the Internet and the Waterways Ireland office in Enniskillen. When probed further, it was identified that respondents awareness of what Waterways Ireland does could be increased (55% said they were responsible for management, 43% for maintenance, 37% for development and 35% for restoration).

2.3.2 Failte Ireland and Waterways Ireland Research towards a 'Boaters Welcome' Initiative

In 2008 Failte Ireland and Waterways Ireland commissioned research into the demand for a 'Boaters Welcome' Scheme amongst accommodation and service providers along the Shannon and other waterways. The results of this research which returned 590 responses from previous hire cruise clients were as follows:

- Many current users of the waterways are frequent visitors with over half having holidayed in Ireland 4 times previously.
- May to August were the peak cruising times (except for German market)
- There were four main reasons for the holiday visits – to get away from it all and relax- to explore the sights and culture of the country - to be active outdoors – to meet local people
- 75% of holiday makers arrived through Dublin, 9% via Shannon airport and 10% by ferry (7% Rosslare, 3% Dun Laoghaire)

- Average group size was 4 people with one third travelling with children
- Average stay by overseas people was just under 11 days with 8 of these being spent on the hire cruiser
- Two thirds booked their holiday via the internet and one third through a tour operator
- Carrick on Shannon (28% of the sample) was the most popular access point for boat rental followed by Banagher (21%) Glasson (12%) and Portumna (10%)
- Other activities were important to the holiday such as culture and natural heritage, walking and fishing. Events were less important but significant as was cycling.
- High levels of satisfaction with most aspects of the holiday

The survey market tested a proposed boater's welcome scheme which may include discounted restaurants and attraction and organised taxi services to take boaters to attractions from the quayside. All aspects of the boaters welcome scheme were of significant interest to the boating customers.

2.3.3 Fermanagh Sustainable Communities Audit – Economy and Infrastructure (July 2010)

This audit was carried out by Colin Stutt on behalf of Fermanagh District Council. Its aim was to establish how Fermanagh has developed over the past 10 years in terms of a number of dimensions of its social, community and economic performance. The audit was also to provide an indication of future priorities.

The Fermanagh Economy A Decade Ago

This section of the report highlights that the available data for the period 2000 and 2001 gives the 'impression of Fermanagh as a traditional rural economy which is adapting to major change in the agriculture sector, in food processing and particularly in textiles and clothing'. Fermanagh also had a high dependence on Mining, Quarrying and Construction employment by 2001, which made the county particularly vulnerable to economic change affecting those sectors.

The Fermanagh Economy Today

- Fermanagh continued to grow its economic activity at a faster rate than the NI average over the period 2000 – 2010
- Growth was particularly fast in relation to mining, quarrying and construction related industries
- Since 2007 unemployment in Fermanagh has been below the NI average
- The location of a dedicated Innotech innovation team in Enniskillen has the potential to make a major contribution to business growth in Fermanagh
- Over the period 2000-2010 tourism expenditure rose by 73% in real terms and tourism employment rose by 96%
- Fermanagh has a significantly higher expenditure stayed than the NI average
- Much work has been done to realise the agenda set out in the Destination Fermanagh Tourism Strategy 2006-2016, the plans have not yet come to realisation and implementation of those plans must be a major focus for the coming years
- The degree of change which Fermanagh has experienced in the period 2000-2010 and the largely successful way in which it has been managed gives confidence for the future. It is important to focus resources on implementing the Destination Fermanagh Strategy, on encouraging business growth and innovation, on braking down the fragmentation of business development support and on working with the retail sector on maintaining the vitality of Fermanagh's town centres

Infrastructure

- Fermanagh's infrastructure has improved markedly because of improvements on the key routes to Belfast and Dublin – the only further investment planned on the A4 route to Belfast is the provision of a bypass for Fivemiletown
- Within Enniskillen the Southern Bypass has the potential to make a significant contribution to reducing town centre congestion
- The existing investment in Enniskillen Airport and the planned new fixed wing maintenance facility will enable the airport to continue to contribute to the creation of employment and the development of the tourism industry - the development of a marina at the airport and a water taxi service to the Lough Erne Resort will, in particular, add to the distinctiveness of Fermanagh's tourism product
- In the longer term the provision of a runway extension will have the potential to contribute further to employment growth and the tourism sector – the council should factor the runway extension into their development plans for the period to 2015 and consider seeking grant assistance for the project either from the Interreg IVA Programme for Northern Ireland 2007-2013

Priorities for Fermanagh's Economy and Infrastructure

1. A renewed commitment to business innovation and business growth in Fermanagh
2. improved business support services and business linkages
3. resourcing and implementing the Destination Fermanagh Tourism Strategy
4. reinforce the independent retail sector in Fermanagh
5. Lobbying (with ICBAN) for the Fivemiletown Bypass and the Enniskillen Southern Bypass to be brought forward

2.3.4 Fermanagh Sustainable Communities Audit – Social and Community (July 2010)

This audit was carried out by Colin Stutt on behalf of Fermanagh District Council. Its aim was to establish how Fermanagh has developed over the past 10 years in terms of a number of dimensions of its social, community and economic performance. The audit was also to provide an indication of future priorities.

Priorities for Fermanagh's Social and Community Development

1. Commission a review of the sustainability of rural settlements, including the provision of health, education and other public and private services, sources of employment And other opportunities and an assessment of alternative sustainability strategies for rural settlements taking account of financial, economic and social costs of alternative approach
2. provide training workshops for voluntary and community sector organisations focusing on producing outcome based business plans
3. Undertake a review of all community and voluntary organisations County wide
4. identify new roles and opportunities for the voluntary and community sectors in tourism and environmental protection and guiding
5. work to promote good relations between the communities and with minorities and strong cross border and external linkages

3 Current Arrangement for Tourism and Recreation

3.1 Tourism and Recreation in Fermanagh

Fermanagh is a very attractive county with a range of landscapes and distinctive areas. The main assets of the area may be considered to be the extensive lakelands and rivers and the limestone uplands of West Fermanagh in addition to a well established reputation for excellence in both cruising and angling. Fermanagh is also unique in having very large tracts of Forest Service lands which offer a recreation and access asset to many parts of the area. The area has long been a tourism destination and has played a significant role in providing recreational opportunities for local people and for visitors from across the world.

3.2 Tourism in Fermanagh

The vision for tourism in Fermanagh is expressed within the Destination Fermanagh document which was prepared on a partnership basis between Fermanagh Lakeland Tourism, Fermanagh District Council, the Northern Ireland Tourist Board and a wide range of other partners statutory and non statutory. Destination Fermanagh was subject to widespread consultation with the tourism trade and others. It sets out a vision until 2016 which re-establishes Fermanagh as the third largest tourism destination in Northern Ireland with a spend exceeded only by the Causeway Coast and the City of Belfast (in 2007 it had the fourth largest tourism expenditure). The intention of the actions in Destination Fermanagh is to achieve this by investing in Fermanagh's strong products and the introduction of new and enhanced products to complement and enrich the Lakeland experience. Part of this involves the development of new infrastructure for access to and within Fermanagh, the renewal of the urban fabric, the development of an appealing events programme and the development of new partnership arrangements for both product development and marketing

Fermanagh's tourism performance in 2009, the most recent year for which figures are published was 177,100 tourism trips (5.7% of trips to NI) 505,200 nights (4.8% of overnights in NI) with an associated estimated expenditure of £32.2 million (6.3% of all tourism expenditure in NI)². Trips nights and expenditure have all declined since 2006 but 2009 showed an improvement in the number of trips on the previous year. A high percentage of Fermanagh's visitors travel to the county from other parts of NI on short breaks and many are repeat visitors many times over with great loyalty to the county. Their most popular activities are sightseeing and tourists, cruising, camping and caravanning, walking and fishing. Most would recommend Fermanagh to their friends and relatives. Key strengths of Fermanagh's tourism offering lie within its natural environment of lakes and dramatic limestone uplands, supported by a strong private sector base of tourism services and investment. The accessibility of this natural environment for visitors is assisted by a high level of public ownership of lands in the area including Forest Service, NIEA, National Trust and Council assets and the extent of water based infrastructure provided by Waterways Ireland. It is also a major asset to both recreation and tourism that the navigations and fisheries of the Erne and Shannon Erne Waterways are also public assets

Destination Fermanagh has identified the main opportunities for Fermanagh as building on these natural tourism assets by adopting a destination management approach with a focus on providing new reasons to visit the county. Important aspects of future destination management include

developing a strong brand, controlling the quality of what is offered to visitors and improving the built environment and amenity of settlements in the area and particularly Enniskillen

The close linkages between Fermanagh, Donegal, Cavan, Sligo and Leitrim and some products in Tyrone offer opportunities for partnerships and networks for tourism delivery that go beyond the county in delivering products and services.

Fermanagh District Council is increasingly active in providing an events programme to attract visitors to the County and to encourage them to stay longer. Waterways Ireland supports events on and near the waterways where this is likely to promote waterways use.

Fermanagh is part of the Lakelands and Inland Waterways Initiative which is both a tourism product development and marketing initiative. Details of this initiative have been covered in the previous context chapter. Within this initiative Fermanagh District Council and the NITB work in partnership with Councils throughout the Shannon, Shannon Erne and Erne corridors to draw attention to the waterways as a distinct region within Ireland. The initiative has a Strategic Plan, launched in 2010, aimed at raising the visibility of the waterways within Ireland and at encouraging a higher number of visits from people touring within Ireland. Waterways Ireland and Failte Ireland lead this initiative in partnership with all of the Lakeland counties and have achieved a strong presence both in specialist angling and cruising markets and the establishment of Lakelands and Inland Waterways as a 'super-region' within Ireland for marketing abroad by Tourism Ireland Ltd. The Initiative is developing itineraries that extend through the Shannon and Erne regions linking the best of what they have to offer and following Ireland tourism market priorities. This approach has considerable potential to deliver a broader range of visitors to Fermanagh and greater overseas visitor numbers.

Visitor attractions in County Fermanagh performed well in 2009 attracting over half a million visits, with the following numbers having visited attractions in the county

Performance of counted visitor attractions in County Fermanagh 2009	
Belleek Pottery	152,573
Castle Coole	18,362
Crom Estate	16,010
Enniskillen Castle and Museum	29,525
Florencecourt House & Gardens	32,823
Macnean Organic Garden	78
Marble Arch Caves Global Geopark	55,519
Castle Archdale Country Park	187,000
Devenish Island Monastic Site	30,000
TOTAL	521,890

There are other attractions in Fermanagh that do not appear as counted visitor attractions within NITB's visitor attractions survey. These include:

- Sheelin Irish Lace Centre
- Monea Castle
- Inish Rath Visitor Centre
- Aughnakillymaude Mummers Centre
- Cuilcagh Mountain Park
- Buttermarket Craft Centre-Enniskillen

² These figures relate to all out of state visitors to Northern Ireland, visiting for any reason (holiday, business, visiting friends and relatives) and staying for at least one night. Added to this are Northern Ireland residents on holiday at home. Day trips are not included – Source NITB

- Roslea Heritage Centre
- White Island

Many of the hotels in Fermanagh are also resort attractions in their own right due to the numbers of activities that can be undertaken on site or nearby. The Lough Erne Resort and Manor House Hotel are examples of this.

The three main Fermanagh boat trips are also attractions – the MV Kestrel operates from Enniskillen with regular trips around the town and to Devenish Island, the Lady of the Lake is based near Killadeas and is available for tours, whilst the Inishcruiser operates from the Share Centre marina on Sundays and Bank Holidays or on the basis of booked tours outside those times.

Fermanagh has a substantial tourism trade sector with the Fermanagh Lakelands Tourism Marketing Group (a partnership between the tourism trade and the statutory tourism development agencies) having over 400 members across a number of sectors as follows:

- 10 Hotels
- 14 Guesthouses
- 55 B&Bs
- 174 self catering providers (many with multiple cottage units)
- 4 hostels
- 7 campsites
- 7 hire cruise operators with boats based in Fermanagh.

There are also over 150 providers of things to do in the area including angling, boat hire, adventure activities, guided tours, complementary therapy and spa breaks, day boat hire, nature tours and field studies. Some examples are as follows:

- Amphibious Flying Club
- Ashwoods Golf Centre
- Bawnacre Centre
- Belle Isle School of Cookery
- Belleek Angling Centre
- Blaney Spa & Yoga Centre
- Castle Archdale Country Park
- Castle Archdale Marina
- Castle Hume Golf Club
- Castle Island Ltd
- Cloughbally Mill Angling Centre
- Corralea Activity Centre Ltd
- Donaldson's Snooker Hall
- Enniskillen Airport
- Enniskillen Golf Club
- Erne Tours
- Erne Tours Day Boats
- Fermanagh Lakeland Forum
- Fishteach/Flatfield Flyfish
- Fletcher Golf Club
- Frankie McPhillips Flytying & Fishing Tackle
- Kilmore Jet Works
- Kingfisher Cycle Trail
- Lakeland Marine
- Lough Erne Golf Resort
- Lough Melvin Holiday Centre

- Lusty Beg Island Activity Centre
- Manor House Marine Day Boats
- Marble Arch Caves Global Geopark
- Moonjumper International
- Necarne Castle
- North South Marine & Leisure
- Rainbow Amusements
- Share Holiday Village
- The Forest Stables
- The Lough Erne Experience
- Ultimate Water Sports
- Unique helicopters N.I
- Watermill Fishing Lodge
- North South Marine & Leisure

Fermanagh has a reputation for arts and crafts and has a number of such providers including:

- Angela Kelly Jewellery
- Ann McNulty Pottery's
- Aughakillymaude Mummers Centre
- Boston Quay Craft Shop
- Cottage Industries
- Frances Morris
- Gail McGowan Photography
- Jo Tinney
- Marjorie Leonard Art Gallery
- Material Things
- Orchard Acre Farm
- Suitor Gallery Crafts & Coffee Shop
- The Buttermarket
- The Cowshed Studios
- Triskele Tattoos

There is a developing eco-tourism sector in Fermanagh initiated under the Greenbox scheme. Funding is being sought for a further phase of eco-tourism development.

The Fermanagh Events Programme is extensive with around 450 events taking place each year some examples of events in 2010 include

- A full programme of plays, concerts and cultural events at the Ardhowen Theatre
- Valentines Day Events
- The Drama Festival
- Mother's Day programmes
- St Patrick's week events
- Easter events
- Daffodil and Spring Flower Show
- Chocolate Couture Festival
- Country Fair
- Maguire History Weekend
- Scottish Pipe Band Championships
- Tempo Vintage Fair Day
- Lady of the Lake Festival
- Belleek Fair Day
- Fermanagh County Show

- Kesh Carnival
- Castle Capers and Tully Dog Show
- Erne Model Railway Competition
- Enniskillen Arts Festival
- Halloween Fireworks and Extravaganza
- Family Fun Days at National Trust sites

A small number of events and festivals advertised through Fermanagh Lakelands are based on natural heritage including:

- RSPB Dawn Chorus events at Castle Archdale
- National Trust Wild About Nature

However the Marble Arch Caves Global Geopark offers around 30 specific natural and geological heritage events during the year which are promoted through Marble Arch Caves and on the Geopark Website www.marblearchcavesgeopark.com³

Fermanagh lies close to areas with other appealing festivals. Examples with the potential to benefit the Fermanagh tourism economy include

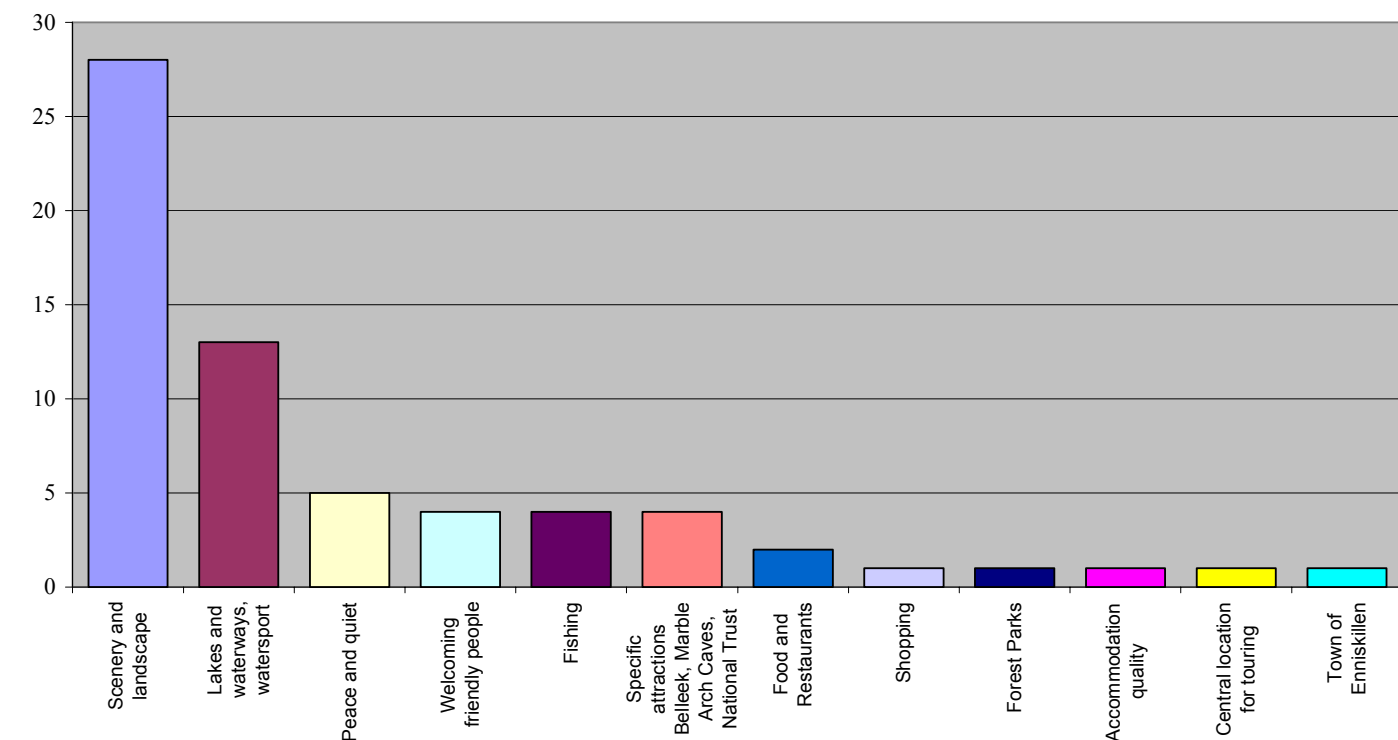
- Festival of the Erne Belturbet
- Cathal Bui Arts Weekend Blacklion

3.3 The Fermanagh Tourism Business Survey

A tourism business survey was carried out by the study team for this report. An e-survey was sent by Fermanagh Lakelands Tourism to 380 of its members with 70 usable surveys returned to the study team by close of survey (18.5%) Reminders were issued on two occasions leading to a doubling of survey response. 75% of the respondents were accommodation providers, 20% provided opportunities to eat out, 16% provided angling services, 13% provided hire facilities on the waterways, 11% transport and 11% were retail providers⁴. The main findings of the survey were as follows.

When asked what they thought their clients most liked about Fermanagh 43% of businesses highlighted scenery and landscape and 20% the lakes and waterways. Other reasons included peace and quiet at 8%. Welcoming people, angling particular attractions were each mentioned by only 6% of respondents.

Reasons for clients visiting Fermanagh



Businesses were also asked how important the navigable waterways of Fermanagh are to their business with 61% recording that the waterways were either essential to or enhanced their businesses. Only 11% felt that the navigable waterways were irrelevant to their tourism related business.

When asked what activities their guests take part in the following responses were provided:

Response	Percentage
Sightseeing	88%
Visit major attractions	85%
visits to historic houses, castles, estates and gardens	85%
Eating out	78%
walking	78%
visiting friends and relatives	69%
Shopping	68%
visits to forests and country parks	65%
visits to Christian heritage sites	53%
coarse fishing (incl. pike)	53%

⁴ Totals more than 100% due to some providers offering multiple services.

attending special events	52%
waterbus trips	49%
dayboat hire	41%
visits to nature conservation sites	40%
horse riding	38%
game fishing	34%
caving	31%
other watersports	27%
hire cruising	22%
canoeing	22%
mountain biking	18%
Other	18%
orienteering	16%
guided nature study visits	12%

Sightseeing, walking, visiting attractions, eating out, shopping and visiting historic houses and castles were felt by the providers of tourism experiences to be more significant than activities such as watersports and angling.

Just under a third of providers intended to expand their current services or add new services in the next five years. The new services proposed included:

- Providing Wi Fi and Broadband (2 respondents)
- Improving interpretation or AV facilities (3)
- Providing more self-catering accommodation (2)
- Providing bike hire and storage
- Providing stabling (2)
- Developing new walking tours and routes (2)
- Moving to a new venue (1)
- Providing new Personal Watercraft courses
- Adding a retail section to an existing visitor service point (1)
- Renovating and extending accommodation (1)
- Providing new client services (1)
- Providing day boat hire (1)

When asked what additional tourism services and facilities the tourism businesses would like to see in County Fermanagh the most common suggestions were provision of more wet-weather facilities and particularly the upgrading of the Enniskillen Forum to provide leisure pool and slide facilities, also a popular suggestion was enhancing and extending the events programme and ensuring there is plenty to do in Enniskillen and elsewhere on Sundays. In total the following suggestions were provided:

- Outdoor play area close to picnic and toilet facilities at Maguiresbridge.
- More wet weather indoor activity facilities- particularly for children – e.g. indoor pool with slides – but also for adults e.g. ten-pin bowling and go karts etc.
- Visitor information at the Janus figure & Drumskinney Stone Circle
- More access to water-based activities
- Mountain bike trail facilities in the Forests to support the efforts of outdoor activity providers

- Information for tourism providers on the Geopark
- More cultural events and entertainment in the visitor season and particularly evenings and Sundays
- More events like the Tug-of-War
- More walking trails
- Training for young people in outdoor pursuits
- Recognition of more lakes as navigable waterways (MacNean, Melvin)
- Look for markets to replace the anglers
- Better transportation for visitors – public transport to visitor attractions – particularly Marble Arch Caves
- More retail
- Cafe and toilets at Killyfole Lough
- More shore-side "things to do" in Enniskillen.
- Share Centre pool open to visitors
- A managed camping site within walking distance from the town centre.
- A slalom water skiing course and wake board facilities.
- Flooding and watercourse management
- Improved parking facilities in Enniskillen – e.g. multi-storey
- National Trust Properties open for longer during off peak seasons.
- Signage and interpretation of walking trails and the historic features of Enniskillen
- Landscaping around Broadmeadow, Enniskillen with seating and paths
- Rainbow trout fishing facilities.
- Longer opening times e.g. National Trust properties, Museum on Saturdays
- Development of more recreational facilities at Lough Navar Forest
- More cycle lanes and walking paths
- Coach parking arrangements with signage
- Development of fun attraction. E.g. steam train, cable car, car museum, paddle boats, complete with retail area, cafe and toilets.
- Fuel points for boaters on Lough Erne
- Good restaurants
- Protection of the undeveloped nature of the Loughs and their shores
- Maintain the shops in Enniskillen
- More flight options into St Angelo Airport.
- Shops open at times convenient to visitors
- Flying boat visits to Castle Archdale
- Better advertising of Kingfisher trail
- Employment of an events coordinator
- Joint marketing between Fermanagh and Donegal

Activity participation by tourists

There are no recent figures for activity participation by tourists in Fermanagh [However data for activities undertaken by visitors to Northern Ireland are indicative and are shown below>

ACTIVITIES UNDERTAKEN BY VISITORS TO NORTHERN IRELAND 2009

SOURCE - NORTHERN IRELAND PASSENGER SURVEY
EXCLUDES REPUBLIC OF IRELAND RESIDENTS AND VISITORS ENTERING VIA REPUBLIC OF IRELAND

ACTIVITY	ACTUAL REASON FOR VISIT	PARTICIPATED	TOTAL
GENEALOGY	8,200	7,100	15,300
HISTORIC PROPERTIES	1,500	110,400	111,900
MUSEUMS/EXHIBITIONS	0	45,400	45,400
FESTIVAL/EVENT	10,300	14,800	25,100
SPECIAL INTEREST SPORT	8,100	10,800	18,900
WALKING	2,700	146,400	149,100
SEA FISHING	100	4,600	4,700
GAME FISHING	600	2,500	3,100
COARSE FISHING	600	1,500	2,100
GOLF	9,000	24,900	33,900
FIELD SPORTS	600	3,300	3,900
CYCLING	800	14,100	14,900
EQUESTRIAN	400	5,300	5,700
GARDENS	0	41,800	41,800

The above figures are derived from survey estimates and extreme caution should be exercised in drawing conclusions, particularly where the smaller special interest and activity products are concerned.

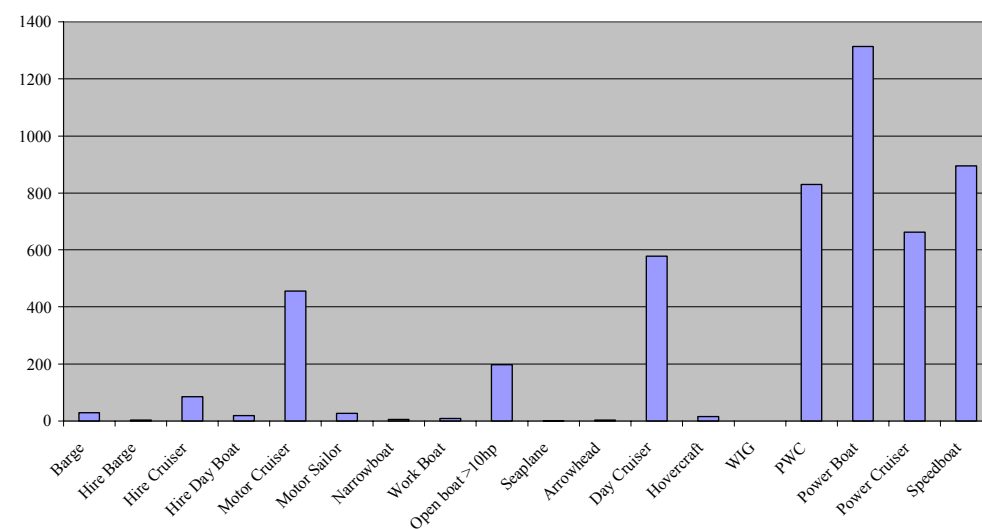
Given the strong participation in cruising and angling in the Fermanagh area and the opportunities for walking these may have performed better within the county.

In terms of field studies visits to the area Marble Arch Caves Global Geopark has been instrumental in attracting international study groups to the area. The Geopark includes the Field Studies Council Centre at Derrygonnelly which also hosts groups from both Northern Ireland and elsewhere. Other centres such as Gortatole Outdoor Education Centre host field studies groups with the majority being from the west of Northern Ireland.

Outdoor Recreational Use of Fermanagh

Boating is a very popular use of Lough Erne, the River Erne and the Shannon-Erne Waterway. Waterways Ireland provides a compulsory boat registration scheme for all boats with an engine capacity of 10 BHP or more. In 2010 some 8900 boats were registered but it is thought that only 5129 are currently used on the waterway.

No and type of boats registered on Lough Erne (source Waterways Ireland)



The predominant type of boat registered on Lough Erne is a powerboat with speedboats and personal watercraft also significant in numbers. There is no requirement to register most sailing boats on the Lough as registration applies only to powered craft with engines capacity of 10 BHP or more. Smaller self-powered craft such as kayaks, canoes and rowing boats are also exempt from registration.

People with boats registered on the Erne predominantly live within Northern Ireland (92%) with a small proportion (6%) resident in the Irish Republic and the remainder mainly from Britain and Europe. Some 49 boats are registered to people with addresses in England.

In 2010 there were 85 hire cruisers registered on Lough Erne – under 2% of all registered craft this sector has seen a decline since 2005. Hire cruise operators in Fermanagh work together through the Erne Charter Boat Association. Boats registered on the Shannon and Barrow are also able to access Lough Erne via the Shannon Erne Waterway. An estimated 2600 boats travel through this waterway each year.

Sailing mainly takes place on Lough Erne through the Lough Erne Yacht Club at Killadeas on Lower Lough Erne and at Lisnaskea Boat Club near Derryadd Quay on Upper Lough Erne. The Share Centre also near Lisnaskea and Gortatole Outdoor Education Centre on Lough MacNea offer sailing tuition and the Lough Erne Yacht Club is a recognised RYA training centre.

In terms of other activities taken in Fermanagh there is little information available. In Northern Ireland as a whole tourists undertook the following activities in 2009

Angling

Angling facilities and opportunities are widespread throughout the county and this is a major recreational asset with high levels of participation. Principal venues and species are listed below:

Lough/River	Species
Mill Lough, Bellanaleck	Rainbow and Brown Trout
Lough Keenaghan, Belleek	Brown Trout
Lough Corranry, Rosslea	Rainbow Trout
Lough Corry, Rosslea	Brown Trout
Lakes Achork, Glencreawan and Meenameen, Navar Forest, Derrygonnelly	Brown and Rainbow Trout
Ballinamallard River, Ballinamallard	Brown Trout and Occasional Salmon
Colebrooke River, Maguiresbridge	Brown Trout
Ballydoolagh Lough, Enniskillen	Roach, Perch, Pike and Eels
Killyfole Lake, Lisnaskea	Roach, Bream, Hybrids, Perch, Pike and Eels
Trory, Lough Erne, Enniskillen	Bream, Roach, Hybrids, Perch, Pike and Eels
Ely Lodge, Lough Erne, Enniskillen	Bream, Roach, Hybrids, Perch, Pike and Eels
Lough MacNea – Lower & Upper, Belcoo and Blacklion, Co. Cavan	Bream, Roach, Hybrids, Perch, Rudd, Pike and Eels
River Erne, Cornagrade, Enniskillen	Bream, Roach, Hybrids, Perch, Pike and Eels
River Erne, Sligo Road, Enniskillen	Bream, Roach, Perch, Pike, Hybrids and Eels
Upper River Erne, Bellanaleck	Bream, Roach, Hybrids, Perch, Pike

River Erne, Broadmeadow, Enniskillen	Bream, Roach, Perch, Pike, Hybrids and Eels
Upper River Erne Schools, Enniskillen	Bream, Roach, Hybrids, Perch, Pike and Eels
Belle Isle Estate, Lisbellaw	Pike, Roach and Breams (Available for Residents only)

Licences and permits are available in Fermanagh from the following outlets

- Belle Isle Estate
- Belleek Angling Centre
- Cloughbally Mills Angling Centre
- Country Sports
- Erne Tackle
- Extern Community Services Dept
- Fermanagh Lakeland Cottages
- Fermanagh Tourist Information Centre
- Frankie McPhillips Fishing Tackle
- Home, Field & Stream
- Lough Erne Hotel (Kesh Village)
- Mahon's Hotel
- Post Office
- Aghinver Boat Co
- Agnacarra Guest House
- Belleek Angling Centre
- Cloughbally Mills Angling Centre
- Country Sports
- Carrick Craft
- Erne Tackle
- Extern Community Services Dept
- Fermanagh Lakeland Cottages
- Fermanagh Tourist Information Centre
- Frankie McPhillips Fishing Tackle
- Home, Field & Stream
- Killyhevlin Hotel
- Mahon's Hotel
- Manor House Marine & Cottages
- Melvin Tackle
- National Trust
- Patrick Trotter

Walking

Provision for walking in the area is extensive varying from long high quality sections of the Ulster Way to short circular walks. Principal provision included in the WalkNI website and brochure includes

Short walks <5 miles	Medium walks 5-10 miles	Longer Walks >20 miles
Castle Archdale various waymarked routes	Cuilcagh Mountain	Ulster Way section – Belcoo to Belleek
Castle Caldwell	Lough Navar Forest Drive	Ulster Way Section – Cuilcagh Way – Belcoo to Florencecourt
Castle Coole		Ulster Way Section – Sliabh Beagh Way
Claddagh Glen		

Correll Glen		
Crom Estate waymarked walks		
Ely Lodge walks		

In fact there are many more walks available in Forest Service properties in Fermanagh which are all open to the public for walking use and the Council has previously published a popular guide to 25 walks in Fermanagh.

Horse riding

Fermanagh is a county with strong equestrian interests and some international standard facilities. The focal point for this activity is at Necarne in Irvinestown where there is a major equestrian facility owned by Fermanagh District Council and operated by the College of Agriculture Food and Rural Enterprise which runs a range of equine related further and higher education courses. Necarne Castle provides an indoor school, outdoor dressage, jumping and cross country arena, point to point course and international standard cross –country course. There is extensive stabling and a catering outlet for students and participants. Erne Lakeland Riding Club is the only riding club in Fermanagh. The Association of Riding Clubs runs several summer camps at Necarne each year and BHS Summer Camps are also held there.

There are trekking and riding opportunities at:

- Castle Archdale Pony Trekking Centre
- Drumbarragh Stables – Ballinamallard
- Drumhoney Stables
- Legginhouse Stables
- CAFRE (Enniskillen Campus) (BHS Approved Centre)

Golf

Fermanagh has four main golf venues

- Lough Erne Resort
- Castle Hume Golf Course
- Enniskillen Golf Course
- Ashwoods Golf Centre
- Manor House Marine

The Lough Erne Resort and Castle Hume are promoted by Northern Ireland Tourist Board as world class, whilst Enniskillen Golf Course is considered to be a 'gem'

Caving

Fermanagh is the only venue suitable for caving in Northern Ireland and as such is the focal point. There are two main cave systems used - the Tullybrack/Belmore uplands and the Cuilcagh Mountains area. The Tullybrack/Belmore area includes Knockmore/Pollraftera, Noon's Hole, Reyfad/Carrickbeg and Boho/Aughnaglack. The Cuilcagh Mountains area includes the Pollnagossan caves, the Shannon system Marble Arch Caves, Prod's Pot, Cascades and Tullyhona rising cave. The area is popular with cavers from all over Ireland and Britain and also has its share of overseas cavers. Corralea Activity Centre can provide caving experiences for those who wish to be led and the Lough Melvin Activity Centre in Garrison can provide accommodation.

Sporting Events

A wide range of outdoor recreational events take place on Lough Erne and surrounding waterways, properties, golf courses and forests. In 2010 these have included:

- Me Too Fun days aimed at encouraging ethnic minorities, people with disabilities and low income families to try adventure activities. These were based at the Share Centre and supported by Sport NI and Waterways Ireland

- Head of the River Rowing Race
- Fermanagh Classic Fishing Festival
- Mahons Coarse Fishing Festival
- Gold Cup Fishing Festival
- Waterways Ireland International Pike Fishing Event
- Erne Safari Rally
- Enniskillen Motor Club May Day Rally
- Enniskillen Motor Club Clubman Stages Rally
- Lisnaskea Water Festival
- Lough Erne Classic Yacht Regatta
- Point to Point in Necarne
- International Horse Trials Necarne
- Volleyball Open Tournament
- Erne Waterways Golf Challenge
- Lakeland Open Golf Championships
- 10 k race.

Other Outdoor Activities

There are well advanced plans for a Scouting Ireland major campsite and activity base at Castlesaunderson funded through European Union's PEACE III Programme. The site will have both indoor and outdoor facilities and will be able to accommodate 1000 people.

The Kingfisher Cycle Trail is the main cycling route through the area. Some tour operators (e.g. Wildflower Cycling Holidays) offer packaged cycle tours on a led or self led basis. The Kingfisher Cycle Trail follows a route on both sides of the border and explores the area from Lough Erne to the Shannon.

The Erne/Fermanagh Users Survey

An E survey was sent out to Governing Bodies of the main outdoor sports that take place on Lough Erne or in County Fermanagh. 20 were sent out with 6 returns.

Responses were received from

- Ulster Angling Federation (Game Angling)
- Gortatole Outdoor Education Centre
- Association of British Riding Clubs
- Erne Lakeland Riding Club
- British Horse Society Ireland
- Shannon Group (Speleological Union of Ireland)

Each was asked for the main areas they use in Fermanagh.

Game angling interests mainly use Upper and Lower Lough Erne and Lough Melvin.

The main waters used by Gortatole OEC were:

- Lower Lough MacNea
- Upper Lough MacNea
- Upper and Lower Lough Erne
- The Arney, Silees, Erne, Arney and Colebrooke Rivers

The main caves used by the Shannon Cavers were:

- Marlbank
- Gortalughany
- Tullybrack
- Reyfad

- Boho
- Knockmore

The combined equestrian interests highlighted the importance of Necarne as a focal point for events, camps, training programmes and events and also mentioned Lackaboy, Thorntons arena and Florencecourt as important for the sport.

The main appeal of Fermanagh for the various activities lies within the natural resource with the main appeal in the case of angling being the quality of the wild brown trout fishing in the large lakes. For outdoor education the appeal lies in the extensiveness of the resources and landscape, the scenic beauty and the clean water for activities. For equestrian activities the main appeal lies in the unparalleled facilities at Necarne

When asked what the respondents would like to see provided in Fermanagh for their activity the responses were as follows:

- *Access to more island (wild) campsites with simple facilities e.g. composting toilet and a regular clean-up system. (particularly useful for Duke of ED Award expeditions)*
- *Access for Canoe launching on feeder rivers to L Erne (to include lay-by space for canoe trailers)*
- *We would like Necarne to remain as an equestrian centre, and also would like more opportunities for off road horse riding.*
- *More suitable affordable lodgings (Hostels, camp sites)*

When asked what issues they encounter in their use of the area and which they would like the study to address responses were as follows:

- *The lack of policing of water based activities on Lough Erne. There have been many cases of anglers being harassed by jet skis and fast ski boats.*
- *More needs to be done to educate water-users on 'Leave No Trace' principles and the organisation of regular clean-up systems and campaigns.*
- *The Weed problem needs to be tackled more aggressively.*
- *The Zebra Mussel problem needs to be researched properly and eradication methods employed comprehensively.*
- *Better co-ordination is needed on water level control across the lakes and across Border.*
- *The College will be leaving Necarne in 2012 and we will have to find a new venue.*
- *Necarne equestrian centre does not currently allow general public horse riders access to the trails on their property, where as cyclists and walkers have free access.*
- *Access is a concern. Most landowners are very friendly to cavers but some remain concerned about liability issues. Fermanagh District Council have been doing a very good job promoting access to the country sites*
- *The Riding Club and the pony club need facilities both indoor and off road in order to enjoy and improve their skills safely in the future at a reasonable cost. At present these are very limited and expensive.*

The Castle Basin Study

During the course of the study a report on the potential of the Castle Basin in Enniskillen was issued. This had been commissioned by Waterways Ireland and Fermanagh District Council and addressed in detail the waterways within the town, together with adjacent lands. The principal recommendations of the study were:




To increase the functionality of the waterways in Enniskillen and adjacent amenity lands as a space for hosting major events




To provide easily accessible water activities such as kayaking and a training zone for smaller craft

To provide new coarse fishing pegs





To provide new floating jetties to facilitate overnight visits to Enniskillen




To provide enhanced riverside walkways





LOWER LOUGH ERNE	
Portora Current position Workboat and inspectorate base for Waterways Ireland on Lough Erne. Adjacent site formerly used as a boat club Opportunities Development of public berthing to enable a visit to Portora Castle. Potential for the development of a sailing club Consider feasibility of allowing access to view the lock – only lock on the Erne System. Investigate restoration of dry dock opposite Portora Lock as a working dry dock for public use.	
Devenish Island Current position Devenish is the most important of Lough Erne's island monasteries, founded in the 6th Century by Saint Molaise. The ruins include St Molaise's Oratory, St Molaise's Church; a well preserved 12th Century Round Tower and the later 15th Century remains of St Mary's Priory and graveyard High Cross. Two access jetties for the island and a trip boat operated by NIEA as a heritage visit. Angling stands lie on the mainland adjacent to the boat trip jetty. One of the most visited islands on Lough Erne. Famous for its Christian heritage Opportunities Scheduled boat service from Enniskillen Opportunity to provide an enhanced experience including e.g. off site interpretation prior to visit and guided walks of the island. (Devenish Experience) Path from West Jetty needs to be improved and maintained. Development of a joint approach to management between all involved	 





<p>Trory</p> <p>Current position At one time main arrival point for short boat trip to Devenish Island run by Northern Ireland Environment Agency. Popular point for fishing with fishing jetties provided. Proposals for an interpretative centre at the site. Narrow access road difficult for coaches</p> <p>Opportunities Renewal of fishing stands. Fishing shelter on shore. Review potential for main boat trip to leave from Enniskillen to facilitate coach tour access and for off site interpretation. Consider toilet block/facilities block. Information about Devenish Island.</p>	
<p>Castle Hume (Lough Erne Resort)</p> <p>Current position Two major golf courses lie adjacent to one another on the shores of Lough Erne. Lough Erne Resort has residential and day spa facilities and a major hotel and accommodation complex.</p> <p>Opportunities Public jetty access to service both golf courses and the resort is being taken forward by Waterways Ireland</p>	
<p>Carrickreagh Jetty (Ely Lodge Forest)</p> <p>Current position Jetty with access to 250 ha of mixed woodland with forest paths and viewpoints over the Lough. 3.5 km trail available from the jetty</p> <p>Opportunities Promotion as a site to enjoy natural heritage. Inclusion in a Lough Erne wildlife guide or Fermanagh wildlife guide. Traffic calming for road crossing to Carrickreagh Wood. Interpretative shelter could be provided including maps for the park. Facilities block</p>	




<p>Derrygonnelly</p> <p>Current position Derrygonnelly is an attractive quiet village away from Lough Erne on the route to the Lough Navar Forest Drive and Cliffs of Magho Viewpoint. The Field Studies Council, a long established and well known field studies provider both for schools and for adults has its only Ireland base in Derrygonnelly. The Tir Navar community accommodation base is used by the FSC for accommodation for its residential programmes.</p> <p>Opportunities Increase in the number of FSC open programmes for interested adults and stronger role in presenting the natural heritage of the Fermanagh area. Derrygonnelly is close to many important nature conservation sites and could be developed as a hub for nature based visits</p>	
<p>Camagh Bay Jetty</p> <p>Current position Small jetty and slipway. Toilets nearby, parking and picnic tables</p> <p>Opportunities No proposals</p>	





<p>Inishmacsaint</p> <p>Current position Jetty allowing access to ruins of the early Christian church of St Ninnidh established around 532 A.D. The saint is associated with other sites around the Lough including Knockninny and Ninnidh's Well.</p> <p>Opportunities Potential for a water trail linking early Christian Heritage</p>	
<p>Tully Bay and Drumcrow Jetty</p> <p>Current position Tully Bay is one of three bases for Carrickcraft Cruisers. The bay also contains Tully Bay Holiday Cottages and Drumcrow Public Jetty. There is a boatyard slipway and marina, with fuel available for boats. Public car park. Woodland walks from Drumcrow public jetty. (Jason's Walk)</p> <p>Opportunities This area is already an activity hub and is capable of providing more visitor activity and services. The area is close to Tully Castle which is popular with visitors. Potential for shore side walk between Tully Bay and Tully Castle.</p>	  





<p>Tully Castle</p> <p>Current position Tully Castle is owned by NIEA and is the remains of a fortified house and bawn dating from the early 17th Century. The gardens have been recreated and there is a visitor centre in an adjacent traditional cottage telling local stories. The public jetty close by is popular with cruisers.</p> <p>Opportunities Potential to provide a service block for boaters overnighiting at Tully Castle Jetty</p>	
<p>Magho Jetty</p> <p>Current position Rather exposed jetty giving access to shoreside car park and picnic area and across the road to walks to Cliffs of Magho (currently closed due to subsidence) Council has proposals for improved visitor facilities at the car park and has received funding from SWARD for car park facilities. Council is seeking funds for the reinstatement of the walk to the cliffs and would like to investigate potential for a cable car to the top of the cliffs from this point.</p> <p>Opportunities Potential for more sheltered harbour at this point to allow overnighiting if necessary. Development of the jetty as a safe haven for the western section of the Lower Lough Development of toilet and potentially café facilities at the site.</p>	
<p>Lough Navar Forest</p> <p>Current position Lough Navar Forest contains one of the best viewpoints in Northern Ireland (1000 ft elevation) and has a popular 7 mile forest drive. The Council and Forest Service are bringing forward a series of improvements including walking and cycling trails, disabled access to small lakes and the reinstatement of public toilets. It is hoped that modifications to the Forest Drive will allow for coach party use</p> <p>Opportunities Current plans for trail improvements are in the process of seeking funding The development of visitor facilities at the viewpoint at Lough Navar Forest (Cliffs of Magho) including toilets and a seasonal café/interpretative centre.</p>	




<p>The Council is keen on establishing the feasibility of a cable car type uplift to this point from the shores of the Lough</p>	
<p>Fermanagh Anglers Fishing facilities (Drumbad)</p>	
<p>Current position Fishing club boathouse, slipway and access facilities. This is an area where fly fishing is popular.</p> <p>Opportunities Greater promotion of facilities for angling. Identify facilities required by anglers</p>	 
<p>Roscor Jetty (River Erne)</p>	
<p>Current position An attractive, quiet and sheltered transit jetty at the exit point of Lower Lough Erne. Allows boats to wait out high flows or high winds.</p> <p>Opportunities Could have improved shore connections to allow access to walks on dismantled railway or Belleek/Pettigo Road to Belleek, Pettigo and potentially Ballyshannon. Joint approach between Waterways Ireland and Fermanagh District Council</p>	 








<p>Belleek Harbour/Marina</p> <p>Current position An excellent facility for boaters visiting Belleek. Close to the village and allows access to all services. Toilets and car parking provided by Fermanagh District Council, marina by Waterways Ireland. Night closure of toilets, no showers.</p> <p>Opportunities WI facilities block. Shore power hook ups should be provided. Signage to marina from the water as route to Belleek pottery. Development of camp site and picnic facilities</p>	 
<p>Belleek</p> <p>Current position Attractive village with all visitor services and a major visitor attraction at Belleek Pottery. This is an important tourism generator for the area.</p> <p>Opportunities Improved marketing linkages with Donegal Sustained promotion to the coach tour and touring visitor market. Waterbus jetty to allow boat operator to visit the pottery or to base a waterbus at the pottery. Campsite for canoe trail and for visitors to the area. Development as an activity hub with Ballyshannon and Assaroe</p>	
<p>Ballyshannon</p> <p>Current position Ballyshannon town is an important visitor service point for both Donegal and those visiting Lower Lough Erne/Belleek. The town has a range of accommodation and is on the River Erne where it exits to the sea. The town has a folk and country festival in August and is close to beaches and surfing. There are several equestrian centres in the area and suitable off road trails. Close to the town is the Lakeside Activity Centre and camping and caravan park.</p> <p>Opportunities Promotion of Ballyshannon as an access route to Lower Lough Erne and Enniskillen by car. . Development of Ballyshannon/Assaroe/Belleek as an activity hub.</p>	



Lakeside Activity Centre Assaroe Lake Ballyshannon	
<p>Current position The Lakeside Activity Centre provides a range of activity including canoeing, sailing and surfing and pedalos from its centre above the dam at Ballyshannon. The centre was conceived as the National Watersports Centre and undertakes coaching training. Also at the site is a 4 star touring caravan park with a lakeside setting.</p> <p>Opportunities Provision of a wider range of activities at the North West corner of Lough Erne based from the centre but linking to Belleek. Activity hub to include walking an horse-riding (Five Oaks Ranch) E.g. Breezy Hill routes linking to Belleek.</p>	
Castle Caldwell Forest	
<p>Current position Castle Caldwell belongs to Forest Service. It has car parking, basic interpretation and walks. The shores and islands are managed by RSPB</p> <p>Opportunities This forest has potential to provide an excellent wildlife experience but requires a higher level of visitor service. Site should be included in a Lough Erne Wildlife Guide Refreshed visitor shelter with interpretation Service Block Promotion as a destination on Lough Erne for boaters</p>	 
Garvary Angling Access Point (DCAL)	
<p>Current position A car park and access point for angling</p> <p>Opportunities Greater promotion of angling opportunities. Particularly fly fishing. Facilities for anglers consistent with Enniskillen as a centre of excellence for angling, with satellite sites. Access for anglers with disabilities.</p>	


<p>Lusty Beg Island and Ferry</p> <p>Current position Attractive visitor prospect with the added attraction of being on an island and gaining access via a chain ferry. Island cottages and swimming pool with bar and restaurant. Activity centre for guests and corporate market. Island trail.</p> <p>Opportunities Continue providing a high quality product on the island with the USP of the chain ferry and island pub/restaurant. Investigate provision of a public jetty.</p>	  
<p>Lusty More Island</p> <p>Current position Lusty More Island has a visitor jetty which gives access to nature walks on the island.</p> <p>Opportunities Promotion within a Lough Erne Wildlife Guide Stronger on-site interpretation</p>	

<p>Pettigo/Tullyhommon</p> <p>Current Position Quiet town with one part belonging to Co Donegal and one part County Fermanagh. Access village to St Patrick's Purgatory - Lough Derg Pilgrimage, Pilgrim's Way and to an interesting hinterland of the Pettigo Plateau and the extensive Forest Service Forests of Killeter. Lough Derg is also a popular angling lake. Pettigo has recently benefited from Peace funding of €8.2 million for a new community centre, walks, footbridge etc as a result of a masterplan for the village and surrounding area</p> <p>Opportunities Pettigo/Lough Derg could be the starting point for a Christian Heritage trail leading throughout the Erne and Shannon corridors. Base for cycling and walking opportunities. Potential to link the village with the waterway if the navigation north of Boa Island was opened up for suitable craft with walking access and a jetty provided..</p>	 
<p>Tudor Farm Marina, cottages and powerboat school</p> <p>Current position Long established provision of water sports services</p> <p>Opportunities Development and promotion of an activity hub at the North east corner of Lower Lough Erne with multiple providers.</p>	 



<p>Edgewater Marina and Caravan Park</p> <p>Current position Private sector caravan and marina complex with slipway. Busy and popular site.</p> <p>Opportunities On water advisory information at launch points about safe conduct of fast powered craft, appropriate driver age, safe speeds. Research into density of boat use and introduction of a limited numbers launch scheme if any issues emerge. Private sector involvement in code of conduct for fast powered craft.</p>	
<p>Muckcross Jetty/Lakeland Marina</p> <p>Current position Public jetty and private marina with marked public swimming area</p> <p>Opportunities Outdoor swimming training events as part of activity hub. RLSS outdoor lifesaving training opportunities and canoe sessions. Advisory information as for Edgewater above</p>	
<p>Kesh</p> <p>Current position Attractive village and visitor service point for Lower Lough Erne and nearest village to the activity bases in the nearby bays. Kesh has a jetty and can be reached via the river from Lough Erne. Toilets and showers are provided for boaters adjacent to the jetty but do not have 24 hr access. Village has several attractive pubs and restaurants</p> <p>Opportunities Formalisation of Kesh/Irvinetown/Castle Archdale as an activity hub for the North East of Lough Erne. Develop 24 hour access to toilets and showers. Promotion of Kesh as a key destination on the Lough.</p>	






<p>White Island</p> <p>Current position Popular island visit from Castle Archdale via trip boat. Early Christian Heritage site. Unique stone carved figures. Public jetty. Island owned by Fermanagh District Council.</p> <p>Opportunities Inclusion in Christian Heritage site itinerary for Loughs and the Lakelands corridor. Improved ferry service as part of an integrated plan for Castle Archdale Interpretative shelter and summer guides.</p>	  
<p>Aghinver Boat Company,</p> <p>Current position Popular base for boats. Provides boat maintenance services. Aghinver a good example of how marinas can blend into the shore. (model for new private and public sector development) Planning application for improvement of tourism facilities</p> <p>Opportunities Important that boat service industry is maintained on the Lough.</p>	  
<p>Tom's Island Jetty</p> <p>Current position Public jetty giving access to Castle Archdale Forest (Forest Service)</p> <p>Opportunities Opportunity for activities from the forest as part of a NE lake activity hub.</p>	




<p>Davey's Island</p> <p>Current position Jetty giving access to Davey's Island. Nature Reserve and short walks.</p> <p>Opportunities Promote within Lough Erne Wildlife Guide</p>	
<p>Crevinashaughey</p> <p>Opportunities Redevelop walking trail between two public jetties</p>	
<p>Castle Archdale</p> <p>Current position Public lands with private sector lease of caravan park and marina area. Country Park, forest, horse-riding, orienteering, hostel and visitor centre for the country park. Very popular area but managed in parts. Adjacent float plane landings.</p> <p>Opportunities Development of an overall joint management plan for the combined public and private sector elements of the site. Needs to play a larger role in providing access to the water for visitors and island visits. Larger boat is required for the boat trip to White Island– potential for eco-boat to be developed for this site. Ferry to White Island to be included in overall management plan</p>	

Inishmakill National Nature Reserve	
<p>Current position Jetty and island owned and maintained by NIEA for access, study and management</p> <p>Opportunities Network of natural heritage sites with good visitor services and interpretation. Included in a wildlife guide to the lakes/Fermanagh. Consideration of a public jetty for landings to NNRs (Crevinashaughey, Inishmakill and Cleenishgarve) Interpretative shelters at all NNR islands</p>	
Rossigh Jetty	
<p>Current position Rossigh Jetty provides berthing, slipway access, camping and canoe trail facilities. Jetty is maintained by Waterways Ireland and shore facilities by Fermanagh DC. Formerly had a restaurant, now closed.</p> <p>Opportunities Service block to support the Erne Canoe Trail and overnight stays on the jetty. Walk from the site.</p>	
Irvinestown	
<p>Current position Irvinestown is a lively village with a busy hotel> the village is active in promoting events and festivals. Necarne Equestrian Centre is accessed via the village and has hosted high level international equestrian events.</p> <p>Opportunities Potentially increased equestrian visits due to the development of an equestrian Toll Ride and inclusion in activity hub with Kesh and Castle Archdale. Inclusion of the village and Necarne Estate in festivals and events.</p>	







Necarne Castle Equestrian Centre	
<p>Current position Necarne Castle is a purpose built equestrian centre. The centre is capable of hosting international horse trials and has hosted the European Eventing Championships. The Centre is owned by Fermanagh District Council and operated by DARD/CAFRE as part of its equine further and higher education programmes. There is some doubt over the future of equine programmes at the venue.</p> <p>Opportunities Reestablishment of the international events. More use for local events and training programmes. Introduction of a toll ride around the estate under the BHS Toll Ride scheme enabling both local and visiting riders with their own horses and local equestrian centres to use the site for hacking and exercising.</p>	
Tempo	
<p>Current positions Small village in East Fermanagh in an outstanding rural landscape. Tempo Manor provides corporate event hire and there is a coach company based in the village.(Lakeland Tours)</p> <p>Opportunities Potential for additional visitor activity products based on Tempo Manor.</p>	
Inish Davar	
<p>Current position Owned by NIEA Inish Davar is of interest for nature conservation and short walks</p> <p>Opportunities Inclusion in Lough Erne wildlife sites scheme and wildlife guide Interpretative shelter Fenced picnic area Seasonal guided experiences Walk</p>	

<p>Rossclare Jetty</p> <p>Current position A rather exposed jetty with access for both boats and anglers. No particular shore interest at this point.</p> <p>Opportunities Maintain as important slipway for launching large craft. Provision of a picnic site Interpretation of World War 2 heritage</p>	
<p>The Inishclare, Rossclare point</p> <p>Current position Formerly a popular restaurant on the water, now closed. Boat moorings associated with the restaurant. High capacity (coach tour) trip boat the Inishclare from this point. Dining cruises.</p> <p>Opportunities Reinstatement if feasible. Relocation of trip boat to service activity hub at NE of the Lough where the numbers of visitors are higher.</p>	

Manor House Hotel, Marine and Cottages. Cruise Hire	
<p>Current position Longstanding hotel, marina and cottage complex with cruiser hire from Manor House Marine. This is an important accommodation complex on the Lough.</p> <p>Opportunities Continuation of business as it is. Increased dayboat hire.</p>	   
Hay island	
<p>Current position Island landing and informal walk</p> <p>Opportunities Promote as part of the natural heritage.</p>	



<p>Gublusk Bay, Lough Erne YC</p> <p>Current position Yacht club with marina, moorings and caravan site. RNLI base for the lower Lough. Main sailing base on the Lough with both modern and classic boats (Fairy class). Swinging moorings. RYA training centre. Major house and marina development planned for the south side of the bay. Also important site for flying model aircraft including model flying boats.</p> <p>Opportunities Opportunities to develop activity instructor skills for the tourism industry. Consider public events based on flying model aircraft.</p>	
<p>St Angelo Airport/Enniskillen Airport</p> <p>Current position Airport available on a PPR basis during daytime hours. Flying club and leisure flights. Seaplane flying lessons.</p> <p>Opportunities Development of an official flying boat landing site associated with the airport and development of a regular connection with the Lagan in Belfast. Proposal for the development of a water-taxi jetty and marina at the site.</p>	
<p>Enniskillen</p> <p>Current position Main hub, retail and service centre for Fermanagh and wider area. Waterway passes through the town which is largely on an island. Fishing stands on approaches to the town</p> <p>Opportunities Opportunities to access watersports from the town consistent with Castle Basin Strategy Development of a rowing boat hire base at Riverview and or Regal Pass Service Block at Henry St Jetty which should be confirmed and managed as an events jetty Promote opportunity for a hotel site and waterside restaurant and private marina base at old Police barracks/training centre Development of a houseboat section in an extended marina at Erneside.</p>	




<p>Portora Boat Club</p> <p>Current position Main rowing club in Enniskillen with competitive programme throughout Ireland. Hosts major events on IARU racing calendar.</p> <p>Opportunities Greater promotion of rowing to the local community. Development of gig racing/coastal rowing in settlements around Lough Erne and race series. Replacement of boat shed and extension of facilities is planned. Worth considering re-establishing the former sailing club downstream of this site.</p>	
<p>Round O Jetty Enniskillen</p> <p>Current position This jetty is a major asset to Enniskillen and is the base for the main waterbus for the town which does trips to Devenish Island .</p> <p>Opportunities Service Block Opening of the café on a more regular basis during the visitor season. Improved walking signage to this jetty from the town</p>	
<p>Waterways Ireland HQ</p> <p>Current position Jetty provided to facilitate visits to HQ by staff and visitors</p> <p>Opportunities Sales of Waterway Guides, permits, charts etc facilitated by the jetty. Signage to indicate sales and opening times. Information sign.</p>	

<p>Enniskillen Castle</p> <p>Current position The Castle is a major attractive feature of the waterway and is open to visitors daily. At present visitors have to find their way from a range of jetties around the town.</p> <p>Opportunities Provision of a specific jetty to assist and encourage visits to the castle and based on short stay only Part of a historic houses and castles trail through the area Opportunity for display on historic uses of the waterways and the strategic position of the castle. Major events venue Dedicated car parking for the castle.</p>	
<p>Castle Island</p> <p>Current position The Castle Island has a set of buildings designed as an outdoor centre and currently primarily has canoeing use. The facility is leased to Highpoint Group for use as an activity centre and is currently marketed under the brand 'Life-One Great Adventure with an appeal mainly to young people.</p> <p>Opportunities A Castle Island Basin Study has brought forward proposals for the island including camping and new overnight jetties.</p>	 
<p>Lakeland Forum, Broadmeadow and Jetty</p> <p>Current Position Lakeland Forum currently plays no real role in providing watersports despite its riverside position. A series of jetties provides good access to the Forum for boat visitors who can use the showers and leisure facilities. The Forum in general turns its back on the river and shows its least attractive side.</p> <p>Opportunities To consider the development of a water fun park (similar to Bundoran) to provide a higher visitor function for Enniskillen Forum) To consider developing an indoor adventure playground at or close to Enniskillen Forum To consider developing a waterfront adventure offering from the Forum rather than from the island.</p>	  

Base for Enniskillen activity hub. Enniskillen Forum should develop its waterfront as an activity base.	
Enniskillen (Erne Tours)	
<p>Current position Erne Tours provides a regular boat trip service from the Round O Jetty. In addition to tours on Lower Lough Erne the boat takes tours upriver and is facilitated by jetties at the Killyhevlin Hotel and at the Ardhowen Theatre.</p> <p>Opportunities Potential for a more accessible jetty to be provided in Enniskillen, e.g. close to the bus station and with a higher visibility to visitors. Added promotion and potentially more than one boat operating at peak times.</p>	




UPPER LOUGH ERNE	
Riverside Farm (Sillees River)	
<p>Current position B&B, activities and riverside moorings on Sillees River (short branch from Erne). Informal boat park, Boat storage. Slipways. Jetties have a home-made appearance.</p> <p>Opportunities Promoter wishes to extend jetties and add activities to the farm and operation. Promoter could create a riverside walk along old railway line.</p>	  
Ardhowen Theatre and Jetty	
<p>Current position Excellent and well-used facility and an important tourism asset. Provides access to both Castle Coole and Ardhowen.</p> <p>Opportunities Examining additional signage to highlight opportunity to visit Castle Coole visible from water. Development of a Fermanagh show that highlights local culture for regular showing throughout the summer. Development of a theatre festival e.g. drama competition.</p>	
Castle Coole	

<p>Current position Castle Coole is a National Trust property on the outskirts of Enniskillen. The 18th Century House sits in a 1200 acre estate which provides walks for local people and visitors</p> <p>Opportunities More visibility of Castle Coole from the water at the Ardhowen Theatre jetty. The entrance to the property is a very short walk from the jetty but is not featured there.. The house should be included in a presentation of all of the historic houses, castles and gardens in the area in the form of a trail linking to the rest of the Shannon and Erne.</p>	
<p>Killyhevlin Hotel and Chalets</p> <p>Current position A major and well established hotel that benefits from its position on the waterway. The hotel is accessible from the WI public jetty rather than having its own jetty.</p> <p>Opportunities Water activity could be available from the hotel jetty</p>	
<p>Rowing Course Finish Jetty</p>	


<p>Current position Rowing course finish jetty Jetty provided for rowing races, for spectators, staff and competitors Also used for waterskiing</p> <p>Opportunities Activities available in conjunction with Killyhevin. Development of improved facilities for waterskiing Picnic and seating facilities</p>		
<p>Culky Floating Jetty (Mullenaclog)</p>		
<p>Current position Popular stop off and access point for waterskiing. Short walk and picnic area</p> <p>Opportunities None proposed</p>		
<p>Tamlagh Bay</p>		
<p>Current Position Quiet, off channel bay between Culky Jetty and Bellanaleck</p> <p>Opportunities Provision of single point moorings (swinging moorings) for the use of cruisers and sailing craft</p>		

<p>Bellanaleck</p> <p>Current position Area contains one public jetty, The Moorings and the Erne Marina. The public jetty gives access to the village of Bellanaleck and there is a facilities block at the jetty. Bellanaleck is an attractive settlement and has the additional attraction of fishing on Mill Lough (public fishery) for rainbow and brown trout. Nearest access point to the Sheelin Irish Lace Museum.</p> <p>Opportunities Make public moorings more apparent visually from the water Develop an activity hub based on Bellanaleck village and the waterside. Provide a circular walk from the moorings Provide a service block</p>	  
<p>Carrybridge</p> <p>Current position Area on a bend in the Erne contains several private marinas, hotel, boatyards and cruise hire opportunity (Carrybridge Boat Company). Waterways Ireland Public Jetty gives access to hotel and hotel also has private jetty. There are caravan and campsite facilities. Canoe trail stopping point. Sewage pump out and full marine services.</p> <p>Opportunities Carrybridge has the potential to be an activity hub and is currently providing for large boats and for the canoe trail. Signage of Carrybridge from main roads. Expansion of existing private marinas at Carrybridge rather than development of new marinas at sites nearby. Some marinas would benefit from tidier and more professional facilities.</p>	  

<p>Improvements to appearance of the waterside facilities for approaching boats. Provide a service block</p>	  
<p>Belle-Isle Estate</p> <p>Current position Provides self-catering cottages around the estate, activities including a cookery school, walks angling and boat trips from private estate. Holds the EU Flower Eco Label</p> <p>Opportunities Continue to provide full packages at high quality Potential for a public jetty to provide access to the tourist attractions of the estate Provide additional activities. Provide a walk from the jetty</p>	 
<p>Naan Island West (Forest Service FNR)</p>	

<p>Current position Forest Service island access. Woodland walks. Recently felled conifer areas have opened up views from the island</p> <p>Opportunities Interpretative shelter Wildlife island as part of a network of natural heritage sites that can be visited by boat</p>	
<p>Kilmore Quay</p> <p>Current position Public jetty with access via shallow water for smaller boats. In need of repair. Slipway Watermill Restaurant close by</p> <p>Opportunities Repair/replacement of jetty and slipway to provide additional destination. Enhance access for small boats and canoes</p>	
<p>Share Centre (Lisnaskea) and Smith's Strand</p> <p>Current position Multi-activity centre with catered and self-catering facilities and camping and caravan Park. Caters well for people with disabilities. Boat trips on the 57 seat Inishcruiser are available on Sundays and Bank Holidays throughout the season and the boat is available for private hire.</p> <p>Opportunities Promotion as one of 3 main activity hubs. Increased opportunities to access activities from Smith's Strand (summer swimming and water safety school for local children). Development of a cluster of activity businesses operating from the area and offering a wide range of water and land activities. Facilitate access for activities at Smith's Strand</p>	
<p>Trannish Island</p>	

<p>Current Position Trannish Island is used by Share Centre as an out centre and camp site for their groups. A derelict cottage on the island has been identified as a site for a bothy to serve the trail</p> <p>Opportunities To develop a bothy to service the Lough Erne Canoe Trail</p>	
<p>Lisnaskea</p> <p>Current position Lisnaskea Village is an attractive settlement with an active community life. There have previously been proposals to extend the navigation to the village. The village has a leisure centre at Castle Park. Lisnaskea is well situated for access to both water and land activities including Sliabh Beagh.</p> <p>Opportunities Lisnaskea would benefit from being connected to the water. Consider revisiting pervious feasibility and environmental impact study for extending the navigation to Lisnaskea to provide a new destination on the Upper Lough</p>	
<p>Lisnaskea Boat Club (Derryadd)</p>	



<p>Current position Lisnaskea Boat Club is very active and has both sailing boats and powered craft. Part of the Lisnaskea water festival is based at the club. The club has an events programme.</p> <p>Opportunities Potential for the provision of activities to visitors through the club as part of the Lisnaskea Hub.</p>	
<p>Derryadd Jetty</p> <p>Current position Derryadd jetty is a popular stopping off point for cruisers and is also, like Corradillar, a renowned point for fishing. The quay is popular for coarse fishing, providing a reliable catch.</p> <p>Opportunities Potential site for the provision of a Service Block (alternative at Corradillar).</p>	
<p>Corradillar Jetty and Slipway</p>	



<p>Current position Corradillar jetty provides another opportunity for berthing on Upper Lough Erne. There are no facilities. The jetty was refurbished in 2008. Corradillar is close to the Share Centre and to Corradillar cottages. It is renowned for fishing and provides slipway access.</p> <p>Opportunities Alternative site with Derryadd Quay for provision of a service block for overnighting boaters.</p>	
<p>Derryvore Jetty</p>	
<p>Current Position Quiet mooring in large, deep bay opposite Crom Castle.</p> <p>Opportunities Walk to the church Signage and interpretation.</p>	
<p>Crom Castle and Estate</p>	



<p>Current position Crom Estate which is owned by the National Trust is a major visitor destination on Upper Lough Erne. The estate offers walks in mature woodland and with lakeshore access and views. The National Trust also rents cottages in the courtyard of the estate and operates a visitor centre which interprets the natural and historic interest of the estate. The Castle itself is private and not open to the public, except for letting the West Wing to guests. National Trust provides toilets and showers at the visitor centre and the site is popular with people before or after a trip through the Shannon Erne Waterway. The site will also be a significant stop off for people using the restored Ulster Canal to Clones. In 2010 the Erne Classic Yacht race, sponsored by Waterways Ireland was held at Crom Castle.</p> <p>Opportunities When the Ulster Canal section to Clones reopens there is likely to be a greater demand for berthing at Crom. Waterways Ireland has proposals to increase the jetty capacity at the site. There should be consideration given to the provision of a 24 hour service block at the site for boaters either through National Trust or through Waterways Ireland. Given the numbers who visit there would be an opportunity for scheduled waterbus tours.</p>	     
<p>Bun Bridge Jetty and Slipway</p> <p>Current position Bunbridge jetty provides approximately 10 mooring spaces along the eastern channel south of Crom Estate. The jetty provides the nearest access point (4km) to Newtownbutler and is linked to this by the Kingfisher Cycle trail.</p> <p>Opportunities Development of walks from Bunbridge to Newtownbutler via minor roads and to the nearby Rathes.</p>	 
<p>Newtownbutler</p>	

<p>Current position Newtownbutler is a small village of just under 1000 population and is surrounded by lakes and is a popular base for fishing. The Newtownbutler area is well provided with self-catering accommodation.</p> <p>Opportunities Continue to develop the angling opportunities and packages in the area Walks to Bun Bridge jetty.</p>	
<p>Galloon Jetty</p> <p>Current position Galloon jetty gives access to Galloon Island and is a popular and sheltered stopping point along the east channel south of Crom Estate. The jetty is serviced and has toilets and a pump out. This jetty is likely to become more popular with the restoration of the initial section of the Ulster Canal to Clones.</p> <p>Opportunities Development of walks on Galloon island. Service block</p>	
<p>Ulster Canal</p> <p>Present Position The Ulster Canal restoration proposals will open a section of the canal linking Lough Erne to the town of Clones. The access route to Clones leads past the Castle Saunderson estate where a major International Scout Camp facility and activity based is planned. A jetty will be provided to allow visitors to access the estate from the water. At Clones there will be a boat harbour.</p> <p>Opportunities The Ulster Canal provides a new destination from Lough Erne and extends the navigation.</p>	
<p>Corraquil</p>	

<p>Current position A pleasant and tranquil harbour and lock with canal barge hire opportunities and a former community owned group of self-catering houses which are lying empty. Currently undergoing a major upgrade with new berthing below the lock. Facilities block provided.</p> <p>Opportunities Encouragement to reopen the cottages as self catering cottage and/or encourage the provision of a camping point walking Trail/Cycle Trail. Potential for pedestrian links across Woodford River. Potential for canoe polo in harbour.</p>	
<p>Aghalane</p> <p>Current Position Aghalane is the first stopping point on the Woodford River/Shannon Erne Waterway. The site has a facilities block with smart card access for boaters and this includes showers and laundry facilities. The berthing is very sheltered and lies close to the main A509/N3 cross border routeway.</p> <p>Opportunities The development of a Shannon Erne Waterway waymarked route (walking/cycling) short walks from Aghalane jetty</p>	
<p>Derrylin</p> <p>Current position Derrylin lies on a major north south route between Cavan and Enniskillen. It has tourism services such as food and beverage, accommodation and campervan hire.</p> <p>Opportunities Greater connection with the water and consideration to a summer scheme for children in Derrylin based at Tirraoe or Corrastitune jetty.</p>	
<p>Geaglum Jetty</p>	

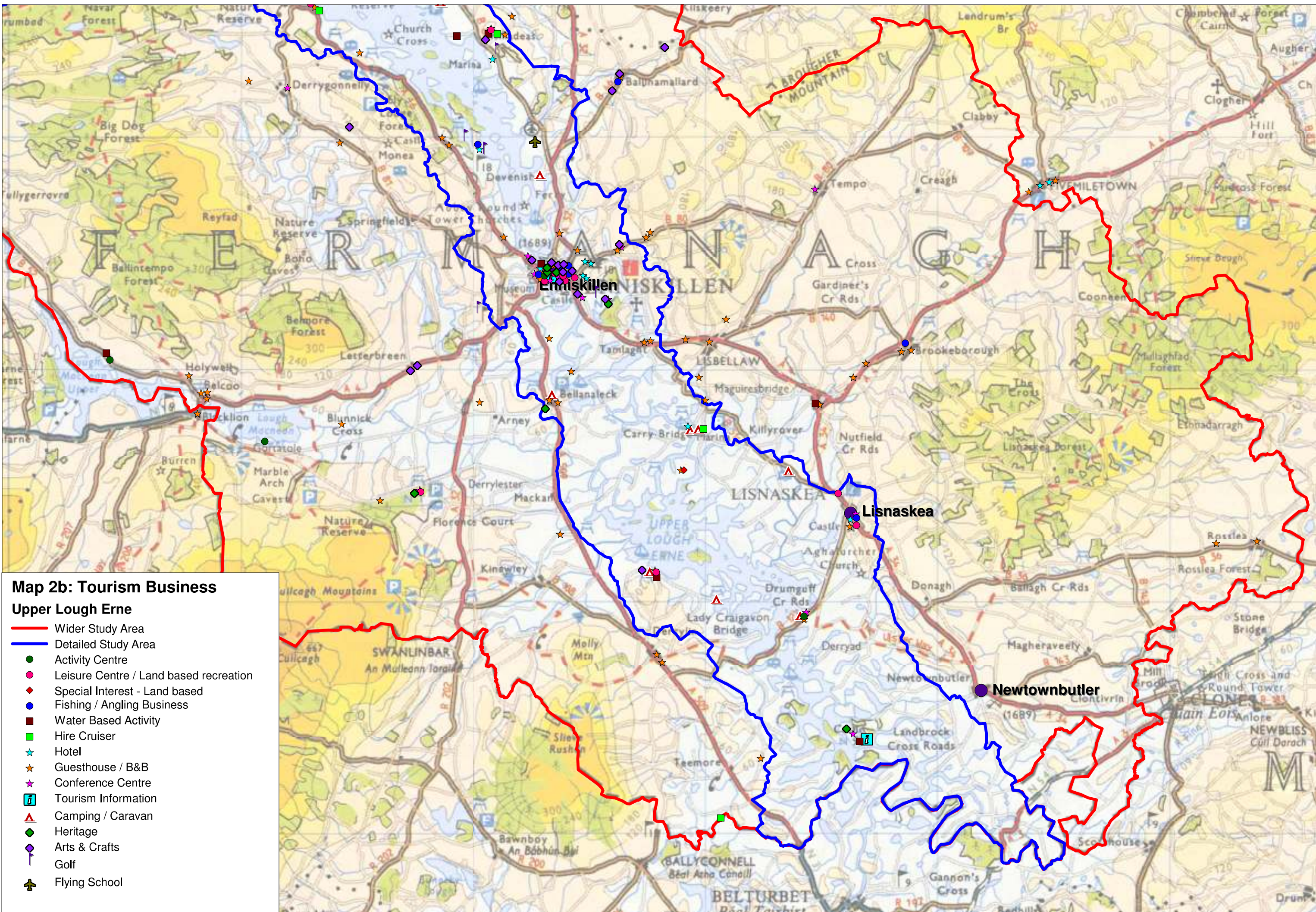
<p>Current position Good overnight shelter on jetty close to Reilly Wood and Gole Wood National Nature Reserves.</p> <p>Opportunities Walks to Gole Wood and Reilly Wood NNR and provision of interpretation of natural and cultural heritage of the area.</p>	
<p>Tirrroe Jetty</p>	
<p>Current position Tirrroe jetty provides a sheltered mooring point on Upper Lough Erne it lies within a short distance of Derrylin Village</p> <p>Opportunities Walks to Knockninny and Derrylin Watersports summer scheme for Derrylin children or local water festival.</p>	
<p>Corristatune Quay</p>	
<p>Current position Used mainly by farmers accessing islands using cot. Near to Derrylin Village.</p> <p>Opportunities None proposed</p>	
<p>Marble Arch Caves Global Geopark Global Geopark</p>	

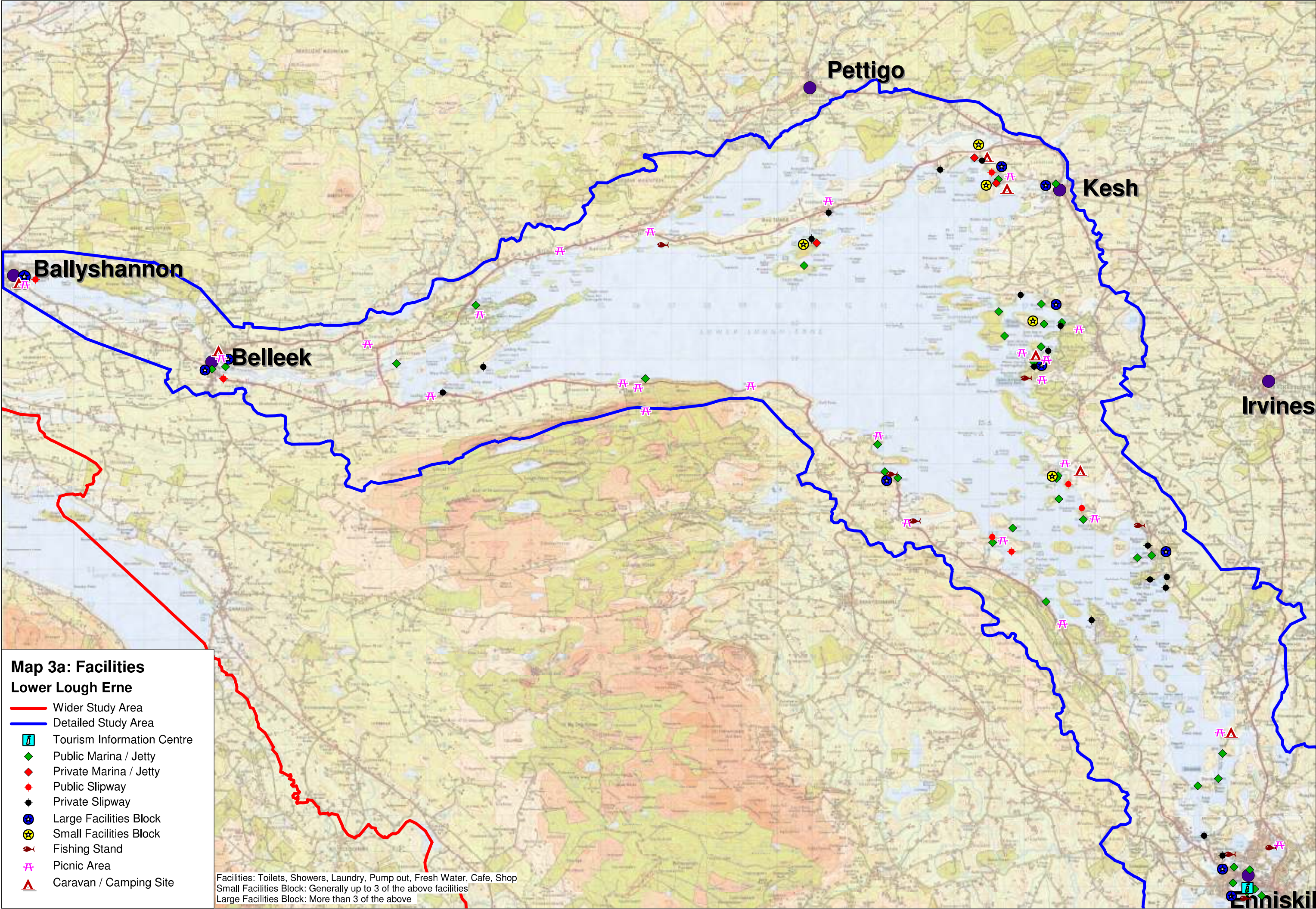
<p>Current position Marble Arch Caves Global Geopark is the premier tourist attraction in County Fermanagh and plays a significant role in the visitor economy of a wider area of Counties Leitrim and Cavan. The attraction provides cave tours on a regular basis throughout the day.</p> <p>Opportunities The Marble Arch is the focal point of the Marble Arch Caves Global Geopark and expects to receive an increasing number of visitors. The centre requires an update and additional facilities to host educational visitors in Fermanagh to study aspects of the Geopark. Upgrading of walks in nearby Claddagh Glen are also planned.</p>	
<p>Cuilcagh Mountain Park</p> <p>Current Position Cuilcagh Mountain has always been a popular upland walk in Fermanagh and can be accessed by a number of routes with the most popular being via the National Trust Path from Florencecourt. Fermanagh District Council purchased an area of cut over bog on Cuilcagh upstream of the Marble Arch Caves Global Geopark and which was causing flooding and siltation issues within the cave. Within this mountain park bog restoration and drainage control has taken place. The area can be accessed independently or as part of a tour from the Marble Arch Caves Global Geopark and a relatively new track enables walkers to access the summit of Cuilcagh. The access track was closed in 2010 due to a landslide.</p> <p>Opportunities Restoration of the mountain path New interpretative facilities and increased capacity.</p>	
<p>Florencecourt House and Forest</p>	

<p>Current position Florencecourt House the 18th century home of the Cole family is now a National Trust property with a café, shop and extensive grounds. The Forest Service has surrounding lands with extensive walking, orienteering opportunities and an eco-trail. A path leads from Florencecourt to the summit of Cuilcagh Mountain.</p> <p>Opportunities Inclusion in a castles, houses and gardens tour of the area Inclusion in natural heritage sites tour in the area.</p>	
<p>Belcoo</p> <p>Current position Belcoo lies on the Sligo Road on the border between Counties Fermanagh and Cavan. The village is a focal point for festivals and visitor accommodation in the area.</p> <p>Opportunities Development of walks along the shoreline of Lough MacNea.</p>	
<p>Garrison</p>	

<p>Current position Garrison is an attractive lakeside village with a Council owned Caravan Park. The lake is one of the most pristine waters in Northern Ireland. The lake has some distinctive trout sub species, sonaghan, gillaroo and ferox and these are sought out by anglers.</p> <p>Opportunities Extension of waterside walks. Marketing links with Donegal Continued protection measures to stop the zebra mussel and other alien invasive species from reaching the lake from other waters Protection of water quality.</p>	 
<p>Knockninny Quay</p> <p>Current position Knockninny Quay gives access to Knockninny Hill and Ninians Well. There are many archaeological sites in this area. The quay also serves the Knockninny Country House Guest House which is a restoration of a former hotel on Upper Lough Erne. The country house rents day boats from the quay. Knockninny Quay has a toilet block. Close by is the Aughakillymaude Mummers Centre which has a permanent display of mumming traditions.</p> <p>Opportunities Formalise the walk up Knockninny Hill as a key activity from the jetty. Provide information on local archaeology and provide archaeological walk Enhanced Service Block Restore swimming beach Signage to Mummers Centre.</p>	 
<p>Cloonatrig Jetty</p>	

<p>Current position Cloonatrig and Inishmore jetties lie almost opposite each other on the River Erne western channel some 3km from Bellanaleck. The jetties are used as quiet moorings and the channel is speed limited. Cloonatrig is popular for fishing.</p> <p>Opportunities Retain as quiet moorings</p>	 
<p>Inishmore Jetty</p> <p>Current position Cloonatrig and Inishmore jetties lie almost opposite each other on the River Erne western channel some 3km from Bellanaleck. The jetties are used as quiet moorings and the channel is speed limited. Inishmore Jetty has a picnic site.</p> <p>Opportunities Retain as quiet moorings</p>	 



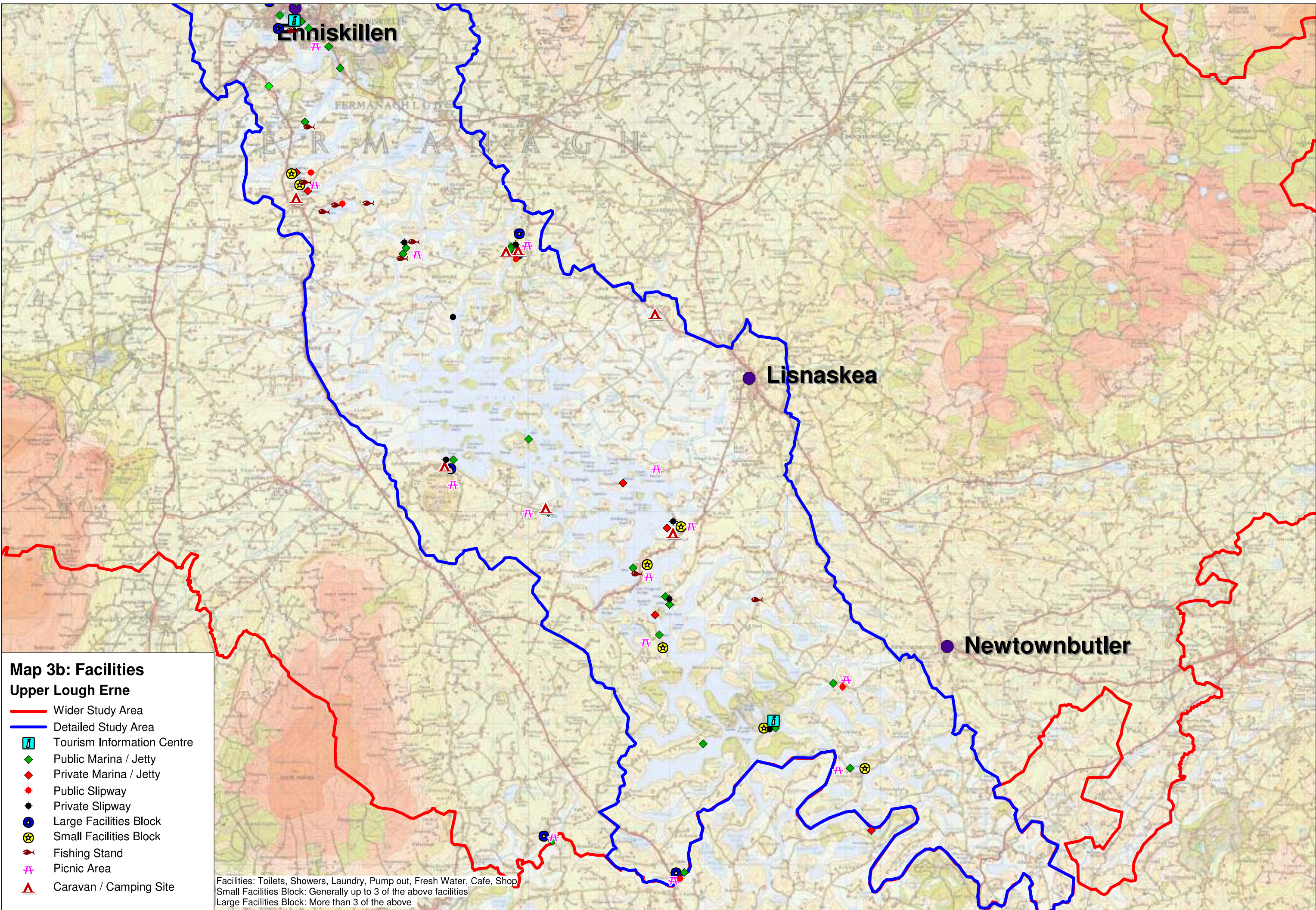


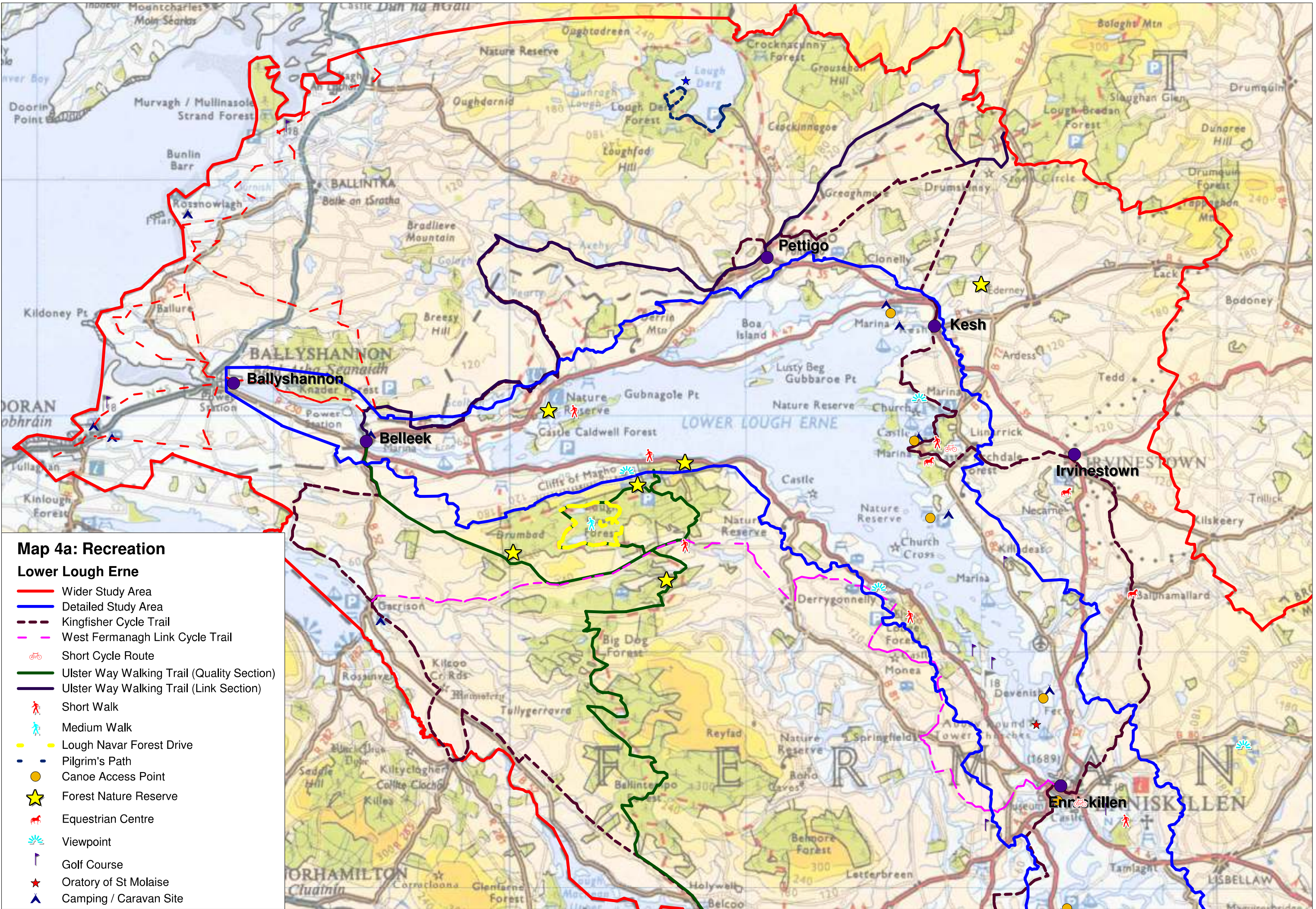
Map 3a: Facilities
Lower Lough Erne

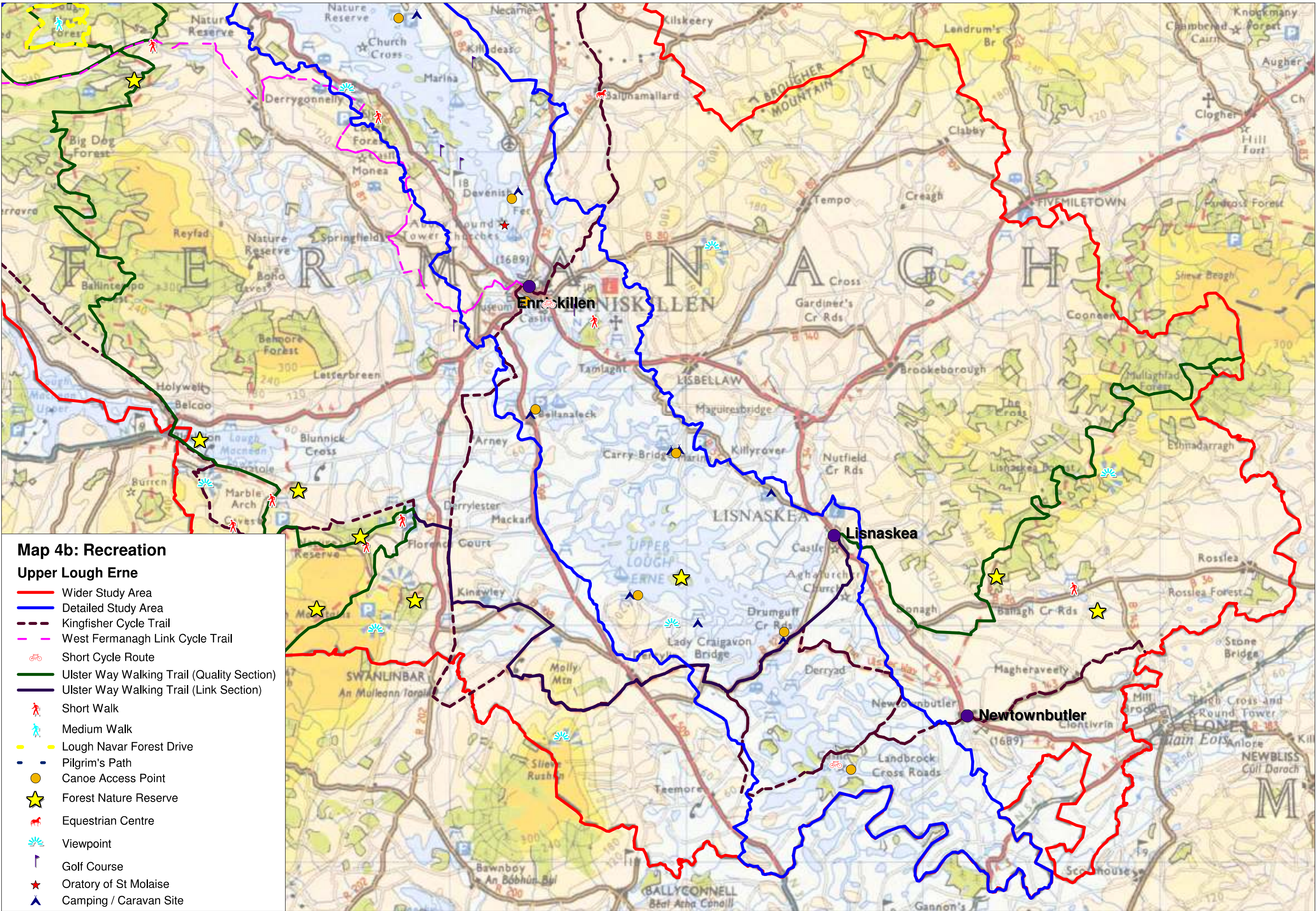
- Wider Study Area
- Detailed Study Area
- Tourism Information Centre
- Public Marina / Jetty
- Private Marina / Jetty
- Public Slipway
- Private Slipway
- Large Facilities Block
- Small Facilities Block
- Fishing Stand
- Picnic Area
- Caravan / Camping Site

Facilities: Toilets, Showers, Laundry, Pump out, Fresh Water, Cafe, Shop
Small Facilities Block: Generally up to 3 of the above
Large Facilities Block: More than 3 of the above

Enniskillen

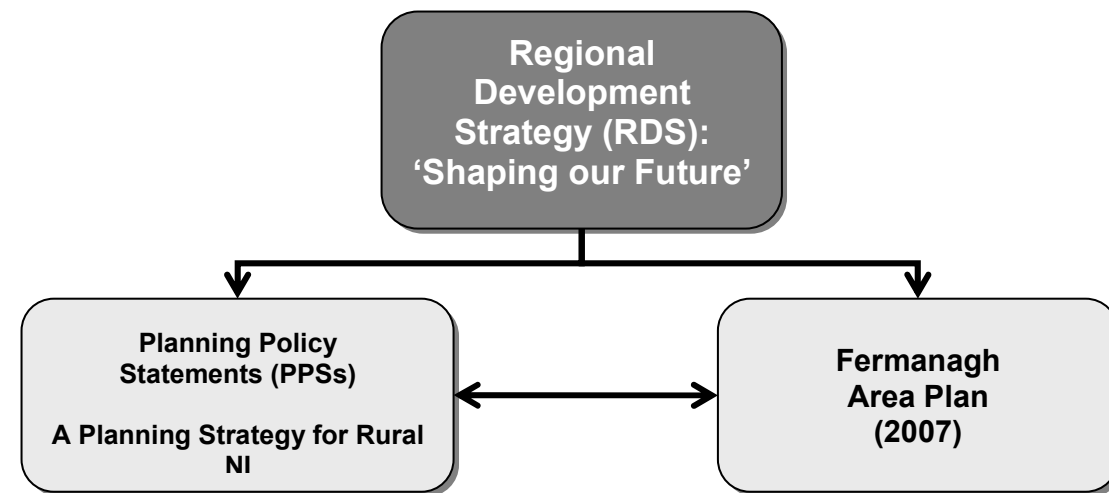






4 Current Planning Approaches

4.1 Northern Ireland



4.1.1 Regional Development Strategy 'Shaping Our Future' 2025

The Regional Development Strategy was published in September 2001 and aims to guide the future development of Northern Ireland up to 2025. The RDS sets out a Spatial Development Strategy and a series of Spatial Planning Guidelines in order to achieve this.

Chapter 10 of the RDS focuses on 'supporting Economic Development' across the Region. The two major economic development themes in the Strategy are to build a region of opportunity and support the growth of tourism.

Relevant Spatial Planning Guidelines are as follows:

SPG-ECON 7: To promote a sustainable approach to the provision of tourism infrastructure

SPG-ECON 8: To establish a world wide image for Northern Ireland based on positive images of progress, and attractive places to visit

SPG-ECON 9: To protect and enhance a varied range of tourism development opportunities

ECON 9.1 Protect and enhance land based visitor amenities

ECON 9.2 Protect and enhance water based visitor amenities

- Protect the natural character of the coastal waters, inland lakes and waterways and provide, where environmentally acceptable, opportunities for water based tourism, such as cruising, angling and activity based holidays;
- Investigate the potential to reopen disused canals to create a regional network of waterways centred on each Lough, facilitating water-based tourism and recreational traffic between Lough, River and Coast; and

- Develop water-based pursuits in appropriate locations, based on Lough Erne and the Shannon-Erne Waterway, Strangford Lough and the Bann, the existing Marinas, such as Bangor and Carrickfergus, and by developing new marinas/moorings.

4.1.2 Planning Policy Statements

Planning Policy Statements (PPS's) set out the policies of the Department of the Environment on particular aspects of land use planning and apply to the whole of Northern Ireland. Their contents will be taken into account in preparing development plans and are also material to decisions on individual planning applications and appeals.

4.1.2.1 PPS1 – General Principles

PPS 1 acknowledges that the Town and Country Planning system exists to regulate the development and use of land in the public interest. Moreover, the public interest requires that all development is carried out with regard for sustainable development and in a way that would not cause demonstrable harm to interests of acknowledged importance.

4.1.2.2 PPS2 – Planning and Nature Conservation

This Planning Policy Statement describes the statutory framework that helps to protect designated areas, including those of international importance and advises on the treatment of nature conservation issues in development plans. This PPS also outlines the criteria, which the Planning Service will employ when processing planning applications which might affect nature conservation interests and surrounding areas of conservation value, to which developers should have, regard when preparing proposals.

4.1.2.3 PPS8 – Open Space, Sport and Outdoor Recreation

PPS8 sets out the Departments planning policies for the protection of open space in association with residential development and use of land for sport and outdoor recreation, and advises on the treatment of these issues in development plans.

Open space for the purpose of this statement, is defined as all open spaces of public value. The definition includes not just outdoor sports facilities, parks and gardens, amenity green space and children's play area, but also natural and semi natural urban green spaces, allotments, cemeteries, green corridors and civic spaces. It includes not only land but also inland bodies of water that offer important opportunities for sport and outdoor recreation and which can also act as a visual amenity.

The main objectives of this policy statement are:

- To safeguard existing open space and sites identified for future such provision
- To facilitate appropriate outdoor recreational activities in the countryside
- To achieve high standards of siting, design and landscaping for all new open space areas and sporting facilities; and
- To ensure that the provision of new open space areas and sporting facilities is in keeping with the principles of environmental conservation.

Generally this PPS has a presumption against the loss of existing open space, however highlights exceptions in the case of 'substantial community benefits' and where there is no 'significant detrimental impact on the amenity, character or biodiversity of the area'.

The policy recognises the importance of the countryside for recreation, and acknowledges the contribution this can make to the rural economy and the promotion of tourism. The policy sets out a list of criteria which must be satisfied before any development is permitted for recreational use in the countryside. Policy OS 5 restricts the development of sport and outdoor recreational activities that generate high levels of noise.

The department will permit the development of facilities ancillary to water sports adjacent to inland lakes, reservoirs and waterways where the proposal complies with the relevant criteria. The department will assess the impact on the visual amenity and character of the area.

4.1.2.4 Draft PPS16 – Tourism

Draft PPS16 was published for public consultation from November 2010 to 25th March 2011. This PPS sets out the departments planning policy for tourism development and also for the safeguarding of tourism assets. When this PPS is issued in final form it will supersede Tourism Policies SP10 and TOUT1 to TOUT4 of the Planning Strategy for Rural NI and also CTY 1 of PPS21.

Policies:

TSM1 – Safeguarding the Tourism Assets – Planning permission will not be granted for development within the visual setting of a tourism asset that would itself or in combination with existing and approved development in the locality have an adverse impact on its value as a tourism asset.

This policy provides for the safeguarding of all tourism assets, including those which are subject to protection for other reasons under various legislative or policy instruments and those which are not subject to such protection.

TSM2 – Tourism Development in Settlements – Planning permission will be granted for a proposal for tourism development (including a tourist amenity or tourist accommodation) within a settlement; provided it is of a nature appropriate to the settlement, respects the site context in terms of scale, size and design, and has regard to the specified provisions of a development plan.

TSM3 – Tourism Development in the Countryside – Proposals for tourism development in the countryside will be permitted in accordance with the provisions of the following policies: Tourism Amenities – Policy TSM4, Hotels – Policy TSM5, Multiple / Clustered self catering units – Policy TSM 6, Holiday Parks – Policy TSM7, Policy CTY11 / CTY 2 / CTY4 (PPS21),

TSM4 – Tourist Amenities in the Countryside

New Proposals – Planning permission will be granted for a tourist amenity in the countryside where it is demonstrated that:

- a. it is in association with and requires a site close to a particular tourism attraction located in the countryside,
- or
- b. the type of tourist activity in itself requires a countryside location

Proposals brought forward under circumstance (b) must demonstrate that there is no suitable site on the edge of a nearby settlement.

All proposals that include buildings must make provision in existing or replacement buildings, where possible.

Where a proposed tourist amenity is of regional importance or is otherwise significant in terms of the extent of new build or the scale of engineering operations it must demonstrate substantial benefit to

regional tourism as well as sustainable benefits to the locality. Such applications must be supported by a tourism benefit statement and a sustainable benefit statement.

EXTENSION of an EXISTING TOURIST AMENITY

A proposal for the extension of an existing tourist amenity will be permitted where the scale and nature of the proposal does not harm the rural character or appearance of the local area.

Where possible, such proposals will be expected to be accommodated through the conversion, reuse or extension of existing buildings on site, unless it can be demonstrated that this is not a feasible option. In circumstances where the planning authority accepts a new or replacement building it should be sited and designed so as to integrate with the overall development.

Any conversion, extension or new building should respect the scale, design and materials of the original building(s) on the site and any historic or architectural interest they may have.

TSM5 – Hotels in the Countryside – Planning permission will be granted for a new hotel in the countryside in the following circumstances and will be assessed under the specified criteria:

- a. the redevelopment of an existing rural building
- b. a new build proposal outside a village or smaller rural settlement

TSM6 – Self Catering Accommodation – New Multiple or Clustered Self Catering Units in the Countryside

Planning approval will be granted for self catering units of tourist accommodation where they form a cluster of at least three units, and in one of the following circumstances:

- a. the units are located within the grounds of an existing hotel or a proposed hotel that is acceptable in principle;
- b. the units are to be provided at or close to an existing or proposed hotel that is acceptable in principle;
- c. the restoration of an existing clachan or close, subject to the retention of the original layout of buildings and spaces and the use of original proportions, materials, finishes and boundary treatments

TSM7 – Static Holiday Parks and Touring Caravan Sites in the Countryside

NEW STATIC HOLIDAY PARKS and LARGE SCALE EXTENSIONS - Planning permission will only be granted for a new static caravan park or a large scale extension on sites identified for such use in a development plan.

MINOR EXTENSIONS to STATIC HOLIDAY PARKS and TOURING CARAVAN SITES - A proposal for the minor extension of an existing static holiday park or touring caravan site will only be permitted subject to a series of criteria being met.

NEW TOURING CARAVAN SITES

Planning permission will only be granted for a new small scale touring caravan site (generally less than 1 hectare) and provided the following specific criteria are met:

- it is not located on or adjacent to the coastline or the shoreline of an inland lake / Lough or river and otherwise (a) does not significantly interrupt views of these water features from a public road or public vantage point, or (b) visually impair views of the shoreline from the water;
- it is effectively screened by existing natural or built features so that caravans, motor-homes and ancillary buildings, infrastructure and storage areas are not significantly visible from any public place.

A larger touring caravan site will be allowed where, in addition, it can be demonstrated that:

- the additional size of the development proposed, in excess of 1 hectare, will have no significantly greater material impact on visual amenity, rural character and the environmental quality of the surrounding countryside;
- the tourism and environmental benefits of focusing such development in a single site outweigh the proliferation of touring caravan sites in the locality.

TSM8 – Criteria for Tourism Development

A proposal for a tourism use, in addition to the other policy provisions of this Statement, will be required to meet all of the following criteria:

Design Criteria

- (a) a movement pattern is provided that, insofar as possible, supports walking and cycling, meets the needs of people whose mobility is impaired, respects existing public rights of way and provides adequate and convenient access to public transport;
- (b) the site layout, building design, associated infrastructure and landscaping arrangements (including flood lighting) are of high quality in accordance with the Department's published guidance and assist the promotion of sustainability and biodiversity;
- (c) appropriate boundary treatment and means of enclosure are provided and any areas of outside storage proposed are screened from public view;
- (d) appropriate use of surface materials to ensure adequate control of surface water run-off;
- (e) is designed to deter crime and promote personal safety;

In addition to the above design criteria, a proposal will be required to meet general criteria (f – n).

General Criteria

- (f) it is compatible with surrounding land uses and neither the use or built form will detract from the landscape quality and character of the surrounding area;
- (g) it does not harm the amenities of nearby residents;
- (h) it does not adversely affect features of the natural or built heritage;
- (i) it is capable of dealing with any emission or effluent in accordance with legislative requirements;
- (j) access arrangements must be in accordance with the Department's published guidance;
- (k) access to the public road will not prejudice road safety or significantly inconvenience the flow of traffic;
- (l) the existing road network can safely handle any extra vehicular traffic the proposal will generate;
- (m) access onto a protected route for a tourism development in the countryside is in accordance with the amendment to Policy AMP 3 of PPS 3, as set out in Annex 1 of PPS 21.
- (n) it does not extinguish or significantly constrain an existing or planned public access to the coastline or a tourism asset, unless a suitable alternative is provided.

4.1.2.5 PPS21 – Sustainable Development in the Countryside

PPS 21 sets out planning policies for development in the countryside. For the purpose of this document the countryside is defined as land lying outside of settlement limits as identified in development plans.

4.1.3 Planning Strategy for Rural Northern Ireland

The Planning Strategy for Rural Northern Ireland covers all of the towns, villages and countryside of Northern Ireland outside Belfast (and adjoining built up areas) and Londonderry.

The Strategy establishes the objectives and the policies for land use and development appropriate to the particular circumstances of Northern Ireland and which need to be considered on a scale wider than the individual District Council Area.

Planning Policy Statements (PPSs) are gradually replacing the policy provisions of the Planning Strategy for Rural Northern Ireland and each PPS indicates those policies of the Strategy that it is superseding. In the meantime, the Planning Strategy remains in force for those topics not covered by a PPS or other policy publication and where still applicable, remain a material consideration until it is completely superseded. Tourism is one of the areas which has not yet been superseded therefore this strategy remains material to the consideration of tourism related development in rural Northern Ireland.

Tourism Policies

Policy TOU 1 – Tourist Development

To give favourable consideration to proposals for tourism development which are appropriate in terms of nature, scale and location

Policy TOU 2 – Protection of Tourist Assets

To protect key environmental assets for the tourist industry

Policy TOU 3 – Tourist Accommodation

To give favourable consideration to proposals for Hotels, Guesthouses and Self Catering accommodation in existing settlements and in appropriate rural locations

Policy TOU 4 – Caravan and Camping Sites

To consider proposals for small scale touring caravan and camping sites in terms of their locational merits with regard to landscape quality, siting and availability of screening

Policy TOU 5 – Advance Direction Signs

Signs directing visitors to tourist attractions will generally be permitted, subject to amenity and safety criteria

4.1.4 Fermanagh Area Plan 2007

Tourism

T3 - Tourism Development in Settlements – The department will normally give favourable consideration to tourism development in settlements

T4 – Expansion of Tourism Facilities – The Department will normally give favourable consideration to proposals which involve the consolidation and expansion of existing tourism facilities

T6 – Tourism Development in the Countryside – The department will assess proposals for tourism development in the Fermanagh countryside according to:

- a. the capacity of the landscape to absorb new development without detriment to visual amenity
- b. the effect of the proposal on the rural character of the locality when considering together with existing and approved developments
- c. the contribution of the proposal to the economy and job creation
- d. the impact on nature conservation and man made heritage

T7 - Tourism Strategy for Lough Erne

Lough Erne is considered to be the principle tourism asset in the District therefore strategic guidance for tourism development of Lough Erne and its hinterland is provided.

“The Department has identified 13 zones around Lough Erne and its immediate hinterland for which strategic guidance has been provided on the potential for tourism and recreational development”

The plan acknowledges the tourism potential of Lough Erne and that tourism proposals for the area have the potential to contribute significantly to the Northern Ireland economy. It is also noted that the shoreline of the Lough is under significant pressure for development, due to the ease of access for water based activities and the growth of the cruiser fleet.

In order to protect the shoreline of the Lough it has been designated as a ‘Countryside Policy Area’ therefore proposals for development need to comply with Plan policies Nat Env 1 and 2. Individual tourism proposals will be assessed against the conservation importance of the site.

Each of the 13 zones have been designated as a Conservation Zone, Sensitive Zone or an Opportunity Zone. These are defined as follows:

Conservation Zones:

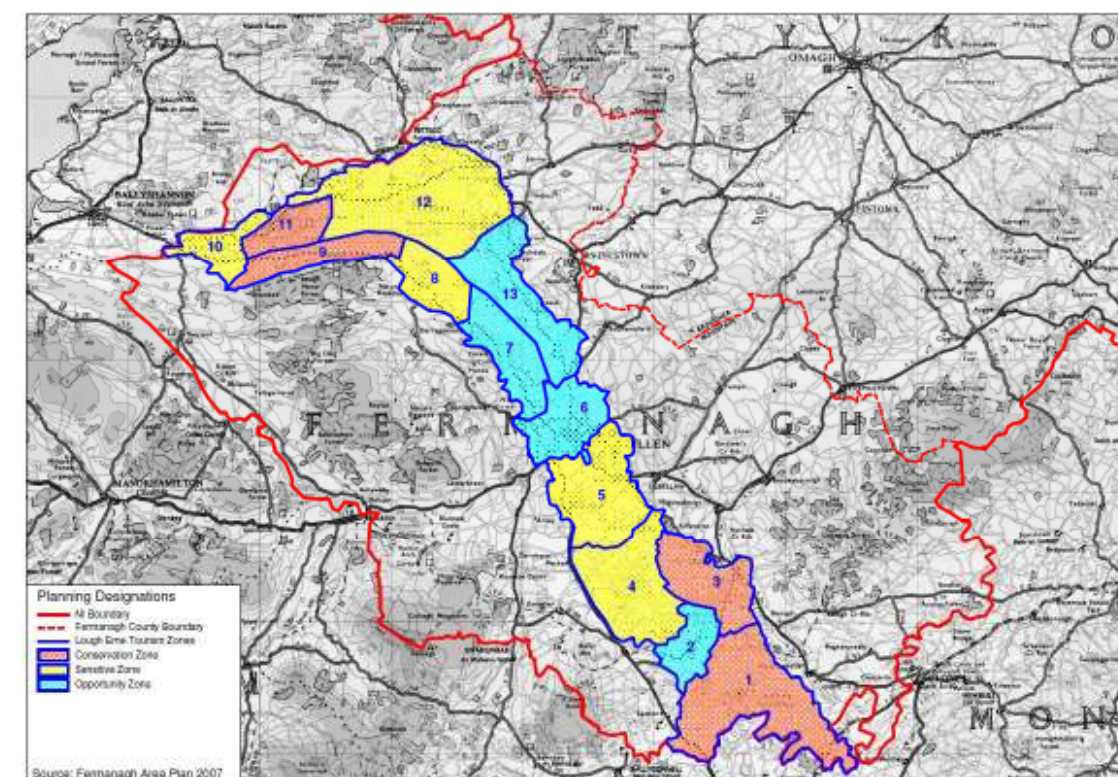
“In these zones the quality and character of the landscape is considered so special and/or the conservation interests are of such significance, that little or no development for tourism or recreation will be permitted within the majority of their extent. The need for maximum protection of the environment means that only a very small scale development is likely to be acceptable and will depend on local landscape, wildlife and heritage interests”

Sensitive Zones:

“In these zones the sensitivity of the landscape, the conservation interest or the existing level of development are such that whilst there may be scope for development, proposals must be sensitive to the particular characteristics of the zone. Sympathetic development, which by its nature and scale would not be damaging to nature conservation interests or the man-made heritage and which is sensitive to the landscape could be acceptable at some locations. The cumulative impact of proposals will be of particular consideration.”

Opportunity Zones:

These zones are considered to offer opportunities for the development of a range of tourism and recreation schemes and appropriate proposals may be permitted on grounds of their overall contribution to the social and economic well being of the region. In some cases this may involve the expansion of existing tourism developments. Landscape sensitivity and the impact upon the man-made heritage and nature conservation interests will be of paramount importance in determining the suitability of development at particular sites as will the cumulative impact of proposals. In some areas it is likely that no development or only development on a very small scale would be considered acceptable.



ZONE 1: CROM	CONSERVATION ZONE
	<ul style="list-style-type: none"> Limited potential for tourism and recreational development due to its sensitivity of the landscape character and its national and international importance for wildlife and nature conservation. Key feature is the National Trust Property at Crom – Listed building and historic demesne This property already attracts a significant number of tourists and has the potential de develop, however this should respect the historic demesne. Scope to re-use and restore traditional buildings for tourist accommodation Opportunity to exploit the Shannon Erne Waterway through sensitively sited, appropriate facilities Potential for farm guest house accommodation and well located small scale chalet development Deep water channels within this zone facilitate cruiser traffic but where channels are narrow and shorelines are soft they are vulnerable to erosion, where waters are more open and shores are harder and sheltered there may be potential for new jetties which are in keeping with the landscape character of the area and have no adverse impact on the nature conservation interests Inland, many of the Loughs are of nature conservation and fishing interest - potential for suitably sited additional fishing stands, small car parks and picnic sites

		<ul style="list-style-type: none"> Proposals which result in noisy activities causing a detrimental effect on the amenity of the area will not be permitted
ZONE DERRYAD TRASNA	2: /	OPPORTUNITY SITE
		<ul style="list-style-type: none"> Key location on Upper Lough Erne and provides opportunities for tourist and recreational development Existing facilities include the Share Centre with chalets, caravan site, beach and holiday centre. Also an amenity area and picnic site at Smith Strand and a chalet development at Kilmore. Scope to consolidate and expand some of these existing tourism facilities. Existing development has not been conspicuous in landscape terms and the development at similar sites should be considered Moderate capacity for cruiser traffic but limited capacity for other types of water recreation Capacity for water activity is considerably reduced in the more shallow bays and narrow channels where damage to the shoreline and conflicts of uses must be avoided Where waters are shallow, and shorelines are characterised by flat areas of marsh and fen, there is little or no potential for tourism or recreational development Steeper slopes adjoining the shores can be more conspicuous in landscape terms making it difficult to integrate development Inland from the shore there may be potential for tourism or recreational development reflecting the scale and character of the landscape and existing development – the cumulative effect of such developments would require frequent review and would be taken into account in assessing development proposals
ZONE COLEBROOKE ESTUARY	3:	CONSERVATION ZONE
		<ul style="list-style-type: none"> Limited potential for tourism and recreational development due to the sensitive landscape and its importance for wildlife and nature conservation Lisnaskea is the main settlement within this zone and already has an important role as a local tourist centre with a hotel, recreation centre and range of facilities and services for tourists – this role could be further consolidated and developed and should benefit from the designation of part of the town centre as a conservation area The flat lowland estuary which extends through the majority of this zone, has delicate landscapes and considerable nature conservation interests which require careful protection Shallow inner bays of Upper Lough Erne have extensive areas of soft shoreline and therefore limited potential for development - only very small scale facilities for fishermen may be feasible and there may be suitable sites on harder shores with existing road access Most of the inland Loughs also have soft shores but there may be potential to develop facilities to observe the bird life and nature conservation interest The Coolbrooke River provides some waterway linkage within the area – potential to develop additional small scale riverside facilities, but local conservation interest would be a major consideration.

		<ul style="list-style-type: none"> Inland from the Lough shores there may be potential for very small scale tourism development, provided it relates to existing buildings The special heritage and nature conservation interest of the zone could be used to develop facilities catering for specialist pursuits
ZONE KNOCKNINNY	4:	SENSITIVE ZONE
		<ul style="list-style-type: none"> Potential for appropriate development which respects the sensitivity of the landscape and conservation interests Carrybridge is currently the main tourism centre on the Upper Lough with a hotel, boat yard and picnic area / car park – potential for expansion of these facilities to consolidate the tourism role of the village Sites with sufficient landscape and / or woodland backing are capable of facilitating development of a reasonable scale Many shoreline areas are however soft, have mature conservation interests and are backed by fragile small scale landscapes which generally have little road infrastructure and development, other than a very small scale is likely to be detrimental to their scenic quality, special character and interest Extensive area of open water on Upper Lough Erne within this zone already accommodates a significant volume of cruiser traffic and has the potential to facilitate some other recreational pursuits` Inland throughout the zone the potential for tourism or recreational development is limited by the traditional small scale character of the drumlin landscape On more enclosed larger sites there may be potential for new development or for limited expansion at existing sites – the historic demesne at Bells Isle will be protected from inappropriate development Development potential is limited on Knockninny Hill due to the conservation interest of the woodlands and limestone grasslands Potential for accommodating appropriate development in secluded areas and at Aghad / killymaud.
ZONE TAMLAGHT / BELLANALECK	5:	SENSITIVE ZONE
		<ul style="list-style-type: none"> Potential for appropriate development which respects the sensitivity of the landscape and conservation interest Bellanaleck is the centre of tourism development with its two marinas, restaurant and service facilities – scope to consolidate and expand the tourism role of the village Tamlaght is a local service centre and has potential for future development In the countryside new development, restoration and/or diversification of use may be feasible using existing dwellings or vernacular farm buildings Existing large estates such as the National Trust property at Castle Coole may offer opportunities for the sensitive promotion of the man-made heritage and nature conservation interest The Lough at this point is narrow, deep and fast flowing – priority must be given to facilitating the volume of inter-Lough cruiser traffic Appropriate activities may be beneficial along subsidiary channels Potential for development is locally related to the width of the river

	<p>channel, existing infrastructure and the character and nature conservation interest of shoreline areas</p> <ul style="list-style-type: none"> Potential to redevelop or consolidate existing tourism nodes together with new small jetties in appropriate areas
ZONE 6: ENNISKILLEN	OPPORTUNITY ZONE
	<ul style="list-style-type: none"> Principal town in Fermanagh and the focus of much of the tourism development Unique atmosphere resulting from its close association with water and wildlife The wide range of activities includes; the Killyhevlin Hotel and chalets, the Ardhowen Theatre, the Lakeland Forum Recreation Centre, Castle Island Canoe Centre, the Castle Museum and the Tourist Information Centre – further opportunities exist to consolidate and enhance the tourism interest in this zone A range of tourism development could be accommodated on appropriate sites within the town Development proposals on sites close to the Lough shore must have regard to critical views from Lough Erne and protection of the wildlife interest within the urban area There is considerable potential for re-use of existing buildings and redevelopment of sites for tourism, recreation or related uses particularly within or close to the town centre Reduced development potential in the open countryside within the Green Belt and any proposals north of the town must take account of views from Devenish Island
ZONE 7: CASTLEHUME / ELY	OPPORTUNITY ZONE
	<ul style="list-style-type: none"> Large scale landscape character of this zone provides opportunities for tourism and recreational development in a few well selected areas Development close to the Lough shore could benefit from screening provided by the wooded areas Open shoreline areas without easy access to deeper waters are less suitable for development Where there are soft shorelines and shallow waters potential for development is limited - however there may be some scope provided it is sensitively sited and of an appropriate scale and character Inland, the nature and extent of woodland and forestry would suggest potential for larger scale development – sites close to existing infrastructure yet largely enclosed by coniferous woodland would probably be most acceptable Elsewhere in the countryside development potential should relate to existing large houses, their courtyards and gate lodges The historic demesnes of Castle Hume and Ely Lodge already accommodate tourism and recreational uses and any further development proposals should continue to respect and reflect their historic landscape character
ZONE 8: TULLY	SENSITIVE ZONE
	<ul style="list-style-type: none"> Shoreline of this zone is largely open to extensive stretches of Lower

	<p>Lough Erne – potential for appropriate new tourism development which is sensitive to the landscape character, nature conservation and the man-made heritage interest</p> <ul style="list-style-type: none"> Few well screened shoreline areas and background slopes are often steep and open – potential for development is limited and only small scale shoreline development could be accommodated – a number of sites have been developed in this zone and the cumulative effect of further development will be taken into account in the consideration of further proposals Inland there is potential for development provide the character, siting and scale relate to the drumlin landscape – sites prominent from the Lough would not be suitable for development Tully Castle is a state care monument and a principle landmark within this zone
ZONE 9: MAGHO CLIFFS	CONSERVATION ZONE
	<ul style="list-style-type: none"> Limited capacity to absorb development due to its landscape features Existing tourism developments are low key and include jetties, fishing stands, forest walks and the Ulster Way Issues for integration along the shoreline, only very small scale facilities such as appropriately sited small jetties for fishermen could be feasible Waters and islands around Castle Caldwell to the north of this zone are managed for their bird life Inland and south of the Enniskillen to Belleek Road in the low drumlin area there is scope for small scale development Traditional buildings could be renovated for holiday purposes
ZONE 10: BELLEEK	SENSITIVE ZONE
	<ul style="list-style-type: none"> Prominence of some areas within this zone and the diversity of small scale landscape features make it sensitive to intrusive development Belleek has a range of tourism facilities including the Carlton Hotel, Erne Gateway and adjoining Cruiser base, public marina and Belleek Pottery – scope for additional development which would enhance the attractions of Belleek and should be the focus of large scale proposals within this zone Little or no potential for the development of jetties since the channel is narrow and high level of cruiser traffic – fishing stands may be desirable and feasible in well selected areas and carefully managed shoreline paths and picnic sites could facilitate access and quiet enjoyment Lough Keenaghan and Lough Scolban are popular with fishermen and existing facilities could be complimented with small scale development May be feasible to accommodate some small scale service development at Carran More / Slawin Throughout the zone the restoration of traditional buildings or disused estate courtyards may be feasible
ZONE 11: CASTLE CALDWELL	CONSERVATION ZONE
	<ul style="list-style-type: none"> Limited potential for development due to the landscape, heritage and nature conservation interest Castle Caldwell Forest Park is the major tourist attraction in this zone –

	<p><i>potential to expand or diversify the existing facility</i></p> <ul style="list-style-type: none"> <i>In shoreline areas potential for new small scale facilities such as jetties will be determined by ease of access to deep waters and local shoreline conditions - any new development in this area must respect the nature conservation interest and not result in noisy activities causing disturbance to bird life</i> <i>Throughout the zone there may be potential for re-use or restoration of older buildings for tourism use</i>
ZONE 12: BOA ISLAND / KESH	SENSITIVE ZONE
	<ul style="list-style-type: none"> <i>Zone already has much small scale development and some of a larger scale and the Lough is used for a wide range of water based recreational activity – Lusty Beg Island, Muckross, Drumrsh (Watersports Centre), Aghinver (Cruiser Hire) – scope to consolidate or expand existing developments subject to assessment of the visual impact and nature conservation</i> <i>Kesh – potential for additional tourism development</i> <i>Potential to restore traditional buildings for tourism use</i> <i>On the shores of the Lough development potential varies and depends on factors such as slope, screening, nature conservation interest, man made heritage and road access</i> <i>The off shore islands are of particular importance for wildlife and are vulnerable to disturbance – North of Boa Island is not accessible to larger boats but small scale fishing facilities may be acceptable provided the quiet, undisturbed nature of this area is retained</i> <i>Given the amount of existing tourism and recreational development within this zone the cumulative effect of any new proposals will be a major consideration in determining planning applications</i>
ZONE 13: LISNARICK / KILLADEAS	OPPORTUNITY ZONE
	<ul style="list-style-type: none"> <i>Range of opportunities for tourism and recreational development</i> <i>Existing activities include Castle Archdale Country Park, Manor House Hotel, Marina and Lough Erne Yacht Club</i> <i>Generally throughout the zone there is easy access to waters capable of accommodating a considerable range of watersports</i> <i>Development proposals should have regard to the character of the historic demesne of Castle Archdale</i> <i>Within this zone shoreline woodland is of major landscape significance and nature conservation interest – potential for new shoreline development is greatest where environmental considerations are respected alongside efficient integration with existing accommodation, services and facilities</i> <i>Well screened areas may be appropriate for hotel development</i> <i>Farm courtyards and other buildings of historic interest may have the potential for tourist accommodation</i> <i>Any proposals in the south of this zone must take account of views to and from Devenish Island</i>

The plan highlights that the Fermanagh countryside is coming under increasing pressure for 'excessive development'. In order to restrict and manage this, the plan identifies Policies Nat Env 1 'Enniskillen Green Belt' and Nat Env 2 'Countryside Policy Areas'.

Policy Nat Env 2 grants those areas designated 'Countryside Policy Areas' equal protection as those designated under Nat Env 1. Therefore within these areas, it is indicated that non residential development will be accepted if it is:

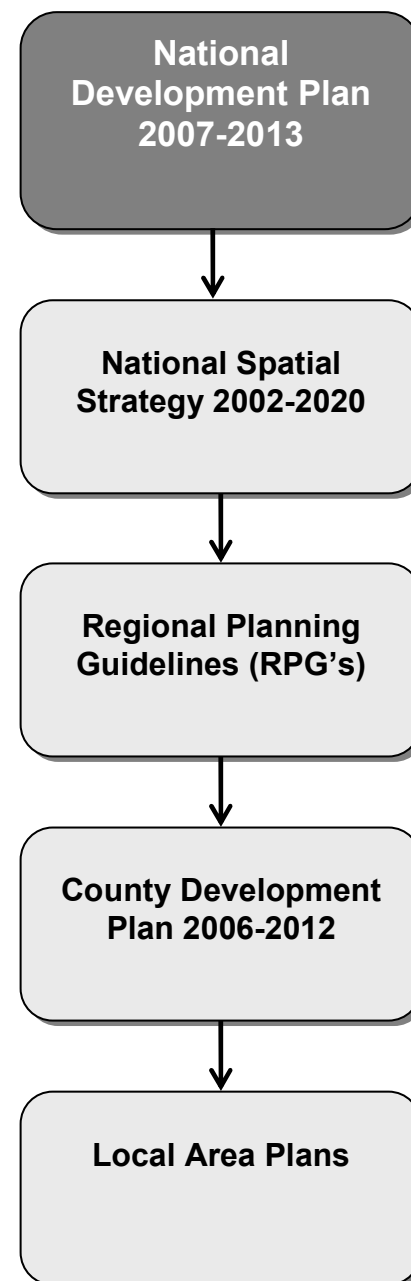
- essential to the needs of agriculture
- necessary for outdoor sport and recreation
- a necessary community facility
- an appropriate scheme

Policy Nat Env 2 also affords protection to the Islands of Lough Erne 'Their relatively undeveloped nature and tree cover give them a characteristic appearance as well as making them of outstanding importance for nature conservation'. Generally on the Islands there will be a presumption against any development except in the following circumstances:

- consolidation of existing development providing it is in character and scale, does not threaten any nature conservation or heritage interest and can be integrated within the landscape; and
- in the wider public interest.

Natural Environment

4.2 Republic Of Ireland



4.2.1 National Development Plan 2007-2013

The National Development Plan (NDP) sets out the roadmap to Ireland's future, taking into account changes in the economic base, and marking out challenges that are faced.

The NDP proposes investment of some €184 billion in our economic and social infrastructure, the enterprise, science and agricultural sectors, the education, training and skills base of our people, environmental services and in the social fabric of our society. The main goals of the plan are to:

- Decisively tackle structural infrastructure deficits
- Greatly enhance enterprise development, science, technology and innovation
- Invest in long term environmental sustainability
- Realise the opportunities of strengthened all-island collaboration in areas of mutual interest

4.2.2 National Spatial Strategy 2002-2020

The National Spatial Strategy for Ireland (NSS) is a twenty year planning framework designed to achieve a better balance of social, economic, physical development and population growth between regions and to assist in the implementation of the National Development Plan. Its focus is on people, on places and on building communities.

This Strategy *"provides a national framework to guide policies, programmes and investment; it is concerned with the location of people, their work and other activities and how different places relate to each other; and it offers a broad, long-term, comprehensive twenty-year view for achieving more balanced patterns of development"*.

4.2.3 Regional Planning Guidelines (RPG's)

Regional Planning Guidelines aim to provide a strategic approach to the planning of the region. National policy, contained in the Spatial Strategy, is translated to a regional level through the RPG's, which will guide policy-making decisions at a local level through the relevant Development Plans and Development Board Strategies. This will ensure that development takes place in the context of a strategic framework, with an awareness of regional and national issues at local level. The study area falls within the Border Region Area, which consists of County's Donegal, Leitrim, Monaghan, Cavan, Louth and Sligo.

The Regional Planning Guidelines for the Border Region are currently under review and are published in draft form for public consultation. This is in accordance with Section 24(4) of the Planning and Development Acts 2000-2006. The Draft Regional Planning Guidelines will provide a long-term strategic planning framework for the development of the Region from 2010-2022. It is anticipated that the final Regional Planning Guidelines for each area will be adopted in approximately July 2010.

4.2.3.1 Border Region – Regional Planning Guidelines 2010-2022 (Draft)

The draft RPG's identify the future vision for the region:

'By 2022, the Border Region will be a competitive area recognised as, and prospering from, its unique interface between two economies, where economic success will benefit all, through the implementation of the balanced development model, which will provide an outstanding natural environment, innovative people, which in themselves, will be our most valuable asset'

The draft Guidelines highlight tourism as playing a key role in the future growth and development of the region, based on its historic strength, existing natural and cultural amenities and infrastructure, and exploiting un-tapped potential through product development.

The following policies are identified in relation to tourism development:

- ESP5 – Develop the potential of Eco-Tourism in the Region so that the relatively unspoilt landscape remains intact and is developed in an environmentally sustainable manner
- ESP6 – Promote and support the development of flagship projects. These projects are significant regional tourist resources, and have potential as economic drivers within the local economy. Such projects might include the Marble Arch Caves Global Geopark, the Shannon/Erne Waterway, the Cooley/Mourne and Gullion geological sites and the re-opening of the Ulster Canal.
- INFP13 – Promote and support cycling and walking within the Region, particularly within urban centres.

4.2.4 Donegal County Development Plan 2006-2012

The County Development Plan identifies the main product development areas as follows:

- Marine Leisure
- Walking Routes
- Angling Projects
- Flagship Projects
- Festivals & Cultural Events
- All weather facilities
- Island Development
- Heritage/ Culture
- Tourist routes including an examination of the potential to designate/open up
- new routes e.g. Croaghs-Edeninfagh
- Sports activities and facilities

POLICY TOUT 1:

It is the policy of the Council to establish Product Development Action Plans for new projects throughout the County. It is anticipated that this can be achieved by:

(1) Working in Partnership with Elected Members, interested bodies, state agencies and local people to create a priority list of projects, which is to be established and reviewed by the Council at regular intervals in order to create a clear understanding and direction of product development in the County.

(2) Adopting the Model of Best Practise method in order to achieve maximum benefits from all projects, for both users and the environment and by regularly reviewing projects to ensure that they are catering for the widest market possible.

(3) Developing a critical mass of walking routes throughout the County, during and beyond the lifetime of the Plan, to incorporate Bealach na Gaeltachta, the Bluestacks Way, the Ulsterway (Donegal Section) and the Slí na Sláinte Walkways and others in conjunction with relevant organisations and groups. These walking routes will also have the dual purpose of local amenity use.

POLICY TOUT 2:

It is the policy of the Council to seek long term provision for access to the Off Shore Islands in the form of sheltered harbours, regular ferry services and airstrips along with the provision of roads, water,

sewage, waste management and a modern efficient telecommunications system in order to allow Islanders to create and maintain a sustainable tourism product.

POLICY TOUT 3:

It is the policy of the Council to support Resource Related Tourism Product Development, other than standalone accommodation, of both existing and new developments, wherein the core of the proposal is the tourism product and the harnessing of an existing resource. This policy shall apply throughout the County, except in Especially High Scenic Amenity areas (EHSA's).

It shall be a requirement of this policy that any such development shall:

Harness an identified tourism resource whilst respecting the existing environment (e.g. natural, cultural, heritage).

The tourism product proposed must relate to and harness the existing resource with which it is associated, and shall have close linkages and dependencies on that resource (e.g. hotel, marina, outdoor pursuits centre).

Holiday home development may be considered in an ancillary capacity to the above, but the Tourism Product must remain the dominant element. Any such holiday home development must be physically close and related to both the Resource Related Tourism Product Development and the resource that Product is harnessing.

Any application for planning permission for a Resource Related Tourism Development Product will be required to clearly demonstrate the resource to be harnessed and how the proposed Resource Related Tourism Product is associated with the primary resource. If ancillary holiday home development is proposed, the onus shall be on the applicant to demonstrate how the Resource Related Tourism Development Product is to remain the dominant element. Any application submitted for a Resource Related Tourism Development Product, must also accord with all other policies and technical standards of this Development Plan.

Protected Sites

The diversity and complexity of sites and associated activities set within the scenic landscapes and heritage areas of Donegal require a holistic response by the Council rather than uniform policy and simple land use zonings. The Council seeks to protect all landscapes; especially those designated as Special Protection Areas (SPA's), Special Areas of Conservation (SAC's), National Heritage Sites (NHA), and Especially High Scenic Amenity Areas (EHSA) and views and prospects.

The Marine Resource

POLICY NRD53:

Identify appropriate strategies for Integrated Coastal Zone Management frameworks and implement these frameworks at selected locations.

POLICY NRD54:

Ensure the inclusion of aquaculture as an integral part of such ICZM frameworks.

POLICY NRD55:

Facilitate the development of a centre for coastal zone education and research in the County.

POLICY NRD56:

Facilitate the development of a Sea-Life centre capable of acting as a major tourism attraction for the County.

POLICY NRD57:

Facilitate the development of marina, boat stations and/or sea angling facilities at the following locations:

- Ballyhoorisky.
- Bunagee.
- Burtonport.
- Fahan
- Killybegs.
- Tory Island.

POLICY NRD58:
Implement Beach Management Projects at suitable locations based on the experience gained from the Rosstown Beach Management Project.

POLICY NRD59:
Safeguard and enhance the roles of Killybegs, Greencastle and Burtonport as centres of fleet activity, processing, and ancillary services and promote the diversification of such locations into new areas of marine related economic activity.

POLICY NRD60:
Maintain and enhance marine infrastructure throughout the County and on the offshore islands.

POLICY NRD61:
Investigate and if feasible support the development of a canal connection between the Shannon-erne Waterway and Donegal Bay.

POLICY NRD62:
Investigate and if feasible facilitate the development of a seasonal ferry link between Donegal and Scotland.

POLICY NRD63:
Facilitate the continued operation of both the Greencastle-Magilligan ferry route and the Buncrana-Rathmullan ferry route.

POLICY NRD64:
Facilitate full development of the County's angling resource.

POLICY NRD65:
Continue to co-ordinate the development and marketing of marine water-based tourism products as per the Framework Report prepared for the County by the Marine Institute in 1999.

POLICY NRD66:
Consider the use of By-laws, which restrict certain activities at coastal locations in order to protect public health and safety and/or vulnerable coastal environments.

POLICY NRD67:
Identify existing and/or potential coastal walking routes, which can be developed and marketed as a tourism product and as a local amenity.

POLICY NRD68:
Not favourably consider development proposals which adversely compromise the recreational and environmental amenity of designated and proposed Blue Flag Beaches.

POLICY NRD69:
Support the National Fisheries College, Greencastle in the provision of marine education and safety training in the north- west.

5 Identifying the Sensitivity of The Erne – Landscape and Ecology

This study involves an assessment of the vulnerability of the landscapes and ecology of the Lower and Upper Lough Erne Waterways. This section records the methodology and outcome of these assessments. Additional supporting information is set out in Appendices specifically relating to Landscape (Appendix 2) and Ecology (Appendix 3).

5.1 Landscape Sensitivity

5.1.1 Existing Landscape Character Areas (LCAs) and Landscape Sensitivity

The Landscape Character Assessments highlight the high landscape value of their shorelines and waterways. A summary of the current landscape designations is contained in the planning section of this report.

Assigned Value/Sensitivity

Fermanagh Area Plan

The Fermanagh Area Plan (2007) has made a number of designations which relate to the sensitivity of the Lough.

- In order to protect the shoreline of the Lough it has been designed a Countryside Policy Area.
- 13 zones have been designated as a Conservation Zone, Sensitive Zone or an Opportunity Zone. The text below briefly outlines the sensitivity of each of these zones.

Conservation Zones: *“The landscape is considered so special and/or the conservation interests are of such significance, that little or no development for tourism or recreation will be permitted within the majority of their extent”.*

Sensitive Zones: *“Sympathetic development, which by its nature and scale would not be damaging to nature conservation interests or the man-made heritage and which is sensitive to the landscape could be acceptable at some locations.”*

Opportunity Zones: *“Landscape sensitivity and the impact upon the man-made heritage and nature conservation interests will be of paramount importance in determining the suitability of development at particular sites as will the cumulative impact of proposals. In some areas it is likely that no development or only development on a very small scale would be considered.”*

A more comprehensive overview of the landscape designations is outlined in the planning section of this report.

Northern Ireland Landscape Character Assessment

Enniskillen Landscape

- Preserve the quality of the Lough-side.
- Minimise disruption to existing vegetation.
- Clustering & re-use of derelict land should be a priority.

Lower Lough Erne Landscape

- Little capacity for further shoreline development.
- For new buildings traditional materials would be preferable.
- Conservation of the historic character of Belleek.

Upper Lough Erne Landscape

- Scope for small scale scattered development.
- Design, size & location not to be visually prominent.
- The historic landscape settings to be maintained.

5.1.2 Visual Landscape Categories identified by site survey

Independently of the existing Landscape Character Assessments, a number of Visual Landscape Categories (VLCs) were identified within the study area. These are areas with similar visual qualities with regard to topography, landuse and existing vegetation cover. The landscape was categorised following a water and land site survey and a desk top study of the OS Maps and available aerial photography of the study area.

It is important to note that the VLC's have only been identified as a tool for facilitating the identification and examination of potential tourism opportunities on Lower and Upper Lough Erne Waterways as part of this report. The purpose of the VLC's is not for making planning decisions, as these are still to be dealt with by the planning authority, based on the development plan and site specific issues.

This assessment is based on “the Guidelines for the Landscape and Visual Assessment: Second Edition” published by the Landscape Institute and the Institute of Environmental Assessment, 2002, Spon Press: London.

These areas were mapped and can be viewed on the following pages. Maps 5a and 5b provide an assessment of the visual sensitivity of the Lower and Upper Lough Erne Waterways. In addition Maps 4a and 4b illustrate the Visual Landscape Categories which were identified during the site survey. These are summarised in the table opposite.

The Landscape Appendix (9.2) contains a brief description of each of the proposed VLCs, including an assessment of their sensitivity to development. For this purpose a simple classification into Low, Medium and High Sensitivity to development was made, using the following definitions.

Low Sensitivity to development: Areas of existing settlement, where further development is acceptable as long as the proposed design is of high visual quality and in proportion to the scale of existing buildings.

Medium Sensitivity to development: Areas of relatively flat or very undulating land with field boundaries bound by mostly mature hedgerows and with some pockets of woodland. Development would be acceptable in these areas as long as it is sited and designed sensitively.

High Sensitivity to development: Areas of relatively flat land with no or only low vegetation and areas of sloping land which are openly visible from a distance despite mature boundary hedgerows. Most development would not be acceptable within these areas. There may however be exceptions where local screening topography/vegetation is available and/or the proposed design is of outstanding visual quality.

In general the areas of least visual sensitivity are those within existing settlements, where the landscape is robust and additional development can be absorbed assuming careful site selection and design.

Table 5.1 The Visual Landscape Categories along with their Sensitivity

Visual Landscape Category	Description	Sensitivity
VLC 1	Devenish Island	High
VLC 2	Woodland Landscape with Golf Course	Medium - High
VLC 3	Chalet Development at Tully Bay	Low
VLC 4	Low Lying Ground with Poor Soil Fertility	Medium - High
VLC 5	Cliffs of Magho	High
VLC 6	Lough Erne Islands Woodland	High
VLC 7	Lough Erne Islands (Commercial Forestry)	Medium-High
VLC 8	Commercial Landscape Hotel and Marina Facilities (Killadeas & Killyhevlin)	Medium
VLC 9	Crom - Historic Demense Landscape	High
VLC 10	Lough Erne Woodland Landscape	High
VLC 11	Low Lying Lough Erne Agricultural Landscape	High
VLC 12	Erne Wet Grassland Landscape	High
VLC 13	Classic Erne Drumlin Landscape	Medium - High
VLC 14	Low Lying, Gently Undulating Agricultural Grassland	High
VLC 15	Lough Erne Historic Woodland Landscape	High
VLC 16	Low Lying Land used for Commercial Forestry	High
VLC 17	Lough Erne islands Agricultural Landscape	High
VLC 18	St Angelo Airport	Medium
VLC 19	Enniskillen Town	Low
VLC 20	Settlements (excluding Enniskillen)	Medium/Low

Below are some samples of areas of low landscape sensitivity. These areas tend to be those with significant amounts of built form where the natural landscape character has been substantially altered.



Below are some samples of areas of medium landscape sensitivity. These areas of medium sensitivity are generally those areas that are used for existing recreational purposes.

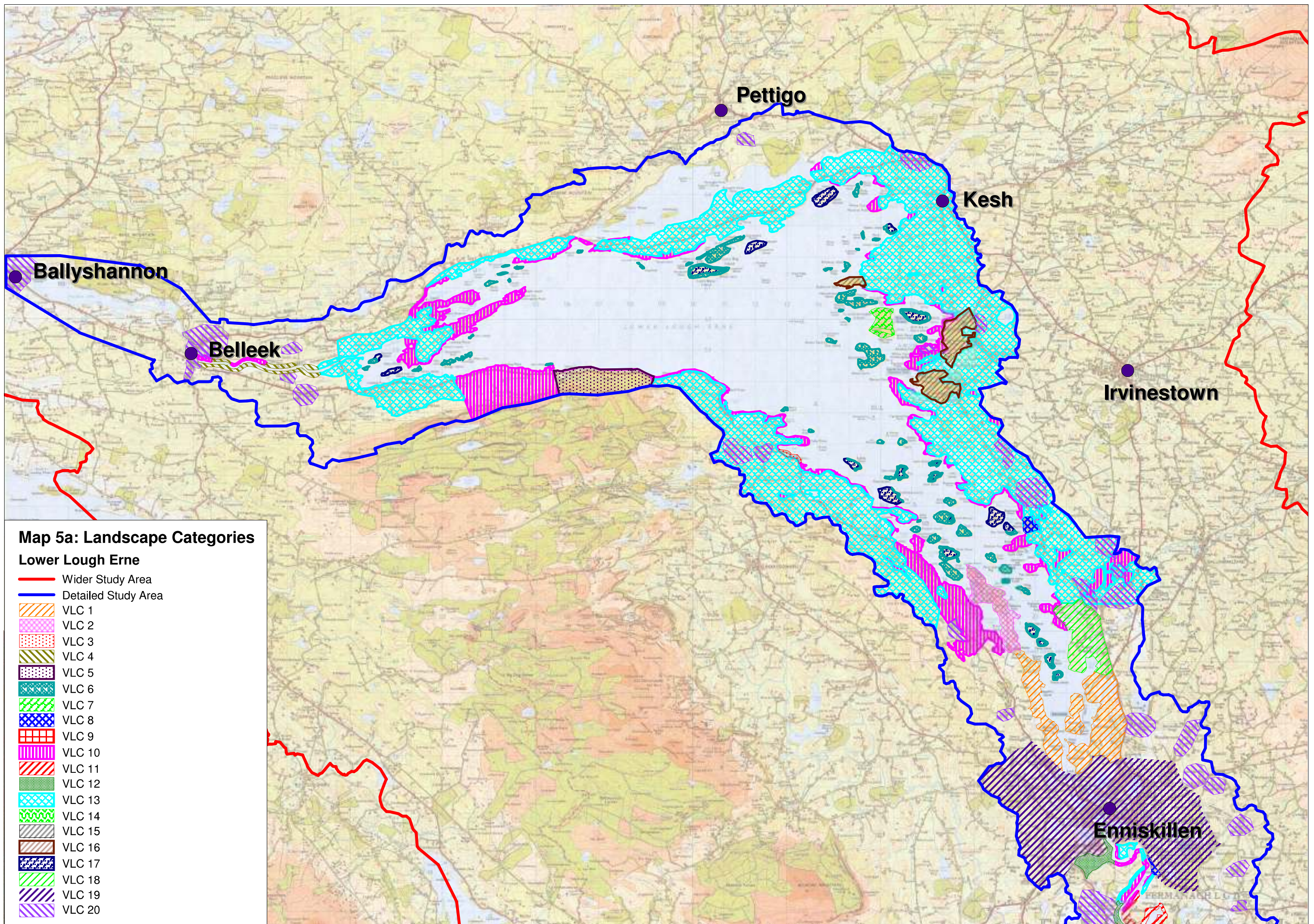


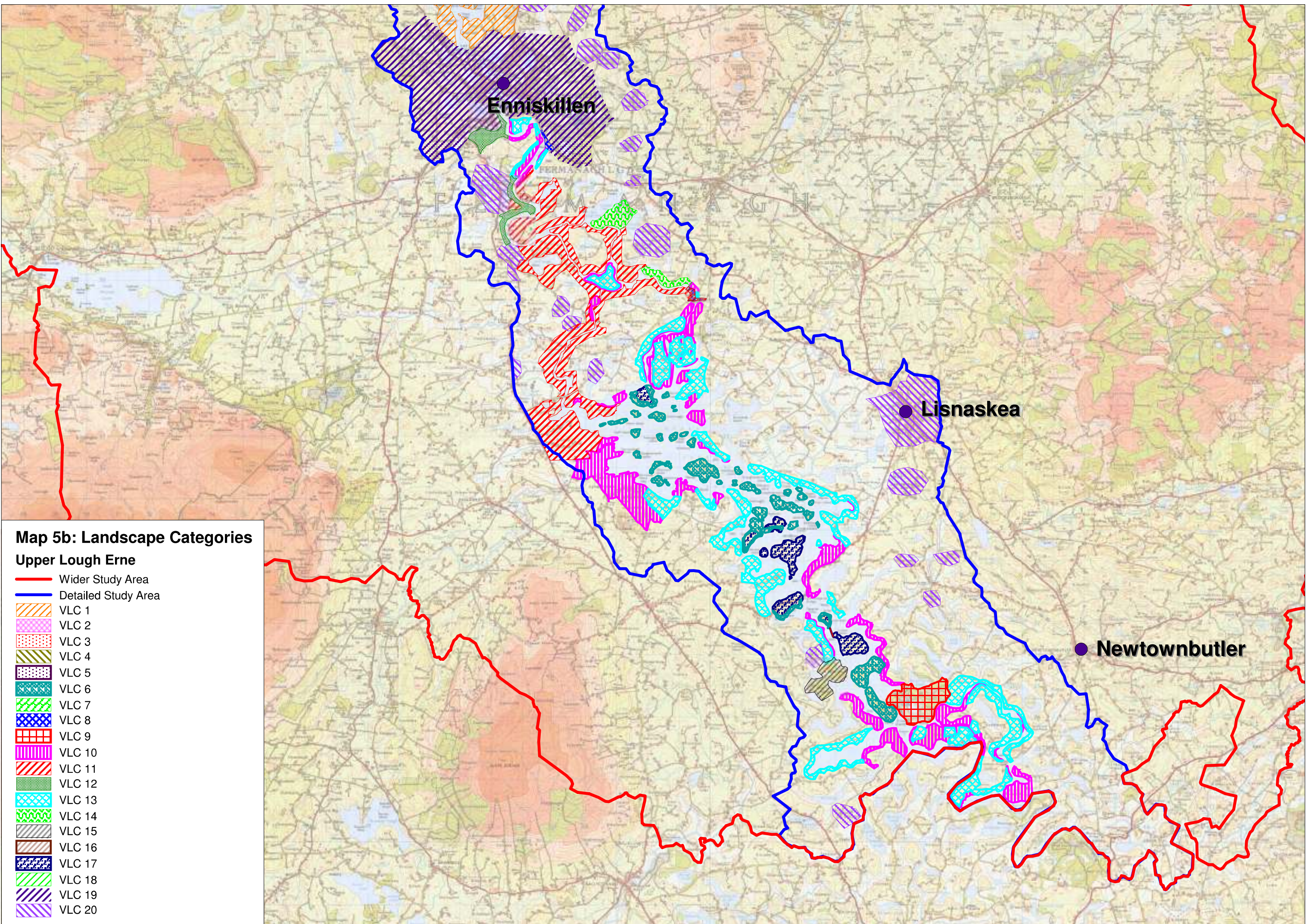
The most sensitive areas are those with little or relatively little evidence of human impact, particularly those that are very low lying. Landscape Sensitivity is closely related to the perception of wilderness/visibility of human influence. Most development in such locations would be visible and appear out of context. The landscapes emerging from the cessation of agricultural activity in some areas is also sensitive, as the encroaching scrub and rushes result in a landscape that is approaching a wilderness visual character.

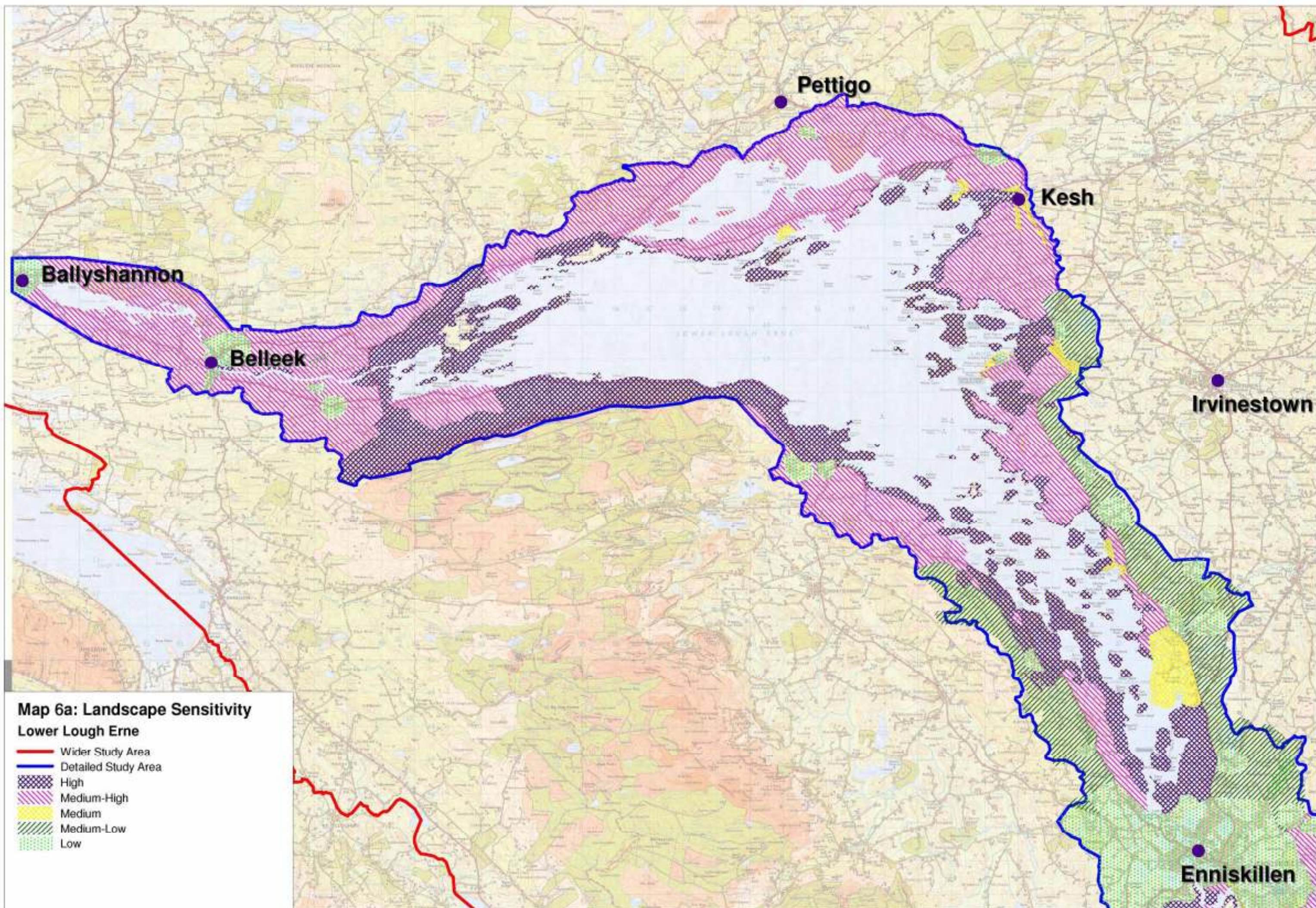
Below are some samples of areas of high landscape sensitivity.

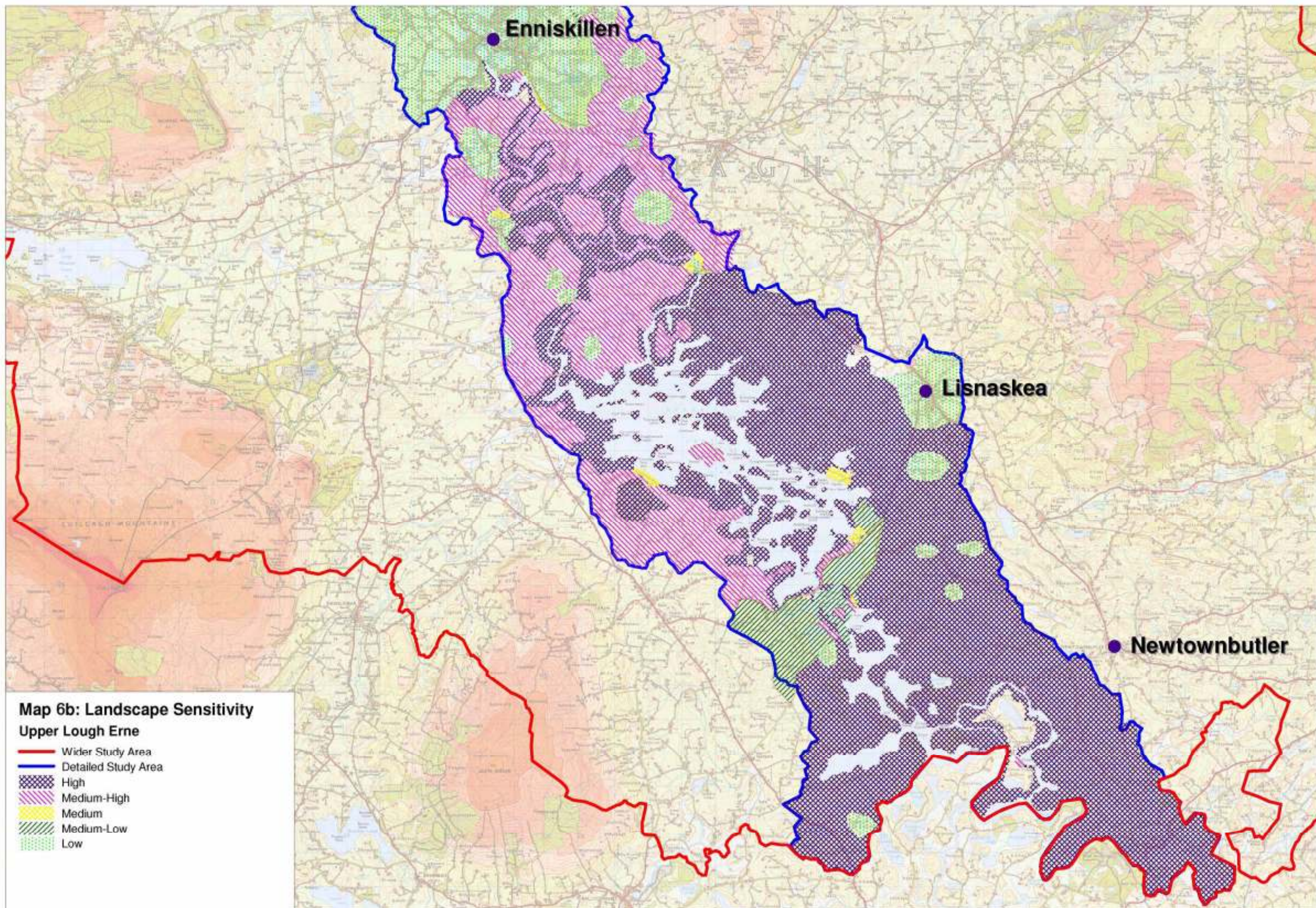


Areas where the visual quality has been compromised would benefit from active landscape management regimes in order to improve landscape integrity.









5.2 Ecological Sensitivity

Both the Lower and Upper Loughs of the Erne are host to many special habitats and species. The area is rich in biodiversity and natural beauty, which when combined with the tranquilly of the setting draws people from all over the world. Many of the numerous islands are home to colonies of breeding birds and the shorelines are lined with sensitive habitats. As a result the study area encompasses numerous designated sites, each one chosen for the importance of its natural heritage.

The remit of the study does not allow for detailed survey of the nature conservation interests of the Lough Erne, therefore the ecological element shall be to characterise the most sensitive ecological habitats and features in the study area with reference to published and unpublished reports in order to determine ecological “hot-spots” through the following process:

- Ecological Baseline – Researching which species and habitats exist
- Identification of Key Sensitive Receptors – Prioritising importance of species and habitats
- Nature of Potential Impacts – Considering the effects of development
- Mapping of Key Ecological Hot-Spots – Production of a hot-spots map.

The whole study area of Lough Erne is ecologically important and sensitive to both development and related activities. No areas within the study area should necessarily be assumed to have “Low Sensitivity”, as sufficient information does not exist to propose such a category. It is important to note that some of the available desk-based information was out of date and more detailed information was unavailable at the time of writing. Therefore, the ecological baseline, and the mapping of key areas of Ecological Sensitivity will need to be interpreted with caution and additional survey work will need to be undertaken should this strategy be progressed further.

It should be noted that any proposed development will require a full ecological assessment in line with legal requirements, particularly due to the level of legal protection afforded to the study area of Lough Erne in respect of its habitats and species.

Following the collation of information, the key sites and sensitive areas within designations were mapped using GIS software. An ‘ecological hotspots’ map was developed. Full details are in the Ecology Appendix.

The hotspots or ecological sensitive sites represent a mix of designated sites and undesignated sites. Each one was assessed and the impact of development considered in relation to the ecological features it held and the value of them.

The sites were classified as:

Red: These were the most ecologically sensitive sites and contained features of considerable importance. Development in these areas was judged to significantly impact the site or its features, either directly or indirectly. As a result, development should be avoided in these areas and their integrity should be preserved at all costs.

Amber: These were ecologically sensitive sites but certain development in these areas was judged to be able to proceed with little impact to the site or its habitat or species interest features. Each

case should be assessed on an individual basis, depending on the interest features and the type of development planned.

5.2.1 Designated sites

The importance of any designated site falling entirely or partially within the study area was considered. Within the detailed study area there are a number of International and National Designations. A total of 35 designated sites occur of six main types. These are Special Protection Areas (SPA), Special Areas of Conservation (SAC), Ramsar Sites, Area of Special Scientific Interest (ASSI), and (National) Nature Reserves (NNR/NR). The entire area of Upper Lough Erne is designated as both SAC, SPA and Ramsar site and is underpinned by ASSI designations (Map 6c). A number of the islands within the Lower Lough are also ASSI (Map 6b).

Table 5.2 The numbers of each designated area type and the typical designation features.

Designation	No of sites within study area	Typical designation feature
SPA	1	Overwintering Whooper swans
SAC	3	Otter Active raised bog Eutrophic lakes Sessile oak woodlands Blanket bog
Ramsar	1	Overwintering Whooper swans
ASSI	26	Notable plant assemblage Breeding and wintering bird interest Notable mammal site.
NNR / NR	4	400 year old oak grove with native flora and fauna
Total	35	

5.2.2 Species and Habitats overview

5.2.2.1 Habitats

A survey of priority habitats was undertaken as part of a habitat audit for the Fermanagh Local Biodiversity Action Plan (LBAP) in 2006. Of the 40 Priority habitats found in Northern Ireland, Fermanagh was found to contain 20 of these. A recent revision of the list saw additions or changes made and the overall total now stands at 52 Northern Ireland priority habitats of which an estimated 22 can be found within the detailed study area. They are outlined in Table 2 along with the main areas of occurrence.

The detailed study area comprises mainly of three Landscape Character Areas (LCA) and a further stretch along the River Erne to Ballyshannon. The LCAs are Lower Lough Erne, Upper Lough Erne and Enniskillen which incorporates the lands mainly the lands between the lakes. The following is a description of their habitats as found in the NIEA's biodiversity profile of each of the areas.

Table 5.3 Northern Ireland Priority Habitats and their main areas in the detailed study area.

Priority Habitat	Occurrence within the detailed study area
Lowland raised bog	Rare in study area. Remnants occur at Monelegny Bog, near Rosscark on Boa Island. It is now completely cut over
Blanket Bog	Rare in the Study area, some occurs in the SW corner and on Deerin Mountain in the north.
Hedgerows	Widespread presence throughout Fermanagh
Parkland	Several large estates have large areas of parkland <ul style="list-style-type: none"> • Crom Estate • Florencecourt Estate • Castle Coole Estate • Castle Archdale County Park
Mixed ashwods	Occurs within Cliffs of Magho ASSI and on the slopes beneath where the largest area of semi-natural woodlands in Northern Ireland which is also very diverse and species rich. An area in Upper Lough Erne, Knockninny Hill has also mixed ashwoods on its upper slopes.
Oakwood	A 400 year old oak woodland exists at Inishfendra. Reilly and Gole Woods NNR also holds mature oak woodland of over 150 years old planted as part of the Crom Estate.
Wet woodland	The shores of both Upper and Lower Lough Erne are flanked by extensive wet woodland. Castle Caldwell Forest has good examples of wet woodland. It consists typically of alder carr with willow, and ash and birch in the drier parts. It is often associated with swamp and fen.
Calcareous grassland	Extensive area can be found on Knockninney Hill ASSI, a limestone hill with thin soils.
Upland heathland	There is little if any upland heath within the detailed study area.
Fens	Fens can be found surrounding both Upper and Lower Lough Erne and are often part of the transition between open water and woodland.
Purple moor-grass and rush pasture	Good examples are located in the Belle Isle ASSI, Killymackan ASSI, Inishroosk ASSI, Trannish ASSI and Galloon ASSI, Mill Lough in Enniskillen, Lergan ASSI among others
Reedbeds	The shores of much of Upper and Lower Lough Erne are lined with extensive reedbeds.
Coastal and floodplain grazing marsh	Extensive areas of shoreline, particularly around Upper Lough Erne fit this category. Also a number of the Lower Lough Erne islands have significant areas of this habitat making them suitable for breeding waders.

Priority Habitat	Occurrence within the detailed study area
Limestone pavement	Some may occur on the Derrin mountain or the Cliffs of Magho, otherwise it is restricted to areas outside the detailed study area.
Montane heath	Some may occur on the Derrin mountain otherwise it is restricted to areas outside the detailed study area.
Lowland meadows	These can be found throughout the Enniskillen Landscape Character Area.
Aquifer fed naturally fluctuating water bodies	The main site for this habitat is found at Fardrum and Roosky Turloughs ASSI and SAC.
Eutrophic standing waters	Most of the larger lakes in the detailed study area are classified as Eutrophic. Upper and Lower Lough Erne are both the obvious main examples of this type.
Mesotrophic lakes	Keenaghan Lough and Lough Scolban are both classed as Mesotrophic. Both are characterised by having a medium level of nutrients.
Marl lakes	Marl lakes are the rarest lake type as they contain the cleanest, clearest, hard water lakes with the highest base status. Examples of these are Loughs Kinarla, Drumcose, Aleen, Yoan and Mill Lough which belong to the Nuphar/Elodea/Hippuris type. They contain very specialised flora and are therefore very valuable natural resources. As they are so pure, they are very vulnerable to phosphate accumulation.
Ponds	Found throughout the detailed study area.
Rivers	Found throughout the study areas, main rivers being River Erne flowing though the Loughs to Ballyshannon and also the Cladagh (Swanlinbar) and Colebrooke Rivers.

5.2.2.2 Protected and important species

The Erne holds a wealth of protected species. The following is a short synopsis of the main groups of species. Further details can be seen in the Ecological Appendix.

Birds

Upper and Lower Lough Erne is one of Northern Ireland's most important sites for waterfowl and birds associated with wetland habitats. The Lough system supports three main groups of bird: wintering waterfowl, breeding waders and breeding seabirds.

Upper Lough Erne has been designated as an SPA and Ramsar in its entirety, supported by four separate ASSIs. It is primarily designated for its Whooper swans but important ASSI interest features also include its breeding wader assemblage (nationally important) and its large heronry.

Lower Lough Erne is only partially designated, with individual islands being declared ASSIs for important breeding wader populations. No overall designation exists for the loughshore and islands such as that for Upper Lough Erne. RSPB own or manage many of these islands to encourage and support the bird populations. Bird numbers are monitored through surveys such as WeBS for

wintering waterbirds, RSPB/NIEA annual monitoring and Seabird 2000 (a recent seabird census). Recent figures suggest that bird populations have been increasing and in addition to Cruninish, Devenish, Hare and Horse islands which are all already designated for their breeding wader populations other islands already meet the ASSI thresholds for designation.

Several islands in the Lower Lough also host nationally significant seabird colonies. Black-headed gull, Common gull, Lesser black-backed gulls and Sandwich terns all breed in large numbers.

The entire Lower Lough Erne, including its shoreline and island if considered as a whole meets the national ASSI designation criteria for many different wintering and breeding bird species.

Fish

Lough Erne is a mixed fishery with an abundance of both game and coarse fish. The game fishery has native Brown trout and some Atlantic salmon can be found throughout the Lough and rivers flowing into it.

Course fishing in the Upper Lough is concentrated between Enniskillen and Newtownbutler with the Broadmeadow, Scotch Store and Schools stretches being popular. Main species include Roach, which are everywhere with Bream, Pike, Perch and Eels in abundance. For the specialist angler, Tench can be found in the weedy areas in the summer. Rudd are also common.

There are some productive areas in the Upper Lough for trout but the Lower Lough is the main fishing area.

In biodiversity terms, Pollan (*Coregonus autumnalis*), is the most important species in Lough Erne. It occurs only in Lower Lough Erne, one of only 5 known lakes in Ireland (Loughs Derg, Ree, Allen, Neagh being the others). It is an Annex II species in Europe and is indigenous to Ireland. Although it was recently discovered to be in Lough Allen (2007), the species has undergone a rapid decline throughout Ireland. This makes the population existing in Lower Lough Erne very important and ecologically valuable. Pollan are one of the few Irish species that are found nowhere else but Ireland.

Mammals

Otters are widespread throughout Lough Erne. Numbers are known to be healthy as the extensive wetland habitats combined with mostly unpolluted rivers and lakes and high density of semi-natural habitats makes an ideal otter environment. The Upper Lough has been designated a SAC partly for its sizeable and dense otter population.

The abundance of insects and wetland habitats mixed with woodland and numerous roosting opportunities make Lough Erne ideal habitat for bats. All 8 species of Northern Ireland's bats occur within the study area with sites such as Crom being real hot-spots for bat activity.

A survey of White-clawed Crayfish distribution conducted in 1996-7 concluded that the species is widespread in the Erne catchment and common in the feeder streams of Lower Lough Erne. On the Upper Lough it was found to be also found in streams on the eastern side of the Lough.

Pine martens and Red squirrels are known to occur in suitable habitat throughout Fermanagh. This habitat tends to be in coniferous forests which are found frequently within the detailed study area. There are increasingly limited opportunities for the Red Squirrel, from threats posed particularly

from the Grey squirrel and as habitat becomes more fragmented. As a result, red squirrel numbers and sites where they still occur have drastically reduced in their range and size.

5.2.3 Assessing the sensitivity of the study area

5.2.3.1 Main Natura 2000 Designations

All SPA and SAC designations are at a European level under the Birds or Habitats Directives. This means any development will be closely scrutinised to ensure that there is no negative or detrimental effects on the ecologically sensitive site selection features. Planning applications pass through the Planning Service and Northern Ireland Environment Agency, where the relevant and specific ecological information is considered amongst other issues. The proposal is assessed alongside any accompanying Habitat Regulations Assessment and scrutinised in respect to the implications for the site in view of the site's conservation objectives.

5.2.3.2 National designations and other non-designated habitats

Known areas utilised by important bird species (SPA selection features, Annex I species and other important bird species) which occur during either the summer breeding season or during the winter months.

It is impossible to display all of the important habitats as many are too widespread, complex or detailed to be included. Examples of such habitats were the continuous reedbeds, fen habitat and transitional zones which exist frequently between open water and woodland habitat surrounding.

The main threats to all these habitats both designated and undesignated are discussed in the text.

5.2.3.3 Implications and recommendations for development

Natura 2000 sites

Development in these areas should be carefully considered and only allowed to proceed in areas where the interest features of the Natura 2000 sites are not affected either directly or indirectly. These may include habitats as a whole or individual species of fauna or flora or groupings of such. Areas located on the edge of the designated sites or just outside it and are near existing infrastructure such as roads or houses e.g. parts of villages, may be more likely to support development. This is providing that the interest features are proved not to be affected by any proposals. It must also be remembered that development outside of the Natura 2000 site can still affect the interest features and so must be considered in exactly the same way as a development inside the designation boundary.

Recommendation 1: Only essential carefully sited and considered development take place within Natura 2000 sites. Any development considered should be properly assessed in line with Article 6 of the Habitats Directive through the Habitats Regulation Assessment.

Ecological hotspots

The ecological sensitive sites or hotspots are the combination of all the designated sites and undesignated sites. These can be seen in Map 7A & B. Those marked in red are the most ecologically sensitive parts of both the Natura 2000 sites and a combination of all other important sites they are of most value and should be preserved at all costs. Those marked in amber are ecologically sensitive sites but certain types of development could proceed, provided the interest features are not compromised or disturbed. Each case should be assessed on an individual basis.

Recommendation 2: Development should not take place within or adjacent to the ecological hotspots - Red.

Recommendation 3: Development considered within the amber ecological hotspots should be properly assessed in relation to the interest features. Only essential development not affecting interest features should proceed.

Continuity / Severance / Fragmentation of Habitat

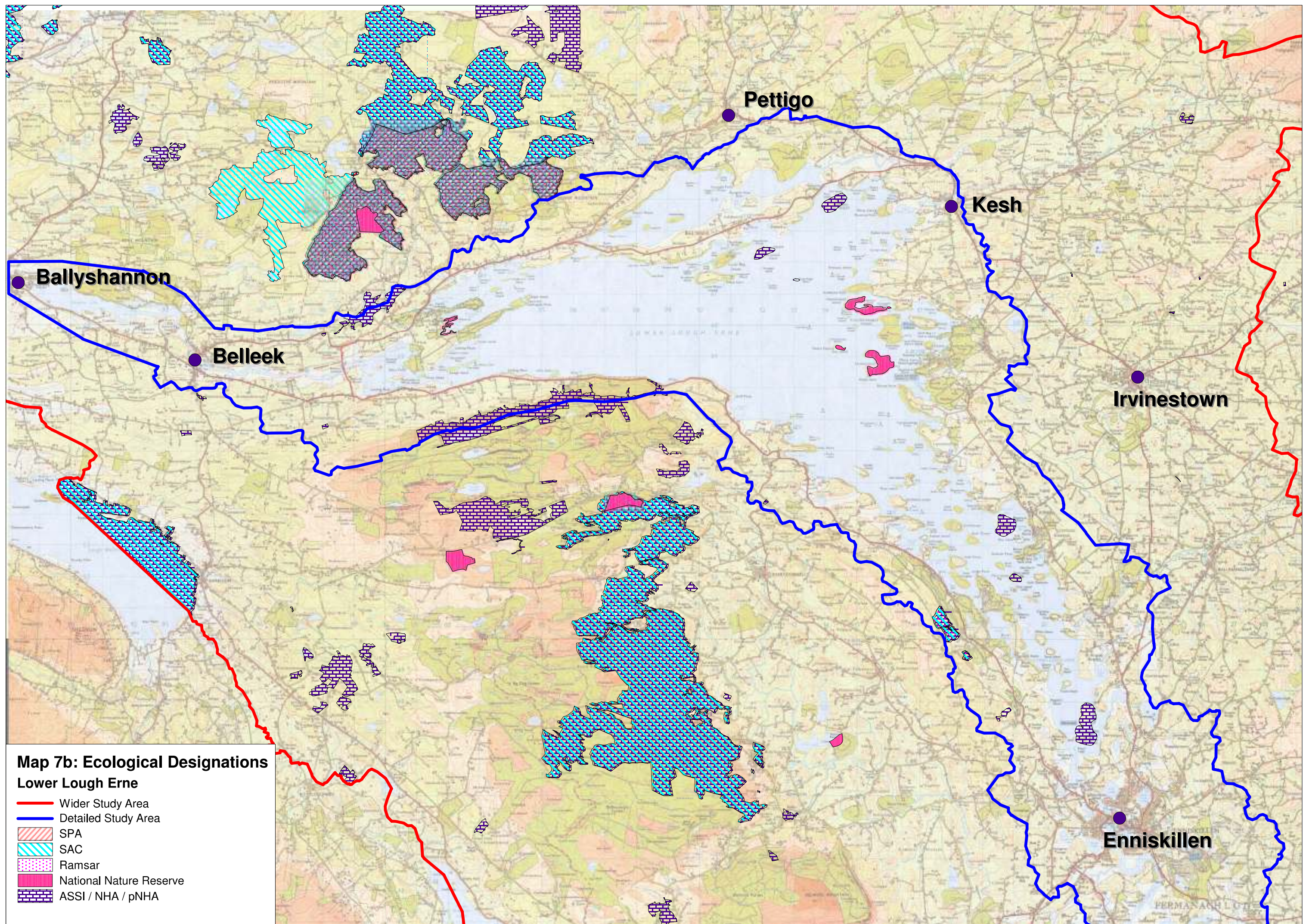
Habitats such as reedbeds and broadleaved woodland occur throughout the study area. Not all are designated and when considered as a whole represent a large area of habitat. In planning development, a small loss of this type of habitat may not appear to be of significance. However, it is important; especially with linear habitats to ensure that the habitat is not split up (severed) or left isolated (fragmented) from other habitat blocks. This can dramatically reduce the value of the habitat and cause connectivity problems for many species travelling around a larger site.

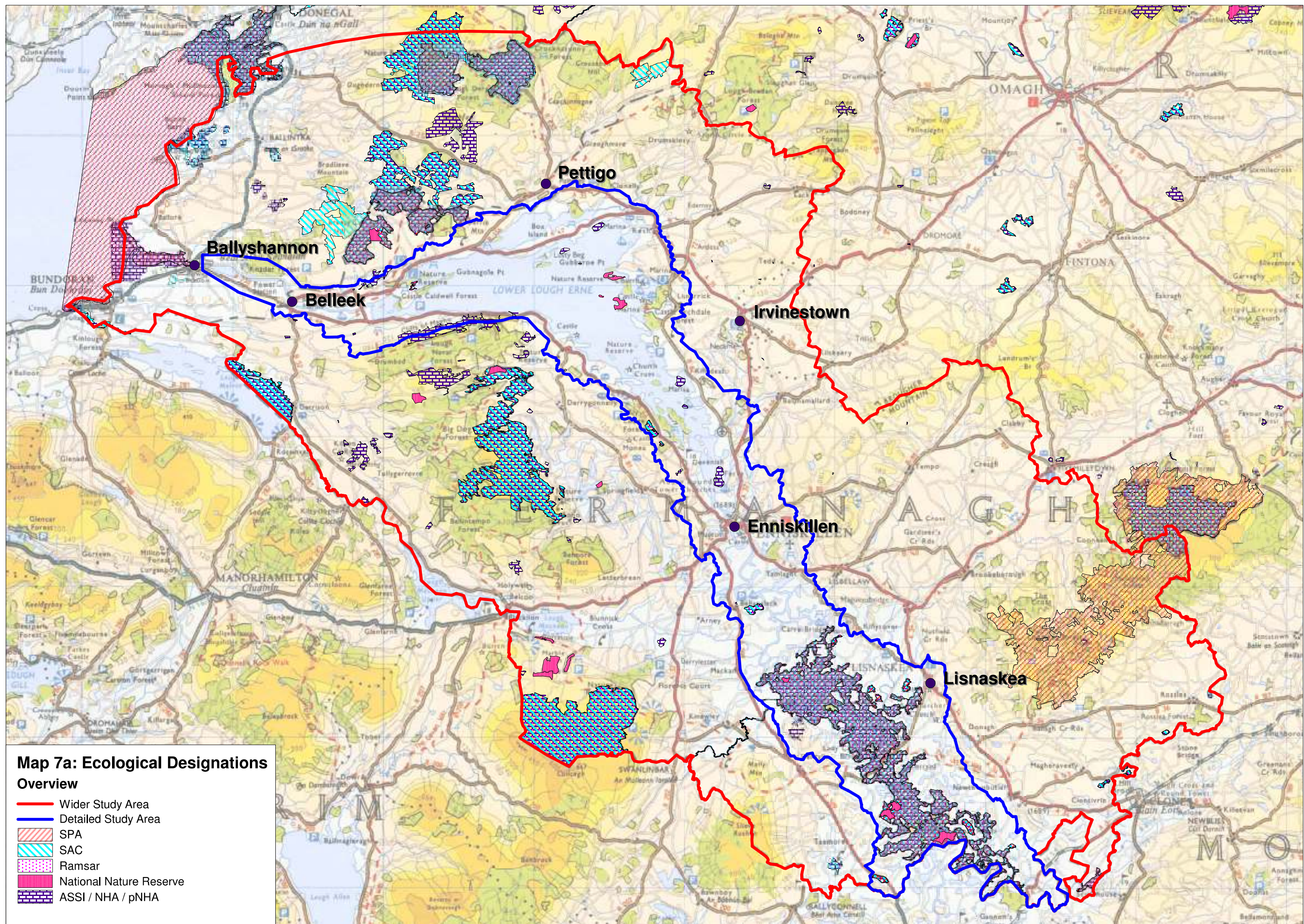
Recommendation 4: Habitat areas should not be severed or fragmented. Continuity of habitat should be maintained at all times.

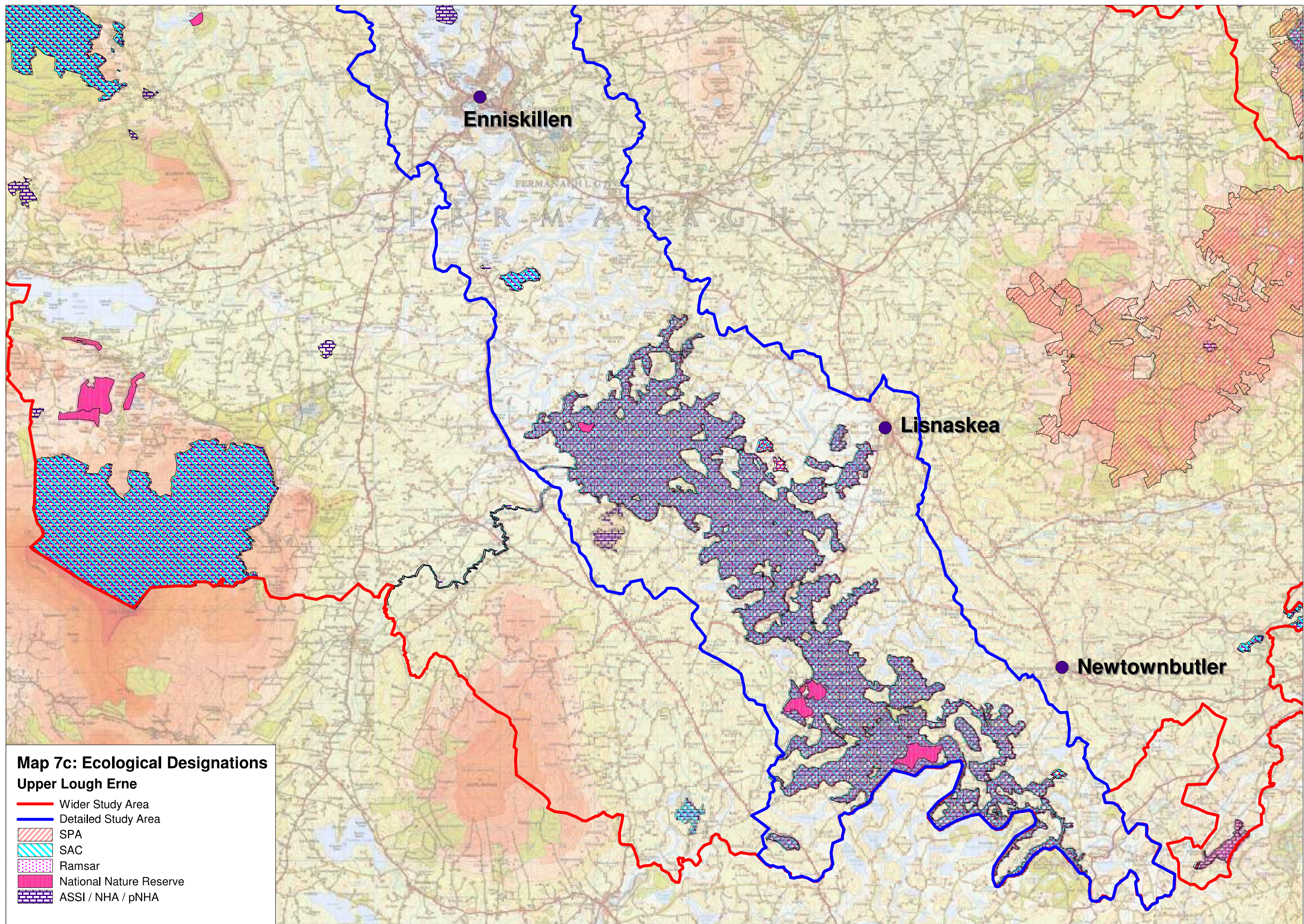
Locations of new development

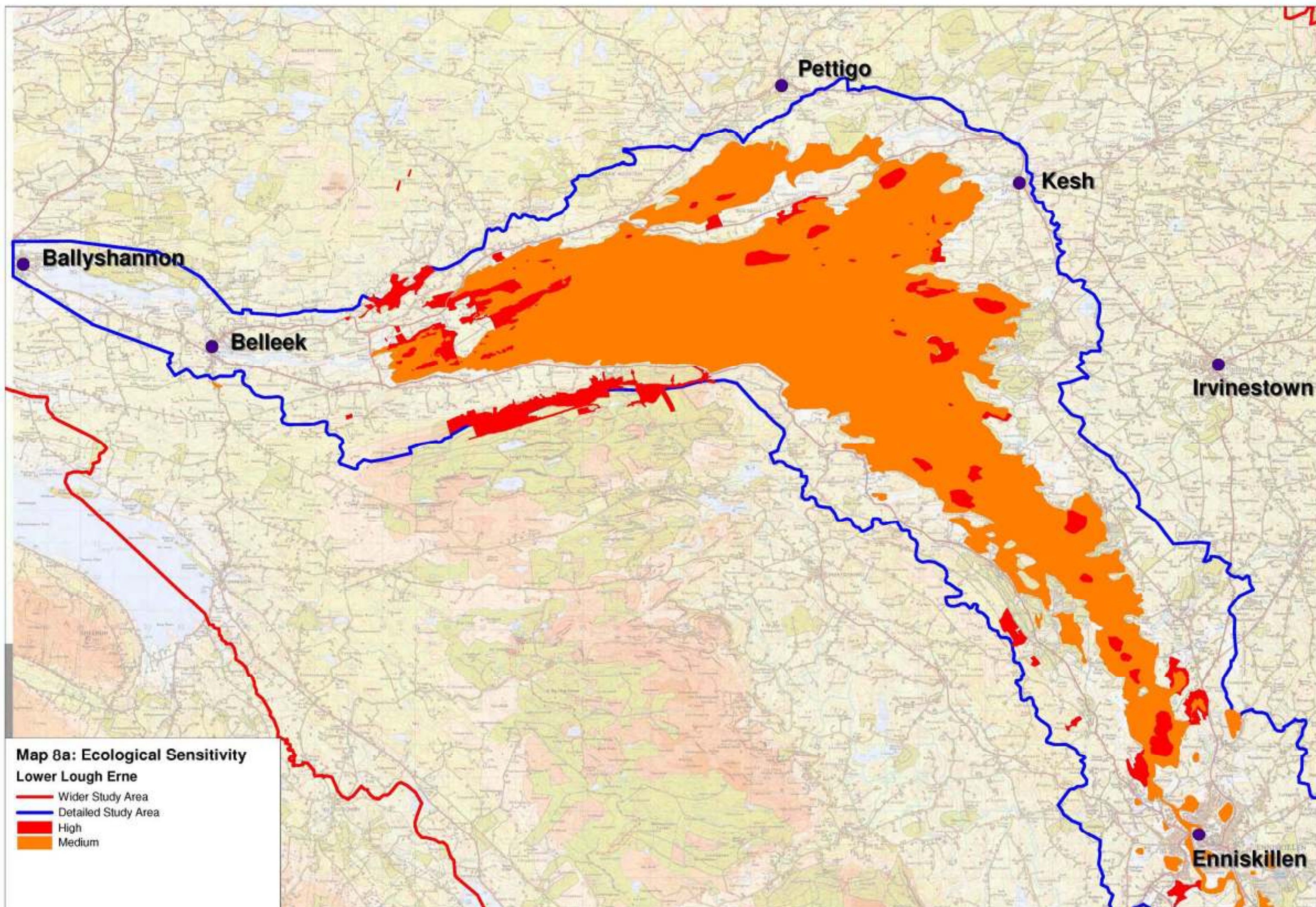
New development should be situated as part of existing development where possible to avoid having additional infrastructure built to access the new structure. This may be outside of the existing study area but still may affect species and habitats within it. By utilising areas of existing developments and simply extending or improving them ensures that no new areas within the study area will be exposed to regular disturbance. Existing areas will hopefully only experience slight increases in disturbance through increased usage and boat traffic.

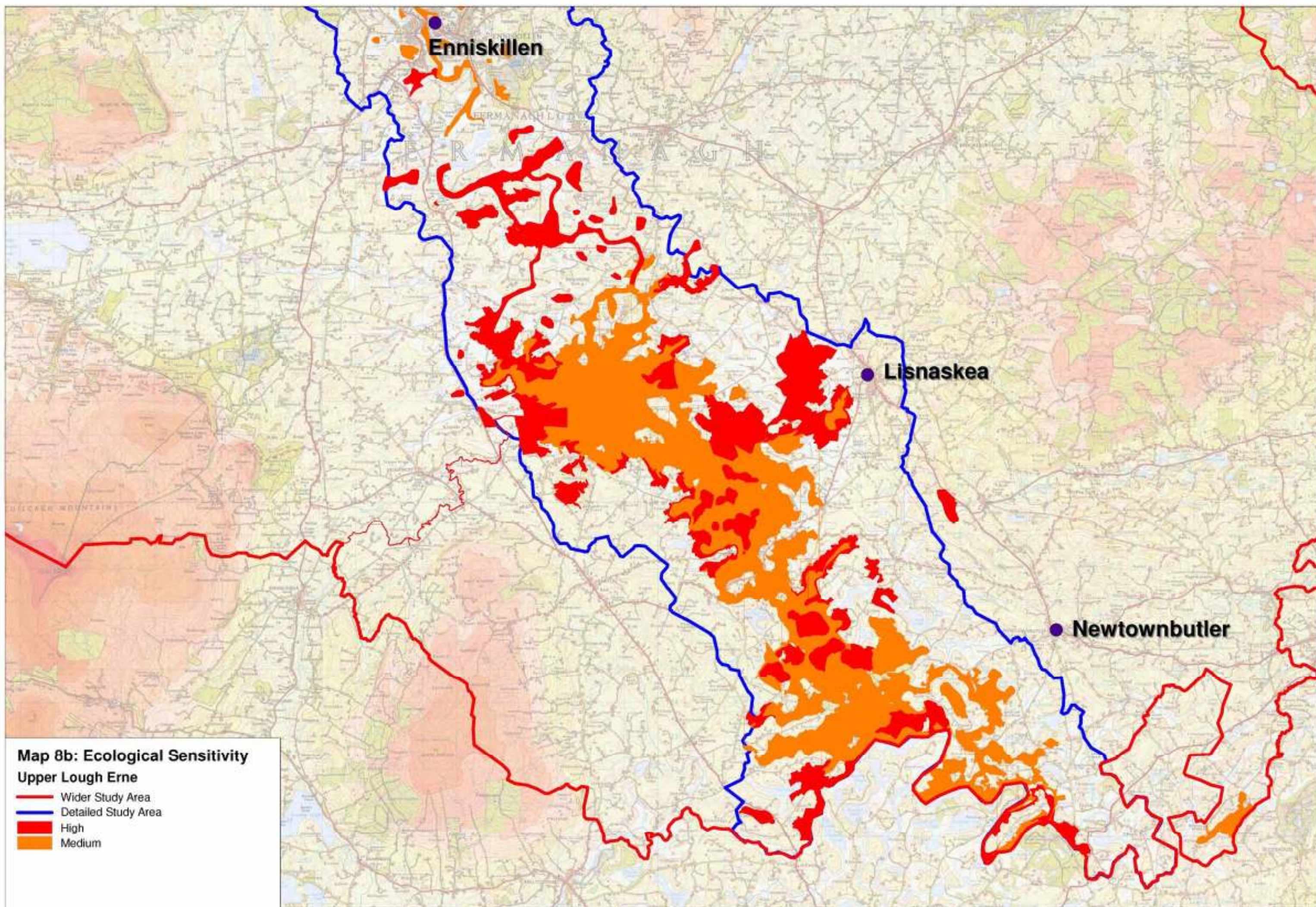
Recommendation 5: Where possible, new development for a tourism purpose should be situated within existing urban areas or within developed sites. A priority might therefore be to add services to existing businesses, marinas, harbours etc except where proposals have a low impact.

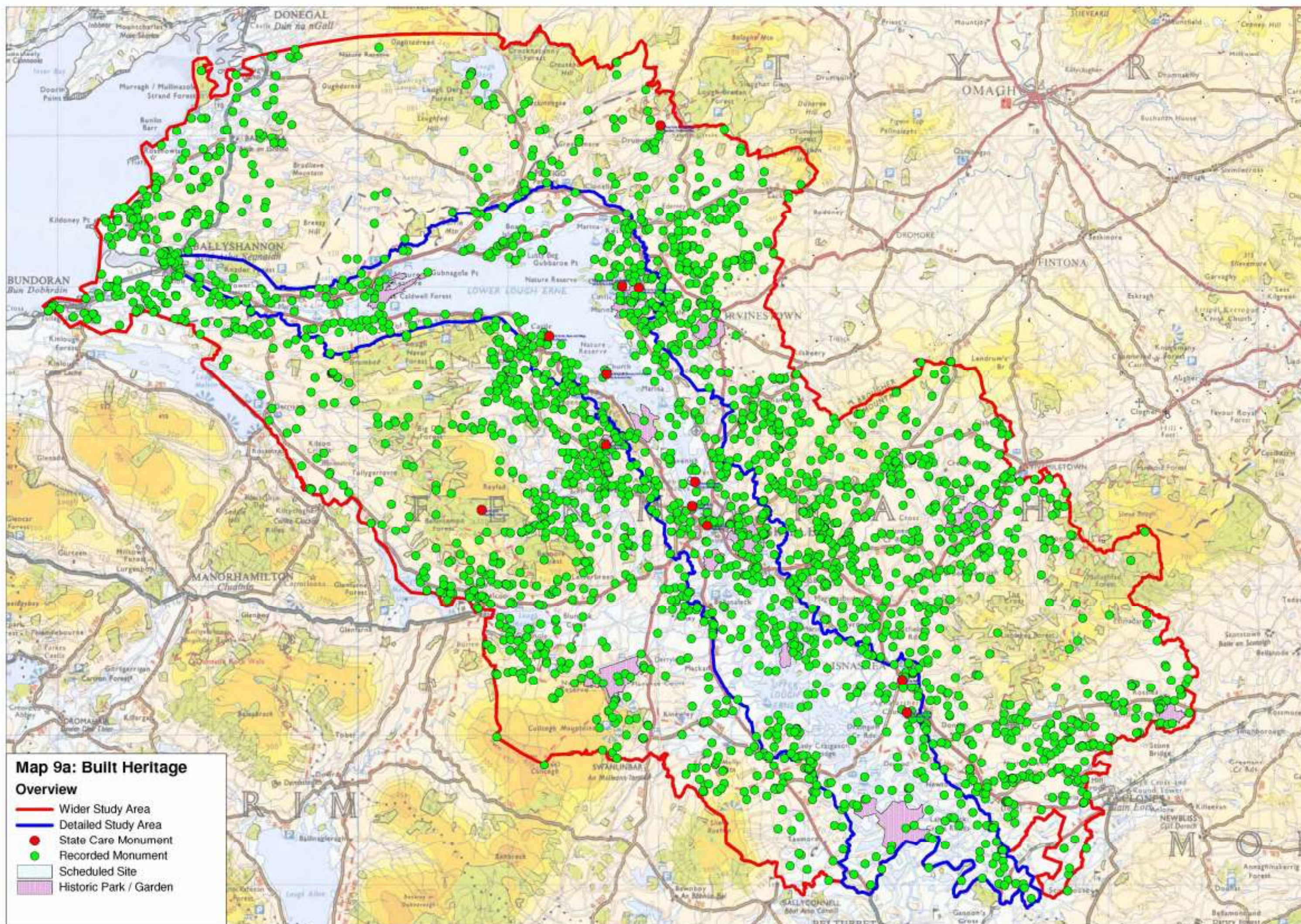


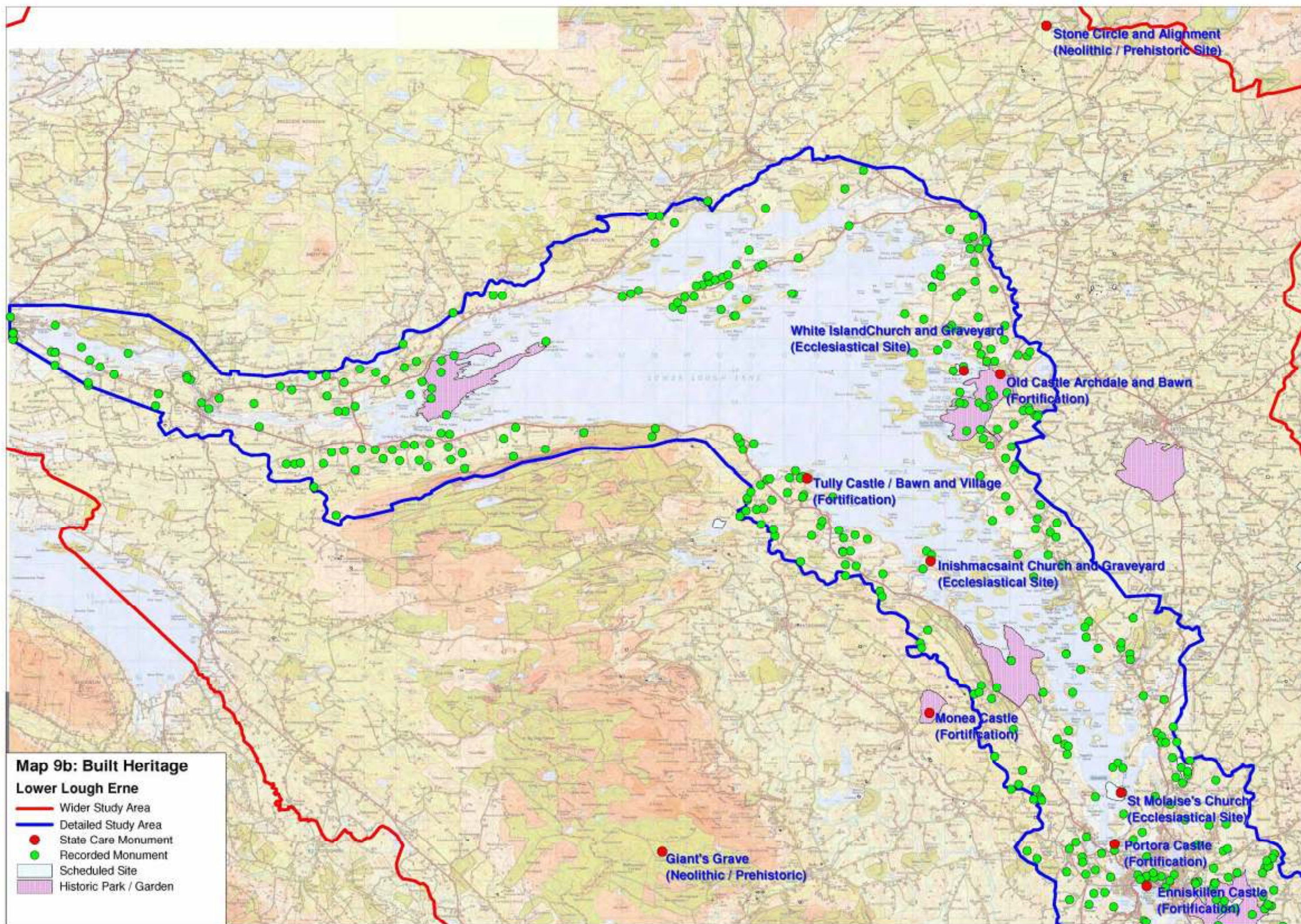


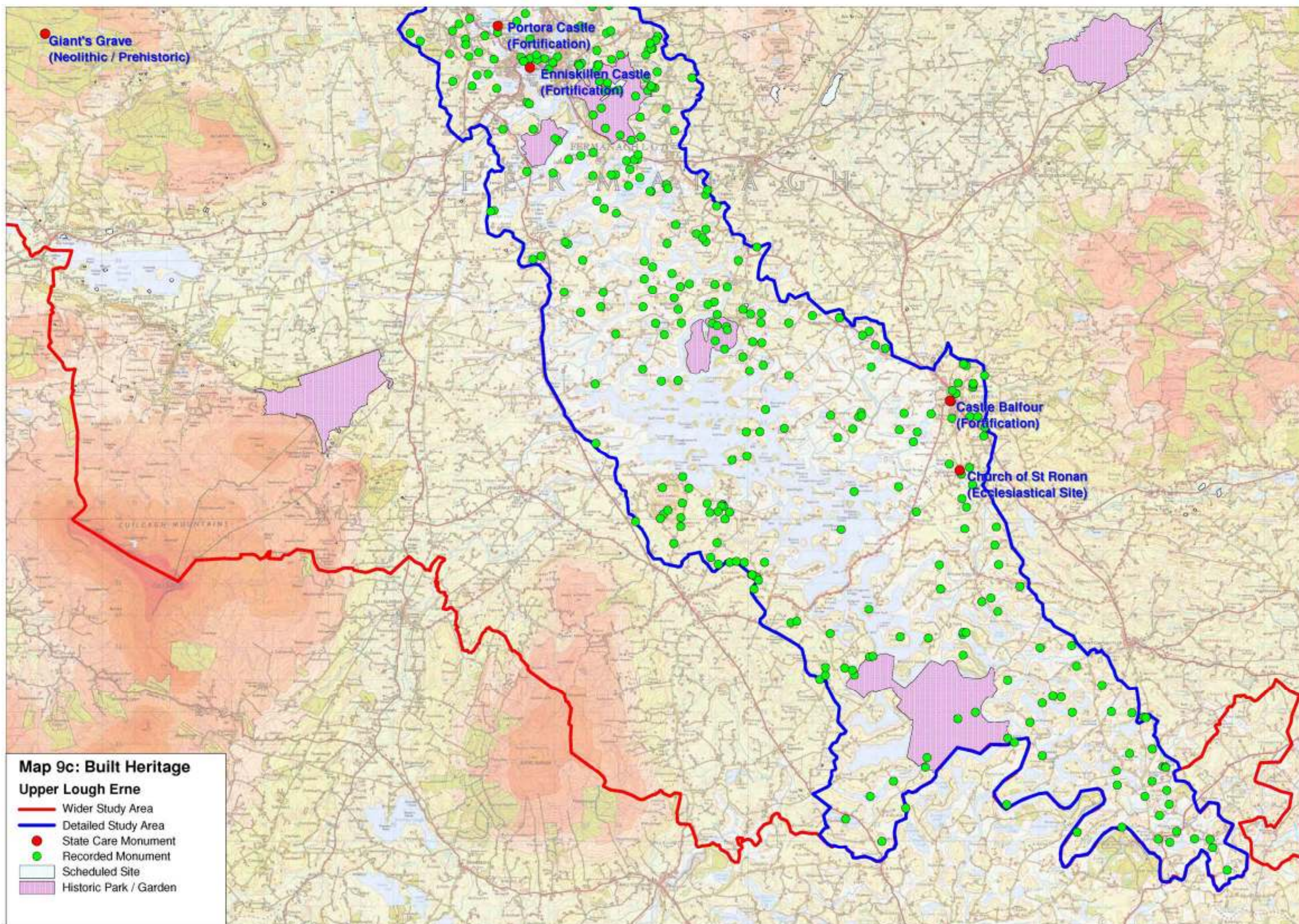












6 Vision, Market Orientation, Objectives and Action Programme for The Erne

Vision

The vision for the development of tourism, recreation and commercial product development on Lough Erne and in County Fermanagh has developed from the Lakelands and Waterways Strategic Plan and Destination Fermanagh, the tourism blueprint for the County. The Lakelands and Inland Waterways vision set the region as real Ireland and the heart of Ireland, based on the warmth of the people and the wealth of things to do every day. The experience provides a freedom that delivers renewal of body and soul. This matches the Destination Fermanagh vision of the area as a must-see and must-do part of Ireland and Northern Ireland. To achieve this the area needs to stand-out and be included within tours of Ireland by the identified 'Sightseers and Culturalists' group within both the overseas and domestic markets. This vision is an economic one with an increased number of visitors and higher visitor spend with an intention of placing Fermanagh high amongst tourism regions in Northern Ireland in terms of visitor spend.

An important component of the vision is to maintain and enhance the area as a family holiday destination for people in Northern Ireland and to raise its profile for activity holidays.

Key Tourism Markets

It is important that Fermanagh benefits from being part of the Lakelands and Inland Waterways area and also as a result benefits from the international marketing activity of Tourism Ireland Ltd towards this area. Tourism Ireland has identified the best prospect for the country as a whole as being Sightseers and Culture Seekers who currently make up over 50% of visitors to Ireland.

Sightseers and Culture Seekers like learning about the country and its culture. They enjoy scenery that is different from home. They like visiting historical sights, and listening to or taking part in music and the arts and often journey through several regions whilst in Ireland. Of crucial importance to them are the experiences they have during their journey. They enjoy living the culture rather than just observing it and appreciate distinctive food and craft. The cultural interest of Fermanagh has the potential to attract more of this market. Interest is sustained with good historic house visits, castles and gardens and a strong pre-Christian and Christian Heritage. Special landscapes particularly with designations, such as the Marble Arch Caves Global Geopark, and Natura 2000 sites if they have visitor arrangements, have the potential to appeal to more people within this market.

The programme that follows places a focus on Sightseers and Culture Seekers as the primary market and the best prospect for growth. It does not ignore specialist markets that are already well established in Fermanagh such as the angling markets, the cruising market, and the developing market for people attracted by natural heritage and the Geopark.

Then programme sets out to benefit from and link with the 'Go where Ireland takes you' brand message put out overseas by Tourism Ireland providing the itineraries and experiences of the promise. It also responds to the NITB's 'Explore More – Discover it all for yourself- Find your Journey' and should position itself to deliver the promise of an 'Island of Unique Character and Characters'

In terms of achieving growth the emphasis will be on attracting visitors from Great Britain, Germany and France in common with the focus of Lakelands and Inland Waterways and Tourism Ireland.

In terms of restoring cruising and angling market volumes the focus will be on linking with key marketing approaches in TIL (angling and cruising), Fáilte Ireland (cruising) and NITB (angling). Specialist cross border approaches led within the region will be important in taking forward specific products such as the Geopark, angling and walking.

Key Objectives

Key objectives of the study include:

- To link attractions and places of interest in the area to provide a more appealing and coherent proposition to the overseas and touring markets – including links to attractions and places of interest within the wider lakelands and inland waterways area to achieve stand-out in Ireland for the products.
- To continue to develop the Marble Arch Caves Global Geopark sites and places of interest for natural heritage identified in the study with an emphasis on developing a strong natural heritage product and on the interaction between Geopark and the waterways
- To establish Enniskillen as an activity hub that provides a range of opportunities for visitors to get onto the water and signpost people to activities in the wider area.
- To improve air access to the area from other parts of Ireland and further afield through supporting the development of St Angelo airport and investigation the feasibility of access by flying boat from Dublin and Belfast.
- To increase the appeal of the area and the numbers of visitors through a coordinated events programme
- To support existing and emerging sustainable tourism enterprises in developing products and skills consistent with providing high quality experiences in the area and to increase market share of visitors to Ireland and of domestic tourism and recreational visitors

Programme recommendations:

The following tourism, recreation and commercial product development programmes are recommended for the area, each is discussed in more detail on the subsequent pages.

1. Waterways Infrastructure
2. Water and Land Activity Hubs
3. Access to the Water and Air Access
4. Events Programmes
5. Historic Houses, Castles and Gardens Trail
6. Natural Heritage Attractions and Opportunities
7. Christian Heritage Route
8. Fermanagh's Ancient Landscape
9. Recreational Trails
10. Signage programme
11. Local Food and Tourism Links
12. Promotion and Marketing
13. Tourism and Recreation Trade Upskilling.

6.1 Programme 1: Waterways Infrastructure

Although Fermanagh has many public jetties and these are in attractive places and well maintained, there is a need to develop further quality **waterways infrastructure** to support recreation and tourism. Particularly weak in relation to the Shannon Erne Waterway and the Shannon is the network of boater service blocks which provide facilities such as showers, toilets and laundry facilities that are open whenever needed by a smart card available from Waterways Ireland. Fermanagh District Council does provide toilets at many jetties but these are closed overnight and do not support late arrivals, early starts or night time requirements. In several areas new jetties are proposed. A set of service blocks will be required in consultation with various landowners as Waterways Ireland does not have significant land side ownership in conjunction with its jetties. Main proposals are in the table below – new Castle Jetty Enniskillen to support Castle Visits from the water, Castle Basin developments.

Action	Lead agency	Partners
Providing new service blocks or upgraded to 24 hr service blocks where required in cooperation with landowners adjacent to Waterways Ireland jetty infrastructure. E.g. Crom Round O Belleek Castle Archdale Magho Knockninny Derryadd Quay Trory Kesh Castle Caldwell Bellanleck Carrybridge	Waterways Ireland	Owners (National Trust, NIEA, Fermanagh District Council, Forest Service)
Consider more sheltered marina infrastructure at Magho Jetty	Waterways Ireland	
Provide waterbus berth in Enniskillen and provide activity orientated jetties and access beside Enniskillen Forum	Waterways Ireland	
Provide jetties suitable for rowing boat hire for trips around the island in Enniskillen. Enable rowing boat hire operator to set up from WI infrastructure.	Waterways Ireland	
Provide interpretative shelters at sites identified as of natural heritage interest	Landowners	Lakelands and Inland Waterways Initiative

Consider waterbus berth at Belleek Pottery	Waterways Ireland	
Consider infrastructure for houseboats within Enniskillen.	Waterways Ireland	
Consider berth for waterbuses in Enniskillen to facilitate people holidaying by public transport. Also consider regular scheduled service to Devenish from there.	Waterways Ireland	Waterbus operator



Principal proposals were:

- To replace existing wooden fixed level jetties with floating structures
- To improve access to water and provide facilities to cater for as wide a range of recreational activities and users as possible
- To increase the mooring capacity available on the Erne system

- To work in partnership with others to provide enhanced facilities
- To provide new destinations for boaters
- To complete the programme of slipway construction to meet the needs of current and future boats using the system
- Improve access to toilet and shower facilities for boaters and other waterway users
- Improve provision of waste disposal facilities for boaters
- Provide information signage
- To provide opportunities for boaters to connect to electricity supplies at some berths.

6.2 Programme 2: Water and Land Activity Hubs

The programme addresses the development of **activity hubs** with a particular focus on activities that can be booked on the day, or at short notice. The programme is aimed in two directions:

- more and more frequent opportunities to get onto the water, have a guided walk or try another activity for adults on a tour of Ireland and visiting the area
- opportunities to book activities at different levels for specialists or for families staying in the area.

These two separate purposes require different approaches. The majority of activity provision at present is aimed towards the youth sector and some staff development may be required.

The priority should be towards multi-provider access at public infrastructure sites and the provision of lettable hire storage units for providers should be considered as part of public infrastructure.

The TIC in Enniskillen and the website should promote the activity hubs and provide booking services.

Services at the hubs should reach the standard of **‘something to do every day’** to encourage people to stay longer in the area.

Water Activity Hubs

The key hub for activities should be Enniskillen as an island town with an attractive setting and as the hub of accommodation provision, services and evening entertainment. This should take the form of the development of a land/water venue based on the Enniskillen Forum and Castle Island and should have an obvious presence and a book at short notice operation.

Activity hub satellites at Lisnaskea/Smith's Strand/Share Centre and at Irvinestown/Kesh/Castle Archdale and Ballyshannon should also be developed. The restoration of the Ulster Canal at Clones should also provide a hub for activities that will benefit this area.

Action	Lead agency	Partners
Develop an activity hub at Enniskillen with access to the water for canoe, dinghy, rowing boat hire and short trips (e.g. round the island)	FDC	Private sector provider
Develop activity hub in Castle Archdale area and improve the function of Castle	FDC	Working group NIEA/FS/Private sector

Archdale as an activity access point. Include Necarne.		and WI
Develop an activity hub based on Lisnaskea, Share Centre and Smith's Strand	FDC	With private, community and charitable sector providers
Develop an activity hub at Ballyshannon with water activities (national watersports centre) and horse-riding trails in the Breesy Hill area and with links to the Pettigo area. Consider a waterbus from Belleek from outside the Pottery.	Faite Ireland	Existing activity providers – water/equestrian
Implement Castle Basin Plan	Fermanagh DC/Waterways Ireland	
Support existing activity providers in the County and provide a more accessible 'activity bureau' contact and booking system for activities	Fermanagh Lakelands	Private sector

Land Activity Hubs

This part of the programme addresses the development of three land activity visitor hubs at **Lough Navar Cuilcagh Mountain Park and Slieve Beagh**.

- **Cuilcagh Mountain Park** is already well developed but could extend to link with proposed new walking trails in West Cavan and to the Burren Forest.
- Enhancements are planned to the **Lough Navar** forest including trail and viewpoint opportunities coach access (consideration to uplift mechanism from foot of Cliffs of Magho to viewpoint. Provision of toilets and consideration to panoramic café at Cliffs. Taken together the **Lough Navar** projects should be marketed as a **visitor attraction**.
- At **Sliabh Beagh** walking trails are well developed but improvements can be made to some of the trails and the development of regular guided walking tours and more active marketing should be undertaken. Sliabh Beagh should develop multi-use trails and increase marketing towards horse-riders and cyclists. The area requires a Fermanagh focal point.
- These should join the three water activity hubs as key attractors for the County. Encouragement should be given to businesses locating at the hubs to benefit from focussed promotion.

Action	Lead agency	Partners
Develop or encourage activity businesses to work from or near the three activity hubs.	Fermanagh District Council	Activity Businesses
Where infrastructure to support an activity provider is not in place provide a base for an activity provider.	Forest Service/Fermanagh District Council/Community interests	
Further develop the capacity of the TIC to take bookings for providers	Enniskillen TIC	Activity businesses
Provide information about activities available at each of the hubs	Private sector/TIC	Site owners and FLT



1.3 Programme 3: Access to the Water and Air Access

This programme has the aim of increasing and highlighting **opportunities for visitors and local people to get onto the water** – This programme involves working with all providers towards:

- Greater promotion of the waterbuses and joint promotion of these opportunities to get onto the water,
- Ensuring that access to water is provided on an 'access for all' basis
- Extended waterbus itineraries to visit wider range of lakeside sites of interest
- Provision of well advertised and located dayboat hire
- Links between waterbuses and public transport hubs.
- Encouragement of private sector water activity provider to offer programmes for adults within the key tourism season and staff them appropriately.
- Development of events that provide access to the water as part of the event
- Development of water based programmes for local people, including those from disadvantaged areas in the District.

The programme also supports the development of a water landing area for float planes at or close to Enniskillen airport and designation of float plane arrival point associated with this (subject to feasibility and environmental assessment). Associated with this is encouragement of regular tourist service associated with Belfast and Dublin. Lakelands Flights Lough Derg (S) to Lough Erne along the lakelands corridor

6.4 Programme 4: Events Programme

Development of a **coordinated events programme** and provision of more high-profile events - date setting in time for TIL collateral and promotions – Development of an event space at Broadmeadow/Castle Basin as part of the Castle Basin study implementation.

This programme should include a major physical participation events such as triathlon, outdoor swimming, adventure racing. A number of events and a major festival should have a natural heritage theme. Discussions should be had with local orienteers to consider hosting a multi-day orienteering holiday event.

An important action will be the formation of a **Fermanagh Events Team** to include tourism and waterway interests, activity providers, outdoor centres and Forest Service.

6.5 Programme 5: Historic Houses, Castles and Gardens Trail

The development of a visitor route through the area presenting the best of the **historic houses, castles and gardens** aimed at attracting sightseers and culturalists. The main venues to be presented in the trail should include: Enniskillen Castle, Castle Coole, Florencecourt, Crom, Castle Archdale, Tully Castle, Monea Castle, Lisnaskea Castle and the Enniskillen Museum

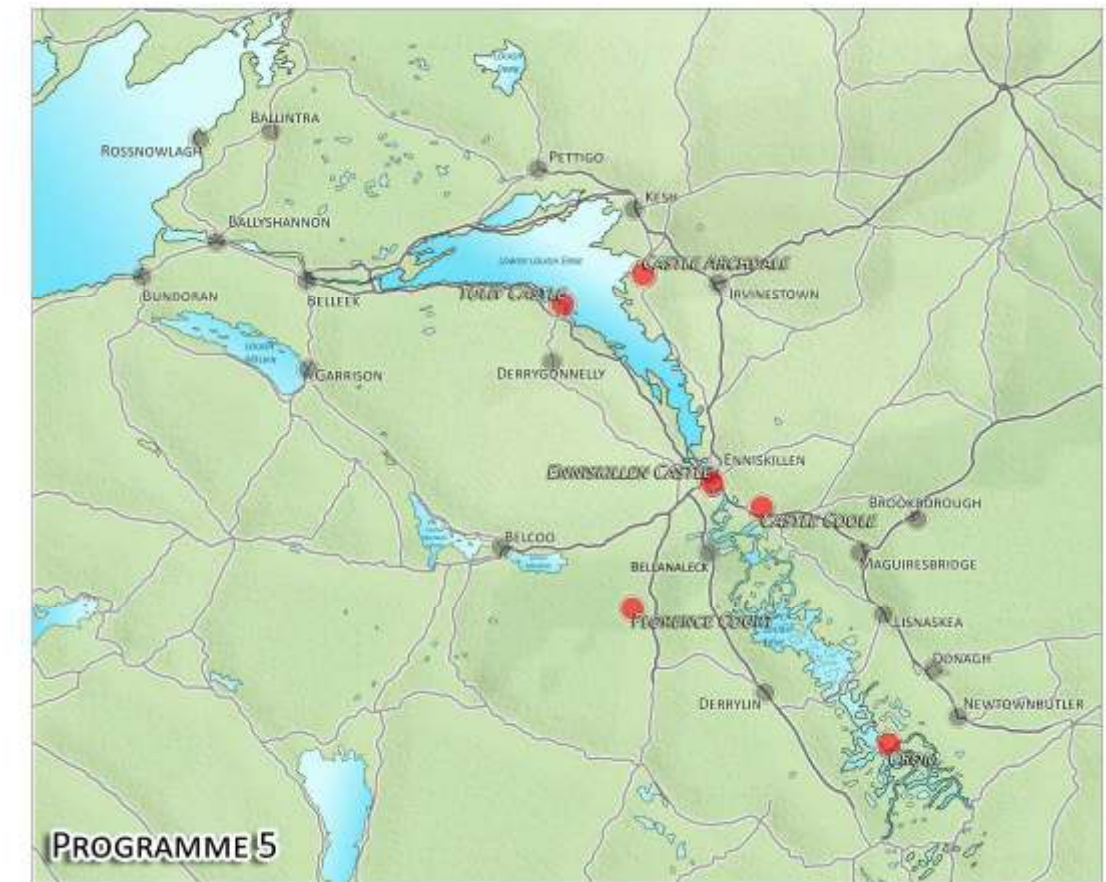
This should be presented as an itinerary and linked with all services such as serviced accommodation, opportunities to purchase crafts, good restaurants and opportunities for evening entertainment.

Animation of life in the great houses and castles and garden tours would enhance this type of trail and attention needs to be given to opening dates and times so that there is coherence in the trail.

The itinerary should also be part of the proposed Historic Houses, Castles and Gardens Trail through the entire Lakelands and Inland Waterways area. Fermanagh has two of the best houses within this overall itinerary and will be strengthened by the link which has the capacity to draw visitors north. There is potential for a link to Lissadel House near Sligo with a Yeats connection.

In order to bring the trail to the market the following action plan is recommended:

Action	Lead agency	Partners
Convene owners of the houses, castles and gardens involved and decide on a recommended itinerary between the sites. Identify serviced accommodation at appropriate quality to support tours.	Fermanagh Lakelands/Lakelands and Inland Waterways	Owners (National Trust, NIEA, Fermanagh District Council, garden owners)
Contact tour operators to ensure that they are aware of the initiative and are able to influence during the development phase.	Fermanagh Lakelands/Lakelands and Inland Waterways	TIL
Develop animation and events at venues at peak times and for tours by arrangement	Owners	Fermanagh Lakelands
Develop trail collateral and ensure that all venues are available as POI by SatNav providers	FL/LIW	
Ensure that jetty servicing Ardhowen Theatre also indicates Castle Coole as an attraction	Waterways Ireland	



6.6 Programme 6: Natural Heritage Attractions and Opportunities.

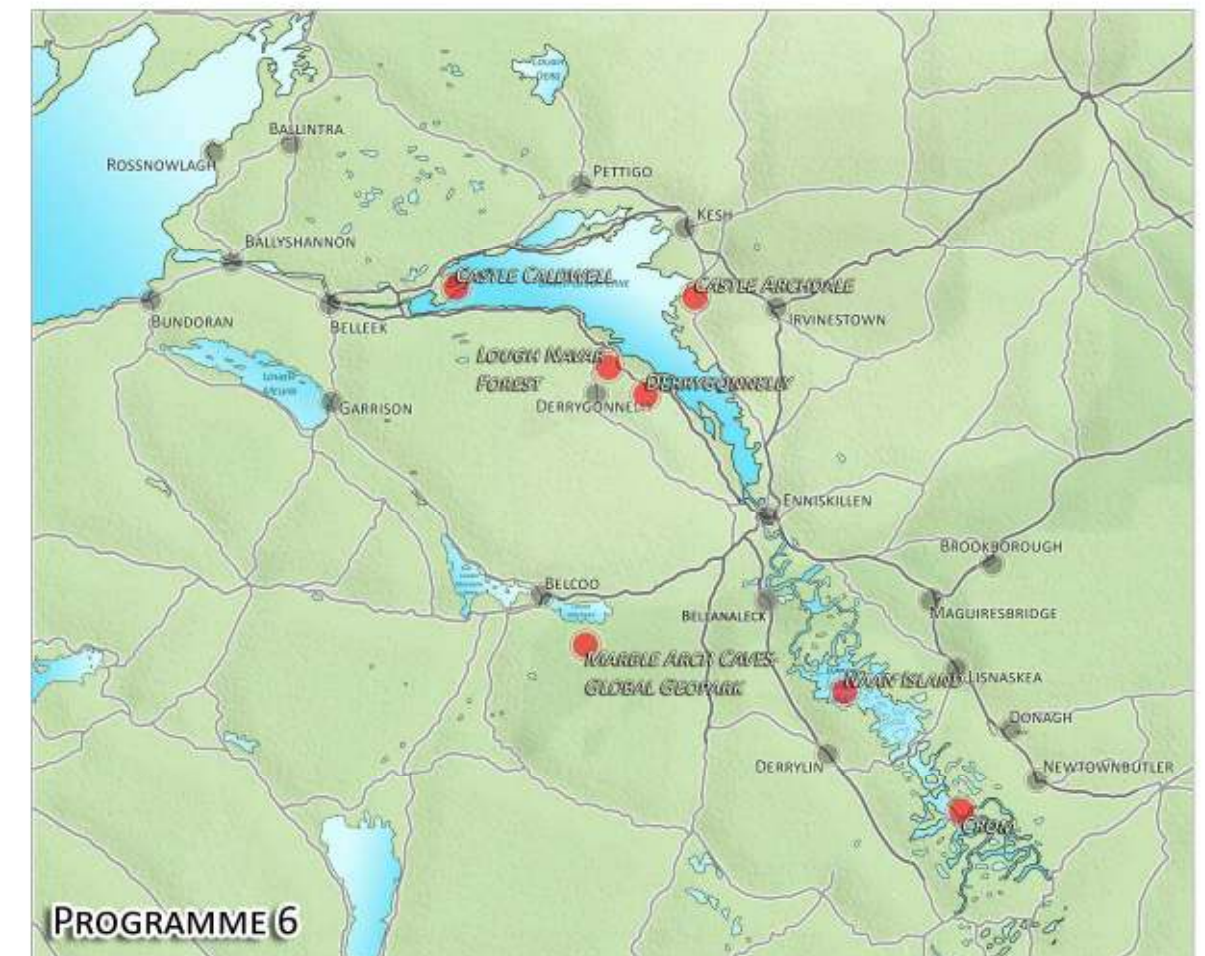
This programme sets out to develop of the capacity of the area to provide access to and enjoyment of the **natural heritage** of the area. This supports the development of the Global Geopark hub at the Marble Arch Caves, and the satellite sites identified in Geopark plans including in particular those at Castle Archdale, Crom, Castle Caldwell, Lough Navar and Naan Island.

The programme will focus on regular, well promoted opportunities for nature based holiday experiences through the development of improved visitor facilities at key sites such as Marble Arch Caves, Cuilcagh Mountain Park, Castle Archdale, Crom Estate, Lough Navar Forest, and Naan Island and potentially one of the Lough Erne island NNRs. The programme will also develop and promote opportunities for holiday based learning about nature at relevant points such as the FSC Centre in Derrygonnelly, Marble Arch Caves Global Geopark Visitor Centre, Castle Archdale and the Crom Estate. Where possible interpretation at each of the key sites will be guided as this method remains flexible to the needs of visitors. This needs to be supported by a Fermanagh wildlife guide which leads the visitor to the best nodes and satellite sites.

Development of a major environmental summer school. Interpretation shelters may be considered for the main forest sites. Public transport access should be detailed in collateral for this programme.

Action	Lead agency	Partners
Convene owners of the identified natural heritage sites and providers involved and decide on key themes and arrangements between the sites.	Fermanagh Lakelands/Lakelands and Inland Waterways	Owners (National Trust, NIEA, Fermanagh District Council, Forest Service, Field Studies Council, Marble Arch Caves Global Geopark
Produce a Fermanagh wildlife Guide detailing key species likely to be seen at each of the sites and in the wider area	Fermanagh Lakelands/Lakelands and Inland Waterways	NIEA/Ulster Museum
Develop plans for guiding and events at venues at peak times and for natural heritage tours by arrangement	Owners	
Assist FSC and Marble Arch in identifying and reaching tourism markets that would enjoy an itinerary based on natural heritage	FL/LIW	
Identify and promote a water based itinerary for cruisers visiting natural heritage sites	Waterways Ireland	NIEA/Forest Service/NT
Provide landing facilities (if agreed at two additional NNRs on Lower Lough Erne and Upper Lough Erne)	Waterways Ireland	
Provide interpretative shelters at identified sites	Forest Service/FDC	
Develop. Provide and promote a major multi-day	FDC and FSC	Local site providers. Fermanagh Naturalists Field Club.

environmental summer school		
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6.7 Programme 7: Christian Heritage Route

In order to provide a second major touring theme for sightseers and culture seekers the development of a **Christian heritage visitor route** should be considered. Such a route could have visitor nodes at Lough Derg in Co Donegal, Pettigo (Pilgrim Trail), White Island, Cleenish Island Inishmacsaint, Devenish Island, Enniskillen and potentially Knockninny Quay. Three of these sites require boat trips with only two provided at present. Arrangements will have to be made for access to Inishmacsaint and consideration should be given to improving the quality of the boat trip to White Island.. Where there is sufficient interest and arrangements for access other ecclesiastical sites could be added to the route.

In order to improve the quality of this experience there should be provision of guided experiences at some sites and the provision of electronic guides via SatNav or Iphone/mobile phone.

This route should be continued through the Lakelands and Inland Waterways Corridor in order to achieve visibility in Tourism Ireland Limited materials promoted abroad. This will have the added strength of a visit to Clonmacnoise within the trail.

Action	Lead agency	Partners
Convene a working group of relevant providers including NIEA, Fermanagh Lakelands, FDC, and private boat operators	Fermanagh Lakelands/LIW	Private sector provider
Liaise with LIW in the development of a whole corridor approach to this.	Fermanagh Lakelands/LIW	
Make contact with tour operators during the design of the trail to improve the design	Fermanagh lakelands	Tour operators
Hold discussions with TIL about trail visibility in overseas tourism materials	LIW	FL
Provide trail guides paper/electronic	Fermanagh Lakelands	Private sector



6.8 Programme 8: Fermanagh's Ancient Landscapes

The Fermanagh area, as can be seen from the heritage map, has a rich mosaic of historic monuments and buildings. Many of these have been highlighted within the Marble Arch Caves Global Geopark as stone monuments were an important part of the culture of the area. Whilst the monuments can be difficult for a visitor to interpret alone the addition of a guided experience to several sites, particularly where local people and stories are involved can really enhance a holiday.

It is proposed that a series of tours is developed and sold from the tourist office in Enniskillen and from the website and that an attractive guide is produced to monuments in Fermanagh in association with NIEA

It is proposed that the tours would focus on accessible sites in Fermanagh and also cross the border to include the Burren megalithic tombs etc.

Action	Lead agency	Partners
Encourage the development of a permanent bookable tour of Fermanagh's monuments with tour guide interpretation. Provide tour guide training.	Fermanagh Lakelands Geopark	NIEA
Develop an attractive tourist guide to monuments in Fermanagh and their associated stories	Fermanagh TIC	NIEA

6.9 Programme 9: Recreational Trails

To further develop circular and linear **cycle, walking and equestrian** trails – to include Shannon Erne Waterway Trail, one off road circular equestrian route, renewal of some of the trails in 25 Walks in Fermanagh.

Action	Lead agency	Partners
To develop a Shannon Erne Waterway Trail	Waterways Ireland	Fermanagh District Council, Cavan & Leitrim Council Councils
To develop a toll ride for equestrian users in Necarne Forest	Fermanagh District Council	British Horse Society Ireland
To investigate the feasibility of a circular equestrian trail from Ballyshannon to Pettigo via Tullychurry and Breesy Hill	Fermanagh District Council/Donagel County Council	British Horse Society Ireland
To establish and promote trailheads as a base for walking by visitors and develop/re new circular walks from these. (link with land activity hubs programme for 3 trailheads)	Fermanagh District Council	NITB/CAAN
To establish dedicated mountain Bike trails in suitable locations'	Fermanagh District Council	NITB, CAAN, NI Forest Service

6.10 Programme 10 – Signage Programme

To ensure that the profile of the waterways in Fermanagh is raised and that visitors are fully aware of the opportunities available to them on and off the waterways in the area.

Actions	Lead Agency	Partners
To draw attention to Lough Erne Upper and Lower, the River Erne and the Shannon Erne Waterway through a waterways signage programme and a series of signboards showing the waterways and their attractions to visitors All major road crossings and waterside settlements/trails Waterbus and water activity opportunity sites Locks and bridges		Erne Steering Group Waterways Ireland Fermanagh District Council
To provide more information about the waterway at transport hubs such as bus stations and at waterbus access points		Lakelands and Inland Waterways Marketing Group Translink Private sector
To provide information at sites of particular natural or cultural interest in coordination with the Marble Arch International Geopark signage and interpretation programme.		Fermanagh District Council Waterways Ireland

6.11 Programme 11: Local Food links with tourism

To ensure that people visiting Fermanagh for recreation or tourism have a chance to experience the best of Fermanagh produce.

Action	Lead agency	Partners
To encourage menus in all restaurants and serviced accommodation that features distinctive locally produced food.	Fermanagh Lakelands Tourism	Trade
To continue the development of a food based festival in Fermanagh which would feature local produce, and the quality of the surrounding environment	Fermanagh District Council	
Consider a daytime regular dining cruise from Enniskillen that showcases local produce.	Waterbus operator	FLT /Enniskillen College
Consider a Fermanagh 'food through the ages' presentation in the Museum that brings people up to the present day.	NIEA	

6.12 Programme 12: Promotion / Marketing

Promotion of Fermanagh needs to be fully integrated with Waterways Ireland marketing activity and Lakelands and Inland Waterways marketing activity. There needs to be visibility for the area in TIL promotion of Ireland and full carry through of the promise within the area.

There should be greater links in terms of the promotion of Fermanagh through North West Tourism and Donegal, Cavan, Leitrim, Sligo and vice versa.

Action	Lead agency	Partners
FLT website to carry the themes proposed in this study and link product to this – but only relevant product to be carried.	Fermanagh Lakelands	
Ensure that product presentations on all websites for Fermanagh make links to other counties where this strengthens the product.		
Ensure that Geopark marketing is fully integrated into the Lakelands and Inland Waterways and FLT proposals		
Develop a tourism and recreation handbook for cruisers that shows what is available at each of the stopping off points on both loughs		

6.13 Programme 13: Tourism and recreation trade ‘upskilling’

Ensuring that the service matches the needs of the visitor is an important aspect of success in tourism. At present the Fermanagh activity product is orientated towards youth participation and not towards adult day and longer visits.

Developing products and services that meets the needs in particular of the sightseers and culturalists market will be important in satisfying new visitors to Fermanagh.

The industry also needs to develop the skills to be able to tell the geological, cultural and natural heritage stories of Fermanagh and to be able to signpost visitors to the best sites for these interests.

Action	Lead agency	Partners
Provide an orientation programme for activity providers toward the needs of the sightseers and culture seekers market	Fermanagh Lakelands	
Provide a programme for accommodation providers in the special interest of the Fermanagh area and the best places to recommend to guests	Geopark Staff	FSC
To hold two cross events for Fermanagh, Cavan, Donegal, Sligo and Leitrim attractions and accommodation providers to assist them in becoming familiar with each others' products.	FLT/FI North West	

7 Vulnerable Landscapes

When the mapping of ecological sensitivity, landscape sensitivity and heritage sites is undertaken and overlaid (see map (9a and 9b) it is clear that the whole of Upper and Lower Lough Erne needs to be treated as a sensitive site and that development projects and programmes need to be well designed, take account of environmental sensitivity and to be well sited to ensure minimum impact. The highly sensitive sites of Lower Lough Erne (Map 9a) mainly consist of the islands and wooded peninsulas together with the Lough Navar escarpment and some important woodlands and wetlands close to the Lough. The Lough in many places has a wooded fringe that is important for birds and wildlife and there are many heritage buildings and structures that provide roosts for bats. The whole of the open Lough is also considered sensitive given its importance to birds and this will vary from season to season. Boa Island has a high density of built heritage sites which must be taken into account in planning tourism and recreation development in that area. Other areas have important clusters of historic monuments.

On Upper Lough Erne, which has a higher density of nature conservation designations, all of the open water is subject to SPA and ASSI designation and there are significant sections of linear waterway that are both highly sensitive from a landscape and ecological point of view including parts of Erne navigation south of Enniskillen and many of the bays and inlets that are off the navigation. The whole of the eastern shore is sensitive from a visual and landscape point of view whilst some of the wooded islands are National Nature Reserves.

In terms of policies for developing tourism recreation and commercial products based on these the Upper Lough presents more difficulty than the Lower Lough in that the Lower Lough has more settlements and developed areas in proximity to the shoreline. It is primarily in these settlements that the development of tourism and recreation services and infrastructure should be considered and beyond this in the sites that already have a level of existing visitor and recreation infrastructure such as Castle Archdale, Tully Bay and to an extent Castle Caldwell. The Upper Lough has very few waterside settlements and the boat clubs, marinas, outdoor centres and Council and Waterways Ireland jetties, amenity areas and sites such as Crom and Derryadd present opportunities to develop facilities to support visitor activity on the shores and on the water which complement the area. In general terms new infrastructure, except for jetty replacements and upgrading of facilities should be considered mainly within existing settlements and visitor hubs rather than being sited in new, previously undeveloped areas

The most appropriate site for the development of substantial recreational and visitor opportunities is the town of Enniskillen which benefits from its position on the waterway but does not capitalise on it except for visiting cruisers and as a starting point for boat trips. Enniskillen presents the best opportunity for the development of an activity hub, presenting opportunities for boat hire, taster sessions, waterbus activity and marine services.

The highly vulnerable nature of the area, and its rich historic past presents a major opportunity to integrate the study of nature, wildlife and culture into tourism and recreation products. It also suggests the type of water-based activity that it is most appropriate to focus on, i.e. angling holidays, cycling and walking, products based on exploration, learning and discovery including geology, and guided experiences to complement the touring, cruising, and domestic watersports activity already so successful in the region.

