Tourism Development Strategy 2016-2019 Summary
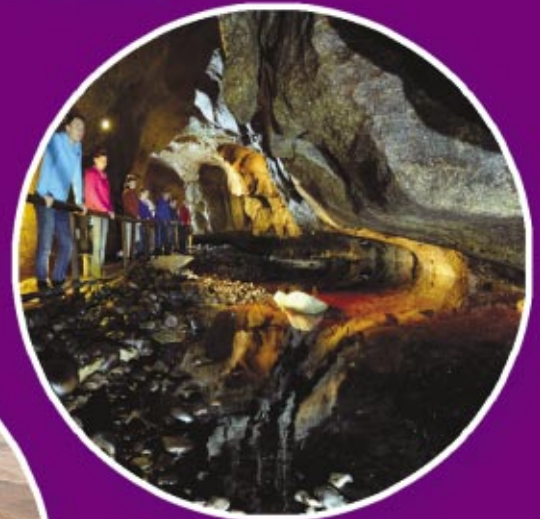
Tourism Development Strategy 2016-2019

1.0 Summary

Fermanagh and Omagh District Council has committed to economic development and tourism as policy priorities, acknowledging the importance of sustaining jobs and ensuring place competitiveness. The context for tourism across the area has changed significantly, with:

- The formation of the new Council, operational from April 2015, made up of the former legacy councils of Fermanagh and Omagh District Councils

- The remit for Local Authorities (LAs) in NI has broadened in the areas of community planning, town and country planning and 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 structures (reported 2015). Meanwhile, the Department for the Economy has initiated a review, with Tourism NI, of the tourism strategy for NI. Consultation has started for this but no outcomes can be integrated into the tourism strategy for Fermanagh and Omagh at the time of writing

The establishment of the new Council provides exceptional prospects to redefine how tourism is managed and developed locally. 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.

1.1 Background

Fermanagh and Omagh cover two of the nine 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 3,800 jobs in tourism and hospitality sectors (almost 6% of the NI total, and 9% of all jobs in Fermanagh and Omagh)

- 4,295 beds (10% of the NI total; the 3rd highest in NI), with strong representation in the self-catering sector

NI's objective (set by the current draft DETI Tourism Strategy) includes:

- Increasing visitors in NI from 3.2m (in 2010) to 4.5m by 2020

- Increase earnings from tourism from £529m (in 2010) to £1 billion by 2020

1.2 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 e.g. the Corporate Plan, Community Plan and the Economic Development Plan – which ranks tourism as one of the five core sectors in the regional economy

2. The plans and strategies of the former authorities (legacy councils) include regeneration frameworks for Enniskillen and Omagh Towns (Masterplans)

3. Tourism plans articulated through e.g. Fermanagh Lakelands 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)

4. Tourism Northern Ireland's preliminary research on Fermanagh and Omagh's strengths and market opportunities is also relevant – acknowledging Fermanagh's natural resources, but that the Lakelands experience is just not well enough defined for visitors and that Omagh is not functioning as a tourism destination in its own right

5. ICBAN identified the cross border region as having the potential to develop its unique tourism offering of coastline, lakes, inland waterways and hills, to the benefit of both residents and visitors

1.3 Tourism Assets, Attributes and Markets

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.

Market data on visitors to Fermanagh and Omagh is weakened by the limited scale of sample surveys and on historic dependence on data collection by the traditional NI destinations; thus data for Fermanagh is robust, while that for the former Omagh area is aggregated within Tyrone and Sperrins visitor destination.

Data that we do have suggests:

- Fermanagh had 42% of its visitors come from NI, and Tyrone & Sperrins 55%

- 23% of visitors to Fermanagh were from the Republic, with 16% the figure to Tyrone and Sperrins

- 12% and 13% of visitors to Fermanagh and Tyrone & Sperrins respectively were from North America

- 48% of visitors interviewed in Fermanagh were day trippers, while the comparative figure for Tyrone & Sperrins was 90%

- 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)

Tourism NI has also undertaken broad-brush analysis relating to the new local government districts. Thus:

- Two thirds of overnight trips can be attributed to the domestic market

- 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 main report.

Market research has also been undertaken for various product segments that Fermanagh and Omagh are strongest in - outdoor activities, road cycling, mountain biking, walking, coarse and game fishing, canoe trails, golf courses, horse-riding, cruising, history and heritage and genealogy.

Future tourism and market trends (global, societal, demographic and technological) influencing the future of tourism across the area are also identified in the main report.

1.4 Key Challenges and Issues

While Fermanagh and Omagh have tourism strengths - the District 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 – there are a number of challenges that have to be addressed.

- **Seasonality**: over 50% of the visits and value from tourism are experienced in the four summer months

- **Domestic Driven Tourism**: a high dependence on the domestic market for visitation

- **Currency and VAT**: medium term predictions (i.e. for the next 2 or 3 years) suggest Sterling remaining high against the Euro, making NI more expensive for Euro zone visitors. Lower levels of VAT in the Republic (for tourism and hospitality expenditure) also mitigate against NI

- **Organisations and Partnerships**: there is some duplication and overlap between tourism organisations in Fermanagh – at a time of declining public sector resources - and an absence of local tourism agencies in the former Omagh area. This duplication and overlap on the one hand and imbalance on the other, suggests the need for better alignment of partnerships and organisational structures

- **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 as a more compelling proposition for visitors, building brand equity to help boost tourism and visitation, while in Omagh and the Sperrins, the lack of visibility in the market, the absence of landscape and tourism management arrangements amongst the four local authorities with responsibilities in the Sperrins suggest that much work is required, including addressing more strongly land access issues, developing the infrastructure for outdoor activities and generating agreement about management and promotional arrangements amongst the four LAs operating in the Sperrins

- **Communities and Places**: dispersing tourism benefits across the whole district needs Fermanagh and Omagh's diverse range of towns and villages to maintain and build their distinctiveness, to attract visitors

- **Planning & Regulations**: many businesses are frustrated by regulations that are seen as unnecessarily complex, inconsistent and obstructive, inhibiting investment in tourism

- **Growing Use of Technology**: the availability of good, reliable high speed broadband and 4G connectivity is essential for both visitors and tourism businesses

- **Accommodation Supply**: the key issue with hotels based in and around Enniskillen is high levels of occupancy, the reliance on the NI business and incentive (deals) led marketing - impacting on the region's capacity to accommodate out of state visitors, travel trade and tour operators. In Omagh there is a less developed accommodation structure, with limited hotel supply and limited accommodation suited to activity tourism e.g. hostels and bunkhouses

2.0 The Vision, Strategy and Objectives

The tourism vision for the area, for both the tourism trade and Council is:

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.

2.1 Objectives

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)

3.0 Strategic Themes

Underpinning the tourism strategy are the following five key themes:

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

Actions fall under each of these themes.

3.1 Marketing & Visibility in the Market

A more dynamic marketing approach is needed to communicate reasons to visit Fermanagh and Omagh by targeting out of state markets while maintaining the area's attractiveness for the existing Northern Ireland market. The destination marketing focus needs to move unequivocally towards digital with a greater emphasis on technology and online marketing and reducing reliance on printed collateral.

These geographic target markets[1] should be:

• Nearby markets – NI and ROI
• Short haul markets – GB, Germany and France
• Long haul – North American
• Secondary markets - Spain, Italy and Scandinavia

[1] All aligned to Tourism Ireland's priority markets

Fermanagh Lakeland Tourism's role in marketing should be acknowledged and there is the potential for it to be strengthened to work across the whole of the new Fermanagh and Omagh District Council area.

Fermanagh and Omagh is not at the moment a destination brand. To stand out from the crowd, the Fermanagh and Omagh "visitor destination" must capture people's attention, inspire and forge positive reputations through compelling messages, stories and icons. 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 for consumers.

The consultation process identified in some respondents, a preference for separate regional identifiers for Fermanagh and for Omagh and the Sperrins.

Fermanagh's destination brand must focus on the Loughs and Lakes and integrate the core tourism products that contribute to visitors' motivation to visit and quality experiences. It must also generate far stronger visibility than currently exists, especially for out-of-state and overseas markets. The over-arching brand should build upon the commercial and product attractors across the area (e.g. UNESCO Geopark, Loughs and rivers etc.), linked by the design of an agreed brand architecture.

We've highlighted that Omagh and the Sperrins' regional identity is not well enough known, again especially for out-of-state and overseas markets. This results in the question of how to raise visibility and visitation and how long it might take. Key solutions lie in:

- Addressing better countryside access for outdoor activities, to contribute to a stronger reputation

- Creating landscape management arrangements across the four LAs with responsibilities in the Sperrins, and by implication determine tourism management arrangements and outdoor activities investment and infrastructure, again to contribute to visibility and reputation across the area

- Reinforcing outdoor activity hubs, where visitors can enjoy the best of the Sperrins and the integration of landscape, outdoor activities, history and heritage

- Maintaining the focus on the Ulster American Folk Park, but strengthening this proposition with the genealogy product stream

- Focusing on Omagh as a regional hub for shopping and entertainment

3.2 Tourism Products and Product Development

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 –including transport and broadband infrastructure, regeneration of towns and villages, Countryside access and development of visitor hubs and enhancing the loughside environment

2. Product experiences – including developing itineraries for visitors, enhancing the quality of welcome and encouraging a better understanding by the whole community of the importance of tourism ("Tourism is Everybody's Business")

3. Product segments and attributes - Natural environment and outdoor activities, Water based activities, including inland cruising, History and heritage, Genealogy, Events, Angling and capitalising on the UNESCO Geopark

3.3 Destination Management and Development

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.

3.4 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 area.

The recommendation is for Fermanagh Lakeland Tourism 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.

Tourism operators need to be engaged across Fermanagh and Omagh, to help them enhance the quality of their businesses and generate their involvement in campaigns.

3.5 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.

Fermanagh and Omagh needs 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 in a coordinated way. A new Partnership model is recommended: The recommended 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.

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.

Fermanagh Lakeland Tourism is recommended to extend its membership model across the entire district and market the whole area.

4.0 Action Plan

The Indicative Action Plan is a working tool for 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.

4.1 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

4.2 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

	Strategic Themes Key Actions	Proposed Lead(s)	Potential Partners	Time Scale
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
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
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 and FODC	FOTP/PS/ TNI/TI	1
4.	**Marketing Plan:** annual delivery of the marketing plan.	FLT	FODC/ PS	1-3
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: • 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
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

	Strategic Themes Key Actions	Proposed Lead(s)	Potential Partners	Time Scale
8.	**Countryside Access:** Strengthen local authority and stakeholder commitment and involvement in opening up countryside and lakeside access. Management is an internal cost; delivery cost to be agreed/confirmed.	FODC	Other agencies including WI, FS and NT	1-3
9.	**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 and delivery). NB Clusters identified in the Council's Economic Development Plan.	FODC	FLT/FOTP/ TNI/WI/FS and NT	1-3
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	1-3
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
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
Strategic Theme 3: Destination Management, Development and Marketing				
13.	**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: • 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
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	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
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
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 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.	FLT	FODC / TP	1-3

	Strategic Themes Key Actions	Proposed Lead(s)	Potential Partners	Time Scale
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
	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	1-3
21.	**Business Portal;** Develop a single, widely recognised tourism business-to-business portal for uploading and sharing information, as well as successful practices.	FODC	FLT/TNI/FOTP/PS/WI/FS	2, 3
	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.	FOTP and FODC	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/T NI	1
24.	**Tourism Conference:** Develop and organise a bi-annual Fermanagh and Omagh tourism conference to share information, promote best practice and networking opportunities.	TP	FLT/FODC	2
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	FODC / TP	1-3

Evaluation and Monitoring

Projected growth for 2020

Different scenarios have been prepared for projecting growth across Fermanagh and Omagh as a result of this strategy. A 'best case' projection is based on a 5.0% increase per annum. This would result in the value of tourism to the local economy rising from £64m in 2014 to £86m in 2020.

Further information may be obtained from :

Tourism Development Section
Fermanagh and Omagh District Council

The Grange	**Townhall**
Mountjoy Road	**2 Townhall Street**
Omagh	**Enniskillen**
BT79 1BL	**BT74 7BA**

Tel: 0300 303 1777
Email: tourismdevelopment@fermanaghomagh.com