



Fermanagh & Omagh
District Council
Comhairle Ceantair
Fhear Manach agus na hÓmaí

Tourism Development Strategy and Action Plan

for

Fermanagh & Omagh District Council

Final Report

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1 Introduction

Fermanagh and Omagh District Council was established in April 2015 through the reorganisation of local government in Northern Ireland. It brings together the former legacy councils of Fermanagh and Omagh District Councils. The new Council area comprises nearly 3,000km² and is home to 115,000 people. It is the largest geographically of the 11 new councils, but with the smallest population¹.

The Council has committed to economic development and tourism as policy priorities, acknowledging the importance of sustaining jobs and ensuring place competitiveness. The geography of the new Council and its organisational context are different from before and necessitate a new analysis of how the local authority and its stakeholders throughout the tourism sector should operate to stimulate and further grow the tourism economy.

The context for tourism has also changed in other ways:

- Fermanagh and Omagh District Council's brief and remit have been broadened in the areas of community planning, economic and tourism development, giving it additional powers to intervene in these areas;
- Tourism Northern Ireland's (TNI) role and focus has changed to provide a stronger area focus, following a Northern Ireland Executive review of tourism structures².

Fermanagh and Omagh covers two of the nine designated Northern Ireland tourism destinations – Fermanagh Lakelands being wholly within the new Council area and the Tyrone and Sperrins destination being shared with a number of other local authorities. In terms of ranking and status, Fermanagh and Omagh achieved:

- 388,000 trips and over 1.06m overnight stays in 2014 (5th local government district out of 11; 8% of the NI total) valued at £64m (3rd highest of 11; 8.5% of the NI total)
- Just under 3,500 jobs in tourism and hospitality sectors (almost 6% of the NI total, and 9% of all jobs in Fermanagh and Omagh)³
- 4,295 beds (10% of the NI total; the 3rd highest in NI), with strong representation in the self-catering sector.

This tourism development strategy identifies performance across the area, key issues, challenges and opportunities for the future. The tourism products are relatively well known, but we restate these to provide readers with a new baseline for assessing future performance. The establishment of the new Council provides exceptional prospects to redefine how tourism is managed and developed. Crucially, relationships between local government, the tourism trade and operators will impact on tourism's success for many years in the future. That is why this strategy is so important in defining these parameters and giving the best chances for success in the future.

The tourism development strategy addresses four complementary strands:

- Market demand (where visitors are from, how many of them, what they like, what they want);
- What is available in the destination (attractions, activities, natural and cultural heritage, retail and eating facilities, events etc.);
- The transport and IT infrastructure gaps;
- The ambitions and aspirations of the tourism trade, community and the new Council itself, in part expressed through the Community Planning process and the Economic Development Strategy.

¹ Comprising 20% of NI's land mass but only 6% of the population

² The Hunter Review

³ This is for 2013; TNI used 2014 data not yet available publicly, demonstrating 3,800 jobs.

1.1 Project Purpose

The key aims of Fermanagh and Omagh District Council in commissioning the strategy are:

1. To set a framework for future growth and development of tourism, particularly identifying the constraints that need to be addressed;
2. To set the priorities for the tourism sector, including targets, marketing strategies, brand guidance and development and product development;
3. To identify factors that will further improve profitability in the tourism sector, stimulate further investment and create new jobs;
4. To demonstrate how tourism's role as a vehicle for economic growth can be maximised; and
5. To review the existing tourism governance structures and recommend appropriate structures for future governance arrangements.

The framework established by the tourism development strategy must integrate local, regional and national tourism delivery and support innovative and sustainable tourism development and growth, while enhancing capacity for wealth and job creation. The importance of tourism across the Fermanagh and Omagh area makes it a leading and key sector for inclusion in the list of sectoral priorities within the economic development strategy and priorities of the new Council.

1.2 Methodology

The preparation of the tourism development strategy has been undertaken using the following methodology:

1. Face to face and telephone consultations with stakeholders and tourism operators;
2. Workshops with tourism trade in Fermanagh and Omagh;
3. Survey of tourism trade in the area;
4. Discussions with elected members of the Council;
5. Desk research – looking at marketing information, existing national and local policies, planned developments etc.

Guidance and direction of this commission has been provided by a group of senior tourism and economic development officers in the Council. Those consulted in the preparation of this plan are listed in the appendices.

2 Policy Appraisal and Organisational Structures

The new Council has extended powers and the remit to safeguard and support tourism development within its area. There also exist two local agencies supported by the Council, Fermanagh Lakeland Tourism and Destination Fermanagh with various roles in tourism strategy and delivery. Fermanagh Lakeland Tourism is one of the three membership organisations remaining in NI⁴, with over 300 members. Meanwhile, the former Omagh area has no additional agency involved beyond the local authority itself.

Crucially, the establishment of the new Council, with a wider remit and stronger powers, offers opportunities to:

- Redefine the coordinating and management role of the Local Authority (LA); and
- Identify ways in which support structures might operate across the District.

The strategic context for destination development in Northern Ireland is conditioned by the Department for Enterprise, Trade and Investment's (DETI) and Tourism Northern Ireland's two-tiered approach to tourism delivery⁵. In this two tiered framework, DETI, other Government agencies, Tourism Northern Ireland, Tourism Ireland (TIL) and Invest Northern Ireland (INI) have strategic NI-wide responsibilities – setting overall policy, direction, determining key markets and investment priorities.

At local level – which can be defined by destination or LA area - responsibilities for tourism delivery fall to the LAs, tourism partnerships or visitor and convention bureaux (where they exist), and to tourism operators, responsible for the quality of the visitor experience and destination competitiveness. Significantly, the two tier structure is not affected by the recent review of tourism delivery structures (the Hunter review).

2.1 DETI Tourism Strategy

As importantly, the current NI Executive's (draft) Tourism Strategy aims do not change, until such time as the updated Strategy for Tourism is published⁶. The strategic context then for tourism development and delivery in Fermanagh and Omagh remains the current (draft) DETI Tourism Strategy:

- Increase visitors in NI from 3.2m (in 2010) to 4.5m by 2020;
- Increase earnings from tourism from £529m to £1 billion by 2020;
- Progressively accelerate spend by visitors;
- Target specific markets and market segments;
- Support indigenous high quality businesses to grow; and
- Be “visitor inspired” in all our actions, by which we mean visitor responsive and aware.

This strategy will need to be looked at again in the light of the outcomes of the DETI/TNI review of strategic priorities.

2.2 DETI and Tourism Northern Ireland Revised Tourism Strategy

At the time of writing, work is currently underway to prepare a new tourism strategy for Northern Ireland, to update and replace the draft Tourism Strategy to 2020 which has prevailed to date. The direction and priorities of the new strategy are unknown at this point with work still to be undertaken. The new strategy is expected to be completed and released for consultation in autumn 2016. While certain influences and objectives are unlikely to be replaced - innovation, entrepreneurship, digital marketing, etc. – the ways in which these might be delivered is uncertain, as would be the product development and geographical priorities, which may impact Fermanagh and Omagh.

⁴ Others being the Belfast and Derry Visitor Convention Bureaux

⁵ We illustrate this in the appendices

⁶ At the time of writing, DETI is planning the preparation of an updated/new strategy, with consultative workshops in February 2016. It is too early to be able to identify, at the time of writing, what the themes and priorities of the new strategy are

2.3 Local Policies and Priorities

There are a number of local strategic contexts, which impact and influence this Tourism Development Strategy and the subsequent actions that emanate from it, these are:

1. The plans and priorities of the new authority, including the Fermanagh and Omagh District Council Corporate Plan, the Community Plan and the Economic Development Plan, being prepared concurrent with the tourism development strategy . Tourism is recognised as a major economic activity, although the dominant SME and micro business structure of the sector suggests the need to support the local business base with tailored solutions and continue to promote the tourist offering on a global scale. In addition, there is a need to better integrate tourism and cultural activities to support local economic development and development of the tourism economy
2. The plans and strategies of the former authorities (legacy councils) include regeneration frameworks for Enniskillen and Omagh Towns (Masterplans) and the Omagh vision “Towards a City Vision for 2025”. These articulate aspirational, built environment and land use enhancements to improve the quality of life and wellbeing in and around the main towns.
3. Tourism plans have been well articulated through Fermanagh Lakeland Tourism Area Plan 2013-2020, Destination Fermanagh – the Vision 2006-2016 (and Tourism Strategy Update 2010), Tyrone and the Sperrins Destination Management Plan and the Sperrins Region Outdoor Recreation Action Plan (2013), and Wild Adventure in Tyrone & Sperrins, 2015. What these and other assessments and reviews in e.g. forestry, outdoor activities, angling etc. demonstrate is a well-researched understanding of the products and attributes of the area. Some may be aspirational, but nearly all of these tourism related assessments identify the actions necessary to deliver added value and better place competitiveness.

While there is a need to focus in the Tourism Development Strategy on “who does what, when and how” we also need to reaffirm which of the priorities articulated in these reports will be the tourism drivers - relating to markets and visitor demand - bringing most economic value in the next five years.

4. Tourism Northern Ireland’s preliminary research on Fermanagh and Omagh’s strengths and market opportunities is also relevant. In mid-2015, Tourism NI identified the challenge facing the District.

“Fermanagh is blessed with enviable natural resources and has enough supporting tourism product to satisfy current demand, the Lakelands experience hasn’t been brought together holistically and the current tourism business model is not sustainable. Omagh is not functioning as a tourism destination in its own right... the area is “attraction led”. The increased potential of the Ulster American Folk Park can be maximised as a hub of the genealogy/ connections experience. Tyrone & Sperrins is not recognised nor is it functioning as a tourism destination/area in the eyes of the visitor. There is an opportunity to extract ‘outdoor’ experiences and integrate (them) into a wider NI proposition to drive growth to the area.”

5. ICBAN identified the cross border region as having the potential to develop further its unique tourism offering of coastline, lakes, inland waterways and hills, to the benefit of both residents and visitors. ICBAN’s Strategic Framework for the Central Cross Border Region 2013-27 identifies, amongst other things, the need for a cross-border regional tourism strategy. ICBAN recognises that no single tourism strategy will be applicable to all parts of the area, but that there are elements which are common across the Region, including the rich natural environment and cultural and heritage. A Regional Tourism Strategy could examine regional tourism branding/ identity; flagship regional tourism assets and plans to maximise their tourism impact in the Region; leisure/ adventure/ activity tourism, including an action plan for cycling and walking, embracing the Greenways concept; building on the Cross Border area’s rich cultural heritage. ICBAN has also initiated a cross border literary trail, which in Fermanagh and Omagh area encompasses the Happy Days Beckett Festival and The Benedict Kiely Weekend.
6. The Council’s Corporate Plan and emerging community plan and economic development strategy set the context for tourism, destination development and management in the area and especially its links with community and environmental policy issues. Tourism issues and opportunities cannot be divorced

from other economic development policy areas - business development, rural development, countryside access, town centres, village renewal, regeneration, skills, infrastructure and investment. The tourism development strategy is also based on the ambitions, aspirations and targets of tourism operators themselves and the behaviours of the market, both explored further in this document.

7. Through key statistics - 9% of all jobs in Fermanagh and Omagh or 3,500 jobs; 3rd highest local government district in NI for trips, at 388,000 and 1.06m overnight stays or £64m revenue⁷ – we can demonstrate that tourism is already an economic driver and should be further endorsed to ensure the potential for growth is exploited. The economic development strategy for Fermanagh and Omagh ranks tourism as one of the five core sectors in the regional economy.


⁷ 2014

3 Key Findings: Tourism Performance

3.1 Baseline Information

Tourism in the Fermanagh and Omagh accounts for:

Table 1: Fermanagh and Omagh Key Facts

Trips, Nights, Spend*	2012	2013	2014	2014 v 2013	2014 % of NI	 <p>941,604 visits to visitor attractions in Fermanagh & Omagh in 2014 - Belleek Pottery Visitor Centre and the Ulster American Folk park were the most popular</p> <p>3,448 tourism jobs in Fermanagh & Omagh in 2013</p> <p>9% of total employee jobs, increased by 6% between 2012/ 13</p>
Trips	295,061	364,682	387,703	+6%	8%	
Nights	845,443	1,215,312	1,067,134	-12%	7%	
Spend	£35.7m	£86.3m	£64m	-26%	8%	
Av length of stay	2.9	3.3	2.8			
Av spend per trip	£121	£237	£164			
Av Spend per night	£42	£71	£60			
No of Beds	4,295 beds (10% of the NI total; the 3 rd highest in NI), with strong representation in the self-catering sector.					
*Based on data published by the Northern Ireland Statistics and Research Agency (NISRA). Figures have been challenged for such wide discrepancies, one year to another						

3.2 Tourism Products: Supply

The Loughs and Lakes of Lough Erne are a superb recreational and tourism resource and is what differentiates the region from other destinations in Ireland and Northern Ireland. Together with the landscape and mountains the tourism product across the area is well defined in terms of attractions; rural heritage (forests, loughs and lakes, countryside, the Sperrins, the UNESCO Geopark); outdoor activities; cruising; events and history and heritage. It is these that provide the region’s competitive advantage.

Water Based Resources

Canoeing

One of NI’s premier canoe trails is on Lough Erne, a 50 kilometre trail spanning both Upper and Lower Lough Erne.

Cruising

Fermanagh has generated a strong reputation in the cruising market, with more than 700km of rivers, lakes and canals, linking to the Shannon-Erne Waterway with navigation as far as Limerick.

Fishing

Coarse and game fishing is popular throughout the area, with fishing on Upper and Lower Lough Erne and many loughs across the area (e.g. Corry Lough, Navar Lakes, Lough Ash, Moor Lough, Lough Melvin).

Water-based activities

There are many opportunities across the Lakes for visitors to get out on the water on a casual basis. They include day boat hire, canoe hire and guided canoe trails and sailing tuition. Additionally, experienced water sports enthusiasts with their own equipment can access the water.

Guided Boat Tours

Guided tours are available generally from Easter to the end of September on both Lower and Upper Lough Erne for individual visitors and groups and private parties.

Land Based Resources

Rural Heritage

The Sperrins are a defined Area of Outstanding Natural Beauty (one of only eight in NI) and the cross border Marble Arch Caves Global Geopark is designated by the Geopark Network and UNESCO.

At 119, there is a disproportionately strong representation of Areas of Special Scientific Interest (ASSIs)⁸ in the area; 19 of NI's 57 Special Areas of Conservation; three Special Protection Areas, designated to help conserve internationally important areas for breeding, over-wintering and migrating birds; eight of NI's 16 Ramsar wetland conservation sites and 13 nature reserves across the area⁹.

Outdoor Activities

Major outdoor activities are cycling, walking, angling, canoeing, as well as golf and horse-riding.

- Sustrans cycle routes cross the district and include part of routes 91, 92 and 95 as well as the Kingfisher Trail, which follows minor country roads through the border counties of Fermanagh, Leitrim, Cavan, Donegal and Monaghan. There are other well defined cycle trails in the Sperrins. While these offer many road cycling routes, most off road biking is informal on various forest and park sites, although Gortin Glen interests seek to establish a premier mountain biking facility and the Mountain Biking NI Strategy identifies development at Navar Forest.
- Walking routes and trails include the long distance Ulster Way and Appalachian Trail as well as the Sliabh Beagh Way. Many countryside sites have shorter trails of varying intensity and length¹⁰.
- There are a number of golf courses, including the internationally renowned Lough Erne Resort, (and home to two championship course, the Faldo and Castle Hume courses), Omagh Golf Club, Enniskillen Golf Club and Fintona Golf Club.
- Horse-riding is a minority activity, with six stables across the area.
- There are many activity operators across the area, catering to various markets, including corporate, hens and stags, friends and families.

A major constraint with outdoor activities is the sometimes limited access to the countryside, especially in The Sperrins.

Attractions

Major attractions in the area comprise the Ulster American Folk Park, Belleek Pottery, Marble Arch Caves UNESCO Geo Park Caves¹¹, Florence Court and Castle Coole, An Creagán and Dún Uladh Cultural Heritage Centre. 550,000 visits were made in 2014 to the 14 attractions that subscribe to the NISRA visitor attractions survey; the largest attractions in terms of visitor numbers was Belleek Pottery Visitor Centre (191,000 visits) and the Ulster American Folk Park (130,000). A summary of visitor attraction numbers is detailed in appendix 10.6.

Events

There are a wide range of events across the year across the area, many with community objectives and some with tourism related objectives (i.e. to increase visitation and profile). Sustained events in the annual calendar are around Halloween, pre-Christmas and St Patrick's Day; Fermanagh has hosted and supported many angling competitions and car rally tours and in 2015 initiated the Water and Food Festival of Lough Erne.

History and Heritage

The area is rich in history and heritage, with important archaeological sites and evidence of 9,000 years of human habitation. There are more than 380 scheduled sites and monuments protected under planning policy for their historical value across Fermanagh and Omagh, plus 17 State Care Monuments, including Aghalurcher Church, Aghanaglack Dual Court Tomb, Enniskillen Castle and Drumskinny Stone Circle.

A significant Heritage Lottery Fund project is under consideration, jointly with Mid Ulster Council, for the Lower Sperrins to the Carrickmore Plateau to the Pomeroy Hill, offering exciting opportunities to integrate heritage tourism into the landscape and boost its appeal for the visitor.

⁸ See www.doeni.gov.uk/niea/protected_areas_home.htm

⁹ Sustainable NI: Places for People: A sustainable planning guide for councillors in Fermanagh and Omagh

¹⁰ See www.walkni.com/walks/?c=5 and www.walkni.com/walks/?c=6

¹¹ Awarded UNESCO status in 2015

Crucially the Ulster American Folk Park and a network of ancient houses and fortifications across the area provide a rich seam of attractions, linked to history and heritage, including Florence Court and Castle Coole. The Mellon Centre for Migration Studies and a network of reference libraries across the area offer a rich opportunity to explore family histories and develop the genealogical tourism product.

Accommodation

The accommodation story is one of two halves, with the Fermanagh area having 3,600 bed spaces and the Omagh area 631¹². In the hotel sector, Fermanagh has 776 beds spaces and Omagh 199. 17% of the available self-catering beds in NI are located within Fermanagh and Omagh, the second highest of all the new local government districts after Causeway Coast and Glens. The same is also true for non-hotel accommodation (guest houses, B & Bs etc.), with just over 1,000 beds across the district.

Even though Fermanagh and Omagh has the second highest levels of occupancy across NI in the hotel and self-catering sectors, the occupancy levels are still low - 59% occupancy for rooms (49% for bed spaces) in the hotel sector and 37% for self-catering (peaking at 53% in April to September). Annual occupancy in the guest house and B & B sector is 26% for rooms and 18% for bed spaces, suggesting either an oversupply¹³, or more likely poor visibility for customers.

While we recognise the weakness of data collection systems, the information presented here suggests useful analytical trends.

3.3 The Market: Current Demand

Evaluating visitor characteristics, behaviours and motivations to visit Fermanagh and Omagh is limited by the continuing collection of data from visitor attitude surveys by destinations; thus data for Fermanagh is robust, while that for the former Omagh area is aggregated within Tyrone and Sperrins visitor destination.

The 2014 Visitor Attitude Survey¹⁴, allows us to identify visitors' origination and characteristics:

- Fermanagh had 42% of its visitors come from NI, and Tyrone & Sperrins 55% (these are the 4th and 5th lowest respectively of the nine destinations);
- 23% of visitors to Fermanagh were from the Republic, with 16% the figure to Tyrone and Sperrins (Fermanagh represented the largest proportion of ROI visitors amongst the nine destinations, in part presumably because of proximity);
- 12% and 13% of visitors to Fermanagh and Tyrone & Sperrins respectively were from North America (2nd = with two other destinations);
- 48% of visitors interviewed in Fermanagh were day trippers, while the comparative figure for Tyrone & Sperrins was 90%;
- Fermanagh had the highest proportion of female visitors amongst all nine destinations (61%);
- Couples were strongly represented amongst Fermanagh and Tyrone & Sperrins visitors (42% and 43% respectively, the highest proportions amongst all the nine destinations);
- Motivations to visit: noticeable in Tyrone & Sperrins is that 54% of the survey respondents visited a specific attraction (interpreted as being the Ulster American Folk Park); noticeable in Fermanagh is the motivation of "A good deal on overnight accommodation" (13% of respondents which is 10% higher than any other destination);
- Other motivators were: Tyrone and Sperrins: "I/we wanted to escape from the normal routine and enjoy exploring the landscape and rural surroundings, local attractions and authentic pubs and cafes." Fermanagh: "I/we just decided to book a trip as a bit of a treat/change of scenery and wanted a good deal and nice accommodation." And "I/we wanted to indulge in a luxury break, in luxury accommodation and fine dining."

¹² Source TNI, 2014

¹³ Anecdotal comments highlighted that perhaps data returns to TourismNI might not give full picture of occupancy

¹⁴ Source: Millward Brown Ulster, on behalf of Tourism NI

Tourism NI has undertaken broad-brush analysis relating to the individual local government districts. Thus, in Fermanagh and Omagh:

- Two thirds of overnight trips can be attributed to the domestic market, the 2nd highest of all NI districts (after Newry, Mourne and Down);
- Fermanagh and Omagh was in the bottom three of all NI districts in terms of the proportions of British, European and North American overnight trips (at 23%);

Tourism Northern Ireland and Tourism Ireland have categorised the market segments for NI and ROI and for Great Britain, Germany, France and North America and identified their characteristics and motivators. These are summarised in the appendices.

However, the distribution, or proportion of visitors coming to Fermanagh and Omagh from each market segment is not surveyed or analysed and we can only deal in the generality of the appeal of the area to each segment:

Table 2: Fermanagh and Omagh key segments

NI & ROI market segments and key motivators	Great Britain, Germany, France and North America market segments and key motivators
<ul style="list-style-type: none"> • Time Together - gentle walking, relaxation, natural scenery, cultural experiences • Mature Cosmopolitans - authenticity, exploration, scenic drives, natural beauty, relaxation • Family Fun - quality time, safe, child orientated attractions, value for money offers • Young and Lively (ROI only – entertainment, contemporary culture and music festivals 	<ul style="list-style-type: none"> • Social Energisers - lively pubs, good food, festivals, entertainment • Culturally Curious - megalithic or early Christian sites, castles, gardens, museums and art galleries, unique local festivals and events • Great Escapers - breath-taking landscapes, remote and exciting places, gentle exploration – walking, cycling, boating

There is quite a lot of data on the users of and demand for facilities within individual sectors or attractions. These give an insight into the performance and appeal of the tourism product of Fermanagh and Omagh, but it is only a snapshot.

Each market segment relates to priorities established by Tourism Northern Ireland: so, for instance, outdoor activities and the natural environment relate to TNI’s “Unique Outdoors” experiential opportunities, while other themes in Fermanagh and Omagh district area relate to “Coasts and Lakes”, “Living Legends”, “Naturally NI” and “Culture and Creative Vibe”. The industry market research is summarised below.

Outdoor activities

Major outdoor activities are cycling, walking, angling, canoeing, as well as golf and horse-riding. Many niche outdoor activities have been developed, especially by specialist activity providers. These might include high adrenaline activities such as zorbing, zip wiring, downhill mountain biking, orienteering and climbing through to more passive activities such as walking the dog, pony trekking, wildlife watching etc. All these take place within the envelope of the countryside, parks, forests, hills, loughs and lakes.

In 2009 Sport NI estimated there to have been 810,000 forest related tourists in Northern Ireland – comprising 168,000 out of state visitors; 184,000 domestic holiday makers (i.e. staying overnight); and 458,000 domestic day visitors. In terms of the activities undertaken in Northern Ireland evidence from household surveys (Public Opinion of Forestry 2010, Northern Ireland) and related research also conducted by the GB Forestry Commission, suggest that general visitors (i.e. those visiting forests for walking, picnics and recreation) predominated (62%), followed by visitors cycling/ mountain biking (15%) and those engaged in nature watching activities (15%). There is much smaller niche representation by visitors, active in horse-riding, water-based activities, and rallying (2.5% of visitors) in forests¹⁵.

¹⁵ NITB & Forest Service-Assessment of Existing and Potential Tourism Development Opportunities Available from NI Forests, 2013

Road Cycling

Sustrans estimates that the cycle tourism market is valued at £1bn p.a. and that long distance cycle routes generate as much as £30m a year to the economies they pass through, sustaining over 600 full time equivalent jobs. In Scotland cycle tourism is estimated at £239m p.a. and in the Republic, €240m. This overview should be tempered by data relevant to Fermanagh and Omagh, but there is little available. The 2014 visitor attitude survey identified that between 39% and 49% of visitors visited a forest, park or garden¹⁶; between 19% and 35% were engaged in hiking or walking; but in Tyrone and Sperrins only 1% were engaged in cycling and in Fermanagh 13% were so reported. This wide variation indicates the unreliability of official statistics.

The benefits of cycle tourism are clear - it provides incentives for people to visit an area and can help to attract new types of visitor who stays longer and spend more in a destination; cycle tourism can support existing local trade (particularly in hospitality sector) and offers business start-up opportunities (such as bike-hire), particularly in rural areas. It is an environmentally sustainable; uses existing facilities and helps disperse visitors.

Despite the spectator appeal of the Giro in 2015, Fáilte Ireland has identified a significant drop in cycle tourism, in large part because of perceptions of unsafe roads. Sustrans cycle routes cross the area (see section 3.2 above); any strategy to attract more cyclists must focus on the benefits of safe roads or off road trails, as at An Creagán., and Gortin Glen within the district (see below) and Blessingbourne just over the boundary.

Mountain Biking

In May 2014, the Northern Ireland Assembly undertook an Inquiry into the Benefits of Cycling to the Economy. Outdoor NI's web site www.cycleni.com generates 80,000 visits every year, 43% of whom are from Northern Ireland.

The three sites of Davagh Forest, Rostrevor and Castlewella (all outside Fermanagh and Omagh) had a combined estimate for the first year of 85,000 visitors. These facilities are developing a positive reputation and the Gortin Glen community aspires to create mountain biking facilities, with plan well developed;

The 2014 -2024 Mountain Biking Strategy for NI identifies under development 4 initiatives for Fermanagh and Omagh:

- Fermanagh Lakelands is one of 4 short break mountain biking destinations in Northern Ireland
- Gortin Glen Forest is one of 8 National Trail Centres within Short Break Mountain Bike Destinations
- Florence Court is one of 6 of Regional Trail Centres within Short Break Mountain Bike Destinations
- Development of Long Distance Rides - possible connection of Enniskillen to Belcoo and Belleek that may include Lough Navar.

Two issues exist regarding the appeal of Fermanagh and Omagh for mountain bikers:

- New (formal) facilities would have to compete with the established venues, which anecdotal evidence suggests succeed in attracting day visitors, but, to date, limited overnight visitors;
- Informal trails in Fermanagh and Omagh in forests and on hills are not well publicised, in part because of access issues (and the reluctance to promote trails where access is not assured) and because no agency has pulled the mountain biking opportunities together in the area and promoted them.

Walking Routes

Between 19% and 35% of visitors were engaged in hiking or walking in Tyrone and the Sperrins and Fermanagh in the 2014 Visitor Attitude Survey. This might have been short walks (say, from the car) to long distance walks or hiking in the hills or forests. Again, there is limited statistical data available for the number of people who walk or hike and their satisfaction with the facilities available in Fermanagh and

¹⁶ Data was still disaggregated in 2014 between "Tyrone and Sperrins" and "Fermanagh"

Omagh. The most significant factor limiting the development of a quality walking product within the Sperrins Region concerns the issue of liability¹⁷.

2013 market research by Fáilte Ireland into the walking market identified that “Promoting Ireland as an activities destination is about using Ireland’s unique selling point in the same way as for general marketing; the activity is a means of enjoying the Ireland experience.”

The implication for Fermanagh and Omagh is that while some visitors will be motivated to visit specifically for walking or hiking, the main opportunity is for the destination to be promoted and walking or hiking presented as an activity that can be undertaken once here. As with other outdoor activities, issues of constraints on countryside access can be off-putting to visitors and clear directional signage and information about accessible routes needs to be available.

Coarse and Game fishing

There are a number of studies which indicate what the demand in Fermanagh and Omagh is likely to be from this sector. We hear much anecdotal evidence for the importance of the sector, and the former Fermanagh Council invested in angling related events, with both legacy Councils completing an Angling Strategy for the new Council in January 2015. This draws on research by others and deals with all angling related issues, not just tourism and visitation (e.g. health, environment etc.)

2013 research¹⁸ for angling in Ireland estimated the value of out of state angling as being €280 million (direct and indirect expenditure), with evidence of a decline in recreational angling participation levels over the past decade. 2005 research in NI, estimated that angling from domestic and visitor markets) was worth £20.5m¹⁹.

While Fermanagh and Omagh are likely to be popular locations for angling (evidenced by the lakes, loughs and rivers in the area and anecdotally and by licence applications²⁰ through DCAL and the Loughs Agency, who both have responsibilities across the District), there is very little data on the numbers and real value of angling tourism to the District, except through individual events/competitions and through a limited number of fishing lodge style businesses. It is estimated that Fermanagh and Omagh might have 20 -25% of this market.

We conclude that the coarse and game fishing sector is high yield (4.9 days per trip and £707 spend per trip) and extends visitation beyond the summer months, but numbers participating/visiting are limited. This suggests that while supply side facilities and water quality need to be concentrated on, marketing needs to be highly targeted and segmented (e.g. to fishing clubs).

Canoe Trails

The Water Sports Participation Survey for 2012 estimated that canoeing/kayaking participation was at an all-time high with a participation rate of 3%, equating to 1.5 million adults in the UK. This represents the largest participation among the activities that constitute “any boating activity”. That said the numbers who use the Upper and Lower Lough Erne is unknown.

Golf Courses

All the golf courses in the district are parkland courses, for which lower demand exists from out of state visitors (who like to play links courses); only Lough Erne Resort and Omagh golf courses are in TNI’s quality assurance scheme.

Horse-Riding

In the UK, the overall number of those who ride has fallen, from 3.5 million in 2011 to 2.7 million in 2015; there has been a decline in regular riders, from 1.6 million in 2011 to 1.3 million in 2015, but there has been growth in the number of riders aged between 16 and 24, rising from 368,000 in 2011 to 403,000 in 2015.

¹⁷ Outdoor Recreation Sperrins Audit 2011

¹⁸ Socio-Economic Study of Recreational Angling in Ireland (for Inland Fisheries Ireland by Tourism Development International)

¹⁹ DCAL, the Loughs Agency, Irish Lights Commission and NITB conducted a Social and Economic Impact appraisal in NI in 2007 (PriceWaterhouseCoopers and Indecon). The £20.5m was split: £13.4m for game angling; £3.2m for coarse angling and £3.9m for sea/shore angling.)

²⁰ Which don’t differentiate between residents and visitors

Fáilte Ireland's 2013 survey estimated the direct economic value of horse-riding as €76m p.a. The survey also identified that equestrianism is of greater interest to the British than to the mainland European markets. Because it is a specialist interest activity it would need careful targeting. The domestic market (i.e. ROI) offers more interest in horse riding/ pony trekking than mainland Europe, with a core potential of around 400,000 offering a good opportunity to develop this niche for Fermanagh and Omagh.

Cruising

The inland waterway cruising market is also a niche that Fermanagh and Omagh has a strong foothold in. Lower and Upper Lough Erne are linked to the Irish inland waterway system. Irish Tourism Industry Confederation (ITIC) estimated that the boat rental sector (throughout Ireland) catered to an estimated 14,500 visitors in 2013, generating an estimated €20m in direct tourist expenditure (estimated at €40m in economic activity, when inducted and indirect expenditure are included)²¹. Two companies (Carrick Craft and Emerald Star/Le boat) account for just over two thirds of total capacity, with a reported additional 50 boats available for hire from NI operators with four bases on the Erne system. Carrick Craft have one of their marinas at Bellanaleck, five miles from Enniskillen.

Germany remains the No.1 source of demand, accounting for almost half (48%) of all-Ireland rentals in 2013, a total of over 1,800 rental weeks. Germany with combined demand from Switzerland and Austria, accounts for almost two out of every three (63%) of total rental demand and 80% of demand from overseas.

The planned combined cross border development of the water based market for cruising by Waterways Ireland, reportedly to be promoted through Fáilte Ireland and Tourism Ireland, suggests the opportunity to continue to promote this sector for Fermanagh and Omagh, working with the cruise boat operators.

History and Heritage

The National Trust defines heritage tourism as "traveling to experience the places, artefacts and activities that authentically represent the stories and people of the past." Archaeological Tourism is a major market segment, evidenced by worldwide visitation to ancient historic sites, old cities and towns, castles and old homes and closer to home the Derry Walls. Sometimes called cultural tourism, the line between visitation to ancient sites and historic sites is blurred with genealogy (below) and visits to art galleries and museums.

The strategy cannot find evidence of the demand for and motivation to visit being stimulated by Fermanagh and Omagh's history and heritage except through the Ulster American Folk Park, which consistently has over 130,000 visitors each year, along with other heritage venues.

Genealogy

There is an estimated 80 million people across the world with Irish roots (Discover Ireland) and an estimated 25 million people worldwide that form the NI Diaspora (those who have migrated away from their ancestral homeland). Tourism NI estimate that over 15,000 overseas visitors participated in genealogical activities in 2009 while visiting NI²². Of these over 8,000 cited this as their reason to visit NI. The same research found that some 35% of ROI adults and 30% of NI adults would be willing to visit places linked to their family history.

Another source suggests that NI counts up to 20,000 annual visitors from overseas who participate in genealogical activities during their trips²³.

The Ulster American Folk Park (UAFP) and Mellon Centre for Migration Studies, along with reference libraries and voluntary genealogical services and tour guides, suggest that this is a strong strand for the area, but there is limited information about how many people make their visit to the UAFP and to the area based mainly on genealogical motivation.

Among adults across the Island of Ireland there is a clear appetite for genealogy. Some 54% of NI adults and 58% of ROI adults claim to be interested in tracing their family history (Mintel/Toluna 2010), through when

²¹ Ireland's Inland Waterways Review & Outlook, June 2014, ITIC

²² Genealogy and Roots Tourism Date: March 2011, TNI

²³ www.familytreemagazine.com/article/genealogy-insider-genealogy-tourism

it comes to participation rates those actively involved in researching their family history are much fewer in number, with 14% and 19% respectively for Ni and ROI.

3.4 The Market: Trends and Future Demand

The future of tourism and the success of destinations will be determined by emerging trends and destinations’ response to them.

Key trends of the tourism sector are²⁴:

Table 3: Tourism Trends

Trend Topics	Trends Themes
Economic	<ul style="list-style-type: none"> • Tourism continues to be a key driver of socio-economic progress which despite occasional shocks, has shown virtually uninterrupted growth, with expected growth to increase by 3.3% a year to 2030 • Growth in emerging destinations (+4.4% a year) is expected to increase at twice the rate of those in advanced economies (+2.2% a year).
Demographic and technological trends impacting destinations	<ul style="list-style-type: none"> • Enhanced use of the mobile and smart phones for information gathering and booking (as much as 25 % of the travel bookings in the US were done on a mobile device and that number will continue to rise). Destinations and operators are responding with their own mobile strategy or app to do business • Other technology changes relate to “beacon technology”, where operators will be able to push data and to seamlessly communicate with customers; integration of travel planning, booking tickets and hotels, a guide on arrival and for follow up on return home, instead of using different media or apps (Apple are developing such a solution at the moment) • New payment mechanisms to complete transactions when travelling; Finding the niche and personalising products and prices to meet individual needs and wants. This technology will adjust pricing according to demand and supply patterns at a day’s notice • New technology based operators like Airbnb and Uber have completely different business models compared to traditional travel companies. They are technology platforms that market privately-owned assets or resources. They are attractive because they offer lower prices, better accessibility, great flexibility, ease of use, including transparency and interactive communications • Social media channels such as review portals, blogs and forums have become very popular for planning trips, and are used intensively by more and more travellers. There were an estimated 1.55billion active monthly users on Facebook; 1 billion on YouTube; 540m on Google+, 400m on Instagram and 320m on Twitter, 1 billion on YouTube and 187m on LinkedIn • One of the most important trends for the future - 90% of online consumers worldwide trust recommendations from people they know, while 70% trust consumer opinions posted online
Activities & Experiential Travel	<ul style="list-style-type: none"> • Outdoor and activity tourism trends see the movement of adrenaline based activities to being the norm this tourism activity now attracts mainstream groups – professionals, families, groups of friends and a far wider range of people concerned with health and wellbeing, including the over 60s • Mintel reports that continuing growth in the activity market is likely to come from: these demographic segments and customers becoming more involved with packaging breaks as co-creators of their holidays/breaks

²⁴ Source: UNWTO

Trend Topics	Trends Themes
	<ul style="list-style-type: none"> • Short intense activity breaks are developing as an alternative or adjunct to city breaks • A desire to experience something different (experiential travel), particularly amongst ABC1s • Changing demographics, particularly in relation to the increasingly health conscious, environmentally aware ageing population • Economic reasons for increase in the “stay at home holiday” market are waning as the UK emerges from recession • Social media channels such as review portals, blogs and forums have become very popular for planning trips, and are used intensively by more and more travellers • While the luxury travel market is robust, other travellers look for service, quality and value for money • Travel has become a means of self-expression, self-definition and a whole fashion in itself. Holidays define our taste, status and how other people view us
Sustainability and war on waste	<ul style="list-style-type: none"> • Consumers are more concerned about eliminating waste and are increasingly aware of the environmental impacts of tourism, resulting in a boom of green travellers and eco-travel
On the up	<ul style="list-style-type: none"> • Learning on holidays • “Doomsday” Tourism (see it before it vanishes) • Religious Tourism • Food Tourism • Wellbeing • Film Tourism / Sports Tourism • Holidaymakers crave engagement with locals, as it makes holidays more interactive and gives them stories to bring home and tell to others; • Budget hotels, VFR, Quality Hostels, Camping / Glamping and Couchsurfing. • With a high disposable income and increased freedom to travel, the gay and lesbian market is an important yet often ignored market segment. • Media channels including TV and the mobile phone will soon be driven by the internet. Traditional advertising media will be less powerful. • Consumers are increasingly using the internet to connect with fellow travellers and strangers to enhance their travel experience
Safety and security	<ul style="list-style-type: none"> • Political instability, regional wars, terrorism, pollution and other crises have unfortunately become facts of daily life, and influence the need to feel safe and secure. In tourism, this results in tourists avoiding destinations that are perceived as unsafe

What are the implications for Fermanagh and Omagh of these global, societal, demographic and technological changes?

1. Firstly, competition from other destinations will be fierce, with world-wide travellers being spoilt for choice. Fermanagh and Omagh must therefore increase considerably its visibility and articulation of reasons to visit.
2. All aspects of marketing and selling the destination should be digitally focussed, with social media, smart phone enabled apps dominating. The role of print should be relegated to information provision once visitors are here.
3. Technological change must be monitored to watch what the implications are for the area.

4. The local authority and its stakeholders must advocate investment in broadband service delivery, for businesses and visitors and residents.
5. The importance of tourism as an economic driver must be communicated to residents and local (non-tourism) businesses. This must be complemented by reinforcing the fact that “tourism is everybody’s business” and encouraging strong positive welcomes to visitors.
6. There has to be better understanding of who Fermanagh and Omagh’s visitors are, what their characteristics and motivations are so that future marketing can be directed to the strongest niches for the area.
7. In a global context Northern Ireland is a safe destination and visitors will feel safe and secure when visiting the Fermanagh and Omagh district.

3.5 Product Gaps

There are a number of tourism product gaps and market failures across the area and the strategy catalogues these here, with the strategy and action plans seeking to address these.

Table 4: Fermanagh and Omagh Product Gaps and Market Failure

Table - Product gaps and Market Failures in Fermanagh and Omagh Council area	
Product Gaps	Market Failures
<ul style="list-style-type: none"> • Wet weather facilities • Full range of accommodation in the east of the district • 5 star hotel accommodation in the east of the district • Lack of bunkhouses and hostels across the area • Enough attractions and facilities across the area, to attract visitors and keep them in the area longer (convert from day to staying visitor) • Evening and week-end facilities for visitors, including opening hours • Land based facilities for water users 	<ul style="list-style-type: none"> • Limited activity of a ground handler infrastructure and operators • Tourism businesses weaknesses in collaborating and bundling product - not enough bundling and packaging of products • Distance from markets • Public transport to and within the area • Broadband and 3 / 4G infrastructure • Seasonality, with visitor peaks and troughs in demand, impacting business growth and product investment • Low accommodation occupancy (excepting 4 and 5 star) • Strong dependence of hotels and the area on the NI market and some 3 and 4 star hotels driving the business on deals/pricing • Lack of appreciation of the importance of tourism to the economy • Country access restrictions, limiting e.g. access to the lakes/water • Currency and VAT differentials between Republic and NI • Liability insurance for promoted walks and thus access to the countryside

4 Challenges & Issues

The tourism industry is an integral part of the Fermanagh and Omagh District Council economy. The destination is highly regarded as one of Ireland's best places to live in terms of its environment, cultural diversity and quality of life, which also makes it attractive to visitors, despite numerous competitor destinations. Fermanagh and Omagh has strengths in terms of its infrastructure and natural assets that support tourism, these are the elements of future success.

While Fermanagh and Omagh's tourism has many strengths, research and consultation with the tourism trade allows us to identify several challenges and issues, which need to be addressed in order to strengthen the destination's competitive place. Some of the issues are influenced by what is happening in the global market. Others are influenced by the domestic market and also identified in the findings of the 'DETI Review of NITB and Tourism Structures'.

The substantive issues are:

4.1 Seasonality

Seasonality is perhaps the biggest challenge for tourism in Fermanagh and Omagh and there needs to be a concerted effort by everyone in the tourism sector to tackle this Northern Ireland wide issue. Over 50% of the visits and value from tourism are experienced in the four summer months. This situation is further complicated due to the nature of some tourism businesses in Fermanagh and Omagh which close during the winter period.

4.2 Domestic Driven Tourism

Northern Ireland tourism is heavily dependent on local people taking breaks at home; they accounted for half the 4.5m overnight trips in 2014 of which the Republic of Ireland visitors' overnight trips were down by 3%. Fermanagh and Omagh has a high dependence on the domestic market for visitation with one of the highest proportions of domestic overnight visitors (65%) and one of the local government districts attracting the lowest numbers of out-of-state visitors. The domestic market is highly important to many tourism businesses and the market share needs to be maintained, but the focus on additional growth will need to come from out of state markets.

4.3 Currency and VAT

The Republic of Ireland operates within the Euro zone while Northern Ireland uses the sterling currency. The current disparities in the value of the £ against the € impacts on travel between the two areas. While in the past the £/€ balance was more even, the medium term predictions (i.e. for the next two or three years) suggest Sterling remaining high against the Euro. A number of businesses overcome the issue of exchange rate variances by accepting Euros.

There is also a cross border disparity in the lower level of VAT in the Republic of Ireland – VAT for hotel accommodation, admissions to cultural facilities (shows/cinema/theatre), amusement parks and restaurants is 9%, thus putting Northern Ireland at a competitive disadvantage. This is a macro issue that can only be addressed collectively by all stakeholders and will involve lobbying higher levels of UK Government.

4.4 Organisations and Partnerships

Many different organisations are currently involved with tourism management and promotion in Fermanagh and Omagh. The Council area spans two of the nine tourism destinations in NI and the destinations are not conjoined. The Sperrins is not wholly within Fermanagh and Omagh Council's area, as well as being dependent upon partnership arrangements with other LAs. Fermanagh has its dedicated membership and marketing organisation, Fermanagh Lakeland Tourism.

Local authorities have always been a significant contributor to tourism through the provision of services and infrastructure, and funding for activities such as marketing. Fermanagh and Omagh District Council

are operating visitor attractions, VICs and tourism development and support Fermanagh Lakeland Tourism. There are also a number of agencies and tourism associations²⁵ operating within the region.

Inevitably there is some duplication and overlap between these partners – predominantly in the Fermanagh area - in a situation of declining real resources. Meanwhile the Omagh area is missing any significant organisational infrastructure beyond the local authority itself. This imbalance on the one hand and duplication and overlap on the other, suggests the need for better alignment of partnerships and organisational structures to improve business engagement, communication and coordination of marketing and other activities across the whole of Fermanagh and Omagh.

4.5 Image & Identity

Tourism NI has identified a low name recognition and market resonance for Fermanagh Lakelands and Omagh and the Sperrins. There is a need to redevelop and reposition Fermanagh and Omagh (individually and as a composite) as compelling propositions for visitors, building the brand equity to help boost tourism and visitation. The area's natural assets provide a strong brand asset and should be central to future brand positioning. While this might be the “attack brand”, slipstream brands (aligned to tourism product propositions) can be developed by continuing to strengthen cross-border collaborative networks, develop and sell ‘Irish Lakelands’ as a destination and build on Omagh’s history and heritage and natural attributes.

4.6 Communities and Places

Fermanagh and Omagh comprises a diverse range of towns and villages, many with distinct characteristics and heritage (the importance of towns and villages have been identified in the Community Plan and Economic Development Strategy). Discovering more about the distinct nature of a locality is of interest to visitors and plays a significant part in the overall quality of their experience. While Fermanagh and Omagh rightly have strong visibility as significant market towns and population hubs, other smaller towns and villages lose their distinctiveness²⁶ and thus the reason to visit. It is important that the benefits of tourism and tourism spend by visitors is dispersed across the region so that everybody benefits.

4.7 Planning & Regulations

Tourism businesses understand the role of regulation and are tolerant of many aspects of ‘red tape’; however, they are frustrated by aspects that are seen as unnecessarily complex, inconsistent and obstructive. In some instances, regulation may be necessary and clear, but there are issues about communication with and understanding by the industry. Additionally, there are sometimes frustrations based on perceived inconsistencies in approach. The growing shared services agenda should assist in addressing these concerns.

4.8 Growing Use of Technology

The availability of good, reliable high speed broadband and 4G connectivity in Fermanagh and Omagh is essential for both visitors and tourism businesses. From research and consultation it was identified that there are many black spots where Broadband and / or 3 or 4G are not available.

The Council committed to a £3,000 grant scheme²⁷ for SMEs to upgrade to a faster, more reliable internet connection. This is useful, but there is still some way to go since the Fermanagh and Omagh areas have only 90% and 92.1% of the area respectively covered with Superfast broadband availability and 21% and 24.4% of premises respectively still have less than 2Mbps/second speeds²⁸. OFCOM estimates that over 90,000 households across Northern Ireland are unable to access a basic broadband service of 2Mbps and the vast majority of these (over 70,000) are found in rural areas.

4.9 Accommodation Supply

Accommodation plays an essential part in the supporting tourism infrastructure and is generally the single largest element in overall visitor spend in a destination. There is high quality provision in Fermanagh with

²⁵ e.g. Waterways Ireland, Destination Fermanagh, Flavour of Tyrone, Fermanagh Lakeland Tourism, Upper Lough Erne Tourism Association

²⁶ Compared to other Northern Ireland destinations – Causeway Coast and Glens, Mourne Mountains

²⁷ Connection Voucher Scheme

²⁸ Source: <http://stakeholders.ofcom.org.uk/market-data-research/market-data/infrastructure/infrastructure-2014/downloads/>

many award-winning accommodation providers, ranging from exceptional top-end hotels through to some major providers in other segments such as caravanning and camping.

The key issue with hotels based in and around Enniskillen is the high levels of occupancy²⁹ throughout the year and the reliance on the Northern Ireland (Belfast centric) business. This is driven by the deal and incentive led marketing of the hotels, which impacts on the regions capacity to accommodate out of state visitors, travel trade and tour operators.

However in Omagh there is a less developed accommodation structure, with limited hotel supply and limited accommodation suited to the activity tourism e.g. hostels and bunkhouses.

4.10 The Sperrins

Developing tourism in the Sperrins has been an ongoing issue, the previous loss of a single co-ordinating management body with responsibility for tourism development, management and promotion of the Sperrins region as a whole has resulted in the loss of visibility in the marketplace and loss of focus on product development and marketing.

The geography of the Sperrins encompasses four Council areas and each authority appears to be focussing on opportunities, development and marketing within its own area. This creates an inherent weakness across the Sperrins because no one organisation, local authority or team is tasked nor is sufficiently resourced and focussed to ensure that priority is given to tourism marketing and tourism product development across the area.

4.11 Tourism is everybody's business

There is evidence that tourism is underrated by many people, non-tourism businesses and sectors across Fermanagh and Omagh. While some evidence is anecdotal – some retailers not being supportive of events that aim to bring visitors into the area – other evidence comes to us through consultation. The disproportionate small size of the sector in Omagh and modest number of SME and microbusinesses reduces the visibility of the sector in Omagh too. Add to this that such a large proportion of visitors are from within NI, or indeed are day trippers, then perceptions of the value of tourism don't penetrate as far as would be desirable. Generating community support for tourism would make recruitment easier as well as beneficially impacting hours of opening, the night-time economy and importantly, the quality of the welcome for visitors.

²⁹ Consultations with hotels indicated a higher annual occupancy that stated in NISRA figures

5 The Vision, Strategy and Objectives

5.1 The Vision

The vision for Fermanagh and Omagh and for the new Council's role in tourism and the visitor economy is based on:

- The core tourism products and attributes of the area;
- The characteristics of current and potential future markets and market segments;
- The characteristics of the tourism industry, made up of private, public and community based operators; and
- The ambitions of the Council and its many stakeholders to grow tourism and tourism related jobs and wealth.

The tourism vision for the new Council should focus upon:

Vision for Fermanagh and Omagh

Fermanagh and Omagh will generate 5% p.a. growth in tourism to 2020 by value and volume by building on being one of Ireland's leading tourism destinations, with all stakeholders and businesses collaborating to maximise visibility, market appeal, the quality of welcome and experience of visitors and tourism's economic value across the whole district.

Objectives

These will be:

1. To establish Fermanagh and Omagh as a 'Must Visit' destination – sustaining and increasing the number of visitors to the area (Marketing);
2. To capitalize and further develop the tourism assets and facilities of the area, to heighten their appeal to visitors (Tourism Products and Product Development);
3. To work with and support tourism operators to maximize their competitiveness and contribution to the vision (Business Engagement and Development);
4. To ensure that the quality of visitors' experiences are exemplary (Destination Management);
5. To ensure the best structures and organisations are in place to support operators, disperse tourism across the area and achieve these objectives (Organisation and Management).

6 Strategic Themes

From the broad stakeholder consultation input and comprehensive market research, five key themes form the foundation of the Tourism Development Strategy to guide direction and drive growth over the next five years to position Fermanagh and Omagh as one of the foremost tourism regions.

1. Marketing and Visibility in the Market
2. Tourism Products and Product Development
3. Destination Management and Development
4. Business Engagement and Development
5. Organisation and Leadership

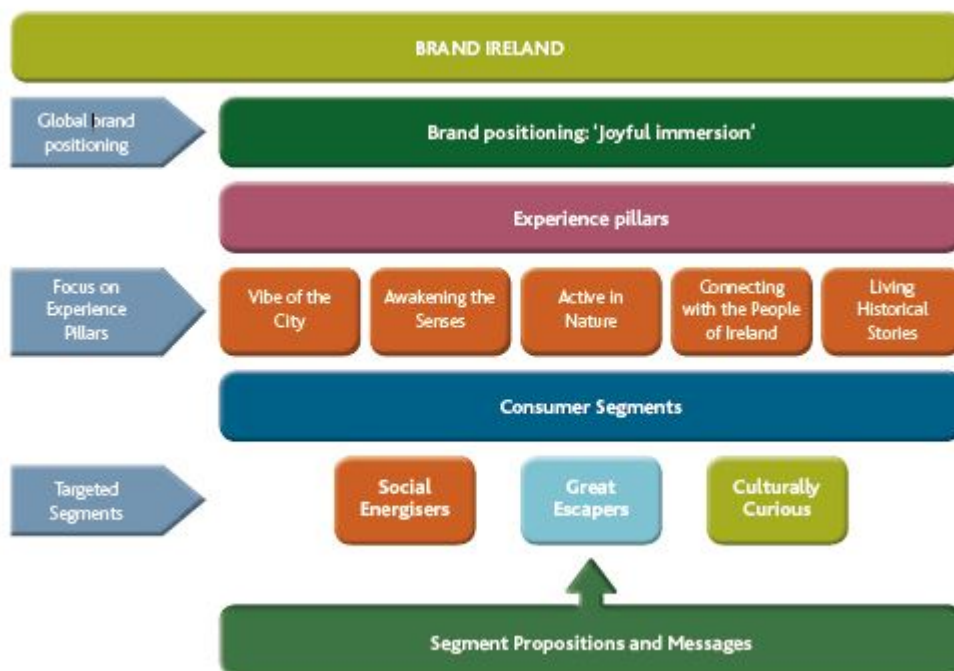
6.1 Marketing & Visibility in the Market

To gain a competitive advantage Fermanagh and Omagh must offer exceptional tourism products and opportunities for the consumer, presented in an inspiring and compelling fashion. Through strategic marketing partnerships, coordinated campaigns and innovative use of technology marketing tools, Fermanagh and Omagh's tourism businesses must reach existing and new customers to drive long term growth in the industry.

To achieve tourism growth the focus needs to be on targeting out of state markets while maintaining the area's attractiveness for the existing Northern Ireland market.

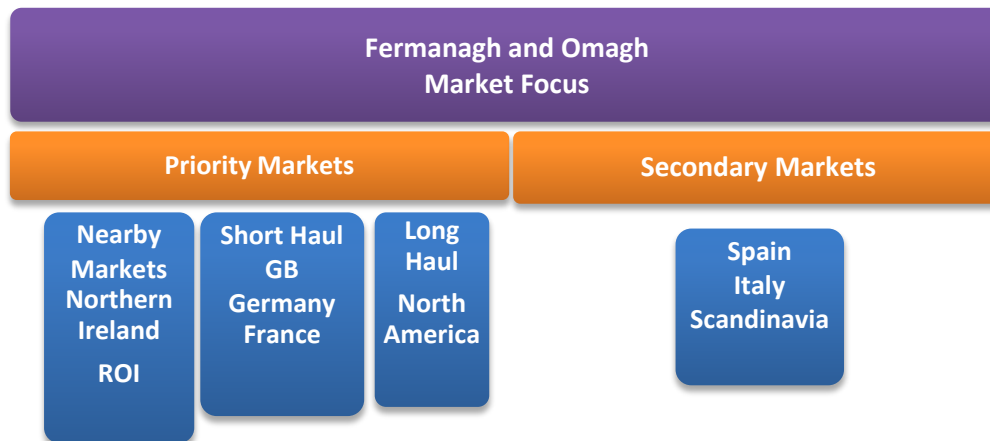
6.1.1 Marketing of Ireland and Northern Ireland

In recent years there have been significant changes in the development and marketing of Ireland to compete in international markets. Overseas marketing is now more focused than ever and based on revised targeted markets and segments. The diagram below demonstrates the integrated nature of the overall experience development framework for Ireland by Tourism Ireland and the fact that all developments are ultimately founded upon compelling stories.



6.1.2 Fermanagh and Omagh Market Focus

These following geographic markets³⁰ should be the focus of Fermanagh and Omagh’s new Tourism Development Strategy. All markets are important but those with greatest identified growth potential include Great Britain, USA, Germany and France with marketing activity appropriate for each target segment.



In nearby markets, consumers will typically be much more familiar with the area’s products. In these markets, the individual businesses and groups of businesses should work together to provide the more detailed information consumers require to make decisions to visit.

In the Short and Long Haul markets, such as GB, marketing the destination and demonstrating the quality of products and experiences to potential consumers should be aligned to Tourism Ireland promotions and opportunities. This work has been led to date by Fermanagh Lakeland Tourism in the legacy Fermanagh District Council and there is now an opportunity to consider how this work can be progressed and strengthened work across the new Fermanagh and Omagh District Council area.

6.1.3 Fermanagh and Omagh Market Segments

The following figure highlights the target segments for Fermanagh and Omagh, based on Tourism Ireland and Tourism Northern Ireland’s market analyses.

A table with motivators to visit for the market segments is included in appendix 10.4.

Table 5: Market Segments

NI & ROI	Great Britain, Germany, France, North America	Secondary Segments
<ul style="list-style-type: none"> Time Together Mature Cosmopolitans Family Fun Young and Lively (ROI only) 	<ul style="list-style-type: none"> Culturally Curious Great Escapers 	<ul style="list-style-type: none"> Golf Meetings & Incentives <p>Both these segments are niche and would be led by the private sector</p>

6.1.4 A New Approach to Marketing Fermanagh and the Sperrins

A new marketing approach is needed in order to effectively communicate reasons to visit Fermanagh, Omagh and the Sperrins. The destination marketing focus needs to move towards digital with a greater emphasis on technology and online marketing and reducing reliance on printed collateral. We acknowledge that print is still required for those who have made the decision to visit, once they get here.

Destination Image and Brand

Fermanagh and Omagh is an administrative region; it is not a destination brand. To stand out from the crowd, the “visitor destination” must capture people’s attention, inspire and forge positive reputations through compelling messages, stories and icons.

³⁰ Based on Tourism NI and Tourism Ireland priority countries

The challenge for Fermanagh and Omagh is to organise the promotion of tourism assets in a coherent and creative way to form a compelling proposition or propositions for consumers.

There was strong opinion throughout the consultation process from the private sector and stakeholders that Fermanagh and The Sperrins were 2 distinct offers and should be marketed and promoted separately.

However, the Tourism Northern Ireland destination review identified that:

Fermanagh Lakelands has a low name recognition and market resonance (especially in highly competitive international and off-island markets). The focus should be to continue and strengthen cross-border collaborative networks to develop and sell 'Irish Lakelands' as a destination by developing the Fermanagh Lakelands USP and brand as sub-proposition under this offering. The Lakelands and Inland Waterways was previously being developed as a premier destination by Fáilte Ireland, however it is understood that this will now not be developed further and is being absorbed into Ireland's Ancient East.

- Sperrins is not recognised nor is it functioning as a tourism destination/area in the eyes of the visitor. There is an opportunity to extract 'outdoor' experience and integrate it into a wider NI proposition to drive growth to the area.

The Ireland Brand developed by Tourism Ireland sets the framework for development and marketing of the destination to the identified international target segments.

In competitive positioning of the destination it is essential that the Lakelands brand be used as the primary filter for development and marketing decisions. Fermanagh Lakelands can only compete with well-established international destinations worldwide through a brand-led focus on its greatest strengths for the target segments i.e. the Lakes and experiences that deliver on the brand for the target segments and are internationally market-ready or could be market ready with some further development.

As previously indicated there is still a significant level of product development required for the Sperrins to be market-ready for the international consumer and this work needs to be undertaken before any additional out of state marketing activity is undertaken.

Recommendation

Fermanagh Lakelands Branding

A brand is the way in which consumers perceive or distinguish a destination. Our recommendation is that a review of the Fermanagh Lakelands brand should be undertaken to ensure that it encapsulates the key elements of the destination which make it unique and thereby distinguish it from other tourist destinations in the international market. With the Lakelands and Inland Waterways brand not being further developed there is an opportunity to consider in the review the positioning of Lough Erne as Ireland's Lake District / Irelands Lakelands or similar identity that would generate more international stand out and recognition.

This will ensure Fermanagh and Omagh as a destination is identifiable and attractive to potential visitors when making decisions to select one destination over another, by conveying and reinforcing positive images and messages of the area over a sustained period of time.

A key task of the branding exercise will be to agree with stakeholders a brand architecture or hierarchy of the Lakelands. This would be used to prioritise investment and to organise marketing and product development. It should include both locational brands and core product thematic brands.

The primary aims of a brand architecture are to:

- Achieve maximum profile and awareness
- Provide an overview to inform consistency in message – both visual and verbal
- Reduce duplication of marketing activity by the various agencies, local authority and private operators
- Support dispersal of tourism across the district
- Also used to inform economic development and inward investment marketing
- Support the development of international market-ready products that are commissionable, geared to the needs of the target market, offer a distinctive, authentic experience; reflect the high levels of

service expected by international visitors, and have marketing collateral geared to the international market.

The Sperrins

Promoting the outdoors and activity tourism in the Sperrins cannot be fulfilled without commitment to meeting a number of success criteria. These have been highlighted in the ORNI Recreation Action Plan for The Sperrins and the Forest Recreation Audit. Until these actions have been undertaken the recommendation is for promotion of activities through existing channels e.g. the Outdoor NI activity site – WalkNI, MountainbikeNI and through products offers on the Fermanagh Lakelands web site.

Investing in Icons

The overarching brand will build on the Tourism Products (the “attractors”) of the area; these are developed in more detail in section 6.2. In summary these are the “icons” that will have the most appeal to and attract visitors to the region and encourage them to stay longer and spend more.

Table 6:Fermanagh and Omagh Key products

Nature & landscape	Arts, Culture & Heritage	Activities	Towns, Villages & Local Communities including
Loughs, Lakes & Rivers Forests UNESCO Geo Park AONB Sperrins Gortin Glens	Marble Arch Caves UNESCO Geopark Florence Court Ulster American Folk Park Belleek Pottery Enniskillen Castle An Creagán Dún Uladh Genealogy Events & Festivals	Canoeing Walking Mountain Biking & Cycling Golf Fishing Horse Riding Cruising	Lisnaskea Belleek Irvinestown Kesh Carrickmore Fintona Dromoe Gortin Irvinestown Enniskillen Omagh

Technology and Tourism

Digital is also one of the most important communication channels for marketing, selling and promoting regional destinations and tourism products. The emergence of digital technologies has changed the way consumer’s access information. Social media is rapidly impacting the way consumers gather information and decide where to travel to.

Mobile services are now at the heart of how most people stay in touch, at home or out and about. In the UK, 95% of households use mobile phones and mobiles are also vitally important to business: 79% of SMEs use mobile phones³¹. Consumers’ use of technology is enabling them to make better-informed judgements about purchases and social media serves as “go-to” authorities for each other about the value and reliability of different options.

Technology has the potential to help dramatically improve business processes, better inform frontline staff, and enable enhanced service provision for tourism businesses. For the visitor, it can provide easy-to-use, accessible information that enables them to make good choices and customise their experience of Fermanagh and Omagh.

Fermanagh and Omagh needs to invest in online resources. To date, the focus has been on developing the Fermanagh Lakelands website. The shift now must be to mobile sites and applications, as mobile devices become the most common form of hardware for accessing digital content. Regardless of which path technology follows and which devices potential visitors embrace, from smart phones to iPads, digital content must be provided to the right people, at the right time in the right context.

³¹ Source: Ofcom Infrastructure Report 2014

Social Media is Mainstream

Twitter, Facebook, YouTube, Instagram, TripAdvisor, among others, have created new worlds of online participation. Sharing ideas, recommendations and experiences on the Internet is becoming commonplace. The opportunities for tourism marketers to engage with consumers through social media are numerous: starting with joining conversations to raising awareness about Fermanagh and Omagh and carrying through to encouraging consumers to share their great experiences after they return home. To meet the popularity and diversity of communication needs, a Fermanagh and Omagh social media tourism plan is needed.

This approach is designed to make the most of direct contact with consumers, tourism businesses, media, and industry partners. The plan needs to support current business needs and social channels. In the longer-term social media will become standard practice, and will blend official marketing messages and consumer recommendations to create the strongest endorsement yet of Fermanagh and Omagh as one of tourism's leading destinations.

Marketing Imperatives

The following principles should guide the marketing of the district to visitors:

- Marketing spend needs to be sufficient to have a significant impact in key markets. This means extra resources need to be sourced and made available for promotion of the iconic destination brands as part of an integrated “attract and disperse” strategy;
- Marketing campaigns should be directed at the identified consumer segments. It should be consumer, not product, driven;
- There needs to be an agreed media and communications plan for the brand and the destination;
- There will be clear differentiation between marketing and provision of visitor information; destination marketing should be digital; print will continue to be part of the mix for visitors once they are in the destination.

Recommendations - Marketing

- 1 Develop a consumer-focused destination brand to differentiate the area and position it within a competitive marketplace. This must be a priority in strengthening the appeal of the area for visitors.
- 2 The destination brand must be able to be used in marketing the area to diverse audiences and niche markets. A brand toolkit and resources for businesses and other stakeholders is required to align their marketing messages with the destination brand to ensure consistency and effectiveness of marketing messaging and efforts.
- 3 Destination marketing priority should be to focus on the use of digital media.
- 4 Bring the brand to life through social media which amplifies the voice of visitors, residents and industry as advocates for Fermanagh and Omagh tourism experiences.
- 5 A marketing and communications plan to underpin delivery of the strategy that aligns with the Tourism Ireland and Tourism NI promotions and activities.
- 6 Raise local residents' awareness of Fermanagh and Omagh tourism products and experiences, through a “Tourism is everybody's business” campaign

6.2 Tourism Products and Product Development

The core of the appeal of Fermanagh and Omagh, together with the quality of the experience of visitors, lies in the area's tourism facilities, assets, attributes and attractions. While the tourism attributes and strengths of the area are reasonably well known locally, the area's and tourism products' visibility in wider markets, and reasons to visit, are much more opaque.

Equally, while the quality of tourism facilities and assets is considered good, there is a need to undertake strategic interventions, and investment, to enhance them further and make them visible and relevant to target markets.

Enhancing the tourism product is a catch-all for a number of actions and these must be accompanied and complemented by marketing actions, the role of operators themselves, the engagement of the wider community, other destination management actions and the determination and resourcing of organisations to deliver the strategy.

There are three dimensions to product improvement and development across Fermanagh and Omagh:

1. Physical issues
2. Product experiences
3. Product segments and attributes

Table 7: Fermanagh and Omagh Tourism Products

Tourism Products & Product Development	
Physical issues	<p>1. <u>Transport infrastructure</u>: key priorities are</p> <ul style="list-style-type: none"> • The acceleration of the upgrading of the entirety of the A5 to dual-carriageway³² • A4 Enniskillen Southern Bypass - potentially subject to a public inquiry; possible start of construction in best-case scenario is 2018 • Other A4 improvements to Enniskillen are not yet in plan and need to be lobbied for • A32 improvements between Omagh and Enniskillen – these are not yet in plan and need to be lobbied for <p>2. <u>Broadband infrastructure</u>: a crucial piece of the tourism jigsaw, both for tourism operators (and to help them digitise their marketing and sales operations)</p> <p>3. <u>Town and Village regeneration</u>: while masterplans are in place for Fermanagh and Omagh, the lack of distinctiveness and visibility of, as well as reasons to visit, many smaller towns and villages, suggest the need for a programme of enhancements and regeneration. Straying over into community development, pride of place and planning policy, nevertheless, the issue is important in tourism terms. Town and Village enhancements will encourage tourism operators in these locations to sell themselves and motivate visitation. (This topic also aligns with the “hub” concept below.)</p> <p>4. <u>Countryside access and development of visitor hubs</u>: the strategy brings these two topics together because, while the area is constrained by limitations on countryside access, the development of visitor hubs will provide practical solutions. All of Northern Ireland operates under a restrictive regime of countryside access. Countryside access is an essential element in the outdoor activities tourism product (see below) and yet it has been quoted many times in our consultations as a constraint. Where prescriptive routes have been negotiated with farmers and landowners, then access allows the outdoors to be enjoyed and provide a strong rationale for visiting. The issue is particularly prevalent in the Sperrins, where the tourism “promise” of unfettered access is not delivered because of many access restrictions.</p> <p>Local authorities, amongst others, have responsibilities for negotiating access and some have been very successful, witness the Mourne, where a partnership of the Mourne Heritage Trust, Outdoor NI and the local authority has resulted in widespread public access for outdoor activities.</p> <p>The concept of visitor hubs would address access issues and provide opportunities for large numbers of visitors to experience and access the outdoors. Within these hubs, countryside access has been negotiated already by community interests, often with external support. To take two examples, An Creagán and Gortin, access has been (or is being) negotiated and visitors have the opportunity to be orientated, hire equipment,</p>

³² (this is in plan, is still subject to a public inquiry, with a “possible” start in 2017);

Tourism Products & Product Development	
	<p>experience the biodiversity, natural environment and history and heritage of the area, walking or cycling across prepared trails. These can be of different gradient – for experienced walkers/cyclists through to casual or family participants. Accommodation, food and retail may also be on site, encouraging visitors to stay longer and spend more.</p> <p>The concept aligns with village regeneration, but is also important for encouraging the dispersal of tourism spend and benefit across the area. Potential hubs could include An Creagán, Gortin Glens, the UAFP, the UNESCO Geopark, Florence Court, Castle Coole. A “hubs” research project is required to define the hubs and their attributes for visitors and then integrate these into marketing.</p> <p>5. Lough- side: Lough Erne itself and the quality of the loughside environment is one of the key visitor attractions in Fermanagh and Omagh. The experience of the lough-shore can be disappointing for visitors, access can be difficult and there is a need to improve and enhance lough-shore sites.</p> <p>Work to identify the best sites for upgrade, and the types of amenities required at each site needs to be undertaken. Developing a Loughside experience programme will open up access to the water in a considered and sensitive manner. It will increase the variety and location of Lough and Lakeside experiences available to the visitor.</p>
Product Experiences	<p>The quality of the visitor experience is crucial in generating positive word of mouth and reputation and encouraging more people to visit, especially with the importance of social media in reporting positive experiences.</p> <p>Three dimensions need to be addressed by the strategy:</p> <p>Development of itineraries that reinforce and support the quality of the experience and the excitement of the area, by demonstrating to visitors things to do and reasons to visit. These would be developed by operators, working with the tourism marketing organisation and potentially the Council’s economic development teams, to encourage clusters and innovation. What is required are clusters of operators working together to develop products/experiences for visitors and placing these in the marketplace</p> <ol style="list-style-type: none"> 1. Enhance the quality of welcome by individual operators by encouraging continued participation in World Host and an extensive programme of networking and familiarisation visits (to each other’s business). 2. “Tourism is Everybody’s Business” Encouraging a better understanding by the whole community of the importance of tourism and tourism related activity, e.g. events, while also motivating local people and businesses to welcome visitors. This can only be done by continuously communicating the importance of tourism and the role of business/community/people in welcoming them.
Product segments and attributes	<p>The tourism development strategy also highlights the need to enhance existing products and make sure new opportunities are developed to meet and build up market demand. The products are as follows:</p> <ol style="list-style-type: none"> 1. Natural environment and outdoor activities: This is a very wide category and would include all activities from passive through to adrenalin-filled outdoor activities, taking place throughout Fermanagh and Omagh’s outdoors (but note the proposition for visitor hubs). <p>Golf and horse riding are minority but important niche products for the area.</p> <p>Visitors need to be made aware of what they can do in the area and where they might access sites and facilities, equipment hire, find (sympathetic) accommodation and refreshments (i.e. for those wearing boots or with bikes). The point made above about clusters and itineraries are crucial, to inform the potential visitor; signposting and</p>

Tourism Products & Product Development

orientation may be necessary; placing the itineraries in the digital market place is crucial. A number of actions are required to fully develop this market segment and these are listed below.

2. **Water based activities, including inland cruising:**

Access to the loughs/lakes and the quality of water are essential prerequisites to continuing to attract markets because of the loughs/lakes. A major opportunity will emerge with Waterways Ireland's development of Blueways , which will be taken up by Fáilte Ireland, Tourism Ireland, for product development and out-of-state marketing respectively.

3. **History and heritage:**

The strength of historic sites and the history of the area provide a compelling supply-side attractor for visitors, but the motivations, characteristics and "wants" of this market need to be understood, as well as developing itineraries and attractive sites. Clusters of operators should be brought together and major site owners (especially NIEA/DoE) encouraged to participate.

4. **Genealogy:**

The recommendation is to classify this separately from history and heritage because of the strength of the product in the area, through the UAFP, Mellon Centre for Migration Studies and the reference libraries and voluntary roots organisations, as well as the tour guides offering this service. Bringing everyone together to articulate the proposition is an essential first step in attracting more business in the sector

5. **Events:**

These are an important attractor especially for out of season visitation. The key to ensuring that events fulfil this tourism role is to understanding which events will generate what value, within the confines of local government resources to help. Equally the cultural disparity between the former Omagh and Fermanagh area in how events are organised needs to be reconciled, with a common agreement about which events to invest in. (Appended is a draft events framework to support such decision making.)_Sporting events have had a strong history in the area.

6. **Angling:**

Another niche market which needs highly targeted marketing to be undertaken, jointly with angling clubs throughout NI, Ireland and GB, as well as clusters of fishing related operators.

7. **UNESCO Geopark:**

The UNESCO status of the Marble Arches Geopark offers potential to attract new visitors if positioned and promoted creatively. The following have been identified as priorities to enable growth:

- Clarity of meaning and benefits to the consumer and tourism businesses
- Development of compelling short breaks combining the themes above
- Integration of UNESCO Geopark in destination marketing

Recommendations - Tourism Products & Product Development

The recommendations under this theme are:

Physical	<ul style="list-style-type: none"> • Advocacy programme by the local authority to support transport and broadband infrastructure investment • Determine which villages should be enhanced, aligned to (amongst other criteria) tourism opportunities • Strengthen local authority and stakeholder commitment and involvement in opening up countryside access • Commission a review of the visitor hubs concept with the identification of where it should be implemented and what actions are required
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Tourism Products & Product Development	
Experience	<ul style="list-style-type: none"> Identify and support clusters of operators – to develop itineraries and help enhance the quality of the welcome in the area. Clusters are required in the angling sector, amongst outdoor activity related operators (including hire, accommodation etc.), in the genealogy and history and heritage sectors Continue to support World Host training throughout the area Initiate a campaign and communications to encourage “tourism is everybody’s business”.
Products	<ul style="list-style-type: none"> Research the origination and motivation of visitors to understand why they are here and their reasons for visiting Align with Waterways Ireland, Fáilte Ireland and Tourism Ireland in the development of the Blueways Implement a tourism events framework to determine which events should be support and how they are organised (e.g. by LA or by external event organisers)

6.3 Destination Management, Development and Marketing

Fermanagh and Omagh possesses an exceptional mix of tourism products – from urban escapes to rugged landscapes and water – with outstanding opportunities for nature-based tourism, as well as cultural, heritage, events, festivals and activities. The warmth of the people and the quality of the service provided by the communities and businesses are the foundation of memorable visitor experiences that will encourage repeat visits to Fermanagh and Omagh.

Destination Management incorporates not only marketing initiatives, but also product development, (which includes both hard and soft product development), industry development, research and industry engagement. Delivering Destination Management activities requires a partnership approach that brings together the new council and their tourism priorities, with the private sector, other agencies and stakeholders. Destination Management and Development is about creating and maintaining visitor experiences, saleable products and services that meet visitors’ needs and expectations and facilitate their travel and stay within the destination.

Getting the right range and quality of provision across Fermanagh and Omagh is a vital part of the strategy. As with the offers, this will require all the relevant stakeholders to focus clearly on what the visitor expects and ensure this is consistently exceeded.

Figure 1 Destination Management



6.3.1 Destination Management

Destination Management is an ongoing process in which tourism, industry, local authorities, and the community leaders plan for the future and manage the destination. The wider Fermanagh and Omagh geographic area requires an effective and consistent approach to Destination Management to maximise the benefits from tourism for the destination, communities, business operators and tourism agencies.

Fermanagh and Omagh District Council has a key role to play in the leadership and influencing input into aspects of the delivery and implementation of the new tourism development strategy.

Three of the Council’s directorates have some aspects of tourism in their remit. The majority of the services impacting on tourism fall under Regeneration and Planning. The Council’s role in tourism is strategy, policy, marketing (through a Service Level Agreement/Memorandum of Understanding with Fermanagh Lakeland Tourism), trade engagement, business development and support. Crucially, who does what needs to be determined; the scope of agencies needs to be resolved and mechanisms for supporting trade engagement and communication in the wider Omagh area need to be defined.

The tasks undertaken by the Council will include:

- Strategy Development: specifically relating to collaboration and networking, product knowledge; transport, routes and connectivity and accommodation;
- Strategy Development: specifically relating to public realm and support for individual businesses;
- Product/ Experiences Development: work to develop the tourism product development/ experiences in areas such as Activities (walking, mountain biking etc.), Heritage & Culture is more effective and efficient at Fermanagh and Omagh level;
- Events and Festivals: Work on events which are strategic, major elements that attract a national and international audiences and engage with locally focused events undertaken by communities that will animate and support the tourism product;
- Support the Fermanagh and Omagh Tourism Development Strategy implement and deliver the strategy actions;
- Industry Engagement ;

- Marketing of Fermanagh and Omagh District – Fermanagh Lakeland Tourism, through an SLA with the Council, to deliver marketing and social media; subject to the approval of FLT’s Board, consideration could be given on delivering marketing and social media for the whole district area;
- Undertake tourism workshops, seminars and familiarisation events;
- Develop a tailored mentoring/facilitator programme to build capacity and support the development of collaborations;
- Encourage and support collaborations utilising existing programmes and initiatives, such as the Council’s Business Support Programmes.

The Sperrins

The future of the Sperrins remains a sensitive and contentious topic and although outwith the terms of reference of this project, there are a number of significant issues relating to the overall management of the Sperrins that need to be addressed.

In the absence of an agreed wider landscape management plan to which all 4 local authorities and local communities would have responsibilities for delivery, the tourism potential of the Sperrins will not be maximised. To move ahead requires the 4 local authorities, key stakeholders (e.g. Tourism NI, Forest Service) to agree a coordinated management plan and priorities.

Actions

- Consolidation of the various Sperrins plans into one development plan with agreed management and maintenance arrangements between Forest Service and the 4 councils;
- Developing a MOU with Forest Services and the 4 local authorities for this purpose;
- Exploring options and mechanisms for providing liability insurance to overcome landowners’ perception of the risk of liability associated with visitor access;
- Further partnership work between local councils for tourism product development;
- Sourcing funding for appointment of a Project Officer to support and implement tourism product development and marketing activity.

6.3.2 Destination Development

Destination development is a continuous process of coordination and development of amenities, facilities, products and services that support tourism businesses and the destination to deliver quality offers and experiences for visitors.

Successfully developing and exploiting the tourism offers lies at the heart of implementing the strategy and achieving the strategic objectives. Securing and delivering investment in high quality cultural, heritage and activity based tourism infrastructure and initiatives in Fermanagh and Omagh is a must to meet the needs of current and future customers, particularly those in the key segments.

The investment and infrastructure recommendations are detailed in the Tourism Product Development (section 6.2)

Product Knowledge and Information

Product information is an essential resource for marketing, business engagement, business support and market intelligence work. The collection, monitoring and dissemination of information are important for the region’s tourism businesses.

At present, responsibility for the collection, maintenance and distribution of tourism information is fragmented across the region with several disparate databases across a number of organisations and agencies.

In the tourism sector, product knowledge is one of the basics in supporting the delivery of excellent customer service and extends well beyond one’s own offering to a wide range of complementary offerings that can be cross-sold and up-sold, as well as a general knowledge of the area and its attributes. Visitors are receptive to, and appreciate, the recommendations of front line staff in tourism facilities as a means of discovering the local ‘hidden gems’ that enrich their experience and sense of authenticity. Their

expectation is increasingly that not only will staff be well-informed, but that their pride and passion for all that is on offer will be evident and sincere.

Recommendations:

- Develop a single, widely recognised tourism business-to-business portal for uploading and sharing information, and good practices.
- Develop and expand familiarisation (FAM) activities among local businesses, tour operators, travel trade press, and transport operators.

Visitor Servicing

Information provision is an important part of the visitor journey as it orientates visitors once they arrive in the area, and influences discretionary plans and spending during their trip. Tourism NI is currently updating the 2010 Visitor Information Strategy and the outputs from this will need to be considered when published.

Currently Visitor Information Centres (VICs) are operated in Enniskillen and Omagh providing visitors with information once they have arrived in the area and both undertake additional services i.e. ticketing for Arts centre. Performance of VICs nationally has declined over recent years³³ due to the availability of online information and the role of VICs is being viewed as less important in information provision.

Areas of high footfall such as Belleek Pottery, Ulster American Folk Park, Marble Arch Caves, Florence Court, and other visitor attractions, accommodation providers and even supermarkets display unmanned information in the form of leaflets, maps, and brochures.

This is predominantly through third parties and provides visitors with some printed tourist information, and the information usually extends well beyond Fermanagh and Omagh. It does little to convey a sense of place for the area.

Recommendations

Drive up the quality of the visitor experience, providing a consistent standard of facilities, services and welcome that meets the needs of all visitors by:

- Ensure all VIC staff have product knowledge of wider Fermanagh and Omagh area and are fully briefed and engaged on directing visitors to all parts of the area.
- Review the roles of the VIC staff to deliver a wider range of tourism functions not just visitor servicing i.e. taking on a role of social media content that needs to be delivered on a seven day basis.
- Explore and then implement new technology for dispersal of information to visitors whilst reducing reliance on printed collateral i.e. provision of comprehensive online/ app based visitor information for Fermanagh and Omagh with downloadable resources such as maps and leaflets, would allow information to be accessed anytime, anywhere by visitors. This will provide a co-ordinated presence for tourism information which can also be utilised by tourism operators to field enquiries from visitors.
- Exploring options for additional visitor information points in visitor attractions, shops etc. A planned approach to unmanned information that reinforces Fermanagh and Omagh branding to ensure delivery of essential visitor information at key sites would address this issue. Ensure area-wide information and communications technology infrastructure (WiFi, mobile and internet access) is in place.

Cross Border

There are opportunities to develop further cross border cooperation – around the UNESCO Geopark, cross border touring routes, joint and collaborative marketing, as well as joint events and festivals and complementary outdoor activities. Plans are also under development for cross border “Borderlands” destination, to have a scale to be successfully promoted overseas³⁴.

Recommendations

- Programme of initiatives to be developed with cross border implications e.g.

³³ The Belfast Visitor Centre being the exception with its “Gateway role”

³⁴ This ‘Borderlands’ destination would highlight the wealth of culture, heritage, landscape, attractions and activities in the Central Border Area and would provide a link between the existing destinations of Ireland’s Ancient East and the Wild Atlantic Way.

- Upgrade route and improvement of Kingfisher Trail
- Walking routes and Greenways
- UNESCO Geopark marketing and business engagement e.g. Geopark Ambassadors
- UNESCO Geopark walking and cycling trails
- Development and marketing of cross border literary festivals & trail
- Eco and green tourism joint marketing opportunities
- Educational tourism
- Collaboration on joint marketing of Waterways Ireland Blueways
- Review and development of common genealogy products and their marketing
- Regular liaison with cross border counties to develop annual programme of collaborative marketing and product development. A strengthened Fermanagh Lakeland Tourism could participate in this work.

6.3.3 Destination Marketing

Effective marketing and communications is an essential component of the strategy to grow the economic value of tourism. This is currently undertaken by Fermanagh Lakeland Tourism (FLT) but does not cover the wider Fermanagh and Omagh area³⁵.

Recommendation

The recommendation is for Fermanagh Lakeland Tourism (FLT) to continue to market the destination, with consideration on how to market all of the council area and to deliver a variety of marketing campaigns and activities on an annual basis. Almost all of this needs to move to digital.

There is a need for engagement with all tourism operators across Fermanagh and Omagh offering a range of marketing opportunities for businesses to promote their products and services through an array of national campaigns, websites, travel trade familiarisation visits, media and press trips, trade shows and exhibitions. These channels need to be reviewed in light of the strategy and the development of a future marketing plan.

The role and remit of the destination marketing would be to:

- Grow visitor awareness and demand for the destination and its products.
- Clearly and effectively communicate with visitors to better understand their needs and wants.
- Communicate the destination's unique offering and value proposition both before visitors arrive and once they are in the destination.
- Develop and communicate the destination's vision and values via a clear brand statement that is then reflected in marketing and promotion of the destination and communicate what is on offer.
- Ensure that demand can be stimulated at times of low demand to address seasonality and low occupancy.
- Have a wider engagement with businesses i.e. non-members and those in the wider Omagh area, ensuring communication with stakeholders and communities.

6.4 Business Engagement and Development

Raising quality is at the heart of national tourism policy and must be at the heart of Fermanagh and Omagh's tourism development strategy. Everyone needs to embrace the fact that they are operating in an increasingly competitive world stage.

Disappointing standards and service can harm a destination very quickly. Everyone involved in providing a direct or indirect tourism service - accommodation, attractions, shops, transport, food and drink, entertainment, activities or any visitor service - must appreciate the importance of delivering high quality to visitors and embrace the need for ongoing skills training and personal and business development to remain competitive.

Key issues to address are:

³⁵ FLT membership has been successful in attracting members from outside the Fermanagh county boundary including Omagh, Ballygawley, Coleraine, Belfast, Leitrim, Cavan, Sligo and Donegal.

- Nearly all Fermanagh and Omagh tourism businesses are SMEs, micro or lifestyle businesses, with varying levels of professional experience and skill. Evidence from the on-line survey points to some business fragility, with performance affected by rising costs.
- Consultation has also revealed concern amongst businesses that lack of general support and understanding of tourism issues amongst local communities may influence the view taken on planning applications and create a negative climate for development and innovation.
- A number of agencies are involved in the provision of business training and support, including some grant aid. A positive and understanding relationship should be established and maintained between enterprises, planners, businesses and communities. There has to be coordination and channelling of information of appropriate support for businesses, to encourage them to take such support up.
- Developing a tourism business network that is open to all tourism and leisure businesses in Fermanagh and Omagh that provides a clear point of access to a wide range of support from Tourism NI, Fermanagh and Omagh District Council, Local Chambers etc.
- Fostering the message that tourism is a key economic driver for the region and that Tourism is everyone's business.

Recommendations

The tourism business engagement and development activities should focus on:

- Keeping Fermanagh and Omagh businesses informed on a regular basis of opportunities to access tourism training and advice.
- Signposting to funding scheme opportunities.
- Promote the Tourism NI B2B mentoring service and engage with businesses that have achieved or excelled in some aspect of their operation to promote best practice.
- Product knowledge of Fermanagh and Omagh for all tourism businesses is priority, especially as it relates to delivering excellence in customer service.
- Improving business competitiveness by e.g. identifying new opportunities for businesses working together to develop joint marketing activities and enhance product development.
- Providing opportunities for networking and sharing of best practice.
- Organising a series of themed business events and potentially the provision of online shared research and information forums.
- Organisation of a bi-annual tourism conference.

6.5 Organisation and Leadership

How a destination chooses to organise its tourism industry is determined by many local factors, including resourcing, industry leadership, the size and importance of tourism to the local economy, and the attitude of local authorities and other stakeholders.

There is not a 'one size fits all' tourism destination structure; a key characteristic of a competitive tourism destination is strong industry leadership, effective public, private sector and community collaboration, with facilitation, leadership and support from the public sector.

The consultation process highlighted the need for a clearer and more defined structure with roles and responsibilities to be agreed to ensure the actions from the strategy are delivered on time and with a coordinated approach. Clearer roles and responsibilities amongst all stakeholders and an effective organisational structure for engaging with the industry in the destination will make for efficient and unambiguous communications as well as creating ownership for the delivery of key projects and the marketing of the destination.

Recommendations:

- A new Partnership model is adopted across all of Fermanagh and Omagh. The Tourism Partnership would take the overarching leadership role for tourism coordination across the whole area, with opportunities for local groups to participate, as and when they develop or emerge.

- The existing Destination Fermanagh has developed a high level of experience and expertise and as an organisation needs to consider their most appropriate role and future relationship with the planned Tourism Partnership.
- The experience generated in public/private working, strategic assessment and destination management through Destination Fermanagh can provide guidance to the design of the new Partnership.
- The Tourism Partnership would support and align with the tourism development strategy and its priorities and ensure coordination of destination management across the area.
- Fermanagh and Omagh wide marketing and membership participation is required. At this time Fermanagh Lakeland Tourism (FLT) undertakes this role within the Lakelands and this should be extended across the Fermanagh District Council area.
 - The marketing focus and emphasis should change in line with our recommendations in this strategy – namely, campaigns should be customer/segment driven and not product driven. There must be an emphatic focus on destination marketing through digital channels.
 - The organisation’s attributes of industry engagement and membership should be extended to offer Omagh located tourism businesses opportunities to participate and benefit.
 - Consequently, the resourcing levels should be reviewed.
- The new Tourism Partnership should be supported by the Tourism Team within Fermanagh and Omagh District Council. This will itself need roles and remits of staff to be determined by the Council. The remit of the Fermanagh and Omagh tourism team will be the achievement of the objectives, working closely with partners, to deliver the new strategic plan, pan-Fermanagh and Omagh projects, reporting progress of the strategy milestones and targets and raising any emerging issues, challenges and opportunities. The tourism team will work in partnership with organisations, agencies and tourism industry operators and contribute to the Partnership on policy, strategy and development.

6.5.1 A New Approach to Tourism Partnerships for Fermanagh and Omagh

The Fermanagh and Omagh Tourism Partnership would oversee the tourism development strategy and help local areas to be involved, by helping local groups or tourism associations to form and be members of the wider partnership. The strategy does not envisage it being an incorporated body – there should be guidance to support grass roots engagement of the trade and marketing, and the Council should support product development, falling within the strategy context.

The Partnership would be a co-ordinated voice and support (and further develop) the strategic vision as outlined in the new strategy. The Partnership will encourage joint working, shared expertise, information exchange and best practice. It will be supported by the local authority, FLT and the arrangements set across the wider district.

The new partnership structure will ensure maximum efficiency and:

- Avoid duplication of resources
- Brings a focus to developing the visitor experience
- Increases the profile of tourism in the area
- Encourage local tourism networks to support tourism development and the quality of visitor experience
- Encourage cross sector tourism cluster development

To oversee the strategy the Partnership might comprise around 16-20 members.. As owners of the action plan that will arise from the strategy, the Group will agree the respective responsibilities and specific actions of the plan.

The remit of the Partnership should include:

- In the first number of years work to the new strategy and tourism priorities for Fermanagh and Omagh
- Overseeing the implementation of Tourism Development Strategy 2016-2019
- Implementing the Action Plan that supports the Tourism Development Strategy and monitoring the success of its delivery

- Engaging fully within the national tourism context to ensure that Fermanagh and Omagh participates fully within a Northern Ireland, UK, Ireland, European and international perspective
- Projecting Fermanagh and Omagh's case to Tourism NI and other Government Departments and agencies where policy decisions are being sought
- Driving the tourist economy by developing quality products in Fermanagh and Omagh
- Acting as ambassadors for Fermanagh and Omagh in all matters relating to tourism
- Acting as a lobbying body and the voice of the Fermanagh and Omagh tourism sector
- Supporting the development of a network of local tourist associations and groups

Leadership Executive Group

The recommendation is that the Partnership is supported by and managed by a Leadership Group (LG). The LEG will be supported by Fermanagh and Omagh Council's Tourism Team.

To ensure objectives are achieved, a robust process for reviewing progress against targets and milestones on an annual basis must be in place. The review process needs to be at the heart of a drive to become more demanding about the future growth of tourism in Fermanagh and Omagh. The first review should be held in six months from the formation of the Partnership and approval of the strategy and then annually to guide decisions for subsequent financial years. The Leadership Group will be responsible for leading this review and reporting to Fermanagh and Omagh Council and to the industry.

7 Action Plans

The Action Plan is a working tool for the Tourism Development Strategy implementation.

The implementation process may vary over time in response to new opportunities to secure funding, the level of support and commitment from stakeholders, and relevant policy changes at all levels of government. The lead stakeholders identified in the Action Plan are therefore indicative only and the final list of stakeholders implementing a particular action may vary. The Action Plan is organised into the five themes each with strategy actions, tasks and priorities. The costs are also indicative, and will require formal detailed review and appraisal, but are based on similar recent procurement exercises.

Time scales

1. Covers the period April 2016 – March 2017; 2. Covers the period April 2017 - March 2018; 3. Covers the period April 2018 – March 2019

Partners

FODC = Fermanagh and Omagh District Council; FOTP = (the new) Fermanagh and Omagh Tourism Partnership; FS = Forest Service; TNI =Tourism Northern Ireland; PS =Private Sector; FLT = Fermanagh Lakeland Tourism; NT = National Trust; TI = Tourism Ireland; WI = Waterways Ireland;

Costs

☐ = internal/ management costs

Strategic Themes Key Actions		Proposed Lead (s)	Partners	Time Scale	Indicative costs (subject to formal review and appraisal)		
					2016/17	2017/18	2018/19
No	Theme 1: Marketing & Visibility in the Market						
1.	Destination Brand: Review and develop a destination brand and brand strategy for Fermanagh Lakelands. This must capture the key USPs of the destination that make it unique in the international market and aligns with target segments.	FLT and FODC	FOTP/PS/ TNI	1	£25,000		
2.	Brand Toolkit and Industry Communication: From the output of 1, develop a brand toolkit and resources for businesses and other stakeholders to align their marketing messages with the destination brand to ensure consistency and effectiveness of marketing messaging and efforts. Marketing and workshops to encourage operators to use it.	FLT and FODC	TNI/PS	1	£15,000		
3.	Marketing Plan: Translate the strategic plan into a three year destination marketing and communications operational plan for the whole Fermanagh and Omagh area. (This must also align with Tourism Ireland and Tourism NI promotions and activities.)	FLT	FODC/PS/ TNI/TI/	1	☐		

Strategic Themes Key Actions		Proposed Lead (s)	Partners	Time Scale	Indicative costs (subject to formal review and appraisal)		
					2016/17	2017/18	2018/19
4.	Marketing Plan: annual delivery of the marketing plan.	FLT	FODC/ PS	1 - 3	tbc	tbc	tbc
5.	Social Media: Develop an ongoing social media action plan to bring the brand and destination to life through social media and subsequent implementation. There are two aspects: <ul style="list-style-type: none"> For consumer/potential visitor Internal for tourism operators to encourage them to deliver their own social media, aligned to key market priorities. 	FLT	FODC/PS	1 - 3	£15,000	£15,000	£15,000
6.	Tourism Awareness: Raise local residents' awareness of Fermanagh and Omagh tourism products and experiences, through a "Tourism is everybody's business" campaign.	FODC	FLT/TNI/	1 - 3	☐	☐	☐
Strategic Theme 2: Tourism Products and Product Development							
7.	Visitor Hubs: Commission a review of the visitor hubs concept with the identification of where they should be implemented and what actions are required to link with the rural development programme, village renewal scheme. Review to include identification of access, car parking, quality of visitor experiences, orientation and signposting and hub facilities. Delivery costs to be agreed.	FODC	Other agencies including WI and FS	1	tbc	tbc	tbc
8.	Countryside Access: Strengthen local authority and stakeholder commitment and involvement in opening up countryside and Lough-side access. Management is an internal costs; delivery cost to be agreed/confirmed.	FODC	Other agencies including WI, FS and NT	1 - 3	☐ + capital costs tbc	☐ + capital costs tbc	☐ + capital costs tbc
	Tourism Clusters and Outdoor Activities: Identify and support clusters of operators – to develop itineraries and help enhance the quality of the welcome in the area. Clusters are required in the angling sector, amongst outdoor activity related operators (including hire, accommodation etc.) in and around the Sperrins, Gortin and elsewhere in the district, in the genealogy and history and heritage sectors, including the planned HLF heritage and landscape project. (Costs relate to organising the clusters, not to itinerary development	FODC	FLT/FOTP/ TNI/WI/FS and NT	1 - 3	£20,000	£20,000	£20,000

Strategic Themes Key Actions		Proposed Lead (s)	Partners	Time Scale	Indicative costs (subject to formal review and appraisal)		
					2016/17	2017/18	2018/19
	and delivery). NB Clusters identified in the Economic Development Strategy.						
10.	Waterways Ireland: Align with Waterways Ireland, Fáilte Ireland and Tourism Ireland in the development and marketing of the Blueways into Fermanagh and Omagh.	WI	FODC/ FLT /TNI	1 - 3	tbc	tbc	tbc
11.	Events and Festivals: focus event support on strategic, major events that attract national and international audiences – many will be sporting events. Local events undertaken by communities still play a role in tourism and the LA would use the events framework to determine the level of support they receive.	FODC	PS/	1 - 3	tbc	tbc	tbc
12.	Cross Border: Review cross border opportunities and develop an action plan to develop products, experiences and potential projects with neighbouring LAs.	FODC	Other LAs	1 - 3	£20,000	£20,000	£20,000
Strategic Theme 3: Destination Management, Development and Marketing							
	Product/ Experiences Development: work to develop the tourism product development/ experiences/choices and itineraries in areas such as Activities (walking, mountain biking, angling etc.) and Heritage & Culture.	FODC	FLT/TNI/F OTP/PS/W I/FS	2, 3	tbc	tbc	tbc
14.	Familiarisation Programme: Implement a familiarisation programme to ensure all tourism related staff have product knowledge of wider Fermanagh and Omagh area and are fully briefed and engaged on directing visitors to all parts of the area.	FODC	FLT TNI/PS	1	□		
15.	New Technology: Explore and then implement new technology for dispersal of information to visitors whilst reducing reliance on printed collateral. This would include e.g. telephone apps, VIPs (below).	FLT	FODC	1 - 3	£25,000	£15,000	£15,000
16.	Visitor Information Points: Exploring options for additional visitor information points in visitor attractions, shops etc. A planned approach to unmanned information that reinforces Fermanagh and Omagh branding.. Ensure area-wide information and communications technology infrastructure (WiFi, mobile and internet access) is in place.	FODC	FLT	1 - 3	tbc	tbc	tbc
17.	Web Marketing: Continue to develop the web content and functionality of tourism web site as the main gateway to the region's tourism product and implement an on-line	FLT	FODC/	1 - 3	£20,000	£10,000	£10,000

Strategic Themes Key Actions		Proposed Lead (s)	Partners	Time Scale	Indicative costs (subject to formal review and appraisal)		
					2016/17	2017/18	2018/19
	marketing strategy to encompass more social networking, blogs and links to other webs sites in the area, including tourism staff generating content for social websites and blog information for visitors.		TP				
18.	Destination Management – Sperrins: Consolidation of the various Sperrins plans into one development plan with agreed management and maintenance arrangements between Forest Services and the 4 councils and source funding for a Project Officer	TNI	LAs/FOTP/ PS/FS	1 - 3	tbc	tbc	tbc
Strategic Theme 4: Business Engagement and Development							
19.	Business Skills: Improve tourism industry performance and profitability by developing and delivering owner/ manager skills and innovation support/training, using existing programmes and initiatives, such as the Councils Business Support Programme. Keep Fermanagh and Omagh businesses informed on a regular basis of opportunities to access tourism training and advice. Continue to support World Host training throughout the area.	FODC	FLT/TNI INI	1 - 3	☐	☐	☐
20.	Tourism Excellence Programme: Develop a Tourism Excellence Programme to support business with product development, business start-up, skills development to help them improve their operations.	FODC	PS TNI/INI	1 - 3	tbc	tbc	tbc
21.	Business Portal; Develop a single, widely recognised tourism business-to-business portal for uploading and sharing information, as well as successful practices.	FLT	FODC/ FOTP	1 - 3	£20,000	☐	☐
Strategic Theme 5: Organisation and Leadership							
22.	Tourism Partnership: Develop Fermanagh and Omagh Tourism Partnership as a strong industry leadership body with responsibility for the coordination and management of all industry initiatives, to unify and grow the maturity of the industry and create quality, consistency, professionalism and innovation.	TP	FODC/ FLT/TNI PS	1	☐	☐	☐
23.	Fermanagh Lakeland Tourism: Undertake the marketing for the Fermanagh Lakelands area and consideration of options to deliver across the wider FODC area.	FLT	TOC/TP/ NI	1	£20,000		
24.	Tourism Conference: Develop and organise a bi- annual Fermanagh and Omagh tourism	TP	FLT/FODC	2		£10,000	

Strategic Themes Key Actions		Proposed Lead (s)	Partners	Time Scale	Indicative costs (subject to formal review and appraisal)		
					2016/17	2017/18	2018/19
	conference to share information, promote best practice and networking opportunities.						
25.	Monitoring & Evaluation: Develop and implement a visitor monitoring programme for the destination with NISRA/TNI, collecting baseline data for the destination including researching the origination and motivation of visitors to understand why they are here and their reasons for visiting.	FLT	FOC/TP	1 -3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Totals					£180,000	£90,000	£80,000

8 Implementation

The previous section set out a range of priorities for action. Together they form a framework action plan for the three year period 2016 – 2019. This section considers the necessary mechanisms for overseeing and coordinating the implementation of the plan and provides an indication of the major stakeholders whose commitment is necessary for successful delivery of the strategy and action plan. Finally it identifies the processes for monitoring the impact of tourism in Fermanagh and Omagh and for reviewing the strategy.

8.1 Sources of Funds

The Action Plan identifies the need for significant investment over a three year period of this plan period. This excludes the potential capital investment through e.g. rural development village renewal scheme , road infrastructure etc. as these initiatives have a wider remit than solely tourism.

Funding is for tourism related activity and the sources of funding will need to be negotiated/sourced with a wide range of agencies and organisations and will include existing commitments of the local authority, with support from government agencies and departments e.g.

- Fermanagh and Omagh District Council
- Heritage Lottery Fund
- Private sector
- Waterways Ireland
- Tourism NI

8.2 Risk Analysis

A risk analysis has been conducted to identify what would happen if the Tourism Development Strategy and associated actions are not adhered to, implemented or resourced.

The major risks identified are as follows:

1. Risk of failure to set up the new Tourism Partnership
2. Limits on resource allocation to deliver strategy
3. Risk of failure of the Council to engage and communicate with tourism operators

The risks are catalogued and how to address or ameliorate them are detailed below.

Table 8: Risk Analysis

Risk Analysis		
No	Risks	Actions to Address Risks
1	<p>Risk of failure to set up the new Tourism Partnership</p> <ul style="list-style-type: none"> • Lack of buy-in from the private sector to the new Tourism Partnership 	<ul style="list-style-type: none"> • Identify potential leaders and influencers to talk to peers in the sector. • Need to reinforce Council leadership through positive commitments and actions • Tourism Development Team to facilitate and support implementation of the new strategy and support the Partnership
2	<p>Limits on resource allocation to deliver strategy</p> <ul style="list-style-type: none"> • Risks to delivery of the strategy in its entirety • Risks to delivery of specific 	<ul style="list-style-type: none"> • Communication and engagement with other agencies and potential funders to generate their buy in to the strategy and actions • Prioritisation of strategy components for resourcing/implementation

Risk Analysis		
No	Risks	Actions to Address Risks
	components (e.g. marketing campaign)	<ul style="list-style-type: none"> Negotiate with other stakeholders for funding commitments
3	<p>Risk of failure of the Council to engage and communicate with tourism operators</p> <ul style="list-style-type: none"> Failure to generate confidence in the strategy and plan results in limited operator commitment and ultimately to lower levels of performance 	<ul style="list-style-type: none"> Requirement to systematise the engagement and communication with the tourism trade Council establish a mechanism beyond the work of FLT to support communication and engagement with tourism members (through SLA/MoU) Brief of Tourism Development Team to include communication and engagement with the trade, working with FLT , TNI, Private Sector and others

8.3 Evaluation and Monitoring

Monitoring and assessing the Fermanagh and Omagh's tourism performance allows for an evaluation of the success in achieving strategic priorities and provides the basis for future decision-making and performance improvement.

Projected growth for 2020

The table below outlines the actual outcome in 2014 and the potential projected outcomes for 2020. The projections reflect three possible outcomes. These are as follows;

- A 'worst case' scenario that assumes no change in the strategic direction or performance of tourism across the district.
- A 'likely' projection based on a 2.5% increase in volume and value per annum. This assumes that the aims of achieving growth outlined in the strategy are partly implemented.
- A 'best case' projection based on a 5.0% increase per annum. This assumes that the aims to achieving growth outlined in the strategy are implemented, and that economic growth in the UK and ROI will result in a significant increase in leisure, business and VFR visitors during the period.
- A 'game changer' projection based on a 10% increase per annum. This assumes that the aims to achieving growth outline in the strategy are implemented and that there is significant growth from the key markets identified.

Contribution to Local economy	2014 Actual	Projected Worst Case Scenario , no change	Projected likely Case Scenario 2.5% p.a.	Projected Most Likely Case Scenario 5% p.a.	Game Changer 10% p.a.
Value	£64m	£64m	£74.2m	£85.8m	£113.4m
Volume	387,703	387,703	449,617	519,559	686,840
			16% Growth	34% Growth	77% Growth

While an increase in the value of the visitor economy is critically important to measuring success, other organisational, business formation and communication measures are of importance to make sure that the changes proposed in the strategy are implemented.

Overall performance of the visitor economy can be assessed through tourism data, measuring overnight trips made by Northern Ireland residents and visitors from outside Northern Ireland. This data will be derived from a variety of sources, including Northern Ireland Statistics and Research Agency (NISRA).

Tourism Northern Ireland and Tourism Ireland assess the market conditions and issue regular updates to the industry. The Tourism Partnership, with the Council, should use this information to determine whether the Tourism Action Plan should be adjusted or whether changes to the strategic objectives may be warranted.

The new Tourism Partnership supported by the Leadership Group, and the Council, will be responsible for the following:

- Monitoring the implementation of the actions in the plan
- Proposing further priorities and actions
- Reviewing progress to date on the baseline indicators
- Monitoring outputs in terms of economic benefit
- Provide regular updates and communicating progress to the industry and other stakeholders

A key element of the monitoring programme will be the delivery of an Annual Review of performance tracking how the Partnership is achieving the key milestones in the Plan. This should be made available to the industry and stakeholders.

The recommended KPIs, for monitoring the performance and impact of tourism success for the period 2015 – 2020 are detailed in the table below:

Table 9: KPIs

Measuring Performance	
Baseline Now (2015)	Measures of Future Success and source of data
Two legacy councils with own tourism programmes and systems	Commitment by Fermanagh and Omagh to tourism as a strategic priority and economic driver
Existing communications from LAs to tourism trade sporadic and not consistent Existing public/private partnerships predominantly Fermanagh based	<ul style="list-style-type: none"> • Establishment of an effective Fermanagh and Omagh Tourism Partnership • Consistent and regular engagement and communications with the trade, through the Council’s Tourism Team and FLT • FLT and other arrangements to encompass marketing of whole area (Source: internal Council assessment and tourism trade views)
Marketing strategy and plan	New brand architecture, marketing strategy and annual plans agreed with and used by operators (Source: Council assessment)
Limited out-of-state marketing and work with travel trade	Proportion of marketing budgets allocated to NI, ROI and out-of-state to be agreed (Source: Council and FLT assessment)
Advocacy for the sector is currently ad hoc	Preparedness of Tourism Partnership and Council to be advocates for the sector (Source: internal Council assessment and tourism trade

Measuring Performance	
Baseline Now (2015)	Measures of Future Success and source of data
	views)
£64m p.a. expenditure by visitors on overnight trips, 2014 (= 8% of NI total)	<ul style="list-style-type: none"> Increase value of overnight stays by 5% p.a. growth by 2020 (Source: NISRA)
388,000 trips and 1.067m overnights in 2014 (7% of the NI total)	Increase number of trips and overnight stays by 5% p.a. by 2020 (Source: NISRA)
Origin of Visitors: <ul style="list-style-type: none"> NI – 64% RoI – 14% GB – 16% Europe - 4% North America – 3% 	Proportion/balance of non NI visitors to increase by 8% in total (reducing NI visitors to 56% of total visitation) by 2020 (Source: NISRA)
Number of people employed in the sector, currently 3,448 jobs (2013)	2% p.a. growth to 2020 (Source: NISRA)
Occupancy in 2014 <ul style="list-style-type: none"> Hotels – 59% and 49% (room and bed occupancy) B & Bs and guesthouses – 26% and 18% Self-catering -37% and 53% 	Increase occupancy by 5% by 2020
Stakeholders' commitment – base line needs to be established.	Value of stakeholders investment and commitment to be evaluated by the Council (Source: Council assessment)
Number of Green/ environmental quality awards (e.g. Green Tourism Business Scheme, EU Flower): currently five	30 by 2020 (Source: Green Business and other environmental schemes)
New business formation	To be agreed in the future (Source: Council)

9 Next Steps

There are a number of next actions leading to successful delivery of this plan:

Table 10: Next Steps

No	Action	Who?	Timescale
1.	Finalisation and agreement on the Tourism Development Strategy, including presentation to the tourism trade	All	May 2016
2.	Fermanagh Lakeland Tourism to consider and determine its district-wide role, and the business implications. Discussions with the Council on implications	Fermanagh Lakeland Tourism	Qtr 2 2016
3.	Prepare the brief for developing new brand architecture to define the interrelationship between the Fermanagh Lakes and the core products in the area a new destination brand and all other local and product brands	Council and Fermanagh Lakeland Tourism	Qtr 3 2016
4.	Definition of the business development programme for enhancing the competitiveness of operators across the area	Council, with TNI and INI	Qtr 3 2016
5.	Develop the industry engagement and communication programme	Council, with FLT	Qtr 2 2016
6.	Together with FLT prepare a marketing plan for the destination, on the basis of the product opportunities and actions identified with digital marketing being at the core	FLT with Council	Qtr 3 2016
7.	Adopt and set up the Fermanagh and Omagh Tourism Partnership, identifying who should participate in it	Council with trade	Qtr 3 2016
8.	Develop and agree SLA for FLT, to define FLT priorities and Council contributions to these	Council, with FLT	Qtr 3 2016
9.	Establish the baseline for KPIs	Council	Qtr 3 2016
10.	Working with TNI and NISRA to determine what surveys are undertaken and agree the research work required to generate and monitor tourism performance, and develop brief for Bi annual visitor attitude survey	Council, TNI and NISRA	Qtr 3 2016
11.	Prepare brief for initial tourism industry conference	FLT and Council	Qtr 3/4 2016
12.	Review landscape management arrangements in the Sperrins with other local authorities and interested stakeholders	LAs	Qtr 3/4 2016

10 Appendices

10.1 Structure of Tourism Delivery

Responsibilities for Tourism Development in NI		
Strategic Tourism Context		
Department of Trade Enterprise and Investment Other Government Departments		
Tourism Northern Ireland	Tourism Ireland	Invest Northern Ireland
Lead Agency For Tourism Development in NI	Overseas Promotion of the Island of Ireland	Tourism Accommodation Grants and Business Support
Fermanagh and Omagh Tourism Area Strategy Delivery		
Local Council / Statutory Agencies / Public-Private Partnerships	Fermanagh Lakeland Tourism	Private, Voluntary and Community Sectors
Lead on tourism strategy and development within own areas; local marketing, product development & infrastructure	Co-ordinate destination wide marketing and product development efforts of local authority, other agencies and private sector	Provide facilities & services essential to the destination competitiveness and the quality of the visitor experience

10.2 Consultations

The Abingdon Collection	Philip Faithfull
An Creagán Visitor Centre	John Donaghy, Manager
An Creagán Visitor Centre	Paula Ward
Arch House B&B	Rosemary Armstrong
Belleek Pottery	Arthur Goan
Belmore Court and Motel	Terry McCartney, also Tourism NI Board Member
The Black Cat Cove	James Gormley

Blakiston Houston Estates	Lucinda Blakiston Houston
Blaney Caravan park	David Bailey
Cavan County Council	Joanne Hayes
Corralea Activity Centre	Marius Leonard
Department of Culture, Arts & Leisure, Inland Fisheries	Michelle McRoberts
Drumaneir Self-Catering	Vincent Meenagh
Dulrush Fishing Lodge	Bridie Gormley
Dun Uladh Cultural Heritage Centre	Brendan McAleer
Enniskillen Castle Museum	Neil Armstrong
Fermanagh and Omagh District Council	Cllr Alex Baird, also FLT Board member
Fermanagh and Omagh District Council	Cllr Rosemary Barton, also FLT Board member
Fermanagh and Omagh District Council	George Bradshaw
Fermanagh and Omagh District Council	Hilda Clements
Fermanagh and Omagh District Council	Sinead Curry
Fermanagh and Omagh District Council	Iain Davidson
Fermanagh and Omagh District Council	Cllr John Feely
Fermanagh and Omagh District Council	Robert Gibson, Director of Community, Health & Leisure
Fermanagh and Omagh District Council	Brendan Hegarty, Chief Executive
Fermanagh and Omagh District Council	Cllr Sorcha McAnespy
Fermanagh and Omagh District Council	Kieran McCrory, Head of Tourism & Economic Development
Fermanagh and Omagh District Council	Alison McCullagh, Director of Regeneration and Planning
Fermanagh and Omagh District Council	Eddie McGovern
Fermanagh and Omagh District Council	Cllr Thomas O'Reilly
Fermanagh and Omagh District Council	Cllr Paul Robinson
Fermanagh and Omagh District Council	Cllr Errol Thompson
Fermanagh and Omagh District Council	Cllr Howard Thornton
Fermanagh Genealogy Centre	Kay Campling
Fermanagh Genealogy Centre	Karen Ireson, Trustee Director
Fermanagh Lakelands Tourism	Tanya Cathcart, Manager
Fermanagh Lakelands Tourism	Theresa McVeigh
Finn Lough	Michael Beare
Flavour of Tyrone	Mary McGee
Forest Services	Noel Melanphany
ICBAN	Shane Campbell, CEO

ICBAN	Andy Hallewell
Killyhevlin hotel	David Morrison
Lakeland Tours	Ian McCutcheon
Little Crom Cottages	Damien O' Keefe
Loughs Agency	Lionel Knobs
Loughs Agency	Andy Sides
Lough Erne Resort	John O'Neill
Lough Erne Resort	Andrew Phelan
Mahons Hotel and Lady of the Lake Event	Joe Mahon
Manor House Hotel	Liam McKenna
Marble Arch Caves	Richard Watson
Marble Arch Caves	Martina O'Neill
McClure Watters	Declan Mackin
Mellon Centre of Migration Studies	Brian Lambkin
Mellon Centre of Migration Studies	Anne Duffy
Mellon Centre for Migration Studies	Patrick Fitzgerald
Mellon Country Hotel	Sinead Duddy
Mid Ulster District Council	Michael Browne, Head of Tourism
Monaghan County Council	Dympna Condra
National Trust	Jim Chestnutt
National Trust	Kate McAloone
North Fermanagh Valley Park	Neville Armstrong
Off Grid Adventures	Donna McBrearty
Omagh Chamber of Commerce and Industry (and North West News Group)	Dominic McClements, President Omagh Chamber
Omagh Chamber of Commerce	Elaine Fyffe
Omagh Chamber of Commerce	Bronagh Gormley, Committee Member
Omagh Jazz Festival	Bob Quick
Omagh Cycling Forum	Harman Scott
Outdoor Recreation NI	Chris Scott
Owenkillew Development Company Ltd	Angela O'Brien
Pat Larry's Self-Catering Cottage	Isabella McKenna
Silverbirch Hotel	Allan Duncan
Silverbirch Hotel & Business Centre	Carla Hosie
Silverbirch Hotel	Liam McElhinney
SHARE Discovery Village	Robert Livingstone
Smart Region initiative, INI	Alan Mitchell

Sport NI	Mike McClure
SUSTRANS	Ross McGill
Talk Up Marketing Consultancy	Louise Reilly
Think 6 Marketing	Teresa O'Laughlin
Todds Leap	Patrick Rafferty
Tourism Ireland (TIL)	Aubrey Irwin
Tourism Ireland (TIL)	Geraldine Egan
Tourism NI	Martin Graham
Tourism NI	Laura McCrorry
Tyrone GAA	Mark Conway (volunteer)
Tyrone Roots	Vincent Brogan
Waterways Ireland	Dawn Livingstone, Chief Executive
Waterways Ireland	John Boyle, Director of Business Development
Waterways Ireland	Katrina McGirr
Waterways Ireland	Sharon Lavin
Waterways Ireland	Joe Gillespie
Waterways Ireland	Norma Herron Marketing & Communications
Westville Hotel	Nick Cassidy
Westville Hotel	Una Monaghan
Ulster American Folk Park	Peter Kelly
Upper Lough Erne Tourism	Barry Flannigan
	Cathal Dolan
	ClIr Richie McPhillips (also FODC)
	Charles Plunket

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10.4 Consumer Market Segments and Motivators

The following table highlights the target markets, and their motivations, for Fermanagh and Omagh, based on Tourism Ireland and Tourism Northern Ireland’s market analyses.

Table 11: Fermanagh and Omagh Segments

NI & ROI	
Market segment	Motivators
Time Together	Romance, cool nightlife, gentle walking, shopping, relaxation, good quality food and drink, natural scenery, contemporary cultural experiences, landmarks.
Mature Cosmopolitans	Curiosity, authenticity, insight, exploration, eating out, natural beauty, relaxation, good quality food and drink, scenic drives, theatre experience, authentic pub experience.
Family Fun	Fun, quality time, safe, child orientated attractions and entertainment, memories, value for money offers, family accommodation, café, activities.
Young and Lively (ROI only)	Entertainment, cool nightlife, the ‘wow’ factor, city experience, contemporary culture and music festivals, events, the local scene, street animation.

Market segment	Who are they?	What they want from a holiday?
Culturally Curious	<ul style="list-style-type: none"> • The Culturally Curious are older – most are over 45 and more than a quarter are over 65. • They travel as couples or on their own. If they had children, they have grown up or have left home. • Typical Culturally Curious travellers would be 55 years old, taking a holiday with their partner. • They are out to broaden their minds and expand their experience by exploring new landscapes, history and culture. • They are curious about everything and are delighted to discover the world for themselves once again. 	<ul style="list-style-type: none"> • They’re interested in all that a place has to offer and they want it to be authentic. • They won’t choose a brand or visit a place just to follow the herd. This is their own exploration and they really want to cover everything, to ‘do’ a place. • The Culturally Curious love to discover the history, the art, the bookshops, the museums. And always find ways of getting real insight. Independent, ‘active’ sightseers, they are looking to encounter new places and experiences that are out of the ordinary. • They like to feel that they have not only broadened their mind but also immersed themselves in a place, giving their senses a holiday too – the sights, the sounds, the smells, the tastes. • They enjoy connecting with nature and getting off the beaten track. They like people to show an interest and educate them – to feel they’ve connected. They really appreciate personal guides.

10.5 Tourism Operators' Views

Table 12: Survey summary of the tourism trade

What in your opinion are the Major Priorities for growing tourism in the area? (Most important to least important)	Total No.	Weighted Average
Extending the range of visitor attractions	42	4.60
More marketing of the area	46	4.59
More use of the Web & social media	45	4.47
Culture and heritage of the area	45	4.44
International standout	44	4.41
Promoting the area's natural environment	45	4.38
Enhancing transport/ accessibility	45	4.31
More business investment	43	4.23
More collaboration between businesses	45	4.20
The image and character of the area	45	4.20
Visitor information	45	4.16
More packages for visitors	45	4.13
Better signposting for tourists	45	4.13
More events	45	4.11
More and better market research (e.g. of visitors' preferences)	41	4.10
Quality of public space, streets and environment	45	3.89
Improved customer care	42	3.83
Improved standard of welcome	44	3.73
More business networking	45	3.69
Better trained staff	44	3.55
Improving accommodation for visitors	43	3.42
Discounted pricing for visitors	43	3.09
More management training for me	44	2.95

10.6 Visitor Attraction visitor numbers

	2014
An Creagán Visitor Centre	35,750
Belleek Pottery Visitor Centre	190,765
Castle Coole	40,943
Enniskillen Castle Museums	26,525
Gortin Glen Forest Park	4,566
Marble Arch Caves UNESCO Geopark	61,143
Ulster American Folk Park	130,434
The Higher Bridges Gallery	9,800
Orchard Acre Farm	250
Forthill Park and Cole's Monument	1,500
Aughakillymaude Mummings Centre	300
Irvinestown Centenary Sculpture Garden	2,500
Dún Uladh Cultural Heritage Centre	27,121
The Mellon Centre for Migration Studies	18,432

Source: NISRA

10.7 Fermanagh and Omagh Tourism Partnership

It is essential there is a structure in place to drive forward the strategy. As this strategy is based on a partnership approach, the whole sector (private, voluntary, community and public) needs to be integral in both overseeing the strategy and its implementation.

Governance and Representation

The partnership would not be / have formal or financial powers so would not need to be formally constituted. Representatives will represent an industry sector body of strategic importance to the tourist economy of F&O and take a broader view than as individual members of the partnership but as a representative role for their sector with appropriate mechanisms in place for reporting back.

It is suggested that membership of the main board comprises 16 – 20 individuals from three sectors –the Council, tourism industry and relevant agencies and statutory organisations, with the potential composition as follows:

- Private sector – 5 representatives
- Tourism NI Destination Manager – 1 representative
- Fermanagh & Lakelands Tourism – 1 representative
- Fermanagh & Omagh Council – 5 representatives
- Waterways Ireland – 1 representative
- Forest Service – 1 representative
- The National Trust – 1 representative
- Local Tourist Associations – 2 representatives³⁶
- Tourism Skills Training – 1 representative e.g. South West College

³⁶ Subject to the number of local groups, this figure might be extended.

Leadership Executive Group

The partnership structure will be run by a Leadership Executive Group (LEG) – a team working together to implement the strategy and it is suggested that this Group comprises 5 or 6 members representing an appropriate mix of sectors.

Local Tourist Associations³⁷

The remit for the local tourist associations will be developed by the bodies themselves but should include development of proposals for local visitor information and community involvement in their areas. In support of these activities the LTAs should be able to bid for funding from a fund overseen by the executive board and managed by the tourism manager. The expectation is that local tourist associations will cover the whole of Fermanagh and Omagh but this will be dependent on the willingness on the part of businesses to join forces and work together for the benefit of their local areas. The chairs of the LTAs should liaise on a regular basis.

Fermanagh & Omagh Tourism Partnership Operational Guidelines

It is recommended that the FOTP should have its own Standing Orders and meeting arrangements.

³⁷ If the proposition for local groups is endorsed, the rationale will be developed further in the tourism strategy

10.8 Events Framework

For the tourism industry, festivals and events carry a positive impact in three parallel areas:

- Attracting tourism,
- Improving the destination's image and
- Supporting the local community.

Events also play a key role in helping destinations achieve their long-term economic and social aspirations. The four main benefit streams associated with events are:

1. **Immediate Economic Benefits:** Events can deliver immediate economic benefits by bringing new money into the economy
2. **Destination Branding:** Hosting events has a significant impact on a destination and its image, and can be a cost-effective means of promoting the destination's brand to a wide audience of potential visitors (nationally & internationally)
3. **Social Wellbeing:** Events make destinations more vibrant and interesting places to live, bringing people and communities together and giving them a sense of identity and belonging
4. **Legacy Benefits:** Major events can be a significant catalyst for change, elevating the host's global and/or regional stature and accelerating its economic and social development

10.8.1 Fermanagh & Omagh Events Portfolio 2015/16

The following are a selection of events previously funded and delivered by Fermanagh & Omagh District Council

Event / Initiative	Dates	Type of Event / Initiative	Amount of Contribution	Estimate of Participants	Estimate / Actual Spectators
FEARmanagh	03-Oct-15	Adventure Race	£7,000	157	
BT Angling Event	18-24 April 2015	Angling	£400	35	N/A
Mini Mahon's Angling Event	25 April - 1 May 2015	Angling	£350	35	N/A
Fire Service Angling Event	25 April - 1 May 2015	Angling	£400	40	N/A
Mal Scott Memorial Angling Event	16-22 May 2015	Angling	£300	60	N/A
Upper Erne European Predator	18-19 April 2015	Angling	£500	80	N/A
Junior Classic Fishing Festival	2-9 May 2015	Angling	£500		N/A
Angling Come and Try It	6 week course	Angling	£1,000		N/A
Lough Erne World Pike Fishing	16-18 October 2015	Angling	£2,000	220	N/A
Waterways Ireland Classic Fishing	11-15 May 2015	Angling	£11,000	240	N/A
Erne Open	10-May-15	Angling	£750	200	N/A
World Pairs	7-11 September 2015	Angling	£1,500	138	N/A
50th Anniversary Erne Boat Rally	22-26 May 2015	Angling	£1,000		N/A
Festival Lough Erne	19-21 June 2015	Food Festival	£32,043	40	10000/6000
Horizons Unlimited	25-28 June 2015	Motoring	£600	150	
Honda CBX Owners Club European Rally	31 July - 9 August 2015	Motoring	£2,000	100	
Ulster Rally	14-15 August 2015	Motoring	£25,000		16690
Enniskillen 100 Revival	12-13 September 2015	Motoring	£5,000	150	1000
Total			£91,343		

10.8.2 Fermanagh and Omagh Tourism Strategy Events Framework Recommendations

Events are an economic driver, but are also resource hungry – requiring skilled event management, effective marketing and sales, experience of income and sponsorship generation and partnership working.

The framework summarises the importance of events to a destination, the resource implications of running events, and identifies how to prioritise and ensure that events are maximised as economic and tourism generators. This leads to the need for a strategic approach to setting up and running tourism events in Fermanagh and Omagh, including the resources required (both human and financial) and planning for the implications of events.

The following key principles are fundamental to the successful implementation of the plan. These are considered to be:

A Portfolio Approach to Events: A consistent approach to monitoring and evaluating events for both one-off and regular events is adopted.

Classification System for Events: Events of all sizes can make a valuable contribution to the region and a key element of the Framework is to develop a simple event classification system that can be used to understand the strengths and weaknesses of the region’s current events portfolio and potential new events.

		← International	→ Local		
		Priority A	Priority B	Priority C	Priority D
		Defined as having/capable of having an excellent strategic fit, very strong/capable of achieving international and/or national (island of Ireland) market appeal, draws upon/capable of drawing on existing destination strengths or 500+ international nights;	Defined as having/ capable of having good strategic fit, strong/capable of achieving regional (within Northern Ireland Ireland/Republic of Ireland but beyond local area) market appeal, and capable of drawing on existing destination strengths; and National showcase event; or 15%+ of attendees are international visitors; or More than 250 visitor nights	Not a Tier A or B event; and Mainly NI residents; and Regional showcase event; or generally < 60% local participants (District & NI)	Defined as having an adequate or lesser strategic fit, not attractors in their own right and predominantly of local appeal but useful in servicing visitor markets when in the destination
↑ Large ↓ Small	Level 1	>15,000 visitors	>5,000 visitors	>10,000 visitors	>2,500 attendees
	Level 2	5,000-15,000 visitors	1,000 – 5,000 attendees	1,500 – 10,000 attendees	500-2,500 attendees
	Level 3	<5,000 visitors	<1,000 attendees	<1,500 attendees	<500 attendees

10.8.3 Event Classification

The event classification matrix can be simplified into the following quadrants, definitions below:

	Priority A	Priority B	Priority C	Priority D
Level 1	Major Events	Signature Events		Local Community Events
Level 2		Economic		
Level 3		Social		

10.8.4 Definition of Events

Events are classified into three categories:

Major Events	Generate significant immediate and long-term economic, social and cultural benefits to Fermanagh & Omagh and Northern Ireland; Attracts significant numbers of international participants and spectators; have a national profile outside of the district; and generates significant international media coverage in markets of interest for tourism and business opportunities.
Signature	Are the social and economic pillars of a region’s event portfolio. These are the large,

Events:	<p>regular events with distinctive qualities that the destination will become famous for. It is important to distinguish between:</p> <ul style="list-style-type: none"> • Social signature – events that are primarily for the benefit of the community; and • Economic signature – events that attract new money into the region’s economy. <p>These events will play a key role in enhancing quality of life and make Fermanagh & Omagh a more attractive place for people to live. To be a signature economic event they must generate a return on regional investment (RORI) of at least £500,000.</p>
Local Community Events	<p>A community festival or event is defined as a series of events with a common theme and delivered within a defined time period. It is developed from within a community and should celebrate and positively promote what the community represents.</p>

10.8.5 Events Framework Actions

A key objective for Fermanagh and Omagh District Council is to maximise the potential of the region as tourism destinations and to attract and encourage visitors to stay longer and spend more, by strengthening tourism performance and appeal across the whole of the area.

Events and Festivals are an important component of a region’s tourism industry. Developing and promoting a year-long tourism events programme will increase visitation, build community pride and attract investment and economic return. Drawing on the strengths of current festivals and events and addressing gaps the new local authority has the opportunity to build on the portfolio of events by developing existing and attracting new events to be a driver of tourism growth.

Key actions

The recommendations detailed above are drawn together and are catalogued into an Action Plan. The action plan should be regarded as a framework document that will be refined and developed over its lifetime and it is recommended that the actions be updated as timescales and financial commitments alter and that the Action Plan is re-published annually to demonstrate progress.

The key objectives of the action plan are:

1. Planning:- Identify and develop events in line with destination tourism strategy to stimulate visitation to the region
2. Investing:- Identifying the resources required to build capacity and capability of events
3. Profiling:- Growing Fermanagh & Omagh visitor economy is pivotal to achieving the regions wider economic aspirations. Investment in domestic and international promotion of major events must increase to capitalise on an enhanced major event programme
4. Organisation:- To successfully enhance itself as an ‘event-friendly’ destination, Fermanagh and Omagh must take a region-wide, co-ordinated approach in planning for and delivering events.
5. Measuring:- Good information is required to make good investment decisions. Fermanagh and Omagh District Council must develop a consistent and systematic approach to event evaluation in order to measure the outcomes generated by the events it invests in. The evaluation framework should be used to assess the outcomes delivered by individual events, as well as the overall portfolio.

The Events Framework outlines the strategic approach for the delivery of events and how events will invigorate the destination’s event calendar and further distinguishes Fermanagh and Omagh District Council as a community that values the diverse cultural interests of residents and visitors alike.

10.9 Electronic Survey Consultation Results

The consultative process for developing the tourism development strategy for Fermanagh and Omagh included an electronic survey and face to face and telephone interviews with tourism trade operators.

The survey took place during late September and October 2015, with the trade invited via the local authority's own databases, and those of Omagh Chamber of Commerce and Fermanagh Lakeland Tourism.

72 respondents opened and started the survey and 46 completed the survey, giving rich, robust and useful data and perspectives. We summarise here the main outcomes of this part of the research³⁸. About 30% of the respondents were from the wider Omagh area, 2 were NI-wide institutions or operators and the balance were from the wider Fermanagh area. Self-caterers were the largest respondent group (26% of respondents), followed by hotels (13%), visitor attractions and Bed & Breakfasts (11% each). 28 respondents qualified their role and function, which included inter alia. combinations of categories, cruiser hire, cultural heritage centre, marketing organisation, museums, studio shop, angling association etc.

We asked for information about our respondents so we could profile them and understand their characteristics:

- 52 respondents employed 1,326 full time and 59 specified as part time or volunteer.
- 24 respondents told us their last year's turnover, which aggregated to just over £17.5m, or nearly £730,000 p.a. each.
- 37 respondents told us that they were accommodation providers and the number of bed they have is 1,749. 7 operators recorded more than 100 beds each.
- 23 respondents told us they were quality graded – there were 3, 5 star operators; 17, 4 star operators; 3, 3 star operators. No 1 or 2 star operators responded.
- 6 respondents told us about their environmental accreditations.

We wanted to understand the importance of all tourism markets to respondents. Over 60% generate more than half their trade from within NI.

- Only 9 (of 48 respondents) generate more than 50% of their business from the Republic of Ireland;
- 5 (of 50) operators generate more than 50% of their business from the rest of the UK;
- 8 (of 46) operators generate more than 50% of their business from Europe;
- 6 (of 46) operators generate more than 50% of their business from USA and Canada;

As one operator said:

“Over 85% of our customer base is NI market.”

Business Challenges - We wanted to understand what respondents saw as their main business challenges so we could see whether and how the tourism strategy could address these. The items of highest concern are (in order):

- Marketing the area
- Overhead costs
- Not enough visitors
- Signage and sign posting
- Seasonality
- Marketing my business
- Packaging/bundling products with other providers

Of course the proximity to the Republic creates its own concerns:

“Biggest challenge has been the strength of Sterling as the biggest competitor is the Shannon, priced in Euro.”

“Current Euro exchange rate VAT on hospitality is at disadvantage to ROI.”

³⁸ A fuller analysis and report are available separately

Top Attributes and Worst Factors Affecting the Area – we wanted to understand how respondents saw the attributes and the negatives of the area. These are summarised below.

Table - Top Attributes and Worst Factors Affecting the Area	
Strengths	Weaknesses ³⁹
<ul style="list-style-type: none"> • Ulster American Folk Park • Belleek Pottery • Lakelands • The Sperrins • Festivals and events • Welcome visitors receive • Beauty of landscape • Unspoilt Countryside • Heritage sites such as Devenish • Angling • Walks, cycling • National Trust Properties, • Friendly Locals • Good food • History and heritage 	<ul style="list-style-type: none"> • Lack of promotion of Tyrone as a tourism destination • Road maintenance • Lack of information • Poor signage, routes and attractions • Apathy from retailers • Environmental degradation • proliferation of wind farms • Quality of transport links • Little to keep people in Omagh for more than 1 day • Lack of indoor provision for activities in wet weather • Parking • Environment and litter

Major Priorities for Growing Tourism in the Area – these were asked for, the top amongst these are (in order):

- Extending the range of visitor attractions
- More marketing of the area
- More use of the Web & social media
- Culture and heritage of the area
- International standout
- Promoting the area’s natural environment
- Enhancing transport/ accessibility
- More business investment
- More collaboration between businesses
- The image and character of the area

Regional Disparity - the coming together of two former local authority areas creates a challenge for the new authority to support/ intervene in the tourism sector in a way that adds value to both areas, while ensuring that differentials can also be addressed. We therefore asked what actions should be taken across Fermanagh and Omagh in order to boost tourism in BOTH Fermanagh and Omagh.

We asked the question related to

- **Boosting marketing** (29 responses):
 - A difference of opinion about branding Sperrins & Tyrone and counter balancing Fermanagh; “keeping them separate” OR Omagh needs to piggyback on FLT & use this to enhance the local tourism offering
 - A clear message for the region but integrated into an entire Northern Ireland offer e.g. the Wild Atlantic Way has boosted tourism significantly for the entire West Coast
 - One brochure covering the whole area
 - Overseas marketing important but also more online and social media marketing
 - Website development - shows still important in Germany, more (presence at) overseas trade shows needed. Market further afield and perhaps TV ads etc.
 - More Funding needed

³⁹ In addition to currency and VAT levels with ROI and the weather

- **Supporting product development (26)**
 - The whole area to be brought together as one - Fermanagh Lakelands and Sperrins should complement/partner each other
 - More for tourists to do in Omagh area; everyone work together to promote area. More accommodation in Omagh would help
 - Extended opening times of attractions
 - Marketing - develop and support a professional marketing strategy. Leverage Tourism Ireland brand
- **Helping businesses grow in BOTH Fermanagh and Omagh (27)**
 - Omagh area needs help to get in line with Fermanagh
 - Increase numbers of tourism visitors to the region
 - Maybe some sort of currency support so we can match Shannon prices
 - Increase awareness of all - networking & cross Selling
 - A properly funded and staffed group to promote the entire area as one or Omagh / West area to work alongside Fermanagh Lakeland Tourism
 - Enhanced marketing and promotion - bigger marketing budgets

Regional Brands and Membership Organisation(s) – we wanted to understand the relevance of geographical and destination brands and the opportunity to extend the Fermanagh Lakeland Tourism Membership model:

- **What relevance does the Fermanagh "brand" have to your business? (32 responses)**
 - Responses ranged from “None” to “hugely important”
 - Huge - well known in Germany / Switzerland (Fermanagh)
 - It is well established
 - None, we actively avoid it and focus on being part of the North West
 - Not sure the Fermanagh brand needs reviewing
- **What relevance does the Tyrone and Sperrins "brand" have to your business? (34)**
 - Again the responses varied from “none” to “very much”
 - More people would come if they knew what was on offer
 - It is relevant but the weakness of the brand (against other destinations) limits its impact
 - More relevance obviously due to location - needs a lot of work to bring together in a similar manner to FLT
- **Could the Fermanagh Lakeland Tourism membership model be extended across the whole area - to include Omagh and surrounds? (33)**
 - Yes, we in Omagh area would need another similar company to Sperrins Tourism which was closed 3 years ago and there has been a void in marketing the Sperrins ever since
 - Yes but it will take time
 - Under the umbrella of F & O a Lakeland arm and a Sperrins arm of the same "Parent"
 - Only as long as the Lakeland part is not diluted
 - I think the Fermanagh product is different and should be kept on its own
 - Yes but needs new blood attending
 - I would support this
 - No, it is an incredibly inefficient organisation, wasting money on print advertising that has long since had its day. Money should instead be allocated to operators marketing the area
 - Yes, but I think we should still be seen as 2 separate entities that complement each other - as opposed to operating under the one banner of Fermanagh Lakelands

Single Action to Boost Tourism - when asked what SINGLE action respondents considered would boost tourism most, the 38 respondents answered as follows:

- Internet, social media, AdWords, Facebook etc.
- More marketing investment required
- A more frequent transport system
- A properly funded and staffed group to promote the Omagh/ West area, similar to Fermanagh Lakeland Tourism

- Collaborative marketing
- A strategic approach is of course required but the main thing is to provide a reason to visit and stay in the wider district... Quality of product is key as is promoting the cross facility activities
- Promotion of world class events, such as Bluegrass Festival and festivals in Enniskillen
- Proper structured investment in the area which would attract visitors for angling and the beautiful countryside we have to offer
- More networking of businesses and stakeholders

Organisation and Management of Tourism - the delivery of the tourism strategy will be conditioned by future structures and management of tourism development, marketing and promotion and visitor management. We wanted to ascertain respondents' views about the best ways to organise tourism in the area. In order of priority, respondents suggested the following:

- Advisory group of operators to communicate with the new Council
- Public private partnership(s)
- Local area groups/clusters of operators
- Informal partnerships of operators
- The new Council sets the strategy and priorities
- Private sector leadership

Specific relevant comments were:

"...good ideas must be acted on and not left on the shelf."

"Management of Tourism for the area needs to be a formal alliance between operators and Council with a strong budget especially for early years."

"Don't just bring together providers for a talk shop that will develop more of the same."

"Partnership working with Council taking the lead to set strategy."

10.10 Fermanagh and Omagh PEST and SWOT Analyses

The PEST analysis (Political, Economic, Social and Technological) charts the framework within which tourism must operate; the SWOT analysis (Strengths, Weaknesses, Opportunities and Threats) reviews the market environment.

PEST analysis of factors impacting tourism			
Political	Economic	Social	Technical
<ul style="list-style-type: none"> • New authority of Fermanagh and Omagh District Council • Integration of legacy local authorities and their cultures • Enhanced tourism and other powers of new councils • NI Executive, DETI and Tourism NI policy priorities and budgets • Two TNI destinations in the Council area • Existence and priorities of Fermanagh Lakeland Tourism & Destination Fermanagh • Political stability, especially in relation to flags and marching season • Commitment to engage and communicate with the tourism trade • Level of partnership and collaboration across tourism sector 	<ul style="list-style-type: none"> • Economic forecasts and growth prospects • £/ € and \$ exchange rates • Differences in VAT levels in tourism and hospitality in UK and Irish Republic • Interest rates and predications about likely change • Levels of disposable income • Confidence in the economy • Local confidence in the area • Tourism performance of the area • Tourism industry confidence to invest in the area • Accommodation base to attract visitors • Public sector support for business formation and tourism development • Likely investment in road and broadband infrastructure • Resources available for delivery of the tourism strategy and action plan 	<ul style="list-style-type: none"> • Demographic characteristics and trends of population, both with UK, Ireland and overseas • Propensity for people to take holidays, and what sort of breaks • Trends regarding type of holidays taken (overseas, staycations, week-end breaks etc.) • Origination of visitors to the area • Demand for outdoor, cultural, heritage etc. breaks • Attitudes to health, wellness, leisure time, personal safety, public transport, the environment etc. 	<ul style="list-style-type: none"> • Change in the use of smartphones mobiles by consumers/visitors • Use of web and technological channels e.g. social media, for deciding and booking holidays • Broadband penetration and efficiency throughout local area • Balance of digital technology v print media in promotion of the destination • Balance of digital technology v print media in providing visitor information • Propensity of operators to bundle or package tourism product for the market • Willingness of marketing organisation(s) and operators to commit to digital

Fermanagh and Omagh SWOT Analysis	
Strengths	Opportunities
<ul style="list-style-type: none"> • Ulster American Folk Park • Belleek Pottery • Lakelands • The Sperrins • UNESCO Geopark • Festivals and events • The quality of welcome and hospitality • Beauty of landscape and unspoilt countryside • Quantity and quality of natural environment sites across the area • Strength and number of archaeological and historic sites • Genealogical and family heritage 	<ul style="list-style-type: none"> • Enlarged LA has opportunity to make tourism a key economic driver • More marketing of the area, especially through digital and social media channels • Promoting the area's natural environment and outdoor activities • Supported by targeted niche marketing • Enhance broadband infrastructure • Town and village regeneration enhance countryside access through negotiation • Development of visitor hubs across area • Develop better itineraries, clustering and linking tourism product and generating stronger visibility in

Fermanagh and Omagh SWOT Analysis	
Strengths	Opportunities
<ul style="list-style-type: none"> • Walks, cycling • Angling • Cruising • Linking the Erne with Irish waterways • National Trust properties, • Famous for activity and outdoor tourism • Many accommodation properties • Fermanagh a recognised market name 	<p>the market</p> <ul style="list-style-type: none"> • Develop history, heritage, archaeological and genealogical tourism products • Align with Waterways Ireland, Fáilte Ireland and Tourism Ireland in the development of the Blueways • Enhance transport/ accessibility • Stimulating more collaboration and networking between businesses • Enhanced engagement and collaboration with the tourism trade • Build on Destination Fermanagh's experience to create a new Partnership infrastructure across the whole area • Extend Fermanagh Lakeland Tourism's membership model across the whole area • Improved standard of welcome and customer • Better signposting for tourists • Using events to stimulate better perceptions of the area and off peak visitation • Strengthening ports events as draw for visitors • More and better market research (e.g. of visitors' preferences)
Weaknesses	Threats
<ul style="list-style-type: none"> • Seasonality/ Short season • Distance and access to the area • Distinct variation across the area of the tourism product and organisational capability • Sperrins AONB falls within several LA areas • Difficulties of engaging wider community in tourism matters • Hotel sector driven by deal and incentive led marketing • Comparatively low occupancy levels in self-catering • Limited promotion of Sperrins as a tourism destination • Poor directional and brown signage • Environmental degradation • Quality of transport links and poor public transport to and within the area • Little to keep people in Omagh for more than 1 day • Lack of indoor provision for activities in wet weather • No ground handlers or agents located in the area • Visitors not staying long enough • Weak accommodation balance (especially in wider Omagh area) • Size of the administrative Council area • Lack of evening and wet weather facilities • Opening times of attractions, retail, etc. • Patchy broadband availability • Limited digital marketing of the area 	<ul style="list-style-type: none"> • Petrol costs for touring • NI and local government resources • Weather • Disparities of VAT rates in UK and ROI • £/ € exchange rates • Economic situation • Destination as a daytripper experience rather than stopover • High volume Self-catering market dilutes value and spend • Windfarms • Inactivity by LA and tourism trade to tackle issues affecting tourism • Continuing weakening of angling and cruising markets • Under resourcing of marketing of the (wider) area