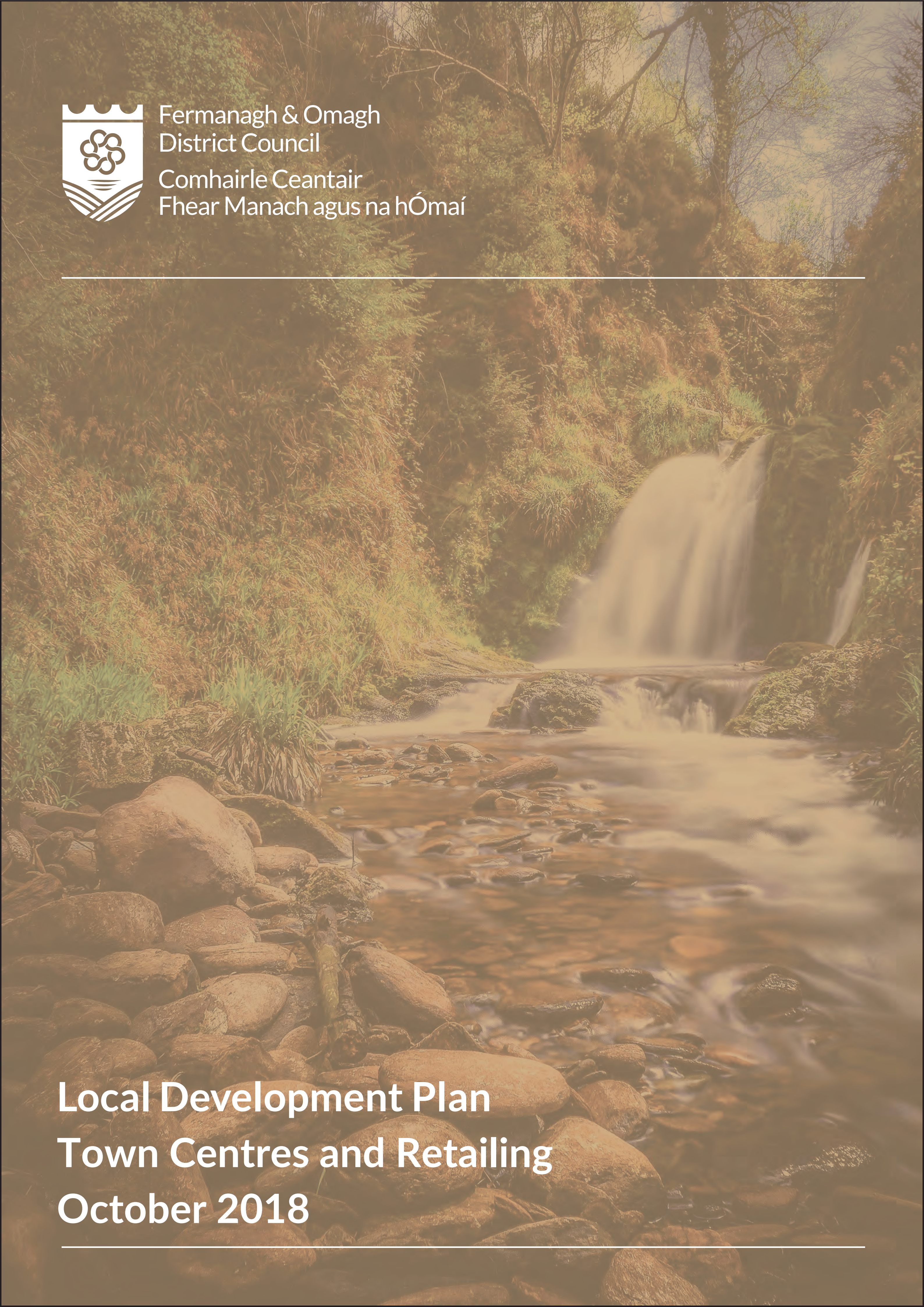


Fermanagh & Omagh District Council
Comhairle Ceantair Fhear Manach agus na hÓmaí

Local Development Plan
Town Centres and Retailing
October 2018

1.0 Introduction

1.1 This background paper has been prepared to draw together the evidence base that has been used to inform the preparation of the Fermanagh and Omagh Local Development Plan (LDP) 2030. It is one of a suite of topic-based background papers that should be read alongside the LDP to understand the rational and justification for the policies proposed within the draft Plan Strategy.

1.2 It updates the Position Paper prepared and published as the baseline evidence for the Preferred Options Paper (POP) in October 2016 and which identified the key issues that need to be addressed by the LDP.

1.3 The paper provides: -

(i) the regional policy context for retail development;
(ii) an overview of the economic importance of retail to the NI economy;
(iii) an overview of town centres and retail activity in the Plan area;
(iv) how retail development will be addressed in the Plan.

2.0 Regional Policy Context

2.1 The Regional Policy Context is provided by the Regional Development Strategy (RDS) 2035 and regional planning policy statements. A summary of these documents as they pertain to plan making and town centre development policy is provided in the following sections.

(a) Regional Development Strategy

2.2 The RDS supports both urban and rural renaissance (RG7) and recognises that regeneration is necessary to create more accessible, vibrant city and town centres which offer people a choice for shopping, social activity and recreation. Urban renaissance is described as the process of development and redevelopment in urban areas to attract investment and activity, foster revitalisation and improve the mix of uses. It advises that innovative ways should be developed to bring forward under-utilised land and buildings particularly for mixed use development with a focus on integrating new schemes within the existing townscape.

2.3 The RDS 2035 recognises the inter-regional gateway function of Enniskillen being only 1 hour's drive to Sligo. It also recognises the strategic location of Omagh on the Western Economic Corridor that connects the town with Londonderry and Dublin. As Hubs, these towns perform economic roles and their town centres provide a range of employment opportunities, therefore they are expected to be the prime locations for businesses, housing, administration, leisure and cultural facilities (SFG 13). For small towns and villages which have been static or declining and contain areas of social need, an integrated approach between government departments, agencies and communities will ensure that regeneration plans reflect the specific needs of each community.

(b) Regional Planning Policy Statements

2.4 The Strategic Planning Policy Statement (SPSS) which was published in September 2015, replaced Planning Policy Statement 5 (PPS 5) Retailing and Town Centres (June 1996), and outlines the regional policy on town centres and retail development. The regional Town Centres and Retailing policy aims to **support and sustain vibrant town centres** across Northern Ireland, consistent with the RDS 2035. Unlike the existing PPS 5, it adheres to a more stringent town-centre first approach, bringing Northern Ireland into line with town centre policy in other jurisdictions. The regional strategic objectives therefore are to: -

- secure a town centres first approach for the location of future retailing and other main town centre uses[1];
- adopt a sequential approach to the identification of retail and main town centre uses in Local Development Plans (LDPs) and when decision-taking;
- ensure LDPs and decisions are informed by robust and up to date evidence in relation to need and capacity;
- protect and enhance diversity in the range of town centre uses appropriate to their role and function, such as leisure, cultural and community facilities, housing and business;
- promote high quality design to ensure that town centres provide sustainable, attractive, accessible and safe environments; and
- maintain and improve accessibility to and within the town centre.

2.5 In preparing LDPs, the SPPS recommends that councils should undertake an assessment of the need or capacity for retail and other main town centre uses across the plan area. A key element in developing the evidence base will be preparation of town centre health checks containing information on a range of indicators and which should be regularly updated (at least one every five years). They will contain information on a range of indicators, including:

- existing town centre use, including resident population;
- vacancy rates;
- physical structure and environmental quality – including opportunities, designations constraints;
- footfall;
- retailer representation;
- attitudes and perceptions;

[1] Includes cultural and community facilities, retail, leisure, entertainment and businesses.

- prime rental values and
- commercial yields.

2.6 From this evidence base, LDPs should include a strategy for town centres and retailing and contain appropriate policies and proposals that must promote town centres first for retail and other main town centre uses (includes cultural and community facilities, retail, leisure, entertainment and businesses). Plans should also:

- define a network and hierarchy of centres – town, district and local centres, acknowledging the role of rural centres;
- define the spatial extent of town centres and the primary retail core;
- set out appropriate policies that make clear which uses will be permitted in the hierarchy of centres and other locations, and the factors that will be taken into account for decision taking;
- provide for a diverse offer and mix of uses which reflect local circumstances; and
- allocate range of suitable sites to meet the scale and form of retail and other town centre uses.

2.7 Primary Retail Cores (PRCs) contain the traditional concentration of retailing and other town centre functions. The purpose in identifying a primary retail core is to ensure the continuance of a compact, lively and attractive shopping environment, offering both choice and convenience, and to control the intrusion of non-retail uses in prime shopping areas. Local centres typically comprise small groupings of shops, e.g. a small grocery store, sub post office and other shops or services of a local nature. Local centres within towns also perform a complementary role to the role and function of the town centre and extensions to these will be permitted so long as there is no adverse impact on town centres in the catchment.

2.8 The town centre first approach will require developers to demonstrate that a sequential approach has been applied to the site selection. This means that existing centres will be the starting point in the search for a suitable location for a development. Proposals in locations outside primary retail cores and town centres shall be accompanied by an assessment of the proposed development which addresses all likely positive and negative impacts on the centre or centres affected.

3.0 Town Centre Research and Retail Trends in NI and the UK

3.1 In preparing the research report - Town Centre and Retailing Research Project (DOE NI) (January 2014) - GL Hearn et al undertook an assessment of the current health of designated town centres and provided an assessment of town centre and retail trends. The town centre health checks were carried out on 24 towns and cities using a variety of health check indicators (see Appendix 1). Town centre composition data was obtained from Experian Goad who undertake physical town centre surveys and prepare occupier plans for most town centres in the UK. Overall the town centre health checks did not identify any towns that were performing badly, but equally there was little evidence of any particularly strong performance. There is clearly room for improvement in the vitality and viability of the town centres and a policy stance which seeks to protect and enhance town centre performance and diversity will contribute to uplifting existing centre vitality and viability.

3.2 Some of the key findings regarding town centres in Northern Ireland were:

- Most centres fell below the national average of 80,170 sqm gross, with only Bangor, Coleraine, **Enniskillen**, Lisburn, Ballymena, Newry and Londonderry sitting above this threshold.
- Convenience goods floorspace was focused in a proportionately small number of larger units and reflects the wider UK trend of the dominance of larger supermarkets in meeting convenience shopping needs.
- Service uses take up a larger proportion of town centres by unit number, reflecting the smaller sized units these uses tend to occupy and often the secondary nature of that floorspace.
- The proportion of other town centres uses was notably higher in NI than the UK average and included uses such as transport services, employment and commercial activities, religious buildings, wholesale trade, civic and unclassified buildings.
- Having a range of other uses within town centres should be seen as a positive attribute helping to attract people into town centres and contribute to overall vitality and viability.
- Most centres had a vacancy rate which exceeded the UK national average (12% in 2013). The average vacancy rate was 14.5% by unit and 11.9% by floorspace. This differential reflects the fact that vacant floorspace includes a disproportionate number of smaller units, a trend reflected in the UK.
- Much of the vacancy is within the secondary/tertiary areas rather than prime retailing frontages.
- Many town centres are characterised by edge-of-centre and out-of-centre food stores and retail parks.
- The amount and quality of out-of-centre retailing and its convenience in terms of accessibility and free car parking are attractive to shoppers. They also tend to have fewer vacancies suggesting a good level of demand for modern larger space units.

A summary of the main findings of the town centre health checks for Enniskillen and Omagh is featured in section 5.0 Town Centre Studies.

3.3 The report also highlighted in an analysis of retail proposals since 2000 that the majority of applications were for non-town centre locations. An example of this in Omagh is the Opportunities Omagh site at Derry Road which incorporates several uses including a supermarket. In Enniskillen, both the Tesco and Asda stores at Derrycharra are outside the town centre boundary.

3.4 There are also several town centre issues facing Northern Ireland towns which are summarised in Table 1. The weaknesses and threats identified by

GL Hearn "indicate that it would be appropriate to have a stronger policy stance on protecting and enhancing town centres, encouraging private sector investment and development and making town centres the focus for not just retail but other significant footfall generating uses".

Table 1: Town Centre Issues

Strengths/Opportunities	Weaknesses/Threats
• Diversity of existing town centres • Strong local independent retail offer • Good quality physical environment • Town centre parking, particularly short stay 'on street' provision. • Employment uses within town centres • Good accessibility and public transport hubs.	• Vacancies and potential obsolesce of some floorspace • Low and falling retail rents • Amount and profile of out of centre retailing • Development pipeline • Limited private sector town centre development/investment • Heavy traffic flows and congestion leads to conflict with shoppers

3.5 The retail sector is also described as one of the most dynamic sectors of the UK economy and is constantly evolving and adapting in response to consumer and lifestyle tends and other market influences. Over the past 30 years, the retail sector has experienced growth in both personal income and disposable consumer spending, coupled with population growth. However, the recession has had a depressing effect and retail spending year on year for the next three to five years is expected to be low.

3.6 Another significant change has been the rise of home shopping and electronic commerce. The home shopping sector includes several retailing channels including catalogue sales, direct retailing, TV shopping and internet shopping. An increasing number of 'high street' retailers now offer internet shopping,[2] and eRetail now accounts for around 10-12% of the UK retail sales. However, the growth in online shopping habits does not mean the death of the High Street. The arrival of 'click and collect' where consumers order online but visit the store to collect their goods can be good news for the market. For example, eBay recently announced a trial 'click and collect' service to allow customers to collect from Argos stores, purchased products from around 50 eBay merchants.[3] John Lewis has a similar type of arrangement with local shops in Northern Ireland such as Spar and Costcutter. This service can help ensure that town centres continue to achieve footfall and remain viable.

3.7 Nationally, the food and beverage sector is one of the few town centre components which does continue to show growth, fuelled primarily by coffee shops (e.g. Starbucks, Café Nero etc) and family dining operators (e.g. Pizza

[2] GL Hearn – Town Centres and Retailing Research Project (DOE NI) January 2014.
[3] Northern Ireland Commercial Property Report 2013 (Lisney)

Express). These outlets do provide vitality and footfall to town centres, but it needs to be balanced carefully against the loss of retail.[4]

3.8 There is also a growing trend by national multiple retailers to rationalise their property portfolios into larger stores in the larger centres for economies of scale and market penetration. This has implications for Northern Ireland's centres, many of which are neither large enough nor have enough shop units to attract national multiples. Retailers are looking at affordability in their overall occupancy costs and will more readily locate in out of town or even secondary locations where business rates are not so prohibitive.[5]

3.9 In conclusion, the GL Hearn report suggested that for town centres throughout the UK to prosper, they needed to offer an experience over and above an average functional shopping trip which might otherwise be carried out on line or at the out of town retail park. The emphasis is on making town centres more attractive, viable and sustainable with more mixed-use futures i.e. not just focusing on traditional shopping.

4.0 Existing Fermanagh and Omagh Area Plans

4.1 Both the existing Fermanagh Area Plan and Omagh Area Plan recognise a retail hierarchy with the District Towns occupying the dominant position supported by the local towns and villages. The Omagh Area Plan recognises that Omagh's central position ensures a catchment over the whole district whereas Fermanagh has an important cross border role providing shopping facilities that benefit a catchment in Counties Donegal, Cavan, Monaghan and Leitrim. The local towns in contrast operate inside the main town's catchment and offer varying levels of shopping and commercial facilities related to meeting the daily and weekly shopping needs of their hinterland. The role of the villages and hamlets role is limited to catering for local day-to-day shopping needs.

4.2 The existing Area Plans designated town centre boundaries for Omagh, Enniskillen, Lisnaskea and Irvinestown. Fintona, Dromore and Carrickmore have no defined town centre boundaries. Where town centres are defined, it was anticipated that commercial activity would concentrate within them. New shopping and office development in the established town centres helps retain their vitality and viability. Within the main towns, opportunity sites and policy areas were designated within the town centres. The take up of these is examined.

4.3 Members should also be aware that Conservation Areas (CAs) are designated within the historic and commercial cores of Enniskillen, Omagh and Lisnaskea in recognition of the architectural and historic contribution these make to the respective towns. The designation of a Conservation Area can bring positive benefits to a town centre through proposals which enhance

[4] GL Hearn – Town Centres and Retailing Research Project (DOE NI) January 2014.
[5] Northern Ireland Commercial Property Report 2013 (Lisney)

the historic built character such as high-quality shop-fronts, facades and - where demolition has been accepted - high quality, contemporary buildings.

4.4 Conservation Areas also provide the potential to attract additional funding streams such as the lottery funded Townscape Heritage Initiative (THI) and NIEA Historic Buildings Unit for works to listed buildings - a high concentration of which can normally be found located within the CAs. These complement other mainstream town centre regeneration initiatives including the recent DSD funded Revitalisation Programmes (Enniskillen & Omagh) and DOE Dereliction Intervention Scheme (DIS) which collectively seek to create quality townscape environments.

(i) Enniskillen Town Centre

4.5 Enniskillen performs an important role as the main service centre for the south west of Northern Ireland as well as a strong cross border shopping function given that it borders four counties in the Republic of Ireland - Donegal, Cavan, Leitrim and Monaghan. The area stretching from West Bridge to Dublin Road and Forthill Street is designated as the Commercial Core of Enniskillen (Policy TC1) (Appendix 2 –Maps) and contains the traditional concentration of retailing and other town centre uses. The frontages of Belmore Street, East Bridge Street, Townhall Street, the Diamond, High Street and Church Street are designated as Primary Retail Frontage (Policy TC2). This places restrictions on non-retail shop proposals at ground floor level within these streets. The remaining streets within the town centre are secondary shopping areas and proposals for local services, offices and food uses will be determined on locational merits.

4.6 The Plan identified seven opportunity sites within the town centre as having special merit for a particular land use. The Plan refers to Enniskillen Town Centre as being an attractive retail, tourist and general service centre. The Plan sets out a range of objectives for Enniskillen Town Centre. This was to retain and consolidate the existing commercial attraction of the town centre shopping streets, to promote the continued development of the town centre as a major tourist and recreation attraction and to incorporate suitable sites to meet small scale craft and mixed business need.

4.7 Most of these sites have been developed, notably the Portora Wharf Holiday Apartments and retail units, the Clinton International Peace Centre and Youth Hostel accommodation and the Railway Junction Retail Park with Lidl, Curry's and Carpetland (Appendix 3). In addition, four Policy Areas were identified within the town centre at Castle Barracks, Buttermarket Area, land to the north of Dublin Road/Tempo Road and Derrychara Industrial Units (Appendix 3).

(ii) Omagh Town Centre

4.8 Omagh has an extensive town centre boundary which is mainly contained at its southern side by the Great Northern Road but with an extension beyond this as far as the Asda store on Dromore Road. It extends northwards from the river as far as the junction of Lisanelly Avenue/Old Mountfield Road junction. The commercial area of Campsie Road is also included and an area along the Derry Road opposite the PSNI station. Omagh’s main shopping frontages are along High Street, Market Street, Bridge Street, John Street and George’s Street and areas accessed from them including Scarffe’s Entry, Foundry Lane, Prospect Court and Old Market Place. However, the western section of High Street near the courthouse has a concentration of offices.

4.9 Within the defined town centre limit 15 Opportunity Sites and 5 Policy Areas were identified (Appendix 2 - Maps). Most of the opportunity sites have been developed with the developments of Dunnes Store, Lidl (James Street) and the Showgrounds Retail Park strengthening the shopping attraction of the town (Appendix 4). This has been complemented by retail developments on non-identified town centre sites such as the former Royal Arms site and the out-of-town-centre retail park at Tamlaght Road (the Great Northern Retail Park). In particular, new retailers such as Argos, Marks & Spencers, Next and Homebase have all added to the variety of shops on offer. The town has also grown as an administrative centre with the development of offices at Scarffe’s Entry and Sedan Avenue. The town’s role as an educational and cultural centre has also improved with the provision of the Strule Arts Centre and South West College of Further Education.

4.10 The creation of a Riverside Walkway/Cycle path from Abbey Bridge through the MoD lands of Lisanelly and St. Lucia connecting to the new proposed Strathroy Link Road, will provide an important link to the town centre as well as an attractive recreation asset. This scheme provides a new public space or plaza above the car park including a new foot/cycle bridge across the river into Old Market Yard. Just outside the town centre boundary, there are plans for a new Omniplex, eight screen cinema on the former Desmond’s factory site. The St. Lucia site also offers the potential for development although it too is outside the town centre.

(iii) Lisnaskea Town Centre

4.11 Lisnaskea is the second largest town in Fermanagh and provides a range of shops and services including two supermarkets (Supervalu store and Lidl store). One Opportunity Site was identified to the west of the town centre suitable for a comprehensive development scheme. It is currently used as a car park. The listed Corn market contains several small shop units.

(iv) Irvinestown Town Centre

4.12 The Plan encouraged development along the Pound Street/Mill Street link road. Supervalu and a number of other retail units have been established, thus creating a retail frontage. The centre remains relatively vibrant with a range of shops and services.

(v) Fintona, Dromore and Carrickmore

4.13 These three towns do not have town centres designated within them. Each of them has a limited range of shops and services, including one or more small food shops. There are two supermarkets (Supervalu store and Eurospar) in Fintona. Essentially, they perform the function of meeting the daily needs of people living in their immediate hinterlands.

Town Centre Masterplans

4.14 Whilst existing Area Plans provide the statutory planning framework for land use proposals, it is acknowledged that Town Centre Masterplans, although non-statutory, perform an important role in focusing regeneration initiatives and public realm improvements in our town centres. They are commissioned by the Department for Social Development (DSD) who work closely with the District Council and other stakeholders to set a vision for the town centre, identify key proposals for realising that vision and how those proposals may be delivered over a set time period. Enniskillen Town Centre Masterplan was published in 2012. Omagh's Town Centre Masterplan, published in 2009 and reviewed at the end of March 2015.

(i) Enniskillen

4.15 The Enniskillen Masterplan (2012) seeks to reinforce its position as a Regional Hub and Gateway as the County Town of Fermanagh and the vision for Enniskillen is enshrined in a set of seven core regeneration objectives which is hoped will contribute to the long-term vitality and viability of the town centre.

4.16 The Masterplan identifies three major opportunity sites as being important to the wider regeneration of the Town Centre, offering the opportunity for more comprehensive redevelopment on a large scale. These are: -

- The PSNI site
- The Buttermarket
- Bus Station

4.17 Although outside the town centre boundary, the Masterplan also recognises the significant opportunity presented by the vacated former Erne Hospital site. Given its size, its potential redevelopment as a shared services facility for public sector offices would allow the release of sites such as the Housing Executive, Library, Jobs and Benefits office and South West College within the town centre which could be considered for residential or commercial development. However, at present, only South West College has plans to relocate to the former hospital site. A new Ambulance base will also be built on the site which is currently being demolished.

4.18 Along with a range of interventions on a variety of sites across the town centre, an Environmental Improvement (EI) scheme is proposed to the main thoroughfare and Wellington Street along with public realm schemes such as at the Buttermarket. An environmental improvement along Queen Elizabeth Boulevard has already been complete and work has commenced on regeneration works to the Castle Basin and redevelopment of Enniskillen Castle.

4.19 To improve Enniskillen's role as a tourism hub in Fermanagh and take advantage of its island setting, the Masterplan also contains tourism proposals aimed at providing more accessible water-based activities, walking and cycling trails, heritage trails, a wider programme of events and festivals and repositioning of the Town Centre retail offer towards one - or a series of - niche (high quality) retail offers. An additional hotel close to the waterside is another proposal.

4.20 There is no doubt many businesses are experiencing difficulties in today's challenging economic climate such as empty and dilapidated properties. In response, Fermanagh District Council through the DSD Revitalisation Scheme successfully delivered shop-front improvements to many individual properties which have collectively improved the appearance of the historic core of the town. This was implemented in 2012 to coincide with the G8 Summit.

(ii) Omagh

4.21 The current Omagh Town Centre Masterplan (2009) acknowledges that High Street and Market Street are the most important streets and should remain so as the town develops into the future. It proposes that High Street/Market Street remains the focus of further investment to ensure that its shops and businesses are economically sustainable. Its historic fabric of churches, narrow streets and barrack buildings such as the Courthouse will be conserved and revitalised to become a vibrant part of the town. Indeed, part of this strategy is currently being realised along John Street with the DSD funded Revitalisation Scheme bringing forward a series of physical works including cover up treatments, painting, signage and new shop-front schemes and interpretation panels showcasing the town's heritage. Funding is also being made available for other initiatives such as marketing strategies which include social media strategies, installation of wi-fi, design of town centre websites and digital marketing awareness programmes.

4.22 The Masterplan focused on six core areas, each with a primary role in terms of land use and regeneration and aimed at maintaining a mixed-use town centre that comprises of commercial, leisure and residential uses. One of these areas is the former army land at Lisanelly, a 126-acre site which now has planning permission for the Strule Shared Educational Campus. This will see the relocation of six schools (Arvalee School and Resource Centre; Loreto Grammar School; Omagh High School; Sacred Heart College; Omagh Academy and Christian Brothers Grammar School) at an estimated cost of £120 million. While the benefits are widely accepted, this is an ambitious project which will nevertheless present a series of challenges/opportunities for the town centre such as impact on vitality and viability as well as coming up with alternative and compatible uses when these existing school sites are eventually vacated.

4.23 The Omagh Town Centre Masterplan is currently being revised and aims to redefine the role of Omagh as a place with a distinctive character and retail offer and strengthening its links with its surrounding area as part of its 'Outdoor Omagh' theme. Amongst some of the draft proposals are sustainable transport planning, High Street Pedestrianisation, riverfront development and public realm works.

4.24 Complementing the Town Centre Masterplan is Omagh's Visioning Framework 2025 which proposes a range of social, economic and physical interventions that could shape the future development of the town. A key objective of the Visioning Framework is the objective to achieve city status for Omagh town.

5.0 Town Centre Studies

In preparing a plan, a town centre retail capacity study and a town centre health check, incorporating retailer and shopper surveys, was undertaken.

Town Centre Health Check

5.1 A town centre health check is essentially a qualitative assessment in that it looks at the attractiveness, accessibility and amenity of the town centre. Although no single indicator can effectively measure the health of a town centre, the use of a series of them can provide a view of performance and offer a framework for assessing vitality and viability. Vitality is a measure of how busy a centre is, and viability is a measure of its capacity to attract ongoing investment for maintenance, improvement and adaptation to changing needs. Key indicators include accessibility, customer views, diversity of uses, retailer profile, environmental quality, pedestrian flows, retailer views, shop rents, crime and vacancy rates.

5.2 Town Centre Health Checks were carried out for both Enniskillen and Omagh in 2016 (see Appendix 5A and 5B). A summary of the key findings is set out below:

(i) Enniskillen

Diversity of Uses

- The survey identified a wide range of uses within the town centre including convenience goods (5.03%), comparison goods (23.41%), mixed stores (0.44%), retail services (30.85%) and offices (29.76%). Vacant properties account for just over 10% of the total.

Shop Rents

- Since 2009, rent levels have dropped in both prime zone A areas and secondary zone A areas (defined as the most valuable area of the shop i.e. the first five-metre depth). Secondary retail areas which include the remainder of Darling Street, Belmore Street and Fort Hill Street achieved £210 per square metre for zone A rents in 2013.

Rental values over the period 2009 to 2013 indicate a 26% decrease in primary retail locations compared to a 22% decrease in secondary areas. Rents generally start to decrease moving away from the prime retail area of High Street and Town Hall Street, largely dictated by market demand and characterised by soft deals and short break clauses.

Shopper Views

- Most shoppers travel to the town centre by car though a substantial proportion (nearly 10%) use the bus or (9%) walk, highlighting how many shoppers live within walking distance of the town centre.
- Most shoppers indicated they were shopping for convenience goods (60%) followed by comparison goods (34%).
- Other than shopping, nearly 87% of shoppers stated that they did come into Enniskillen for other reasons e.g. working, socialising and dining.
- Most shoppers live 2 – 10 miles from Enniskillen and travel to the town by car, where it was stated there is sufficient parking and public amenities within the town centre. However, most shoppers believe there is a need for more public toilets.

Retailers' Views

- Most of the businesses in Enniskillen are independently operated (62%) with 68% of those who responded indicating they had been trading in the town over ten years.
- 65% of retailers have premises of under 300 square metres and over half of retailers operate their business on a single floor level.

Pedestrian Flows

- Pedestrian counts were taken in 2016 over a two-day period in June. Highest counts in all survey areas were between 13:00-14:00, followed by the evening period 15:00 – 16:00 and lowest footfall figures returned in the morning period 10:00 – 11:00. Peripheral areas such as Paget Square and East Bridge Street returned higher pedestrian flows on the Friday than the more central count points around The Diamond. On the second count day, a Saturday, the central count points around the Townhall and in Erneside Shopping Centre returned higher values than the more peripheral areas.

Accessibility

- Enniskillen's town centre infrastructure was improved in 2013 with the addition of Cherrymount Link Road carrying approximately 16,000 cars a day across the north of the town. Traffic on the main Belfast to Sligo road must continue to use the Enniskillen by-pass which also serves local traffic traversing the town centre.
- The bus station is located in the town centre with frequent services to Belfast and Dublin on weekdays. Surrounding towns and villages are also serviced. Again, services are noticeably poorer at the weekends, reducing the accessibility of the town centre. Large areas of Fermanagh do not have public transport provision, thereby limiting accessibility to Enniskillen town centre.

- Enniskillen has no access to the rail network within the Region.
- The National Cycle Network runs through Enniskillen.

Car Parking

- There are 1,697 car parking spaces in Enniskillen. E-car charge points are available throughout the town centre[6]. The nearest 'park and ride' facility is located at Ballygawley.

Environmental Quality

- The previous Environmental Improvement Scheme was completed approximately 30 years ago. The Castle Basin and Revitalisation projects have been completed since. Minor cosmetic works were completed in preparation for the G8 summit.
- Communities Minister Paul Givan announced a £5.2million improvement scheme in January 2017 to further enhance the town centre.

Building Condition Survey

- A survey was carried out in September 2016 by FODC to assess the quality of buildings in Enniskillen. Enniskillen town centre was considered to have a high proportion of high quality buildings.

Environmental Quality Assessment

- Most street surfaces were of good quality. Limited street furniture was evident in the town centre and where it was provided it was found to be of moderate condition. Signage and tourist information was limited in several streets in the town centre. High Street, Belmore Street and New Street had the highest standard of signage and tourist information within the town centre.
- Many of the streets in Enniskillen that have vehicular traffic flow do provide substantial accommodation for pedestrians such as crossing points and islands.
- There are no green park spaces within the main shopping area of the town centre.
- Wheelchair access is generally good within the town centre, with nearly all shops having access of suitable widths without steps.

(ii) Omagh

Diversity of Uses

- The survey identified a wide range of uses at ground floor level within the town centre including convenience goods (5.07%), comparison goods (30.27%), mixed stores (0.5%), retail services (26.76%) and offices (26.37%). Vacant properties account for over 10% of the total;

[6] https://www.zap-map.com/live/ accessed10/10/2018

Shop rents

- Prime areas of retail floor space are located along upper Market Street and High Street. In the secondary rental areas of lower Market Street, Foundry Lane and John Street, rental values over the period 2009-2013 appear to be decreasing at a slower rate than in the Prime zone;
- Omagh Town Centre is achieving higher prime zone rental rates than Cookstown, Dungannon and Magherafelt, with only Enniskillen achieving higher rental rates. Secondary rental areas are achieving the same rental rate as Dungannon which is higher than both Cookstown and Magherafelt whilst lower than Enniskille.;

Shoppers' Views

- Most shoppers travel to the town centre by car though a substantial proportion (nearly 15%) walk;
- Almost half respondents indicated the purpose of the visit was for convenience goods. When questioned whether they would shop in any other town, over 80% of respondents said they would, shopping for comparison goods (48%) followed by convenience goods (41%);
- Whilst shoppers commented on the atmosphere, cleanliness, familiarity convenience and choice of shops as things that they like most about Omagh town centre most shoppers stated that there were insufficient parking and public amenities within the town centre, with the need for public toilets most frequently underlined.

Retailers' Views

- Most of the businesses in Omagh are independently operated with 71% of those who responded indicating they had been trading in the town over ten years.
- 71% of retailers have premises of under 300 square metres and over 70% of retailers operate their business on a single floor level.

Pedestrian Flows

- Pedestrian counts were taken in 2016 over a two-day period in June. Highest counts in all survey areas were between 15:00 – 16:00, followed by 13:00 – 14:00 and lowest footfall figures returned in the morning period 10:00 – 11:00. Market Street at Primark returned highest count values. Bridge Street returned a relatively high value for the 15:00 – 16:00 time as the street is a route for school children to the depot.

Accessibility

- Omagh is located at the intersection of several strategic routes and other important transport corridors in the area. Most important among these are the A5 (Derry/Londonderry to Dublin route), the A505 (Omagh to Cookstown route) and the A32 (Omagh - Enniskillen route).
- The Bus Centre is centrally located offering services to Dublin and Derry/Londonderry. Omagh has seven bus routes within the urban area

which provide accessibility to most areas of the town. None of the town routes nor routes servicing surrounding villages operate on a Sunday.

- There is no rail infrastructure in the Fermanagh & Omagh District Council Area.
- A taxi rank is located adjacent to the Bus Station.
- The Sustrans National Cycle Network runs through Omagh.

Car Parking

- There are 1,443 car parking spaces available within Omagh town centre. E-car charge points are available throughout the town centre[7].
- A 'park and ride' car park is available at Crevenagh Road adjacent to the A5 Great Northern Road. A smaller 'park and ride' facility is available at Crawford's Bridge, Curr Road, Beragh immediately adjacent to the A5. The Ballygawley 'park and ride' facility is approximately 16 miles away.

Environmental Quality

- Environmental Schemes have been undertaken in the late 1990's and 2005 in Omagh town. In 2016 a scheme was undertaken in the Old Market Yard area to improve the shopping experience within Omagh town centre.
- The OASIS project immediately adjacent to the Bus Depot contributes to improving the local townscape and environment. The project included the development of a pedestrian and cycle path along the river bank, the installation of a pedestrian bridge to create a new link to the town centre and the creation of a recreation and meeting space above Drumragh Car Park.

Building Condition Survey

- A survey was carried out in September 2016 by FODC to assess the quality of buildings in Omagh. The town centre was considered to have a high proportion of high quality buildings.

Environmental Quality Assessment

- An environmental quality assessment was carried out in June 2016 by Fermanagh and Omagh District Planning Department for the main shopping areas within the town centre.
- Most street surfaces were of good quality in the primary shopping areas with a notable decrease in the more secondary areas such as Old Market Place and Scarffe's Entry. Most areas in the town centre had limited or no presence of street furniture particularly seating. The quality of the street furniture and the provision of street lighting was generally good, particularly in the shopping courts such as Prospect Court and the Royal Arms Development off High Street.
- Dublin Road and Market Road area had the highest standard of signage and tourist information within the Town Centre. Dublin Road had good styling and good level of signage and tourist information. Castle Street and Market Road area had a moderate styling with limited

[7] https://www.zap-map.com/live/ accessed10/10/2018

provision. The signage and tourist information in the remaining survey areas such as High Street, Market Street and Royal Arms Development was either none existent or has poor styling with poor provision.
- While much of the town centre is devoid of landscaping, trees have been planted around the town centre as part of the environmental improvement scheme. There are no green park spaces within the main shopping area of the town centre.
- Trees have been planted around the town centre as part of the environmental improvement scheme. There are no green park spaces within the main

Retail Capacity Study

5.3 In order to inform the LDP's town centre and retail strategy and in line with the SPPS, a Retail and Commercial Leisure Needs Assessment Study (March 2017), was undertaken to assess the potential need for additional retail and main town centre uses for the period up to 2030. The main objectives of the study were to:

- Provide an analysis of retail and commercial leisure market trends to examine how town centres are changing;
- Undertake a quantitative assessment of the retail and commercial leisure capacity of the town centres of Enniskillen and Omagh for the period up to 2020;
- Compare Enniskillen's and Omagh's retail offer in the context of UK averages;
- Take into account plans and proposals in neighbouring towns and cross-border which may impact on Enniskillen and Omagh; and
- Make recommendations for future improvement, arising from the assessments.

Key Conclusions of the Study

5.4 The report sets out the context for the Retail and Leisure Study by analysing key current and future retail trends within the UK and NI and the current composition of the two main town centres, Enniskillen and Omagh in terms of floorspace and unit numbers. The methodology follows a consistent, robust approach and is informed by population and expenditure forecasts and the analysis of a household telephone survey to assist in an understanding of existing market share patterns, and the performance of existing centres and stores. In assessing future retail capacity floorspace need, a number of extant planning commitments have also been taken into account.

5.5 The report concludes that there is demonstrable capacity for additional convenience floorspace over the Plan period within Enniskillen (maximum of 2,200 sq.m net by 2030) and the rest of the District (maximum of 600 sq.m net by 2030). However, across the district as a whole this is more than off-set by a significant negative capacity in Omagh (minus 6,000 sq.m net by 2030). Whilst there is significant over-trade from existing food stores in Omagh, indicating that there is the opportunity for increased competition, there are three large extant commitments for convenience retailing (three in Omagh) which, if implemented, would more than consume available floorspace capacity.

5.6 With comparison goods - and taking into account commitments totalling 4,348 sq. m net - there is an identifiable capacity for between 4,400 sq. m and 6,900 sq. m of net additional comparison floorspace across Fermanagh and Omagh from 2025 onwards. Capacity is identified in both Enniskillen and Omagh to support either a large standalone retailer, or a small retail park.

5.7 In terms of leisure and other town centre uses, Fermanagh and Omagh's existing leisure provision was measured against 'benchmarks' to ascertain whether there were any gaps in the market where demand is not being met by existing provision. The report concludes that the District provides well for its population in terms of health and fitness, indoor sports, cinemas and bars/pubs and there was no identified latent capacity for any of these activities. This is largely a factor of the District's small and relatively stable population, with only limited growth predicted through to 2030.

5.8 However, consideration of the household survey identified that qualitative improvements could be provided to the stock of health and fitness clubs, ten-pin bowling facilities (e.g. Omagh) and improvements to the quantitative and qualitative provision of hotels in the Omagh area. It was also noted that around one-third of respondents suggested the need to improve tourist attractions across the District.

6.0 Conclusions

6.1 The key role for a development plan is to support and sustain vibrant town centres. Town centres should not be viewed simply as destinations for shopping but also places providing a wide range of uses to attract people into them. This includes cultural, community, residential, retail, leisure, public/open space, entertainment and businesses. From the studies for Enniskillen and Omagh, both towns already have a diverse range of uses although clearly there is room for improvement particularly in the commercial leisure and tourism areas in Enniskillen. These areas also have the potential for growth in Omagh as explored in the Omagh Town Centre Masterplan which is currently being revised.

6.2 In Omagh, it is recognised that the future release of vacated school sites within the town centre as a consequence of the development of the Strule Shared Education Campus, will provide opportunities for the development of a wide range of uses (cultural and community facilities, residential, leisure, etc) which can assist in complementing the retail offer and attractiveness of the town centre. It also presents challenges for the Plan as development will be dependent upon the willingness of landowners/developers to release them. In Enniskillen, there is also uncertainty about the availability of some of the potential development sites identified in the Enniskillen Town Centre Masterplan. As part of the process of identifying sites to be allocated for town centre uses in the Plan, the SPPS suggests that councils should undertake a 'call for sites' consultation exercise.

6.3 The new Local Development Plan (LDP) will provide the opportunity to re-examine the spatial extent of existing town centres, define a primary retail core and allocate a range of suitable sites to meet the scale and form of retail and other town centre uses.

6.4 As set out in the SPPS, LDPs are also required to include a Retail Strategy and contain appropriate policies and proposals that must promote town centres first for retail and other main town centre uses. It has focused developer's attention on town centres again rather than out of centre development. In line with regional policy, the Plan will need to ensure that retail growth remains focused in these centres. That said,

6.5 Therefore, in line with regional policy and in recognition of their respective roles within the settlement hierarchy, the principal focus for retail growth and other town centre uses shall be within Enniskillen and Omagh town centres. The importance of the retail hierarchy across the district is also recognised in that retail facilities in the small towns, villages and at local level can complement the main centres. Thus, opportunities for small scale growth which helps meet the daily shopping needs of local residents and adds to the vitality of the small towns and villages through the creation of local services such as financial/professional services and cafes and restaurants, should be encouraged in appropriate locations.

6.6 Additionally, to maintain compact, lively and attractive centres within Enniskillen and Omagh, Primary Retail Cores will be designated within these two towns which encompass the traditional concentration of shops. Proposals for retail development will therefore be directed towards the Primary Retail Core in the first instance.

Appendix 1

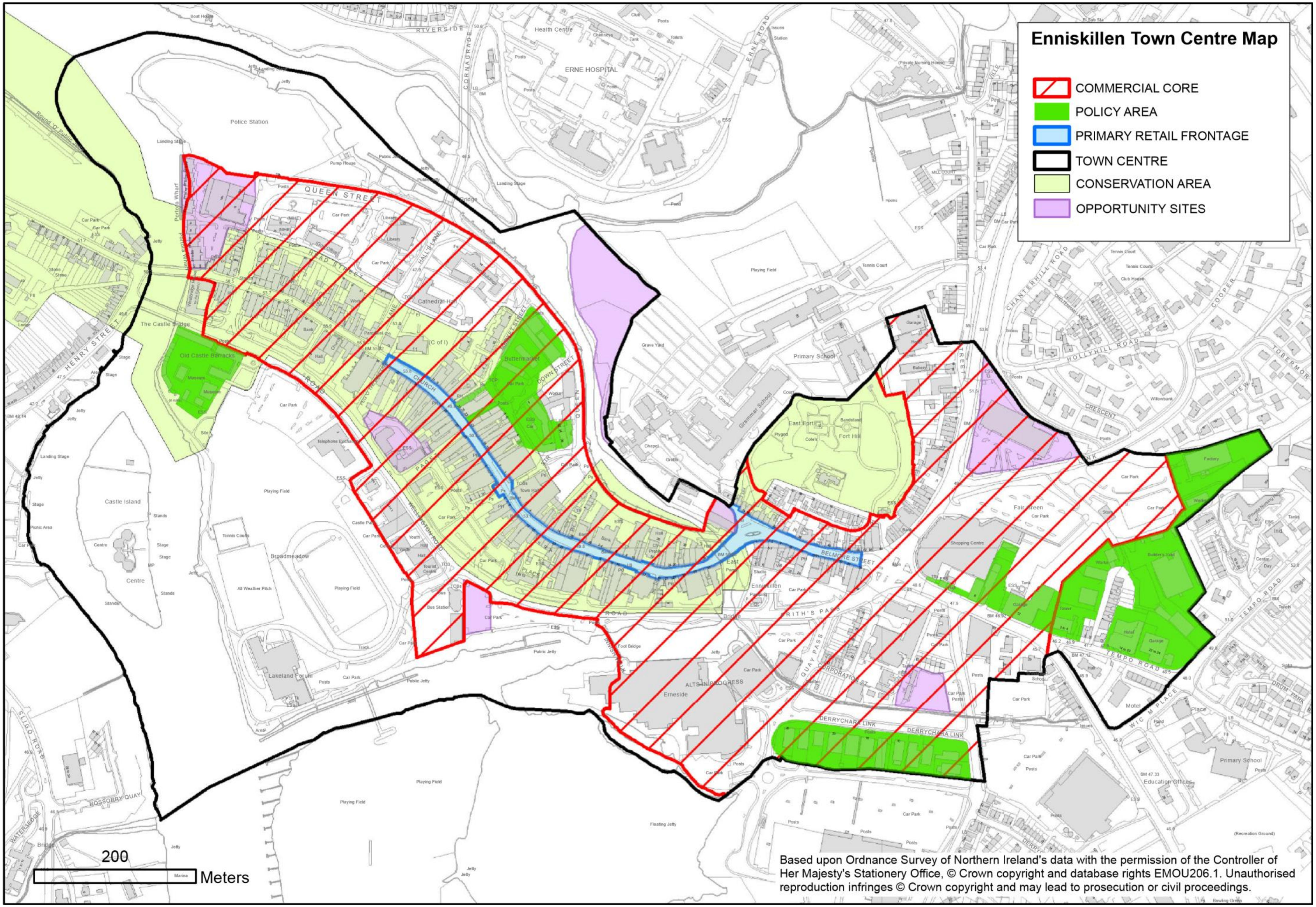
Town Centre Health Check Criteria

- Town centre diversity: assessed in terms of types of uses (by number and, where available, by floorspace), in conjunction with analysis of Experian historic trends.
- Floorspace in edge-of-centre and out-of-centre locations
- Potential capacity for growth or change: analysis of historic trends and identification of key opportunities in terms of vacant sites for expansion or clusters of vacancies which might point towards contraction
- Retailer representation and intentions to change: notable retailers present in the town and identification of any clear gaps in representation/evidence of retailer requirements in centres
- Shopping rents: where available, details of rental levels in the prime shopping areas
- Vacancy rates: identification of ground-floor vacancies and observations on any notable clustering
- Commercial yields: where available, analysis of yield data to provide insight on investor confidence in the centres
- Pedestrian flows: observation of footfall on main shopping streets to assess vitality and identify main attractors within the centres
- Accessibility: consideration of opportunities to access the centre by non-car transport modes and provision of car parking
- Safety and crime: observations, including evidence of CCTV or police presence, vandalism and graffiti, limited to daytime and relating to the town centre only
- Environmental quality: qualitative assessment of the town centre environment including dominance of traffic, ease of pedestrian movement and details of any recent investment in public realm.

Source: G L Hearn, Town Centres and Retailing Research Project (DOE NI) January 2014.

Appendix 2

Existing Town Centre Maps


Enniskillen Town Centre Map
COMMERCIAL CORE
POLICY AREA
PRIMARY RETAIL FRONTAGE
TOWN CENTRE
CONSERVATION AREA
OPPORTUNITY SITES
200
Meters
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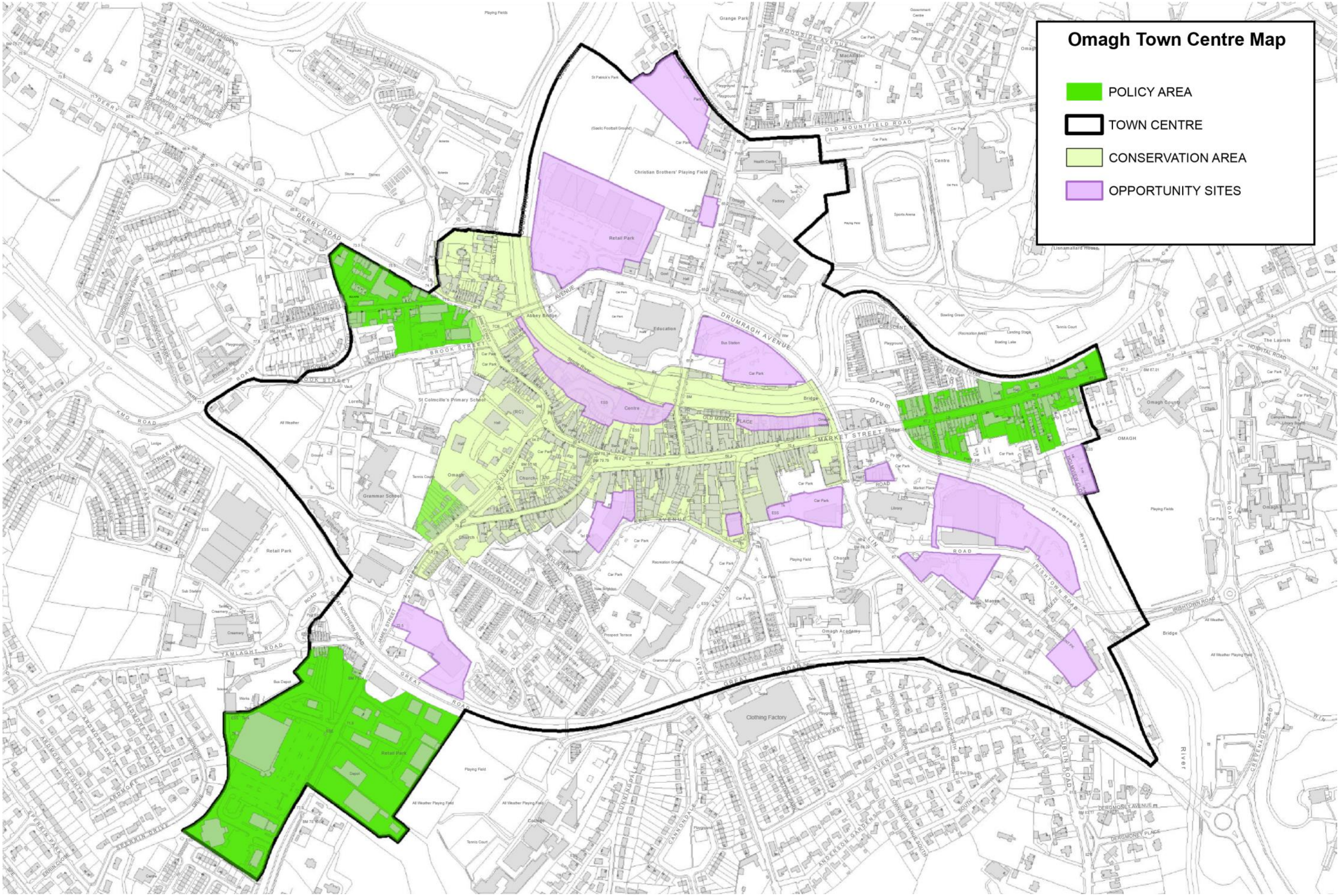

Omagh Town Centre Map
POLICY AREA
TOWN CENTRE
CONSERVATION AREA
OPPORTUNITY SITES
DERRY ROAD
BROOK STREET
MARKET STREET
DRUMRAGH AVENUE
OLD MOUNTFIELD ROAD
GREAT NORTHERN ROAD
IRISHTOWN ROAD
DUBLIN ROAD
HOSPITAL ROAD
Retail Park
Christian Brothers' Playing Field
Clothing Factory
Omagh Academy
Grammar School
Sports Arena

Appendix 3

Opportunity Sites – Fermanagh Area Plan 2007

OS	Location	Plan Proposal	Development Status
01	Former Erne Engineering Site Fronting Queen St and Anne Street	Commercial/ Residential/Car Parking/Tourism	Riverside Apartments/Petrol Filling Station (Maxol) Supermarket (Spar)
02	Johnston Basin	Civic Uses/Residential/Car Parking	Undeveloped
03	Former St Michael's Community Hall	Community Uses/Housing	The Clinton Centre
04	Old Railway Yard	Retail Warehousing/Offices	Curry's/Carpet Right/ Lidl & Car Parking
05	Lands Adjoining Fermanagh College of Further Education	Community Uses	Undeveloped
06	Vacant Site adjacent to Bus Depot	Commercial/Car Parking	Car Parking
07	Paget Square and Adjacent Backland	Residential/Commerci al/Car Parking	Office/Apartments/ GF Retail (Xtravision)

Policy Areas – Fermanagh Area Plan 2007

Plan Ref	Policy Area Description	Current Status
P1	Castle Barracks – encourage further development as a major tourist attraction; protect the site and setting and important views from and of Enniskillen Castle	Castle Museum with work underway for exhibition centre (based in Barrack Coach House), erection of new visitor centre
P2	Extended Buttermarket Area –encourage consolidation and development for crafts, restaurants and tourist attractions	Extensive range of small, specialist, 'niche' craft shops etc

P3	Land to the north of Dublin Road/Tempo Road – area of mixed uses with opportunities for redevelopment for mixed business purposes.	Mix of uses including Westville Hotel, McDonalds, convenience store, garden centre/building
Plan Ref	Policy Area Description	Current Status
		merchant supplier; plant hire
P4	Derrychara Industrial Units – encourage consolidation of this area for small scale retail warehousing, light industrial or commercial units.	Mix of bulky goods retailing; commercial units

Appendix 4

Opportunity Sites – Omagh Area Plan 2002

OS	Location	Plan Proposal	Development Status
1	Showgrounds, Sedan Avenue	Mixed Commercial & Residential	10 Retail Units
2	Rear of Georges Street, High Street and Castle Street	New Town hall, Community/Cultural Development	Strule Arts Centre & Tourist Information, 3 Retail Units, Offices & Riverside Walkway
3	East of James Street	Commercial/Residential Uses	Partly Developed as Retail Warehousing (Lidl)
4	Adjacent to Foundry Lane	Retail/Office Development	Shops and Office Developed including Iceland
5	West of Scarrfe's Entry	Retail/Office Development	Offices (Boaz House) and 2 retail Units
6	West of Dublin Road	Mixed Retail Development	Partly Developed for mixed retail. Application approved (K/2014/0497/f) for new Primark involving extension, new service yard, car parking and alteration to existing road junction
7	Irishtown Road	Mixed Retail/Offices/Light Industry Development	Dunne's Stores
8	Between Irishtown Road and Dublin Roads	Sheltered Housing/Museum/Technology Centre and Car Parking	Technology Centre/Offices
9	Market Road	Retail/Office Development	Retail Units
10	Behind Market Street	Mixed Retail/Office/Leisure Development with Town Centre Parking	Not Developed
11	Drumragh Avenue	Mixed Commercial/Leisure Development With Town Centre Parking	Development Commenced for Proposed public space area Includes 60m pedestrian/cycle bridge, access ramp at Old Market Place and 130m

			of riverside path/angling platforms – Planning Reference K/2012/0553/F
12	Mountjoy Road	Office Development	Not Developed – Used for Car Parking
13	Lisanelly Avenue	Residential/Office Use	Partly Developed for CarParking
14	Breezemount Park	Sheltered Housing	Not Developed
15	Holmview Avenue	Residential Use	Developed as Flats/Housing

Appendix 5A

Enniskillen Town Centre Health Check

1. Vitality and Viability

1.1 The Strategic Planning Policy Statement (September 2015) states that a 'health check' of the town centre must be undertaken as part of the preparation of a development plan. The SPPS continues by stating that the plan 'must undertake an assessment of the need or capacity for retail and other main town centre uses across the plan area'. The Local Development Plan will include a strategy for town centres and retailing and contain appropriate policies and proposals that must promote town centres first for retail and other main town centre uses.

1.2 Town centre health checks provide a baseline position, against which future measurement and regular monitoring can be carried out over the plan period. The concept of vitality and viability is central to maintaining and enhancing town centres. Vitality is a measure of how busy a town centre is and viability is a measure of its capacity to attract ongoing investment for maintenance and improvement and adapt to changing needs. Although no single indicator can effectively measure the health of a town centre, the use of a series of them can provide a view of performance and offer a framework for assessing vitality and viability. The key indicators used to measure the health of Enniskillen Town Centre are accessibility, customer views, diversity of uses, retailer profile, environmental quality, pedestrian flows, retailer views, shop rents, and vacancy rates.

2. Retailer Profile, Diversity of Uses and Vacancies

Retail Hierarchy and Market Overview

2.1 The Regional Development Strategy 2035 brings forward a spatial framework including a hierarchy of settlements. This defines the Belfast Metropolitan Area and Derry/Londonderry (the regional centre for the North West) as major regional cities, below which there are a series of 'main hubs' such as Enniskillen and 'local hubs'.

2.2 In February 2013, the former DOE commissioned a consortium of consultants led by GL Hearn, to prepare a research report[8] to:

- investigate existing town centre and retail planning policy practice in other jurisdictions, advise on best practice and identify potential implications for Northern Ireland;
- undertake an assessment of the current health of designated town centre and review existing and committed out-of-centre retail development;

[8] Department of the Environment Northern Ireland (January 2014) *Town Centres and Retailing Research Project*

- provide an assessment of town centre and retail trends, specifically considering their impact on Northern Ireland in the short, medium and long term;
- undertake a programme of structured stakeholder engagement to inform research and policy recommendations;
- provide and evaluate options for town centre and retail planning policy in Northern Ireland, including recommending a preferred approach for future policy direction.

2.3 The report developed a retail hierarchy based on a combination of five key indicators of a centres' role in the retail hierarchy:

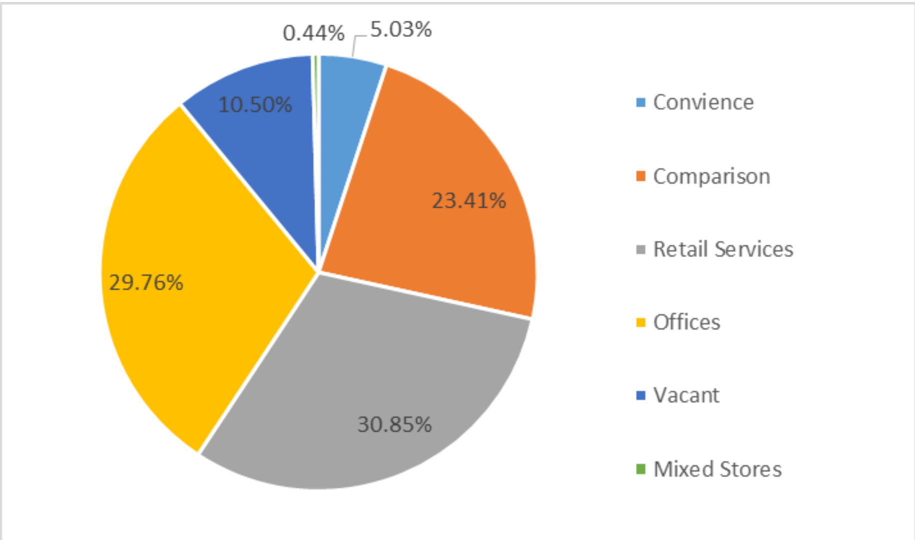
- Status in the RDS settlement hierarchy;
- Population;
- Experian Goad Retail Rankings position;
- Scale of retail floor space;
- Comparison goods market share.

This hierarchy identifies Belfast as a 'very large' centre followed by four 'large' centres. Enniskillen is classified as a 'medium' centre.

Diversity of Uses Survey

2.4 A diversity of uses survey was carried out in November 2016 for the main shopping areas within the town centre at ground floor level. The survey identified a wide range of uses within the town centre including convenience goods, comparison goods, mixed stores, services, offices, community, residential and vacant (Figure 1).

Figure 1: Diversity of Uses at Ground Floor level in Enniskillen Town Centre 2016



Source: FODC Town Centre Retail Survey 2016

2.5 Within the surveyed area, the largest number of units at ground floor level were found to be retail services (30.85%), offices (29.76%) and comparison stores (23.41%). Convenience stores accounted for approximately 5% of all units whilst 10.5% of units were found to be vacant. Those comparison and convenience goods stores which were part of a national group accounted for 35%, with the remainder being independent stores.

2.6 A concentration of retail services is found on Fort Hill Street and Belmore Street with a concentration of comparison retailing located in Town Hall Street, High Street and Church Street and the shopping areas accessed from them. However, a notable concentration of offices is found in East Bridge Street and Town Hall Street in the vicinity of the Town Hall. The secondary shopping areas on Darling Street, and Fort Hill Street have a greater proportion of service uses and characteristically have more vacant properties. Paget Square also has a concentration of vacant properties. Residential use at ground floor level (mainly houses in single occupation) is mostly found at the periphery of the main shopping area.

2.7 Several units in the area of High Street and Town Hall Street are recorded as having comparison goods, with very few of these having a first-floor sales floor area. Instead these units are normally used for either storage or office use ancillary to the ground floor retail use. A significant proportion of units in this area are vacant at first floor level. The secondary shopping areas on Darling Street and Fort Hill Street have a greater proportion of residential use (mainly flats) at first floor level.

Shop Rents

2.8 Enniskillen's prime areas of retail floor space in the town is found along High Street and Town Hall Street, surrounding the Diamond. There is also prime retail space in Erneside which also has close access to the town centre via Erneside Bridge and Regal Pass. Since 2009, rent levels have dropped in both prime zone A areas and secondary zone A areas (defined as the most valuable area of the shop i.e. the first five-metre depth). The average rental values for primary locations for zone A rents achieved £340 per square metre in 2013. Secondary retail areas which include the remainder of Darling Street, Belmore Street and Fort Hill Street achieved £210 per square metre for zone A rents in 2013. Rental values over the period 2009 to 2013 indicate a 26% decrease in primary retail locations compared to a 22% decrease in secondary areas.

Table 1: Town Centre Rents 2009-2013

	2009		2011		2013	
	Prime Zone A £/sq m	Secondary Zone A £/sq m	Prime Zone A £/sq m	Secondary Zone A £/sq m	Prime Zone A £/sq m	Secondary Zone A £/sq m
Cookstown	360	220	300	200	250	180
Dungannon	360	220	300	210	240	200
Enniskillen	460	270	380	250	340	210

Omagh	420	220	360	210	320	200
Magherafelt	300	210	270	200	250	180
Erneside Enniskillen	700 Zone A		640 Zone A		600 Zone A	
Oaks Centre Dungannon	240 Zone A		210 Zone A		170 Zone A	
The Linen Green Dungannon	240 Zone A		210 Zone A		170 Zone A	

Source: Land and Property Services, 2014

2.9 Rents generally start to decrease moving away from the prime retail area of High Street and Town Hall Street, largely dictated by market demand and characterised by soft deals and short break clauses. However, there are few vacant retail units in Enniskillen compared to other places which is a reflection on landlords being realistic with their rental requirements and offering incentives such as rent free periods. It is fair to say, that demand has remained buoyant over the last 2 years. Enniskillen is an attractive proposition for start-up businesses.

2.10 When rental values are compared to other district towns in the West (Table 1), Enniskillen town centre is achieving the highest prime Zone A rents in comparison to Omagh, Cookstown, Dungannon, and Magherafelt, confirming its position as a major retailing town. Rents in primary retail locations have decreased in Omagh by 24% from 2009 to 2013. Cookstown have seen a 31% decrease from 2009 to 2013, whilst Dungannon has experienced a decrease in rental values by 33% from 2009 to 2013.

3.0 Shopper Views

3.1 Fermanagh & Omagh District Council undertook an Enniskillen Town Centre Health Check to help inform the Council's Preferred Options Paper. The study included a shopper survey using a previously agreed questionnaire and undertaken in Enniskillen town centre over a period of 3 days in June and July 2016.

3.2 The shoppers who participated in the survey were mainly female and from different age groups. The majority of shoppers lived within 10 miles of the town centre and were resident in Enniskillen and its immediate environs.

3.3 Most shoppers travel to the town centre by car though a substantial proportion (nearly 10%) use the bus or (9%) walk, highlighting how many shoppers live within walking distance of the town centre. It also gives an insight into the availability of access to public transport.

3.4 The majority (60%) of respondents indicated they were shopping for convenience goods with 34% of respondees shopping for comparison goods. Most shoppers stated that there is a good range of shops within Enniskillen town centre. Nearly 87% of shoppers stated that they come into Enniskillen for other reasons other than shopping. The main reasons being for work, socialising and to dine in restaurants.

3.5 Over 67% of shoppers stated they shopped in another town, identifying a level of willingness to shop around. The most popular towns cited as an alternative place to shop to Enniskillen are Irvinestown, Omagh, Belfast, Derry/Londonderry, Sligo and Lisnaskea with a focus on convenience goods. Shoppers indicated they shopped in these towns one to three times a month as they offered a good choice of local and handy shops.

3.6 The majority of shoppers live 2 – 10 miles from Enniskillen and travel to the town by car, where they consider there is sufficient parking and public amenities within the town centre. However a majority of shoppers believe there is a need for more public toilets. Some shoppers also indicate a need for more bus services within the town centre.

3.7 The atmosphere, cleanliness, familiarity convenience and choice of shops are those factors identified as most liked about Enniskillen town centre whilst shoppers cited traffic congestion, uneven pavements and lack of parking on Townhall Street and High Street as the things they liked least. In addition, some shoppers indicated that improved traffic management is needed for Enniskillen town centre.

4.0 Retailers' Views

4.1 FODC carried out a retailer survey in July/August 2016 to ascertain the views of retailers on Enniskillen Town Centre.

4.2 Almost 62% of businesses in Enniskillen are independently owned and operated. 68% of those who responded indicating they had been trading in the town over ten years whilst 65% of retailers have premises of under 300 square metres.

4.3 Different types of chain type stores reported various profitability patterns. Northern Ireland based chain stores reported average and below average profitability. Retailers appear to be evenly split in terms of their profit expectations over the following financial year, 44% of retailers expect better profits whilst 40% believe there will be no significant change in profits. Only 16% of retailers believe it will be worse than the 2015/2016 financial year.

4.4 Most retailers indicated that there was no change in the range and quality of goods they sold, 40% of retailers believe there has been large or small increase. Only 13% believe there has been a large or small decrease in the range and quality of goods.

4.5 Of those who answered the question about price rises, most retailers (86%) felt there had either been a small increase or no change in the price level of their goods over the past two years. When asked about the number of customers who had visited their store, the answers were more evenly spread between small and large increases and no change at all.

4.6 Retailers were asked to list all reasons they felt were responsible for the change in sales of businesses over the previous two years. Almost three quarters of retailers included ‘the national economic climate’, 30 percentage points above the next nearest reason attributed, ‘competition from other shops’. Interestingly, when asked to state the single main reason for change in turnover the highest response was traffic/parking with over 30% of retailers attributing this reason for the change in turnover.

4.7 The majority of retailers are trading from the same place as they were in 2010 and only 14% of those questioned were considering relocation.

4.8 The majority of staff employed by the retailers surveyed are on a full-time permanent basis. 59% of retailers feel the number of staff has stayed the same since 2010. 8% believe numbers have had a 10% increase since 2010 whereas 12.24% believe they have fallen by more than 10%. Retailers feel that the main reason for change in staff numbers is loss of business and staff costs. A small number of retailers believe improved trading costs and competition from other businesses has created a change in staff numbers.

4.9 Since 2010 half the retailers have undertaken some type of external improvements to their premises while 63% have carried out either minor or major internal improvements. A majority of retailers reported no change to the surfaces outside their premises. Just over one fifth of retailers reported deterioration due to lack of street maintenance and repair.

4.10 A large proportion (57%) of retailers feel the trading performance of Enniskillen has got weaker within the last five years. Most retailers consider that the main anchor store in Enniskillen town centre is Erneside. Over 51% of retailers stated that additional retailers would not improve the retail offer and attraction of the town centre to shoppers. However 72% of retailers believe additional floor space should be provided in the town centre to enable new retailers to locate in the centre. Primark was the most frequently mentioned store. While the friendliness, convenience and atmosphere were things that retailers liked most about Enniskillen town centre, lack of parking was identified as what retailers like least about Enniskillen town centre.

4.11 While most retailers felt that the number of services present in the town centre is about right, almost 17% felt that there were too many, the highest concentration being catering services[9]. A large number of retailers also believe there are too many financial services.

4.12 Omagh was identified as the main rival shopping town to Enniskillen with Belfast and Lisburn also identified.

5.0 Pedestrian Flows

5.1 PPS 5 defined pedestrian flows as the number and movement of people on the streets, in different locations at different times of the day or evening and

[9] Ibid., 61

over a period of time. If carried out annually, it can build up a picture of any changes to the pedestrian flows that have occurred over time. As no previous data exists for pedestrian flows in Enniskillen, only flows within the retail core were analysed for a specific period of time.

5.2 Pedestrian counts were taken in June 2016 at five separate count points within Enniskillen town centre by FODC. The count locations were East Bridge Street, Townhall Street, Diamond, High Street, Paget Square towards High Street and Erneside.

5.3 Each count point was surveyed for 30 minutes, at three times on Friday 17th June and Saturday 18th June 2016. Each survey related to three sample periods: morning 1000-1100, lunch 1300-1400 and afternoon 1500-1600. The flow for each sample period was calculated by multiplying the count return by two (see Figures 3 and 4).

Table 2 & Chart 3: Pedestrian count in Enniskillen town centre- flow at each survey point over the two survey days Friday 17th June, Saturday 18th June 2016

Friday 17th June

Location (movement direction)	Period 1 1000 – 1100	Period 2 1300 – 1400	Period 3 1500 – 1600
East Bridge Street (westward)	346	516	384
East Bridge Street (eastward)	246	454	434
Diamond -Townhall Street South (eastward)	194	348	256
Diamond -Townhall Street South (westward)	194	430	256
Diamond - Townhall Street North (easward)	252	412	296
Diamond - Townhall Street North (westward)	214	398	240
Paget Square (eastwards)	402	700	550
Paget Square (westwards)	340	694	562

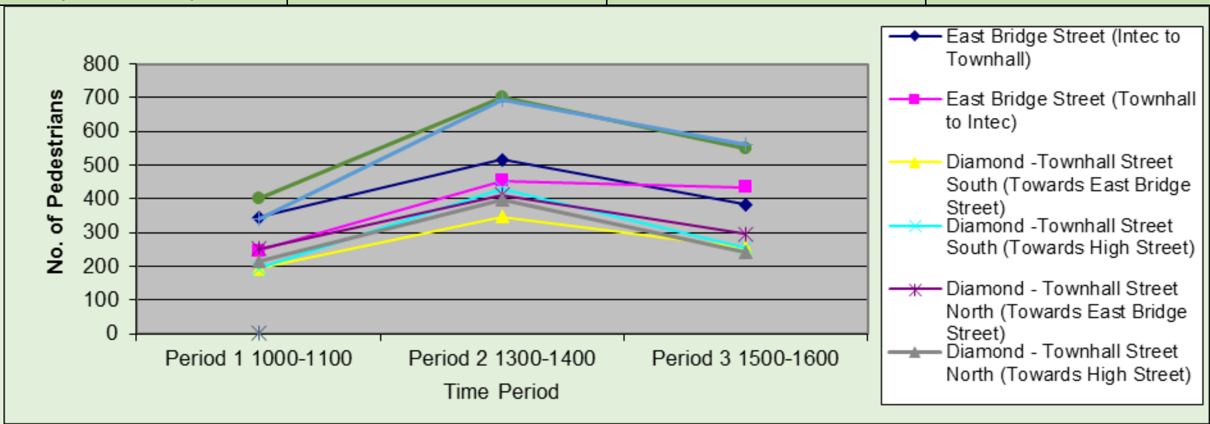


Figure 3: Source: FODC Pedestrian count 2016

Saturday 18th June 2016

Location (movement direction)	Period 1 1000 – 1100	Period 2 1300 – 1400	Period 3 1500 – 1600
East Bridge Street (westward)	156	278	210
East Bridge Street (eastward)	126	248	194
Townhall Street (westwards)	126		632
Townhall Street (eastwards)	136		658
Townhall Street (From East)	126	434	658
Townhall Street (From west)	136	460	632
Townhall – Courthouse	160	262	-
Courthouse – Townhall	198	196	-
Erneside	292	858	686
Erneside	302	766	606
High Street (East)	426	680	694
High Street (West)	434	704	642

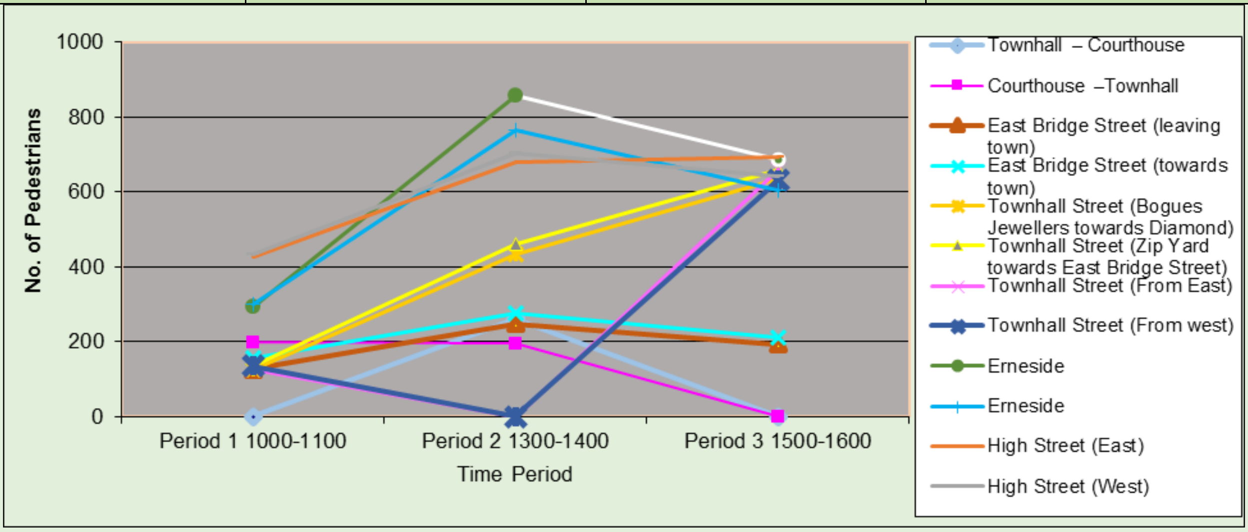


Figure 4: Source: FODC Pedestrian count 2016

5.4 Saturday had the highest count despite weather conditions being marginally better on Friday.

5.5 The flow towards High Street (east) was consistently the survey point with the highest number of pedestrians, consistent with its location having the prime retail frontages. Erneside is an attractive retail space in a great location with great parking therefore this space gained the second largest pedestrian count on the Saturday. Townhall Street near the Diamond has the third largest flow of pedestrians. Secondary shopping areas such as East Bridge Street with limited attraction to shoppers had a markedly lower number of pedestrians than any of the other points.

5.6 On all survey days, the lowest number of pedestrians was recorded between 1000- 1100. On Friday the highest number of pedestrians was recorded between 1300 and 1400. This peak may be attributed to town centre based office workers being on their lunch break. On Saturday the highest count was recorded between 1500 and 1600.

5.7 The data shows there is no pattern in terms of directional flow with pedestrians moving in both directions at all survey points over the time periods. While pedestrians generally used the choice of retail and service businesses on offer in the vicinity of most of the survey points, in East Bridge Street it was observed that many pedestrians passed through to other parts of the town centre.

5.8 The results indicate that the location of national retailers in areas such as High Street, Erneside and Townhall Street draw large numbers of shoppers. Secondary streets such as East Bridge Street have a poorer retail offer and therefore do not draw a significant number of shoppers. Footfall data is consequential in determining the most attractive pitch for prospective retailers or retailers seeking a relocation opportunity.

6.0 Accessibility

Road Network and Public Transport

6.1 Enniskillen is located at the intersection of several strategic routes and other important transport corridors in the area. Most notably the A4 Belfast to Sligo route but also the A32 route north to Irvinestown. There is currently a 2.1km link road running from the existing Cherrymount roundabout on the A32 to the B80 Tempo Road, opened in June 2013. The northern 0.5km already existed, but was upgraded. The road is expected to carry 16,000 cars per day, many of which would previously have been traversing the Tempo Road towards the town centre. Traffic then uses the existing B80 to reach the A4 road.
The A4 is a major road in Northern Ireland. It travels through Counties Armagh, Tyrone and Fermanagh and continues to Sligo in the Republic of Ireland as the N16.

6.2 Enniskillen remains a bottleneck for long distance traffic on the Belfast to Sligo route because all traffic must use the A4 Enniskillen through pass which was opened in 1986. While no official figures exist of any reduction in pollution levels in the town centre, the route is inevitably being used by vehicles to by-pass the town centre, as designed. This still involves going close to the heart of the busy town where strategic traffic has to mingle with local traffic and this delays both groups of users.

6.3 Enniskillen has a bus station located in the town centre boundary on the Shore Road. Its central location aids integration with Enniskillen's primary shopping areas and Townhall Street, High Street and Erneside Shopping Centre are within short walking distance. This depot is also in walking distance from the Fermanagh Lakeland Forum leisure complex. The Enniskillen depot offers a waiting area, a cafe and public toilets.

6.4 An Express Bus Service operates from Enniskillen to Belfast. This service provides good accessibility to other neighbouring towns such as Dungannon. Translink also provides frequent, standard bus services to Derrygonnelly, Belturbet, Fivemiletown, Irvinestown, Lisnaskea and Omagh, Belleek and Kesh. It also has services to Clones, Rosslea, Swalinbar, Pettigo and Bundoran. These services often operate via the villages of the District. Bus Éireann runs a service between Dublin and Donegal via Enniskillen. Notable is that while the services are adequate between Monday and Friday, services are frequently poor at weekends, especially on Sundays, reducing the accessibility of the town centre. Large areas of Fermanagh District do not have any public transport provision, thereby limiting accessibility to Enniskillen town centre to other means of travel, most commonly the private car.

6.5 Enniskillen has three bus service routes within the urban area that provides accessibility to most areas of the settlement. These bus services are 397A, 397B and 397C and run approximately every two hours. This creates quite good accessibility to the town centre for people living in settlements outside the town centre and the South West Acute Hospital. Notably there are reduced services on Saturdays and no services on Sundays, significantly having an adverse effect on accessibility at the weekends.

6.6 Enniskillen does not have access to the rail network within the Region.

6.7 A taxi rank is conveniently located off the Shore Road at the Bus Station.

6.8 National Route 91 of the National Cycle Network is between Portadown and Tynan. There is a cycle route which is part of the National Cycle Network as a figure of eight based around Enniskillen known as the Kingfisher Trail. There is provision for cyclists along the River Erne as part of the Sustrans National Cycle Network. This links to the route along the Irvinestown Road and the Sligo Road. This provides the opportunity to access the town centre by bicycle. The cycle route also runs through Enniskillen Town Centre along East Bridge Street and Townhall Street.

7.0 Car Parking

7.1 There are fifteen car parks in and around Enniskillen town centre; twelve public car parks and three private at Erneside Shopping Centre, Asda and Tesco. Of the twelve public car parks, five are free and seven are pay and display. This provision in public car parks amounts to 1,444 parking spaces and two coach spaces in Shore Road East carpark[10]. Three E-car charging

[10] Fermanagh and Omagh District Council (2015) FERMANAGH AND OMAGH DISTRICT COUNCIL, Position Paper Six, Transportation, Available at: file:///C:/Users/julie.mcquaid/Downloads/transportation%20(2).pdf (Accessed: 23rd March 2017).

points are available on the first storey car park. In addition to the town centre car parking (affected by time restrictions in the central area). There is currently no ‘Park and Share’ carparks in Enniskillen. The nearest ‘Park and Share’ carpark is Ballygawley.

8.0 Perception of Safety and Occurrence of Crime

Pattern of Crime

8.1 The Policing and Community Safety Partnership (PCSP) works with the community to identify issues of concern within the Fermanagh and Omagh district in relation to policing and community safety. The focus of the Partnership’s work is on delivering practical solutions by working in partnership with organisations which contribute to the enhancement of community safety in the area.

8.2 The Partnership is made up of ten elected members, nine independent members and representatives from seven designated organisations including the Police Service of Northern Ireland, the Northern Ireland Housing Executive, the Probation Board for Northern Ireland, the Youth Justice Agency of Northern Ireland, the Western Health and Social Care Trust, the Education Authority; and the Northern Ireland Fire and Rescue Service.

8.3 Policing and Community Safety Partnership consists of seven areas to help and inform the community regarding safety within Fermanagh and Omagh District:

- Anti-burglary Campaign
- Community Safety Wardens
- Crash Car Simulator
- Crime Prevention Event
- Forthcoming meetings
- Newsletters
- Omagh Street Safe Project

Enniskillen at Night Strategy – An integrated approach

8.4 Enniskillen’s evening economy is generally considered to be ‘a problem’ and the town is described as almost being a ‘different place’ at night[11]. The result of this is that the town centre has become more than just a focus for leisure, entertainment and cultural activity for people of all ages. It has specifically become a focus for young people, with all the adherent problems that this may attract. To address this, the approach suggested by Fermanagh District Policing Partnership (DPP) and Fermanagh Community Safety Partnership (CSP) is ‘to build a partnership approach to ensure that Enniskillen town centre can continue to develop as a vibrant and family orientated area, whilst ensuring visitors and inhabitants feel safe and that the town is a place where everyone can visit and enjoy themselves’.

[11] Policing and Community Safety Partnership (2017) *Enniskillen at Night Strategy – An integrated approach,* Available at: *http://www.andygallowayassociates.co.uk/wp-pdfs/Review%20of%20the%20Enniskillen%20at%20Night%20Strategy%20-%20An%20Integrated%20Approach%202013%20a.pdf* (Accessed: 5th April 2017).

8.5 The Director of Public Prosecutions and Crown Prosecution Service have to create an ideal way to prevent crime. The initial work carried out by these two partnerships has sought:

- through historical and statistical evidence, to examine some of the elements which contribute to, and impact upon, the problems which arise in the late evening;
- to identify those agencies which, in partnership, can address the issues identified; and
- to facilitate and assist in establishing real and lasting solutions to crime and anti-social behaviour in Enniskillen town.

8.6 The core areas which are being addressed through this strategy is transport through the provision of taxi ranks within the town, hot food outlets in aid to reduce their opening hours and increased staff training to improve alcohol provision at night time, provision of alcohol includes the use of plastic glasses and 'Not on the Street' campaign, more scrutinising to prevent underage drinking and an increase of Police presence in the town as well as reintroduction of town beats and zero tolerance operations. The CCTV scheme in the town centre will help crack down on antisocial behaviour and crime at night and will create a safer feel within the town centre. Other schemes to try improve the night-time economy is training/education of Sensible Serve programme and Door Supervisors Scheme, education programmes such as 'Youth against Alcohol and Crime', anti-social behaviour plays, Citizenship and Safety Programme and Alcohol and Drug Education.

8.7 For most large towns, the night-time economy is a feature of our culture and is here to stay. Successful management of night-time leisure will depend on proactive planning by all those involved to develop a leisure culture in which the whole community can participate. This will involve local partnerships, such as the Community Safety Partnership, or the creation of a partnership, such as a town business forum, to develop a fully integrated approach.

8.8 During 2016, Police Service of Northern Ireland recorded 21% of crime within Fermanagh District Command Unit (3,650 crimes), occurred within the town centre12. A large proportion of crime recorded within the town centre is linked to the evening and night-time economy - i.e. anti-social behaviour (34%), criminal damage and arson (16%) and violence and sexual offenses (26%). Streets with the highest number of recorded crimes and assaults in particular include Darling Street, High Street, Townhall Street and Forthill Road.

8.9 In Northern Ireland crime has shown an overall downwards trend over the last fourteen years with some of the lowest crime levels since 1998/99. Between May 2017 and May 2018 the number of reported crimes in the Fermanagh & Omagh District fell from 4,592 to 4,210, an 8.3% drop. Figures for Northern Ireland as a whole show an 0.4% increase in recorded crime from 2017. There is still a problem with the relationship between late night premises and

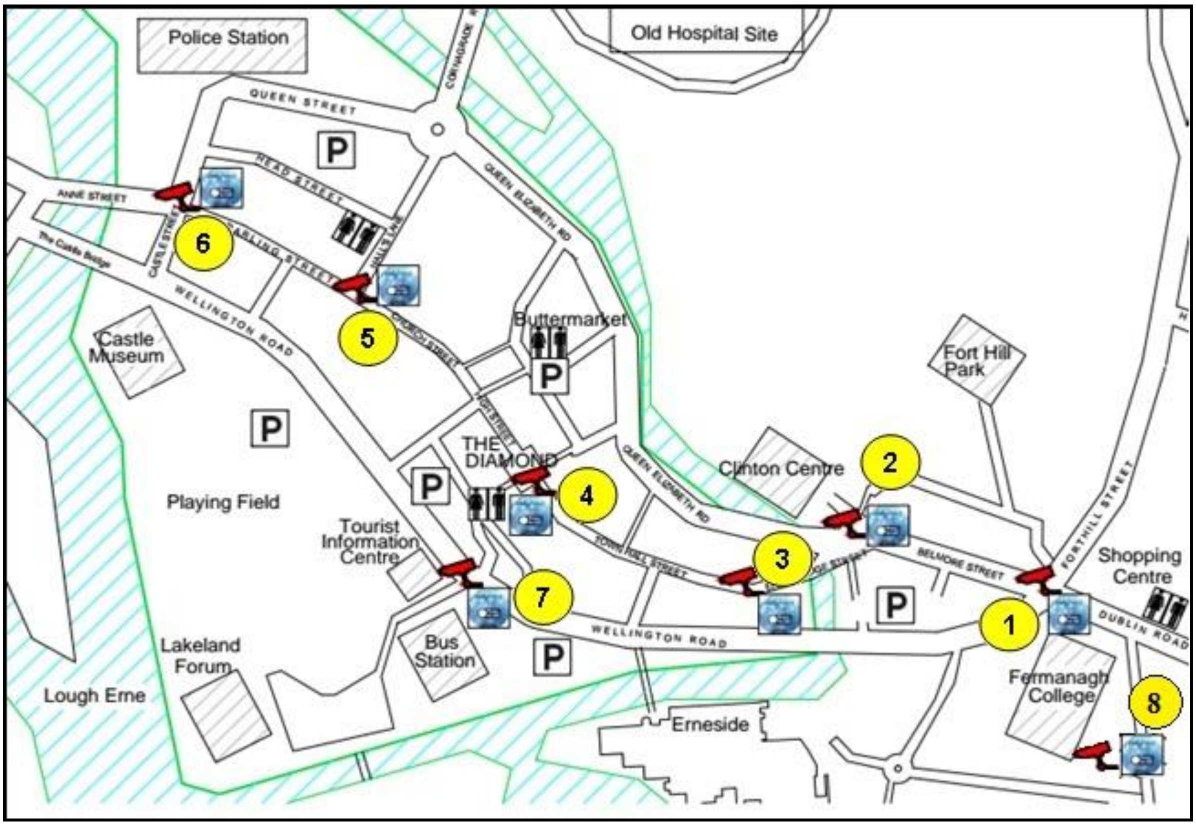
[12] Police Service of Northern Ireland (2017) Crime Map, Available at: https://www.police.uk/northern-ireland/Omagh/crime/ (Accessed: 16 March 2017).

assaults which occur after midnight. The main hotspots are linked to major bar/ night-club locations including Darling Street, High Street, Town Hall Street and Forthill Road.

8.10 Analyses of the incidence of criminal damage and disturbances shows peaks in those areas that have a significant licensed component with High Street, Darling Street, Town Hall Street and Forthill Road featuring highly.

8.11 Overall, Darling Street has the highest level of crime within the town centre, followed by High Street having the second worst record. Some of the more minor and smaller streets such as Paget Square, Eden Street and Head Street have the lowest level of recorded crime within the town centre.

Figure 5: CCTV and Street Lighting



Source: Policing and Community Safety Partnership: Location Map of CCTV points within Enniskillen Town Centre

8.12 In 2004 the local authority funded the capital cost of introducing CCTV in the town centre, and the ongoing running costs are shared between the private sector and the council. The current CCTV system has eight cameras and Emergency Help Points at strategic locations throughout Enniskillen. The locations of all eight cameras can be seen in figure 5. All cameras have been positioned in response to a detailed crime pattern analysis undertaken by the PSNI.

8.13 The use of lighting can create a calm ambience, reducing the fear of crime, making places more “liveable” and in most cases increasing legitimate activity after dark. Such well-designed public lighting schemes are argued to open up town centres to improve surveillance at night and sends out positive messages about the overall management of the area, helping to reduce the "fear factor". Patrons generally feel safe in the Diamond area of Enniskillen, which is well lit, police are highly visible and CCTV cover is provided.

8.14 The most up-to-date PSNI statistics re-inforce the fact that the seven Emergency Help Point devices have helped to reduce crime within Enniskillen[13]. For example in November 2014 there was a total of 194 reported incidents within the town[14]. If we compare this to the month before the devices were installed (April 2014) there were 220 reported incidents. The number of 'anti-social behaviour' incidents, over the same period, are down by 9.5% (84 incidents to 76 incidents), with other crimes such as 'violent and sexual offences' reducing by over 7%[15].

Late Evening Transport

8.15 'Enniskillen at Night - An Integrated Approach' was drafted in 2005 by the Fermanagh District Policing Partnership (DPP) and the Community Safety Partnership (CSP)[16]. In the 2005 strategy, under the objective 'To improve how people get to and from the town centre' the Partnership examined two possible systems of late evening transport:

- A Late evening bus service
- Improved use of taxi services.

8.16 In 2005 it was recommended that private taxis, the main provision of public transport servicing the night time economy would be controlled through the establishment of two taxi ranks. One taxi rank was established in Eden Street, but was seldom used. Taxi firms found it unworkable as customers preferred to be collected in the main thoroughfare or in the Diamond. It is suggested that customers felt unsafe and vulnerable in the lesser populated, and more exposed area of Eden Street. Customers did however feel safer being picked up in the Diamond, Townhall Street or High Street.

9.0 Environmental Quality

Environmental Improvement Schemes

9.1 The previous Environmental Improvement Scheme was carried out approximately 30 years ago by Department of Environment. Castle Basin and Revitalisation projects have also been completed. In preparation for the G8, a lot of cleaning and tidying up was completed - power washing and re-grouting of pavement at Willoughby Place and Buttermarket, resurfacing Down Street and Market Street, painting and landscaping at Canoe Island, painting Clinton Centre and installation of arch at Forthill Park. New signage, railings along Wellington Road, replacement height restriction barrier at Round O, cast iron

[13] ATCM (2017) *PURPLE FLAG: Enniskillen - 'Help at the touch of a button',* Available at: *https://www.atcm.org/programmes/purple_flag/document_library/helppointsenniskillen* (Accessed: 12th April 2017).
[14] Ibid., 147
[15] Ibid., 147
[16] Policing and Community Safety Partnership (2013) *Review of the 'Enniskillen at Night Strategy An Integrated Approach' Strategy*, Enniskillen: Andy Galloway Associates

bollards, cycle parking stand brackets, window images and water feature in river were also some improvements which were completed.

Castle Basin and Revitalisation projects

9.2 A revitalisation project was undertaken in the vicinity of the Castle Basin in 2014. It involved improvements to surfaces and widening of existing path to improve the cycle way and pedestrian path at Castle Bridge to Wellington Road car park. Works included: picnic bays, picnic tables, seating areas, railings improvement, lights, and events space at existing basketball court at Lakeland Forum (works included grass reinforcement). It also involved replacing existing concrete jetty at the rear of Lakeland Forum with recessed timber/stone stepped structure and creation of a projecting boulevard at the rear of the Wellington Road public car park. The areas which have been improved are the West Bridge, Castle Bridge, existing path adjoining and rear of Enniskillen Castle, the Lakeland Forum, Translink Bus Centre, Wellington Road public car park and Broadmeadow.

Enniskillen Town Centre - Environmental Improvement Scheme

9.3 In January 2017 Communities Minister Paul Givan announced a £5.2million public realm scheme for Enniskillen town centre. The Department for Communities is investing £4.7million backed by a £500,000 from FODC. Improvement works including paving, landscaping, street lighting and furniture will be delivered on a number of streets to further enhance the town centre, building on the recently completed Castle Basin Project and revitalisation scheme. The proposed public realm improvements will make a significant improvement to the shopper and visitor experience in Enniskillen.

9.4 The Department for Communities is currently working with Fermanagh & Omagh District Council to appoint a Team who will be responsible for taking this outline stage through to implementation. The scheme will be delivered over the next two financial years, subject to confirmation as part of the budget settlement.

Tackling Deprivation in Enniskillen Action Plan 2015-18

9.5 Tackling Deprivation in Enniskillen Action Plan was developed through a process instigated by the Department for Social Development (DSD) in August 2014[17]. The aim of the planning process was to develop an Action Plan with a primary economic development and regeneration focus for areas of deprivation in Enniskillen. A strategic objective of this action plan is Physical Renewal - ***"To help create an attractive safe, sustainable environment for the community".*** An action for this objective is aiming to improve roads, pathways, parking and cycle lanes across Enniskillen deprivation area. This involves FODC and Transport NI developing cycle paths and Fermanagh and Omagh District Council in consultation for the improvement of footpaths in the town centre. Another action is Environmental

[17] Fermanagh and Omagh District Council (2015) *TACKLING DEPRIVATION IN ENNISKILLEN ACTION PLAN April 2015 – March 2018*, Enniskillen: Fermanagh and Omagh District Council.

improvements across the Neighbourhood Renewal Area. This involves prevention signage to try prevent dumping, drinking, alcohol, dog fouling within the Town Centre. Overall signage will be assessed and Town Centre environmental upgrades are still ongoing. This scheme adheres to the long-term goal which has improved the attractiveness of Omagh Town Centre.

Building Condition Survey

9.6 A survey was carried out in September 2016 by FODC to assess the condition of buildings in the main shopping areas within the town centre. Buildings were assessed as being high quality, medium quality, improvement needed, derelict, gap site or under/ construction renovation. The criteria used to carry out the assessment is outlined in Appendix 6.

9.7 Overall Enniskillen town centre has a high proportion of buildings classified as being of high quality condition. Relatively few buildings are classified as in need of improvement with ten buildings classified as derelict. A majority of buildings were classified as needing improvement on Darling Street. The main shopping areas on Townhall Street and High Street have a high proportion of buildings classified as high quality, interspersed with a few buildings of medium quality. Erneside Shopping Centre also is a primary shopping area with high quality building condition.

9.8 Generally, secondary areas such as Belmore Street, Darling Street, East Bridge Street and Church Street have a high proportion of high quality buildings but also tend to have a significant number buildings classified as either medium quality. Ann Street has a high level of medium quality buildings. Significantly the buildings on Derrychara Link Road are all of high quality. The buildings within the Buttermarket are all high quality. However the old Enniskillen Enterprise building opposite the Buttermarket on Down Street is derelict and because of the size of the site, it is predominant and visually distracting especially as it is in close range of the Buttermarket which is as it is an area with historical significance to the town of Enniskillen and attracts a large number of customers to the site. Dunnes Store is a building of high quality and all the buildings on the Dublin Road are of high quality.

9.9 Overall Enniskillen Town Centre has a large proportion of high quality buildings.

Environmental Quality Assessment

10.1 An environmental quality assessment was carried out in June 2016 by FODC for the main shopping areas within the town centre. The assessment included an appraisal of attributes including street surfaces, street furniture, street lighting, signage/ tourist information, pedestrian facilities, public spaces, wheelchair access and CCTV. The criteria used to carry out the assessment is outlined in Appendix 5a.

10.2 Most street surfaces were of good quality in the primary shopping areas with a notable poor quality in Wellington Place. Most areas in the town centre had limited or no presence of street furniture particularly seating. The quality of the street furniture was generally moderate and the provision of street lighting was generally good, particularly in the main shopping area, High Street. New Street, Belmore Street and High Street had the highest standard of signage and tourist information within the Town Centre. Darling Street had signage top and bottom whilst Queens Street had only directional signage. Paget Square and Regal Pass were assessed as having poor signage and tourist information. Signage and tourist information was limited on Church Street, Townhall Square and the Diamond and East Bridge Street. Forthill Road, Anne Street, Wellington Place and Castle Street Road area had a moderate styling with limited provision. The signage and tourist information in the remaining survey area, including Wellington Road, was considered insufficient.

10.3 Pedestrian areas in the town centre include along the River by New Street, Middleton Street, Market Street and the Diamond. Many of the streets in Enniskillen that have a traffic flow, do not provide substantial accommodation for pedestrians such as crossing points and crossing islands. However, Belmore Street maintains both a traffic flow and a substantial crossing points. The traffic lights on the Dublin Road between Dunnes Stores and South West College provide adequate crossing points for pedestrians. There are traffic lights on Wellington Road allowing crossing in front of Maud's Café allowing easy access between Townhall Street and Erneside Shopping Centre. Traffic Lights adjacent to the Enniskillen Translink Bus Station allows crossing for pedestrians creating accessibility between the bus station and Townhall Street and High Street, the main shopping areas.

10.4 While much of the town centre is devoid of landscaping, trees have been planted over the years around the town centre on Townhall Square and the Diamond. There are no green park spaces within the main shopping area of the town centre. 'The Diamond' is a hard surfaced public realm where pedestrians meet but it lacks quality. There is a lot of greenery along the edge of the town centre such as the Queen Elizabeth Road, New Street and along the water's edge on Wellington Road[18].

10.5 Wheelchair access is generally good within the town centre, with nearly all shops having accesses of suitable widths without steps.

10.6 Premises with specific CCTV cameras are found throughout the town centre. The Diamond, Darling Street, High Street, Townhall Street, East Bridge Street, Belmore Street, Wellington Road and the Derrychara Link Road are covered by general surveillance cameras. They are subtly integrated into the street scene.

[18] Ibid., 177

Litter

10.7 Enniskillen won the ‘Best Kept Large Urban Centre’ and overall title of ‘Best Kept Town’ in 2014. The Department of the Environment, Community and Local Government and the Northern Ireland Amenity Council initiated the Ireland’s Best Kept Towns competition in 1995 to help raise the profile of both the TidyTowns and Northern Ireland's Best Kept competitions, and so help to improve the standard of towns and villages across the island of Ireland.

10.8 Because of Enniskillen’s cleanliness and attractiveness, the town was selected to host many showcase events like the G8 Summit, Beckett Festival, Ulster Rally, The Classic Annual Fishing Tournament, Waterskiing & Wakeboarding Competitions and many more.

10.9 Fermanagh and Omagh District Council has employed staff including a Waste Manager, a Technical Officer, a Refuse Collection Supervisor, an Environmental Compliance officer, a Waste & Recycling Education Officer and a litter warden to control the level of cleanliness and to control litter to a high standard within the Town Centre of Enniskillen and the rest of Fermanagh. Fermanagh and Omagh District Council will spend over £2 million in the 2017/2018 financial year to control the level of tidiness and cleanliness of the district. There are 37 frontline staff dedicated to street cleansing, bin emptying, public conveniences, flyposting removal, graffiti removal and other general minor works in the public realm. Street sweepers and precinct sweepers are in use around car parks and housing areas. There are also regular street audits conducted by management as well as Lough Shore Clean ups around the island of Enniskillen by a private contractor in conjunction with their own staff. There is a rapid response to requests from the public, other agencies and internal Council staff relating to reporting of incidents regarding cleanliness. FODC has inter agency relationships including Transport NI, PSNI, NIHE and Waterways Ireland and many other government departments.

10.10 Cleanliness of Enniskillen Town Centre is approached by spraying weeds, litter picking, manually sweep streets and estates, open, close and clean Public Toilets. Approaches to keeping the Town Centre attractive are grass cutting, minor maintenance, inspect, litter pick play areas, cover Recycling Centres, bin loading, assist Mechanical sweeper and salt footpaths as necessary in winter.

National Benchmarking Report 2015-16

10.11 The National Benchmarking Report (2015-16) provides a detailed analysis of Local Environmental Quality data[19]. The report was based on the assessment of the presence of the following adverse environmental quality indicators and a comparison of 2015 with three previous years of legacy council data. Litter and cleanliness data comes from a survey of 2,140 individual transects covering over 107km (or 66 miles) of streets and parks across all 11 councils. However, the standard against which sites are graded as “acceptable” or “not acceptable” does take into account the volume and distribution present.

[19] Keep Northern Ireland Beautiful (2015) National Bench Marking Report 2015-16, Belfast: Keep Northern Ireland Beautiful.

Figure 6: Grading system used for litter

Grading system used for litter		
An explanation of the grading system used for litter, detritus and other indicators		
	Grade Awarded	Description of Grade
Acceptable	Grade A	Completely free of indicator.
	Grade B	Predominately free of indicator apart from some small items.
Unacceptable	Grade C	Widespread distribution of indicator with minor accumulations.
	Grade D	Heavily affected with significant accumulations.

Source: Keep Northern Ireland Beautiful, 2015.

10.12 Each of the streets in Enniskillen were given a cleanliness grade, ranging from A to D as seen in figure 6. These grades assess the presence of the following adverse environmental quality indicators:

- Dog fouling
- Fly-posting
- Graffiti
- Detritus

10.13 The National Benchmarking Report (2015-16) assessed the standard of cleanliness of towns in Northern Ireland. The survey aimed to obtain information on actual and perceived cleanliness of town centres, the sources and types of litter within the surveyed streets, to gain an insight into other “Adverse Environmental Quality Indicators” and their perceived appearance of the town centres and to assess the management of litter bins in the surveyed town centres.

10.14 The actual cleanliness index reflects the exact level of litter recorded. The overall “actual” cleanliness index for the 2015 town centre survey of Northern Ireland was compared to the 2014 survey. This is in accordance with the Litter (NI) Order 1994 and its associated code of practice on litter (2012)[20]. In

[20] *The Litter (Northern Ireland) Order 1994,* United Kingdom. Available at: http://www.legislation.gov.uk/nisi/1994/1896 (Accessed: 16th March 2017)

Northern Ireland the level of transects which meet the required standard have improved from 84% between 2012 and 2014 to 88% in 2015[21].

Figure 7: Transects which meet the standard for each indicator

Comparison of indicators between England, Wales and Northern Ireland				
Similar grade structures are used, but with different methods for choosing survey areas. Surveys in the other three regions of the UK have a significantly higher proportion of low density housing areas, which are generally very clean areas.				
	Northern Ireland	Scotland	England	Wales
Transects with no litter (Grade A)	5%	21%	3%	7%
Transects which meet standard	88%	94%	96%	90%
Transects with dog fouling	12%	9%	14%	7%
Average of transects which meet standard 2012-2014 (baseline)	84%	95%	96%	87%
Trend	Improved	Steady	Steady	Improved

Source: Keep Northern Ireland Beautiful, 2015.

Figure 8:Transects which fall below the required standard

Transects which fall below the required standard							
	Litter Pollution Index	Detritus Pollution Index	Anthropic Pollution Index	Staining Pollution Index	Graffiti Pollution Index	Flyposting Pollution Index	Perception of Pollution Index
Fermanagh and Omagh District Council	7	1	5	3	1	0	13
Northern Ireland Average	12	3	8	4	3	0	18

Source: Keep Northern Ireland Beautiful, 2015

10.15 Transects which fall below the required litter pollution index for Fermanagh and Omagh is 7 which is less than the Northern Ireland average of 12 as presented in figures 7 and 8. Therefore the cleanliness level in FODCO is above the regional average.

10.16 The "perceived" cleanliness index reflects the cleanliness of each local town as viewed by a member of the public. Transects which fall below the required standard of perception of pollution index for Fermanagh and Omagh in 2015 is 13. This level is less than regional average which means FODC has a perceived a better cleanliness level from the public than regional average.

[21] Keep Northern Ireland Beautiful (2015) National Bench Marking Report 2015-16, Belfast: Keep Northern Ireland Beautiful

Figure 10: Level of obstruction preventing a mechanical sweeper from cleaning

The level of obstructions that would prevent a mechanical sweeper from cleaning a transect in each council				
	Unobstructed	Partially Obstructed	Mostly Obstructed	Completely Obstructed
FODC	38%	6%	5%	49%
Average of All Councils	34%	9%	8%	49%

Source: Keep Northern Ireland Beautiful, 2015.

10.17 Figure 10 shows that FODC is 38% unobstructed and 49% completely obstructed[22]. That means a mechanical sweeper is unable to clean a majority of Enniskillen Town Centre. Since the area is unable to be cleaned via mechanical sweeper then the options are: leave any litter and detritus, task a sweeper to sweep the area on foot or organise that the obstruction will change within a reasonable timeframe. The majority of obstructions within Enniskillen Town Centre are parked cars preventing access to the kerb, signs, street furniture and sites of poor design which prevent access. Enniskillen Town Centre is therefore more dependent on manual cleansing which is less efficient.

Local Environmental Audit and Management System (LEAMS)

10.18 LEAMS is a method of measuring litter and other indicators which is used in both Scotland and Wales[23]. Northern Ireland use the pass/fail ‘Performance Indicator’. Scores closer to 100 indicate better performance[24].

Figure 11: Extrapolated new council spend on street cleaning per annum

Extrapolated new council spend on street cleaning per annum					
	Street Cleansing	Spend Compared with 2013-14	Against Average of 2011-14	Spend per head of Population in 2014-15	Litter Leams
Fermanagh and Omagh	£1,597,555	-£52,267	£17,422	£13.98	74
Antrim and Newtownabbey	£2,160,554	£202,298	-£67,433	£15.48	71
Belfast	£14,658,793	£161,955	-£53,985	£52.04	73
Northern Ireland Average	£3,637,483	£124,778	£41,593	£21.87	72

Source: Keep Northern Ireland Beautiful, 2015.

10.19 The National average spend on street cleansing in 2014-15 was £40,012,315 as seen in figure 11. Every person pays an average of £21.87 per year through their rates for street cleansing. Each person in FODC pays an average of £13.98 for street cleaning.

[22] Ibid., 221
[23] Local Environmental Quality Network (2015) *National Cleanliness Benchmarking Report 2014-2015*, Stirling: Keep Scotland Beautiful.
[24] Keep Northern Ireland Beautiful (2015) National Bench Marking Report 2015-16, Belfast: Keep Northern Ireland Beautiful

10.20 Fermanagh and Omagh District Council spent half of the regional average on street cleansing, £52,267 less than 2013-14. Fermanagh and Omagh District have a high score of 74 regarding Litter LEAMS. Antrim and Newtownabbey Borough Council spent £2,160,554 on street cleaning; £15.48 per person and only achieved a score of 71 for Litter Leams which shows simply spending more on street cleansing does not correlate with better Local Environmental Quality.

Figure 12: Fixed Penalties

Issue of fixed penalties extrapolated for each council				
	Rate per 100,000 per year	Percentage of total issued	Average return from each FPN issued	Litter LEAMS
Fermanagh and Omagh District Council	8	2.2	£30.56	74
Northern Ireland Average	22	100	£52.67	72

Source: Keep Northern Ireland Beautiful, 2015

Figure 13:Clean Neighbourhoods and Litter Enforcement

Since April 2015 the Council has:				
	Dog Fouling	Fly-posters	Abandoned Vehicles	Littering and illegal dumping
No. of fines	4	472	16	128
7 Litter prosecutions for failure to pay FPN				

Source: Fermanagh and Omagh District Council, 2017

10.21 All councils in Northern Ireland are required to protect and improve the quality of the environment for our local community[25]. This requires Fermanagh and Omagh Council to keep the district clean and tidy by adhere to the Clean Neighbourhoods and Environment Act (NI) 2011 by issuing fixed penalties to those who take part in littering, fly-posting, graffiti, dog control, dog fouling and abandoned or nuisance vehicles. Figure 12 and 13 shows the number of fixed penalties being which had been issued during 2015 to 2016 by Fermanagh and Omagh District Council and the Northern Ireland average. Figure 13 show that since April 2015 Fermanagh and Omagh Council has issued 620 fines and had 7 prosecutions for failure to pay FPN. The council has to keep these records and provide them to the DoE so that they can be monitored. Fermanagh and Omagh District has over half the rate per 100,000 per year than the Northern Ireland average and has a higher litter LEAMS score. This suggests less littering goes on in Fermanagh and Omagh.

[25] Fermanagh and Omagh District Council (March 2017) Clean Neighbourhoods and Litter Enforcement, Available at: http://www.fermanaghomagh.com/residential-services/environment-and-waste/clean-neighbourhoods-litter-enforcement/ (Accessed: 16th March 2017).

Appendix 5B

Omagh Town Centre Health Check

1. Profile and Role

1.2 Omagh is situated at the confluence of the Camowen and Drumragh rivers which give rise to the River Strule. It lies approximately 69 miles west of Belfast and 34 miles south of Derry/Londonderry along the Western (Derry/Londonderry to Dublin) key transport corridor. It is a medium sized town in the west of Northern Ireland with a population in in 2011 of 19,659 (1.26% decrease from 2001). Omagh Town Centre’s central and accessible location make it ideally placed to serve a large hinterland population.

1.3 Omagh is an attractive and desirable town in which to live with a town centre partially designated as a Conservation Area. The town provides an extensive range of retail, commercial, administrative, educational and health services for a large rural community. Its shopping function has developed steadily, now providing a wide range of independent traders and well-known “high street” multiples within the town centre including the Showgrounds Retail Park. In addition to the above, the town centre contains 4 “national” food retailers - Dunnes, Asda, Iceland, SuperValu – plus international food retailers, Lidl and Marks and Spencers.

2. Vitality and Viability

2.1 The Strategic Planning Policy Statement (September 2015) states that a ‘health check’ of the town centre must be undertaken as part of the preparation of a development plan. The SPPS continues by stating that the plan ‘must undertake an assessment of the need or capacity for retail and other main town centre uses across the plan area’. The Local Development Plan will include a strategy for town centres and retailing and contain appropriate policies and proposals that must promote town centres first for retail and other main town centre uses.

2.2 Town centre health checks provide a baseline position, against which future measurement and regular monitoring can be carried out over the plan period. The concept of vitality and viability is central to maintaining and enhancing town centres. Vitality is a measure of how busy a town centre is and viability is a measure of its capacity to attract ongoing investment for maintenance and improvement and adapt to changing needs. Although no single indicator can effectively measure the health of a town centre, the use of a series of them can provide a view of performance and offer a framework for assessing vitality and viability. The key indicators used to measure the health of Omagh Town Centre are accessibility, customer views, diversity of uses, retailer profile, environmental quality, pedestrian flows, retailer views, shop rents, and vacancy rates.

3. Retailer Profile, Diversity of Uses and Vacancies

Retail Hierarchy and Market Overview

3.1 The Regional Development Strategy 2035 sets out a settlement hierarchy. This defines the Belfast Metropolitan Area and Derry/Londonderry (the regional centre for the North West) as major regional cities, below which there are a series of 'main hubs' such as Omagh and 'local hubs'.

3.2 In February 2014, DOE Planning Service commissioned a consortium of consultants led by GL Hearn, together with RPD Consulting and MCE Public Relations, to prepare a research report[26] to:

- investigate existing town centre and retail planning policy practice in other jurisdictions, advise on best practice and identify potential implications for Northern Ireland;
- undertake an assessment of the current health of designated town centre and review existing and committed out-of-centre retail development;
- provide an assessment of town centre and retail trends, specifically considering their impact on Northern Ireland in the short, medium and long term;
- undertake a programme of structured stakeholder engagement to inform research and policy recommendations;
- provide and evaluate options for town centre and retail planning policy in Northern Ireland, including recommending a preferred approach for future policy direction.

3.3 The report developed a retail hierarchy based on a combination of five key indicators of a centres' role in the retail hierarchy:

- Status in the RDS settlement hierarchy
- Population
- Experian Goad Retail Rankings position
- Scale of retail floor space
- Comparison goods market share

This hierarchy identifies Belfast as a 'very large' centre followed by four 'large' centres with Omagh classified as a 'medium' centre.

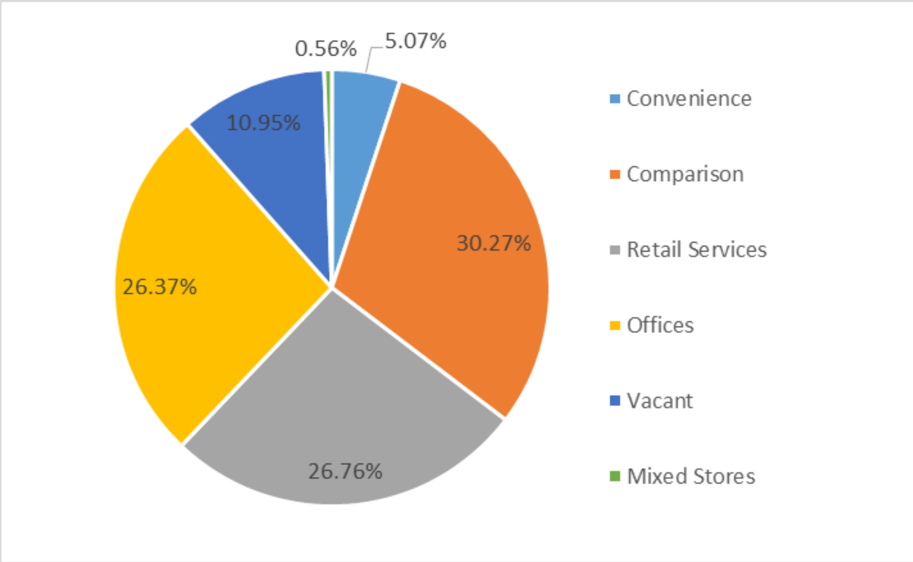
Diversity of Uses Survey

3.4 A diversity of uses survey was carried out in November 2016 for the main shopping areas within the town centre at ground floor level. The survey identified a wide range of uses within the town centre including convenience

[26] Department for Regional Development Northern Ireland (2014) *Town Centres and Retailing Research Project*

goods, comparison goods, mixed stores, services, offices and vacant (Figure 1).

Figure 1: Diversity of uses at Ground Floor level in Omagh Town Centre 2016



Source: FODC Town Centre Retail Survey 2016

3.5 Within the surveyed area, the largest number of units at ground floor level were found to be comparison stores (30.27%) and retail services (26.76%). Convenience stores accounted for less than 11% of all units whilst 15.5% of units were found to be vacant. Those comparison and convenience foods stores which were part of a national group accounted for 28%, with the remainder being independent stores.

3.6 A concentration of comparison retailing is found in High Street, Market Street and the shopping areas accessed from them. However, a notable concentration of offices are found to the east of High Street in the vicinity of the Courthouse. The secondary shopping areas on Campsie Road, John Street and George's Street/ Castle Street have a greater proportion of service uses and characteristically have more vacant properties. Residential use at ground floor level (mainly houses in single occupation) is mostly found at the periphery of the main shopping area.

3.7 A variety of uses are found on the first floor in the main shopping area. A concentration of office uses are found in High Street and Market Street. While several units in this area are recorded as having comparison goods, very few of these have a sales floor area at the first floor level. Instead these units are normally used for either storage or office use ancillary to the use of the building for retail. A significant proportion of units in this area are vacant at first floor level. The secondary shopping areas on Kevlin Avenue, George's Street/ Castle Street, Campsie Road and John Street have a greater proportion of residential use (mainly flats) at first floor level.

Shop Rents

3.8 Omagh's prime areas of retail floor space in the town are found along upper Market Street (west of Drumragh Avenue) and High Street (east of Foundry Lane).

3.9 Average rental values for primary locations for zone A rents achieved £320 per square metre in 2013[27]. Secondary retail areas which include the remainder of High Street, Bridge Street, lower Market Street, part of John Street and George's Street achieved £200 per square metre for zone A rents in 2013. Land and Property Services (LPS) figures further show rental values over the period 2009 to 2013 indicate a 24% decrease in primary retail locations compared to a 9% decrease in secondary areas. In the secondary retail areas of lower Market Street, Foundry Lane and John Street, rental values appear to be decreasing at a slower rate compared to the primary locations. Rents generally start to decrease moving away from the prime retail area High Street, largely dictated by market demand and characterised by soft deals and short break clauses. However, there are very few vacant retail units in Omagh compared to other places which is a reflection on landlords being realistic with their rental requirements and offering incentives such as rent free periods. It is fair to say, that demand has remained buoyant over the last 2 years. Omagh is an attractive proposition for start-up businesses.

3.10 When rental values are compared to other district towns in the west (Table 1), Omagh town centre is achieving higher prime Zone 'A' rents than Cookstown, Dungannon, and Magherafelt, confirming its position as a major retailing town. However Enniskillen Prime Zone 'A' rental values are slightly higher than Omagh. Rents have decreased by 31% in Cookstown from 2009 to 2013, whilst Dungannon has experienced a decrease in rental values by 33% from 2009 to 2013. In October 2014, various letting agents for the town stated that Zone 'A' prime retail rents were in the region of £25 -40 per sq. ft. However, the rental value achieved will depend on market demand at the time, size and configuration of the unit and flexibility of the property owner to strike a deal.

Table 1: Town Centre Rents 2009- 2013

	2009		**2011**		**2013**	
	Prime Zone 'A' £/m^2	**Secondary Zone 'A' £/m^2**	**Prime Zone 'A' £/m^2**	**Secondary Zone 'A'' £/m^2**	**Prime Zone A'' £/m^2**	**Secondary Zone 'A' £/m^2**
Cookstown	360	220	300	200	250	180
Dungannon	360	220	300	210	240	200

[27] Land and Property Services 2014

Enniskillen	460	270	380	250	340	210
Omagh	420	220	360	210	320	200
Magherafelt	300	210	270	200	250	180
Erneside Enniskillen	700 Zone A		640 Zone A		600 Zone A	
`Oaks Centre Dungannon	240 Zone A		210 Zone A		170 Zone A	
The Linen Green Dungannon	240 Zone A		210 Zone A		170 Zone A	

Source: Land and Property Services, 2014

4 Shopper Views

4.1 A shopper survey was undertaken in Omagh town centre over a period of 3 days in June and July 2016.

4.2 The shoppers who participated in the survey were mainly female and from different age groups. The majority of respondents lived within 10 miles of the town centre and were resident in Omagh and its immediate environs. Evidence from the survey indicated there is no significant extension of the catchment into Mid Ulster or Derry & Strabane District Council Areas.

4.3 Most shoppers travel to the town centre by car though a substantial proportion (nearly 15%) walk, underlining how many shoppers live within walking distance of the town centre.

4.4 Almost half respondents indicated the purpose of the visit was for convenience goods. The majority of respondents who indicated they shopped elsewhere indicated when doing so they shopped for comparison goods (48%) followed by convenience goods (41%). Most shoppers stated that the range of shops within Omagh town centre was good. Other than shopping, nearly 85% of shoppers stated that they did come into Omagh for other reasons. The main reasons are for work and socialising/nightlife.

4.5 The vast majority of shoppers (over 80%) stated they did shop in another town, underlining to some degree the willingness of people to shop around. The most popular towns included Enniskillen, Derry/Londonderry, Belfast, Craigavon and Cookstown as an alternative to Omagh, mainly shopping there for comparison goods. Shoppers stated that they shopped in those towns as they had a good choice of shops and most went there one to three times per month.

4.6 Most shoppers live 2 – 10 miles from Omagh and travelled to the town by car. Most shoppers stated that there were insufficient parking and public amenities within the town centre, with the need for public toilets most frequently underlined.

4.7 Whilst shoppers commented on the atmosphere, cleanliness, familiarity convenience and choice of shops as things that they like most about Omagh town centre, most commented on lack of parking, uneven pavements and lack of public toilets as the things they liked least. In addition, some shoppers indicated that improved traffic management and car parking were needed for the town centre.

5. Retailers' Views

5.1 A retailer survey was undertaken in July/August 2016 to ascertain the views of retailers on Omagh Town Centre.

5.2 The survey revealed that most of the businesses in Omagh are independently operated with 71% of those who responded indicating they had been trading in the town over ten years. 71% of retailers have premises of under 300 square metres and over half of retailers operate their business on the ground floor only.

5.3 Northern Ireland based chain stores reported average and above average profitability. Small local chains reported average and below average profitability while UK/ Irish based chains reported average profitability. Nearly half of retailers expect no significant change in profits over the next year. However, one fifth of retailers believe profits will be increased from last year.

5.4 Most retailers (31%) indicated that there was no change in the range of goods and services they provided. Almost 38% of retailers considered that there was either a large or small increase in the range of goods and services they provided over the previous two years. In terms of the quality of product of goods or service being offered, just over 43% of retailers stated there was no change over the previous two years whilst the same percentage of retailers expressed the view that there was some degree of increase in the quality of goods or service on offer.

5.5 A majority of retailers (almost 40%) believe there was some degree of increase in the price level of their goods. A similar amount (38%) state that there was no change in their price levels over the previous two years.

5.6 A question was posed regarding the perceived trends in shopper footfall through their stores. The retailers were fairly evenly divided in how they perceived footfall through their stores in the previous two years.

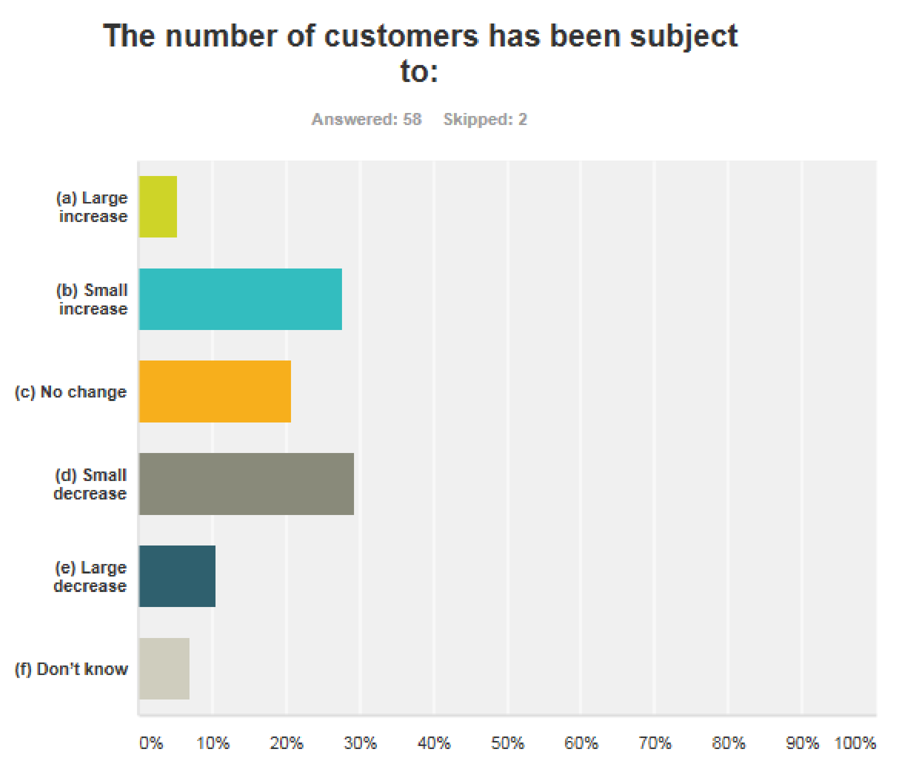
5.7 Almost one third of respondents indicated they felt they had experienced a small decrease in the level of sales over the previous two years. Perhaps, more worryingly, over 10% of respondents indicated they felt they had gone through a large decrease in the level of sales.

5.8 Over half of retailers indicate that the reasons for the change of sales over the last two years was due to the national economic climate, competition from other shops and services and traffic/parking problems. A large number of retailers indicate that increased competition is key factor which has effected the level of sales at their business over the past two years. Over half of retailers state the main reason for turnover in sales is improved trading performance. The majority of retailers are trading from the same place as they were in 2010 and none were considering relocation.

5.9 The majority of staff employed by the retailers surveyed are on a full-time permanent basis. 63% of retailers reported that the number of staff has remained the same since 2010. 15% reported that numbers had increased whereas 20% reported that they had fallen. The main reason given for an increase in staff numbers is improved trading performance and premises expanding and upgrading. Staff costs, loss of business, decline in performance and competition from outside business were attributed as the main reasons for no change or a decrease in staff numbers.

5.10 Since 2010 half the retailers have undertaken some type of external improvements to their premises while 60% have carried out internal improvements. Over half of the retailers reported no change to the surfaces outside their premises. A fifth of retailers reported deterioration due to lack of street maintenance and repair.

Table 2: Retailers views on number of customers over previous two years.



5.11 A large proportion of retailers feel the trading performance of Omagh has got stronger within the last five years. Most retailers consider that the main anchor store in Omagh town centre is Primark which opened in September 2015. Over 63% of retailers stated that additional retailers would not improve the retail offer and attraction of the town centre to shoppers. However 80% of retailers believe additional floor space should be provided in the town centre to enable new retailers to locate in the centre. Debenhams was the most frequently mentioned store. While the compactness and good variety of shops were things that retailers liked most about Omagh town centre, lack of parking was identified as what retailers like least about Omagh town centre.

5.12 While most retailers felt that the number of services present in the town centre is about right, almost 15% felt that there were too many, the highest concentration being catering services.

5.13 Enniskillen was identified as the main rival shopping town to Omagh with Londonderry and Cookstown also identified.

6. Pedestrian Flows

6.1 Pedestrian flows record the number and movement of people on the streets, in different locations at different times of the day or evening and over a period of time. If carried out annually, it can build up a picture of any changes to the pedestrian flows that have occurred over time. As no previous data exists for pedestrian flows in Omagh, only flows within the retail core were analysed for a specific period of time.

6.2 Pedestrian counts were taken in June 2016 at five separate count points within Omagh town centre. The count points were High Street (east), High Street (west), Bridge Street, Market Street and Campsie Road (Map 1). See Appendix 5.

6.3 Each count point was surveyed for 30 minutes, at three times on two different dates, namely Friday 24th June and Saturday 25th June 2016. Each survey related to three sample periods: morning 1000-1030, lunch 1300-1330 and afternoon 1500-1530. The flow for each sample period was calculated by multiplying the count return by two to give an hourly figure (Tables 3 and 4).

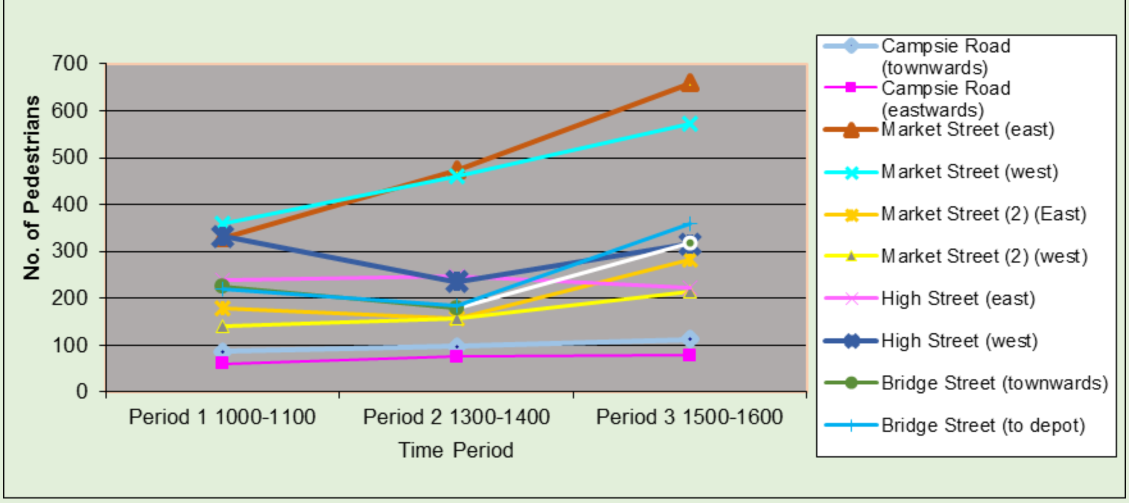
6.4 Saturday had the highest pedestrian count despite weather conditions being poorer than those experienced on Friday.

6.5 High Street (east) was consistently the survey point with the highest number of pedestrians, conducive with its location having the prime retail frontages. However, Market Street had a slightly higher number of pedestrians than High Street on Friday. Campsie Road, as a secondary shopping area with limited attraction to shoppers, had a markedly lower number of pedestrians than any of the other survey points.

6.6 On each survey day, the lowest number of pedestrians was recorded between 1000- 1100. On Friday the highest number of pedestrians was recorded between 1500 and 1600. This peak may be attributed to school closing times with students passing through the town centre towards the Bus depot along Bridge Street. On Saturday the highest count was recorded between 1500 and 1600, typical of shopping trends across the UK.

Table 3: Pedestrian count in Omagh town centre- flow at each survey point on Friday 24th June 2016

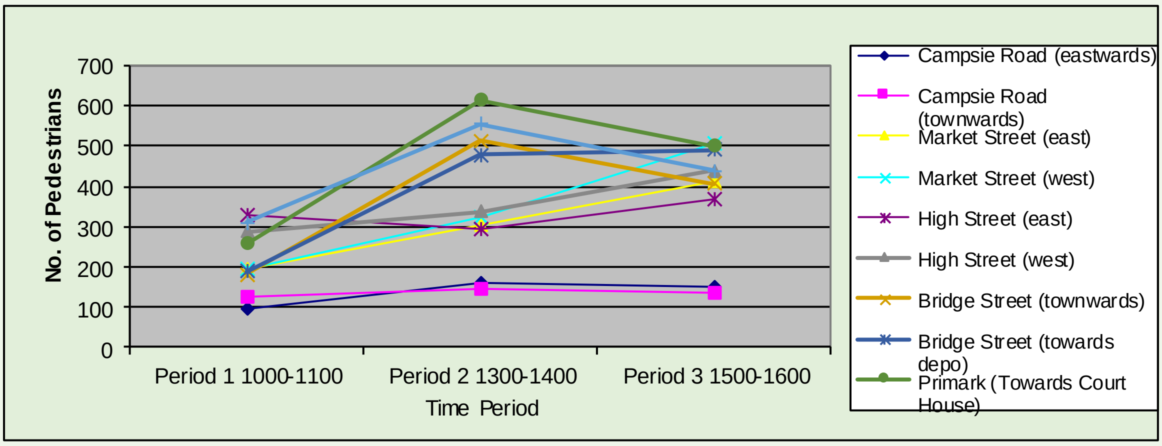
Location	Period 1 1000 – 1100	Period 2 1300 – 1400	Period 3 1500 – 1600
Campsie Road (townwards)	86	98	112
Campsie Road (eastwards)	60	76	78
Market Street – Primark (east)	328	474	660
Market Street – Primark (west)	360	460	574
Market Street (2) (East)	180	158	282
Market Street (2) (west)	140	156	214
High Street (east)	240	248	222
High Street (west)	332	236	316
Bridge Street (townwards)	224	178	318
Bridge Street (towards depot)	220	184	360



Source: FODC 2016

Table 4: Pedestrian count in Omagh town centre- flow at each survey point on Saturday 25th June

Location	Period 1 1000 – 1100	Period 2 1300 – 1400	Period 3 1500 – 1600
Campsie Road (eastwards)	98	160	150
Campsie Road (townwards)	128	146	136
Market Street (east)	194	302	412
Market Street (west)	196	322	506
High Street (east)	328	296	370
High Street (west)	288	338	440
Bridge Street (townwards)	182	514	408
Bridge Street (towards depot)	190	478	492
Primark (Towards Court House)	258	614	500
Primark (Eastwards)	310	556	440



Source: FODC 2016

6.7 The data shows that generally there is no particular pattern in terms of directional flow with pedestrians moving in both directions at all survey points over the time periods. While pedestrians generally used the choice of retail and service businesses on offer in the vicinity of most of the survey points, in Bridge Street it was observed that many pedestrians passed through to other parts of the town centre.

6.8 The results indicate that the location of national retailers in areas such as High Street and Market Street draw large numbers of shoppers. Secondary streets such as Campsie Road have a more limited retail offer and therefore do not draw a significant number of shoppers. Footfall data is consequential in determining the most attractive pitch for prospective retailers or retailers seeking a relocation opportunity.

7. Accessibility

Road Network and Public Transport

7.1 Omagh is located at the intersection of several strategic routes and transport corridors in the area. Most important among these are the A5 (Derry/Londonderry to Dublin route), the A505 (Omagh to Cookstown route) and the A32 (Omagh- Enniskillen route). Other local routes include those to Gortin (B48), Carrickmore (B4), Fintona (B122) and Drumquin (B50).

7.2 The A5 has benefited from the implementation of several of the road improvement schemes identified in the Regional Transportation Strategy. These schemes have aided accessibility northwards towards Strabane and southwards towards Ballygawley.

7.3 Omagh has a bus station located in the town centre at Drumragh Avenue. Its central location aids integration with Omagh's primary shopping areas. Both Market Street/ High Street and the Showgrounds Retail Park are within a short walking distance.

7.4 An Express Bus Service operates via Omagh from Belfast to Derry/Londonderry. This service provides good accessibility to other neighbouring towns such as Strabane and Dungannon. Translink also provides frequent, standard bus services to Cookstown, Dromore and Enniskillen, Fintona and Carrickmore. These services often operate via the villages of the district. Notable is that while the services are adequate between Monday and Friday, services are frequently poor at weekends, especially on Sundays, reducing the accessibility of the town centre. Large areas of Omagh District do not have any public transport provision, thereby limiting travel options to Omagh town centre to other means of travel, most commonly the private car.

7.5 Omagh has seven bus services within the urban area which provide accessibility to most areas of the settlement. Notably there are reduced services on Saturdays and no services on Sundays, which significantly limits accessibility at the weekends.

7.6 There is no operating rail infrastructure within the Fermanagh & Omagh District Council area.

7.7 A taxi rank is conveniently located adjacent to the Bus Station.

7.8 There is provision for cyclists along the Camowen River as part of the Sustrans National Cycle Network. This links to the route along the Gortin Road and provides the opportunity to access the town centre by bicycle.

Car Parking

7.9 There are sixteen car parks in and around Omagh town centre; thirteen public car parks and three private at Dunnes Stores, the Showgrounds Retail Park and Rooms at Rue. Of the thirteen public car parks, eight are free and five are pay and display. This provision in public car parks amounts to 1,069 parking spaces. In addition to the town centre car parking (affected by time restrictions in the central area), there is also a Park & Share located on Crevenagh Road. The park and share occupies 247 parking spaces, 11 disabled spaces, 2 electric power points and 6 bicycle spaces.

8. Perception of Safety and Occurrence of Crime

Pattern of Crime

8.1 Over the years, there have been ongoing actions and initiatives to try and reduce the incidence of crime and difficult behaviour in Omagh town centre and promoting the town centre as a safe place to be. This creates a safer and more attractive central area with increased footfall. Medium term action and initiatives are production of evening and night time economy guide, evening and night time dining promotions (e.g. joint “Theatre-and-Meal” tickets) and family orientated restaurants and entertainment. This helps improve town centre economy, increased footfall and create a child-friendly town centre economy.

8.2 During 2016, Police Service of Northern Ireland recorded that 20% of crime within Omagh District Command Unit (2955 crimes)occurred within the town centre[28]. A large proportion of crime recorded within the town centre is taken up by crimes linked to the evening and night-time economy- i.e. anti-social behaviour (35%), criminal damage and arson (10%), drug offences (4%) and violence and sexual offenses (31%). Streets with the highest number of recorded crimes and assaults in the town centre include John Street, High Street and Drumragh Avenue. However, the majority of the crimes recorded occurred in residential areas such as Glenelly Gardens, Meelmore Drive, Beechgrove Park and Culmore Park which are not located within the town centre boundary.

8.3 In Northern Ireland crime has shown an overall downwards trend over the last twelve years with some of the lowest crime levels since 1998/99[29]. The level of crime during 2014/15 in Ballymoney, Coleraine and Omagh policing areas was the second lowest level seen since 1998/99. Crime rate trends were relatively flat from 2015 to 2016. However, there is still a problem with the relationship between late night premises and assaults which occur after

[28] Police Service of Northern Ireland (2017) Crime Map

[29] Police Service of Northern Ireland (2016) Police Recorded Crime in Northern Ireland: Monthly Update to 30 April 2016, Belfast: Northern Ireland Statistics and Resource Agency.

midnight. The main hotspots are linked to major bar/ night-club locations including John Street, High Street, Bridge Street and Drumragh Avenue.

8.4 Analyses of the incidence of criminal damage and disturbances shows peaks in those areas that have a significant licensed component with High Street, Drumragh Avenue, Bridge Street and John Street featured highly.

8.5 Overall, John Street has the highest level of crime within the town centre, followed by High Street having the second worst record. Some of the more minor and smaller streets such as McConnell Place and Old Market Yard have the lowest level of recorded crime within the town centre.

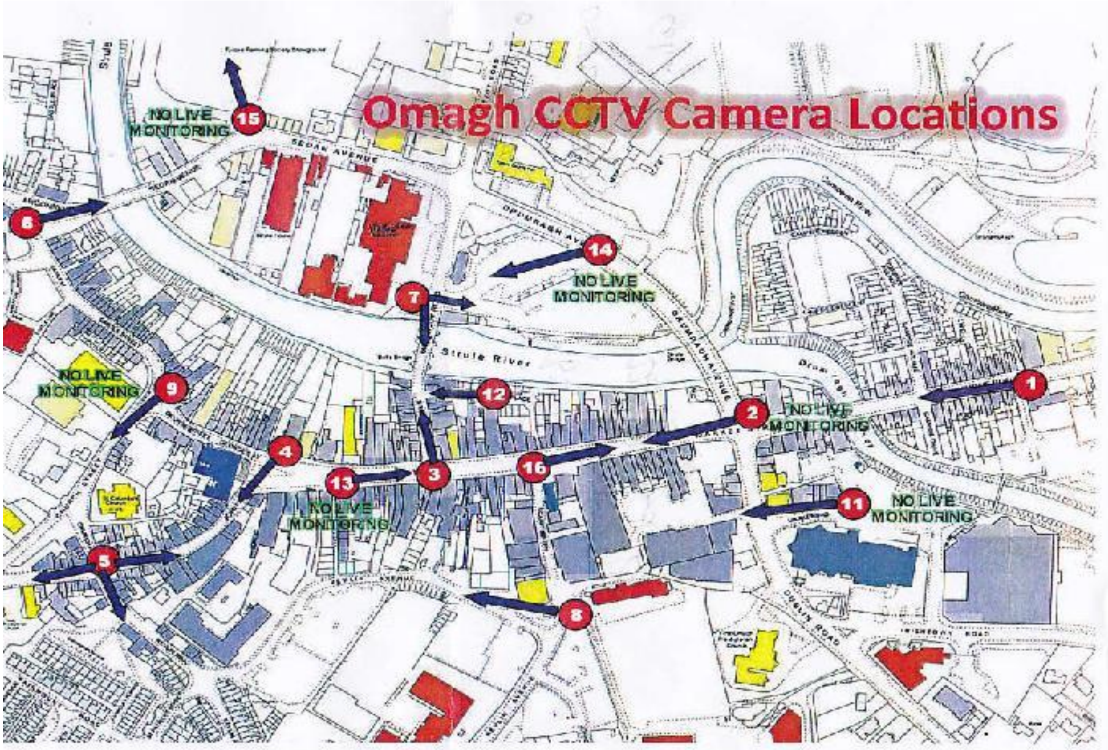
CCTV and Street Lighting

8.6 Several areas within the town centre are covered by CCTV including High Street, Market Street, Old Market Place, Scarffe's Entry and Campsie Road. These provide a feeling of safety within the town centre.

8.7 The use of lighting can create a calm ambience, reducing the fear of crime, making places more "liveable" and in most cases increasing legitimate activity after dark[30]. Such well-designed public lighting schemes are argued to open up town centres to improve surveillance at night and sends out positive messages about the overall management of the area, helping to reduce the "fear factor". The environmental improvement scheme on Old Market Place had street lighting enhancement which helps create a safer environment within the town centre. The environmental improvement scheme on Market Street and High Street included the provision of blue lighting. This is anticipated to improve the lighting and the "feel safe" factor within the town centre. The design attempts to provide consistency and flow throughout the town centre.

[30] Office of the Deputy Prime Minister (2004) Safer Places: The planning system and crime prevention, Wetherby: ODPM Publications

Figure 2: Location Map of CCTV points within Omagh Town Centre



Source: Policing and Community Safety Partnership

9. Environmental Quality

Environmental Improvement Schemes

9.1 Over the years, environmental improvement schemes undertaken within the town centre have contributed to enhancing the environmental quality of many of the street areas through the provision of new street lighting and street furniture, tree planting, footway widening, cobbled foot ways and disabled car parking spaces. The most recent of these was undertaken in 2016 and involved improvements to the streetscape of Old Market Place.

9.2 The OASIS project completed in 2016 was a step forward in the regeneration of Omagh town centre. A key attraction for new visitors to the town, it provides a public space where people can meet and interact as well an open air location for various festival events held in the town. A new pedestrian/cycle bridge across the Strule River, links it to the town centre.

Building Condition Survey

9.3 A survey was carried out in September 2016 to assess the condition of buildings in the main shopping areas within the town centre. Buildings were assessed as being high quality, medium quality, improvement needed, derelict, gap site or under/ construction renovation. The criteria used to carry out the assessment is outlined in Appendix 6.

9.4 Overall Omagh town centre has a high proportion of buildings classified as being of high quality condition. Relatively few buildings are classified as in need of improvement with just one building classified as derelict. The main shopping areas on High Street and Market Street have a high proportion of buildings classified as high quality, interspersed with several buildings of lower quality.

9.5 Generally, secondary areas with the exception of Castle Street/ George's Street, tend to have more buildings classified as either medium quality or those in need of improvement. Significantly, Campsie Road has a high proportion of buildings of high quality, John Street has a notable concentration of medium quality and buildings needing improvement. The Bridge Street and Old Market Place areas have a majority of buildings which are either medium quality or improvement is needed. There is also a one derelict building within this area.

Environmental Quality Assessment

9.6 An environmental quality assessment was carried out in June 2016 for the main shopping areas within the town centre. The assessment included an appraisal of attributes including street surfaces, street furniture, street lighting, signage/ tourist information, pedestrian facilities, public spaces, wheelchair access and CCTV. The criteria used to carry out the assessment is outlined in Appendix 5a.

9.7 Most street surfaces were found to be of good quality in the primary shopping areas with a notable decrease in the more secondary areas such as Old Market Place and Scarffe's Entry. Most areas in the town centre had limited or no presence of street furniture particularly seating. The quality of the street furniture and the provision of street lighting was generally good, particularly in the shopping courts such as Prospect Court and the Royal Arms Development off High Street. Dublin Road and Market Road area had the highest standard of signage and tourist information within the Town Centre. Dublin Road had good styling and good level of signage and tourist information. Castle Street and Market Road area had a moderate styling with limited provision. The signage and tourist information in the remaining survey areas such as High Street, Market Street and Royal Arms Development was either none existent or has poor styling with poor provision.

9.8 Pedestrian areas in the town centre include Old Market Place, Foundry Lane, the Royal Arms Development and Prospect Court. A significant presence of vehicles was noted in Old Market Place, confusing its designation as a pedestrian area. Many of the other streets that have a traffic flow, do not provide substantial accommodation for pedestrians such as crossing points and crossing islands. However, High Street and Market Street maintain both a traffic flow and a substantial amount of crossing points.

9.9 While much of the town centre is devoid of landscaping, trees have been planted around the town centre as part of the environmental improvement scheme. There are no green park spaces within the main shopping area of the town centre. However the hard surfaced area immediately in front of the courthouse on High Street does provide a civic space to some extent.

9.10 Wheelchair access is generally good within the town centre, with most shops having accesses of suitable widths without steps. However some shops particularly those on High Street (east) that are located on a gradient do have stepped accesses. Some older buildings adjacent to the courthouse on High Street (west) similarly have stepped accesses.

9.11 Premises with specific CCTV cameras are found throughout the town centre. High Street, Market Street, Scarffe's Entry and Campsie Road are covered by general surveillance cameras. All but the Campsie Road camera are subtly integrated into the street scene.

National Benchmarking Report 2015-16

9.12 The National Benchmarking Report (2015-16) provides a detailed analysis of Local Environmental Quality data. The report was based on the assessment of the presence of the following adverse environmental quality indicators and a comparison of 2015 with three previous years of legacy council data. Litter and cleanliness data comes from a survey of 2,140 individual transects covering over 107km (or 66 miles) of streets and parks across all 11 councils. However, the standard against which sites are graded as "acceptable" or "not acceptable" does take into account the volume and distribution present.

Table 5: Grading system used for litter

An explanation of the grading system used for litter, detritus and other indicators

	Grade Awarded	Description of Grade
Acceptable	Grade A	Completely free of indicator.
	Grade B	Predominately free of indicator apart from some small items.
Unacceptable	Grade C	Widespread distribution of indicator with minor accumulations.
	Grade D	Heavily affected with significant accumulations.

Source: Keep Northern Ireland Beautiful, 2015.

9.13 Each of the streets in Omagh was given a cleanliness grade, ranging from A to D (Figure 5). These grades assess the presence of the following adverse environmental quality indicators:

- Dog fouling

- Fly-posting
- Graffiti
- Detritus

9.14 The National Benchmarking Report (2015-16) assessed the standard of cleanliness of towns in Northern Ireland. The survey aimed to obtain information on actual and perceived cleanliness of town centres, the sources and types of litter within the surveyed streets, to gain an insight into other "Adverse Environmental Quality Indicators" and their perceived appearance of the town centres and to assess the management of litter bins in the surveyed town centres.

9.15 The actual cleanliness index reflects the exact level of litter recorded. The overall "actual" cleanliness index for the 2015 town centre survey of Northern Ireland was compared to the 2014 survey. This is in accordance with the Litter (NI) Order 1994 and its associated code of practice on litter (2012). In Northern Ireland the level of transects which meet the required standard have improved from 84% between 2012 and 2014 to 88% in 2015 (Table 6).

Table 6: Comparison of indicators between England, Wales and Northern Ireland

Similar grade structures are used, but with different methods for choosing survey areas. Surveys in the other three regions of the UK have a significantly higher proportion of low density housing areas, which are generally very clean areas.

	Northern Ireland	Scotland	England	Wales
Transects with no litter (Grade A)	5%	21%	3%	7%
Transects which meet standard	88%	94%	96%	90%
Transects with dog fouling	12%	9%	14%	7%
Average of transects which meet standard 2012-2014 (baseline)	84%	95%	96%	87%
Trend	Improved	Steady	Steady	Improved

Source: Keep Northern Ireland Beautiful, 2015.

Table 7: Transects which fall below the required standard

	Litter Pollution Index	Detritus Pollution Index	Anthropic Pollution Index	Staining Pollution Index	Graffiti Pollution Index	Flyposting Pollution Index	Perception of Pollution Index
Fermanagh and Omagh District Council	7	1	5	3	1	0	13
Northern Ireland Average	12	3	8	4	3	0	18

Source: Keep Northern Ireland Beautiful, 2015.

9.16 The number of transects which fall below the required litter pollution index for Fermanagh and Omagh is 7 which is below the Northern Ireland average of 12 (Table 7). Therefore the cleanliness level in Fermanagh and Omagh is above the regional average.

9.17 The “perceived” cleanliness index reflects the cleanliness of each local town as viewed by a member of the public. Transects which fall below the required standard of perception of pollution index for Fermanagh and Omagh in 2015 is 13. This level is less than regional average which means Fermanagh and Omagh perceive a better cleanliness level from the public than the regional average.

Table 8: Percentage of obstructions that would prevent a mechanical sweeper from cleaning a transect in each council

	Unobstructed	Partially Obstructed	Mostly Obstructed	Completely Obstructed	
Fermanagh and Omagh District Council	38%	6%	5%	49%	
Average of All Councils	34%	9%	8%	49%	

Source: Keep Northern Ireland Beautiful, 2015.

9.18 In terms of obstructions to a mechanical sweeper which would prevent areas being cleaned effectively, Fermanagh and Omagh District has a similar proportion of area to other councils where a mechanical sweeper is unable to clean. Since the area is unable to be cleaned via mechanical sweeper then the options are: leave any litter and detritus, task a sweeper to sweep the area on foot or organise that the obstruction will change within a reasonable timeframe. The majority of obstructions within Omagh Town Centre are parked cars preventing access to the kerb, signs, street furniture and sites of poor design which prevent access. Omagh Town Centre is therefore more dependent on manual cleansing which is less efficient.

Local Environmental Audit and Management System (LEAMS)

9.19 LEAMS is a method of measuring litter and other indicators which is used in both Scotland and Wales. Northern Ireland uses the pass/fail ‘Performance Indicator’. Scores closer to 100 indicate better performance.

Table 9: Extrapolated new Council Spend on Street Cleaning per annum

	Street Cleansing	Spend Compared with 2013-14	Against Average of 2011-14	Spend per head of Population in 2014-15	Litter Leams

Fermanagh and Omagh	£1,597,555	- £52,267	£17,422	£13.98	74
Antrim and Newtownabbey	£2,160,554	£202,298	- £67,433	£15.48	71
Belfast	£14,658,793	£161,955	- £53,985	£52.04	73
Northern Ireland Average	£3,637,483	£124,778	£41,593	£21.87	72

Source: Keep Northern Ireland Beautiful, 2015.

9.20 Fermanagh and Omagh spends an average of £13.98 per head of population on street cleaning which is approximately two-thirds of the regional average of £21.87. It also achieved a high score of 74 regarding Litter LEAMS, which is higher than the regional average.

Table 10: Issue of fixed penalties extrapolated for each council

	Rate per 100,000 per year	Percentage of total issued	Average return from each FPN issued	Litter LEAMS
Fermanagh and Omagh District Council	8	2.2	£30.56	74
Northern Ireland Average	22	100	£52.67	72

Source: Keep Northern Ireland Beautiful, 2015

Table 11: Clean Neighbourhoods and Litter Enforcement since April 2015

	Dog Fouling	Fly-posters	Abandoned Vehicles	Littering and illegal dumping
No. of fines	4	472	16	128
7 Litter prosecutions for failure to pay FPN				

Source: Fermanagh and Omagh District Council, 2017

9.21 All councils in Northern Ireland are required to protect and improve the quality of the environment for our local community[31]. This requires Fermanagh and Omagh Council to keep the district clean and tidy under the Clean Neighbourhoods and Environment Act (NI) 2011 by issuing fixed penalties to those who take part in littering, fly-posting, graffiti, dog control, dog fouling and abandoned or nuisance vehicles. Since April 2015, Fermanagh and Omagh Council has issued 620 fines and had 7 prosecutions for failure to pay FPN. The council has to maintain these records and provide them to DAERA so that they can be monitored[32].

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[31] Fermanagh and Omagh District Council (March 2017) Clean Neighbourhoods and Litter Enforcement, Available at: http://www.fermanaghomagh.com/residential-services/environment-and-waste/clean-neighbourhoods-litter-enforcement/ (Accessed: 16th March 2017).

[32] Keep Northern Ireland Beautiful (2015) National Bench Marking Report 2015-16, Belfast: Keep Northern Ireland Beautiful

Appendix 6 -Environmental Quality Assessment

Criteria for Assessment Indicators using Grades:

Attribute	Grade A Indicators	**Grade B Indicators**	**Grade C Indicators**
Condition of Street Surfaces	Good state of repair. Even surfaces with no patching of materials. No broken or cracked pavings.	Moderate state of repair. Limited number of broken or cracked pavings. Limited repairs- those undertaken of good quality.	Poor state of repair. Numerous broken or cracked pavings. Poorly repaired- may have potholes and/or have patching with different materials.
Street Furniture (Availability)	Significant presence of street furniture.	Limited presence of street furniture.	Very limited/ no presence of street furniture.
Street Furniture (Quality)	Street furniture in good state of repair, well painted and maintained. Well designed and easily usable.	Moderate state of repair. Some furniture may need painting. Limited signs of damage.	Poor state of repair. May show evidence of being shabby or having undergone vandalism. Poorly designed.
Street Lighting	Good styling and good level of provision.	Moderate styling with limited provision.	Poor styling with poor provision. Lighting may be damaged/ vandalised.
Signage/ tourist information	Good styling and good level of provision. Free from vandalism/ defacement.	Moderate styling with limited provision. Very little vandalism/ defacement.	Poor styling with poor provision. Signage may be vandalised and defaced.

Other aspects of environmental quality include:

- Is there conflict between pedestrians and traffic? Comment on availability of crossing points, speed of traffic, parking on pavements/ pedestrian areas etc.
- Are any streets in the town centre pedestrianised?
- Are there public spaces or parks convenient to the town centre (within walking distance)?
- Is there adequate access for wheelchairs? Comment on ramps from pavements to cross roads and ramps into premises together with width of accesses.
- Is CCTV installed and if so, where?
- Has the area been subject to an EI scheme? Comment on what features in the scheme and the level of provision.

Street: ____

1. Assessment of Environmental Quality- Grading

Please select grade A, B or C.

Condition of Street Surfaces	Street Furniture (Availability)	Street Furniture (Quality)	Street Lighting	Signage/ tourist information

2. Pedestrians and Traffic
Is there conflict between pedestrians and traffic? Comment on availability of crossing points, speed of traffic, parking on pavements/ pedestrian areas etc.

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3. Pedestrianised Streets
Is any part of the street pedestrianised?

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4. Public Spaces and Parks
Are there public spaces or parks convenient to the town centre (within walking distance)?

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5. Wheelchair Access
Is there adequate access for wheelchairs? Comment on ramps from pavements to cross roads and ramps into premises together with width of accesses.

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6. CCTV
Is CCTV installed and if so, where?

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7. EI Scheme

Has the street been subject to an EI scheme? Comment on what features in the scheme and the level of provision.

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8. Other Comments

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