



**FERMANAGH AND OMAGH DISTRICT COUNCIL**

Position Paper Seven

**Tourism**

June 2015

## **Accommodating Tourism Development across Fermanagh & Omagh**

**Purpose:** To provide the Planning Committee with an overview of the area's tourism assets, an assessment of tourism demand and growth areas and how sustainable tourism development will be addressed in the Plan.

**Content:** The paper provides:

- i. the regional context for formulating Local Development Plan policies for tourism development along with other Government policy objectives for this sector;
- ii. the existing local area plan context;
- iii. an assessment of the tourism base in Fermanagh and Omagh; and
- iv. future tourism potential;

**Recommendation:** That Members have regard to the findings and consider how future sustainable tourism development and associated uses should be accommodated across the Fermanagh and Omagh District Council Area.

### **1.0 Introduction**

1.1 This is one of a series of papers being presented to the Planning Committee as part of the preparatory studies aimed at gathering the evidence for the new local development plan.

1.2 The purpose of this paper is to inform members about tourism within the Council area, by providing information on the existing tourism infrastructure and current and proposed tourism initiatives. This will assist the Council in the development of their Plan Strategy. It also provides an overview of regional planning and policy context in relation to tourism and includes other Government policy objectives in relation to this key sector, namely; the NI Executives Programme for Government 2011-15 (PfG), the Economic Strategy and the Tourism Strategy and the Council's vision taken from its Corporate Strategy.

1.3 The paper allows members to commence consideration of the priorities for formulating a sustainable tourism policy to grow tourism in a manner

which, in line with the Regional Development Strategy, balances the economic benefits of tourism with the environmental and social impacts.

- 1.4 Tourism is recognised as the world's fastest growing industry, encompassing a very wide range of activities including travel and visits for business, professional and domestic purposes as well as for holidays and recreation. In 2013, The World Travel & Tourism Council (WTTC) estimated that the industry contributed 9.5% to the global economy and continues to outperform the wider economy in terms of economic growth (3% vs 2%). In 2013, tourism contributed 6.6% to the Northern Ireland economy equating to £722.1m and supporting 67,282 jobs across the Province (NISRA 2014).
- 1.5 Through utilising existing environmental, historical, cultural and geographic assets, tourism can be a key economic driver capable of stimulating further growth and development opportunities. Tourism can benefit the assets on which it depends for example through assisting in the financing of conservation or enhancement initiatives. In towns and cities tourism can contribute positively to urban regeneration. In rural areas, tourism is important to the development of the rural economy by offering, for example, opportunities for farm diversification.
- 1.6 The World Tourism Organisation (WTO) promotes sustainable tourism and defines this as: "*tourism that meets the needs of present tourists and host regions while protecting and enhancing opportunity for the future.*" Sustainable tourism development is brought about by balancing the needs of tourists and progressing the tourism industry along with protecting the assets of the destination. The land use planning system has a key role in managing tourism-related development through planning policies that provide a framework for identifying appropriate development opportunities and safeguarding tourism assets from harmful development.

## **2.0 Regional Policy Context**

### **Programme for Government (PfG) 2011-15**

- 2.1 The Office of the First and Deputy First Minister (OFMDFM) published the Programme for Government Building a Better Future on 12th March 2012. Included within the key commitments and strategic priorities set out for the Assembly term 2011 to 2015 is a key commitment to increase visitor numbers from 3.2 million to 4.2 million and tourist revenue to £676 million by December 2014. The Government therefore recognises the potential of the tourism industry to deliver significant economic growth in the future.

- 2.2 The PfG also identifies the Tourism Strategy as one of the ‘building blocks’ to underpin the first strategic priority of growing a sustainable economy and investing in the future.
- 2.3 Aligned with the PfG the Department for Enterprise, Trade and Investment (DETI) published the **Economic Strategy Priorities for Sustainable Growth and Prosperity** on 13th March 2012. The Strategy sets out the economic vision including a framework for growth and key priorities for growth and prosperity.
- 2.4 The Strategy reaffirms the PfG and includes developing the potential of the tourism industry through focusing investment on strategically significant areas and developing the quality of the visitor experience. The Strategy sets a collective goal for the sector to double the income earned from tourism by 2020.

### **The Regional Development Strategy (RDS)**

- 2.5 The Regional Policy Context is provided by the Regional Development Strategy (RDS) 2035 and regional planning policy statements. The RDS 2035 aims to protect and enhance the environment for current and future generations. It recognises that Northern Ireland’s environment is one of its greatest assets which has benefits in terms of the economy and quality of life. The following Regional Guidance (RG) in the RDS 2035 is relevant to this paper:
- 2.6 RG 4: *Promote a sustainable approach to the provision of tourism infrastructure* by:
- Promoting a balanced approach that safeguards tourism infrastructure while benefitting society and the economy;
  - Improving facilities for tourists in support of the Tourist Signature Destinations, including Fermanagh Lakelands and Tyrone & Sperrins, as identified in the draft Tourism Strategy 2010;
  - Encouraging environmentally sustainable tourism development.
- 2.7 The RDS states that sufficient choice of the right type of visitor accommodation in the right areas is important; there must also be an adequate supply of things to do. It is possible to create and/or maintain a feeling of being somewhere unique with quality assets, interesting architecture and built heritage and a feeling of sense of place. All new or extended infrastructure required to support and enhance the tourist industry needs to be appropriately located and sited with proper regard to tourism benefit and the safeguarding of the natural and built environment on which tourism depends. It should also be noted that the spatial framework of the RDS identifies the Fermanagh Lakelands and the Sperrins as Strategic Natural Resources

## **Regional Planning Policy Statements**

2.8 The RDS is complemented by the DOE's Planning Policy Statement's, the most relevant of which is PPS 16 Tourism. Planning Policy Statements will be replaced by a Strategic Planning Policy Statement (SPPS) a Draft of which was issued for consultation in February 2014. The draft SPPS does not represent a significant change to tourism policy but helps to shorten and simply the guidance for councils. The policy objectives for tourism are:

- facilitate sustainable tourism development in an environmentally sensitive manner;
- contribute to the growth of the regional economy by facilitating tourism growth;
- safeguard tourism assets from inappropriate development;
- utilise and develop the tourism potential of settlements by facilitating tourism development of an appropriate nature, location and scale;
- sustain a vibrant rural community by supporting tourism development of an appropriate nature, location and scale in rural areas; and
- ensure a high standard of quality and design for all tourism development.

2.9 With regards to plan-making the Draft states that councils should consider how best to facilitate the growth of sustainable tourism in their areas and reaffirms the provisions of PPS 16 by bringing forward a tourism strategy tailored to the needs and assets of their local area. Such a strategy should reflect wider government tourism initiatives (e.g. Signature Projects) and may address the following:

- how future tourism demand is best accommodated;
- safeguarding of key tourism assets;
- identification of potential tourism growth areas;
- environmental considerations; and
- the contribution of tourism to economic development, conservation and urban regeneration.

2.10 The Draft states that policies to safeguard tourist assets will be contained in the LDPs, together with policies for tourism development such as tourism accommodation, amenity facilities, and holiday parks, and the criteria for consideration of such proposals.

2.11 Finally, the Draft states that there should be a general presumption in favour of tourism development within settlements. However, in the countryside there is a need, in the interests of rural amenity, and wider sustainability objectives, to manage the level of new build for tourism purposes. The guiding principle should be to facilitate tourism development where this supports rural communities and promotes a healthy rural economy and tourism sector.

- 2.12 PPS 16 Tourism sets out the policies for tourism development, including the main forms of tourist accommodation and tourist amenities. In addition it provides policy for the safeguarding of tourism assets from development likely to adversely impact upon the tourism value of the environmental asset. It also seeks to facilitate economic growth and social well-being through tourism in ways which are sustainable and compatible with environmental welfare and the conservation of important environmental assets. Other planning policy statements that provide scope for tourism development in the countryside are PPS 4 Planning and Economic Development and PPS 21 Sustainable Development in the Countryside.
- 2.13 Whilst the RDS, PPS's and draft SPPS set out the regional planning policy pertaining to tourism development there are other relevant Government policy objectives and strategies which relate specifically to the promotion of the tourism industry.

### **Draft Tourism Strategy**

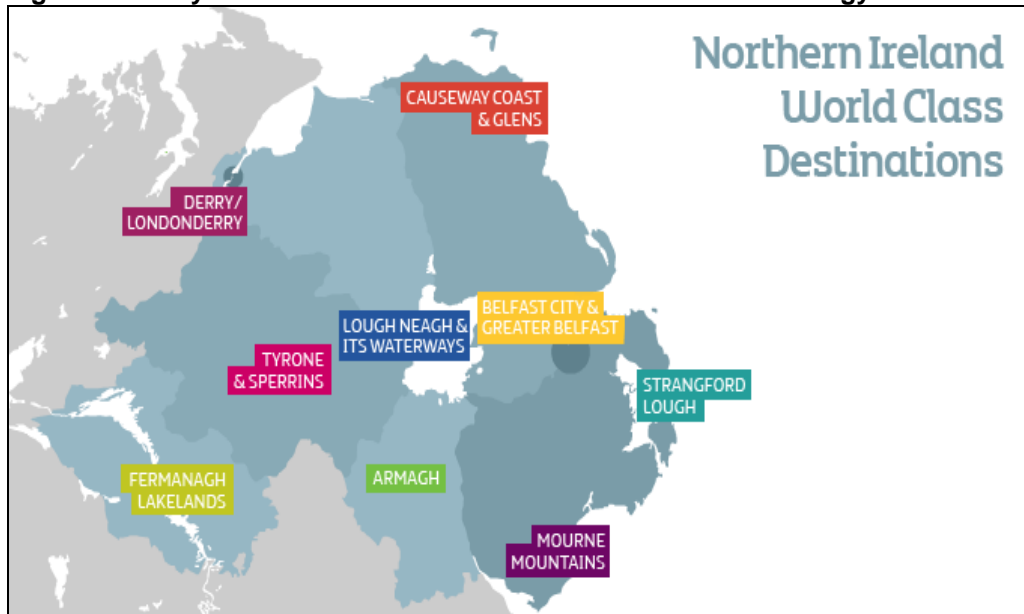
- 2.14 DETI published *A Draft Tourism Strategy for Northern Ireland 2020* in February 2010. As noted, it was identified as one of the '*building blocks*' to underpin the first strategic priority of the PfG. The aim was to provide a strategic direction for the development of NI's tourism experience to the year 2020 and a targeted Action Plan to deliver it. At the core of the strategy was the intention to grow income from visitor numbers with tourist revenue increased from £536 million in 2010 to £1 billion by 2020.
- 2.15 The Draft and associated Action Plan set out priorities for action under the three pillars of People, Product and Places, and Promotion along with a cross-cutting theme of Partnership through a multi-stakeholder approach to lead and partner each action.
- 2.16 The Draft built upon the previous Tourism Strategic Framework for Action 2004 which introduced the concept of Signature Projects<sup>1</sup> to align tourism investment to those developments that would act as the catalyst to put Northern Ireland on the international stage. It was noteworthy at the time that none of the five Signature Projects identified was in the south west of the region.
- 2.17 In contrast, the Draft Tourism Strategy has identified 9 Key Tourism Destinations including the Fermanagh Lakelands and Tyrone & Sperrins. However these have not been identified as Signature Projects. Investment by private developers in projects such as the Lough Erne Resort has already transformed the product offer in some

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<sup>1</sup> The five Signature Projects that were identified for their potential to create international stand out and world class excellence for Northern Ireland included: Saint Patrick's Trail; the Mourne Signature Project; Causeway Coast and Glens; the Walled City of Derry; and Titanic Signature Project

locations. The Draft was due to come into effect on 1<sup>st</sup> April 2011, however, it has not yet received clearance from the Executive due to the instigation of the Hunter Review.

**Figure 1: 9 Key Destinations identified in the draft Tourism Strategy**



Source: NITB

### **Review of the NITB and Tourism Structures (Hunter Review)**

2.18 DETI commissioned an independent review of NITB and wider tourism structures in December 2013. The Hunter Review was published in June 2014. The Review made a number of recommendations which fell into 3 themes:

- i. Setting the strategic direction for tourism;
- ii. Building closer relationships within the tourism sector; and
- iii. Closer alignment with Invest NI.

2.19 A number of the recommendations are concerned with building strong relationships within the sector including developing a more client-facing tourism body. To this end a change to the name, structure and culture of NITB was recommended. Accordingly NITB has since been rebranded to Tourism NI.

2.20 It is anticipated that Tourism NI will have a much greater presence at local level, developing strong relationships and increasing its knowledge of the needs of local tourism partners particularly in light of recent changes in local government which has seen Councils assume increased powers and responsibilities for Community Planning, including local economic development. Collaborative working with the new Councils and the establishment of strong partnerships are considered essential ingredients for Tourism NI in order to maximise the tourism potential of each of the 9 Key Tourism Destinations.

## **Fermanagh Omagh Council Corporate Strategy**

- 2.21 In regard to local plans and strategies, the overarching vision of the Council's Corporate Strategy is to make Fermanagh and Omagh, the place of choice – where people, communities and businesses prosper and where people choose to live, a place where businesses choose to invest and visitors choose to spend time. The strategy recognises the areas unique and natural environment and the potential to maximise this resource to benefit its people and enhance the quality of life.

The Council has identified **Place and Environment – Protecting and Creating Quality Places** as one of its three corporate themes through which it will deliver on a range of strategic actions. Central to this theme is growing tourism by providing and promoting desirable locations, a wide range of quality outdoor and cultural activities/experiences based around the natural and built environment and heritage.

### **3.0 Existing Local Area Plan Context**

- 3.1 Both the Fermanagh and Omagh Area Plans are significantly out-of-date and not reflective of the recent emphasis on the promotion of tourism development in Northern Ireland. Whilst both plans clearly recognised the tourist potential of their respective areas, development was not to be at the expense of existing natural or man-made assets.

- 3.2 Significantly, given the importance of tourism to Fermanagh, the Fermanagh Area Plan 2007 contains 7 policies relating to tourism development. The stated objectives of these policies are:

- To promote the development of a sustainable tourism industry for the long-term economic benefit of Fermanagh and its people;
- To ensure that new tourism developments respect the quality of Fermanagh's landscapes, natural environment and man-made heritage;
- To ensure that resources exploited for tourism are properly managed and conserved for the sake of future generations;
- To provide guidance on the nature, scale and location of acceptable development proposals along the Lough Erne Shoreline and its immediate hinterland.

- 3.3 Whilst most of the policies are non-site specific and reflective of those contained in PPS 16, an emphasis has been placed on protecting Lough Erne and its immediate hinterland. A key policy is T7 which is detailed and site specific relating to a Tourism Strategy for Lough Erne. The Plan also identified 13 zones around Lough Erne and its



immediate hinterland for which strategic guidance has been provided on the potential for tourism and recreational development. The landscape character and capacity of each zone has been assessed, together with the nature conservation interest, the man-made heritage, existing facilities, potential pressure and opportunities and categorized into either *Conservation Zones*, *Sensitive Zones* or *Opportunity Zones* (see Appendix 1)

- 3.4 In addition, Lough Erne's shoreline was designated as a Countryside Policy Area (CPA) to protect it from over-development in light of its importance for landscape and nature conservation. Under PPS 21 the CPA was changed in name to Special Countryside Area (SCA).
- 3.5 The Sperrin AONB extends over much of the north-eastern part of the Omagh area. Plan policies relating to development in the AONB were superseded by Policy DES 4 Areas of Outstanding Natural Beauty contained in 'A Planning Strategy for Rural Northern Ireland'. In assessing development proposals within AONBs, the aim is not only to protect their unique qualities but also to promote their enjoyment and make a positive contribution to their conservation.

## **4.0 The Tourism Base in Fermanagh and Omagh**

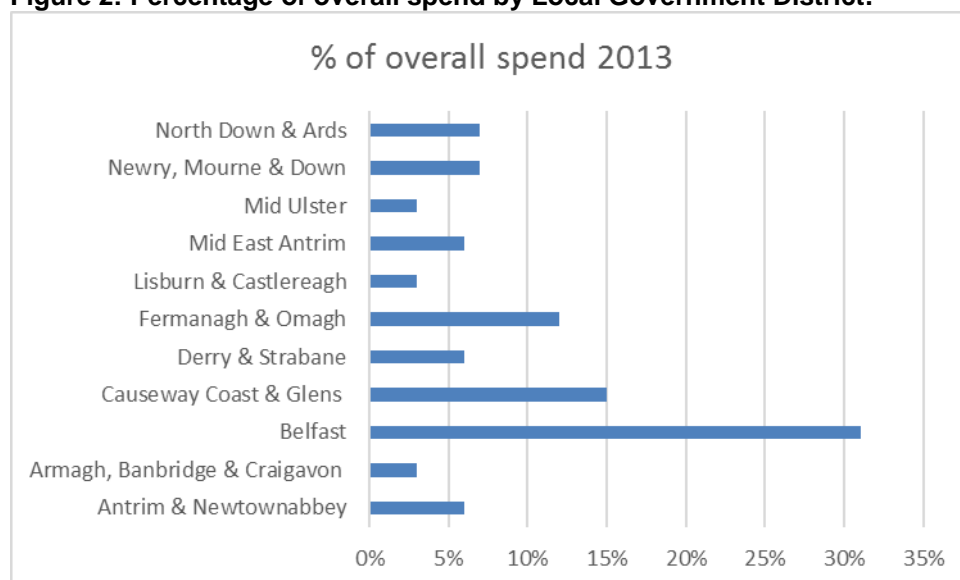
- 4.1 The Council area comprises the Fermanagh Lakelands, part of the Sperrin AONB and river valleys such as the Strule which attract tourists to and provide opportunities for a wide range of outdoor activities including hiking, climbing, fishing and cycling. As outlined in the previous position paper on Environmental Assets, its natural heritage is recognised in the numerous designations as Special Protection Areas (SPAs), Special Areas of Conservation (SACs), RAMSAR sites and Areas of Scientific Interest (ASSIs). The area also has a rich archaeological heritage with standing stones, raths, cairns and monuments distributed across the countryside. There is a rich cultural, historical and built heritage as represented by visitor attractions such as the Ulster American Folk Park and Devenish Island. The area is also home to the world's first Global Geo-Park at the Marble Arch Caves.
- 4.2 Tourism is an integral part of the local economy with the sector having generated £58.8m in Fermanagh and £27.4m in Omagh in 2013. In the same year, there was an estimated 3,448 tourism related jobs across both Fermanagh and Omagh accounting for 9% of total employee jobs within the District Council area<sup>2</sup>.

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<sup>2</sup> Northern Ireland Census of Employment September 2013

4.3 The strength of the tourism market in Fermanagh and Omagh can be measured in terms of the number of trips, nights and spend (Table 1). Following a dip in the tourism market in 2012, 2013 saw strong growth of 24% on 2012 in the number of overnight trips an accounting for 9% of the NI total. In the same period Fermanagh and Omagh Council Area also had the third highest tourism expenditure of £86.2m in 2013, accounting for 12% of the overall spend in NI (after Belfast and Causeway Coast and Glens).

**Figure 2: Percentage of overall spend by Local Government District.**



Source –NISRA, Northern Ireland Passenger Survey 2013

4.4 The combined strength of tourism statistics relating to the Fermanagh and Omagh District Council area have the potential to mislead. It is therefore important to recognise that examination of these statistics, broken down further into the legacy council areas of Fermanagh and Omagh, demonstrates a more significant contribution by Fermanagh to trips and spend than Omagh (Table 1).

**Table 1: Trips, Nights and Spends in Fermanagh and Omagh 2011- 2013**

	2011	2012	2013
<b>Trips</b>	<b>F&amp;O – 366,799</b> <i>F – 85%</i> <i>O -13%</i>	<b>F&amp;O- 295, 061</b> <i>F-85.5%</i> <i>O-14.5%</i>	<b>F&amp;O 364,682</b> <i>F - 80%</i> <i>O- 20%</i>
<b>Nights</b>	<b>F&amp;O 965,257</b> <i>F – 86%</i> <i>O- 14%</i>	<b>F&amp;O- 845,443</b> <i>F – 75%</i> <i>O – 25%</i>	<b>F&amp;O - 1,215,312</b> <i>F – 79%</i> <i>O – 21%</i>
<b>Spend</b>	<b>F&amp;O- £56.0m</b> <i>F - 92%</i> <i>O - 8%</i>	<b>F&amp;O - £36m</b> <i>F - 85%</i> <i>O - 15%</i>	<b>F&amp;O - £86.3m</b> <i>F - 68%</i> <i>O - 32%</i>

Source: NISRA, Northern Ireland Tourist Board

- 4.5 Whilst it is the case that Fermanagh currently contributes more to the tourism sector within Fermanagh and Omagh, recent figures have shown an upward trend for Omagh. In the period 2011-2013 Omagh has shown increases, proportionate to Fermanagh, in the number of overnight trips, estimated number of nights spent and in spend, moving from a position in 2011 of generating 8% of the cumulative Fermanagh and Omagh spend to 32% in 2013 (Table 1). It should be noted that it is not possible to assess the impact of the G8 Summit in Fermanagh in 2013 on the trip, nights and spend figure.
- 4.6 Fermanagh with its lakelands, limestone uplands and forests is an established tourist destination and has played a significant role in providing recreational opportunities for local people and visitors from across the world. The islands and Lough shores are rich in heritage interest particularly of the Early Christian period; most noteworthy are the monastic remains and round tower on Devenish Island, Inishmascsaint and the carved figures on White Island. Castles from the Plantation period; Crom, Castle Caldwell, Tully and Castle Archdale, are also a feature of the Lough shores. Belleek Pottery achieved the highest number of visitors across the Fermanagh and Omagh District Council area with 187,025 visitors in 2013.
- 4.7 Like Fermanagh, Omagh has a variety and quality of landscapes and rural scenic heritage which has the potential to generate greater interest and revenue from tourism. The principal tourist attractions centre on the foothills of the Sperrin Mountain range as they extend into the Omagh area including the Ulster American Folk Park, Gortin Glen Forest Park and An Creagan Centre (Table 3). The Ulster American Folk Park is the top attraction for visitors to the Omagh area and the third most popular (after Belleek Pottery and Castle Archdale) in the Fermanagh and Omagh District.

**Table 2: Reason for Overnight Trips in Fermanagh and Omagh, 2012-2013**

LGD	Holiday/Pleasure/Leisure (HPL)	Visiting Friends and Relatives (VFR)	Business	Other	All.
Fermanagh	161,370(56%)	99,131(34%)	16,451(6%)	11,484 (4%)	288,436
Omagh	9,262 (17%)	38,915(71%)	5,157 (10%)	1,092 (2%)	54,427
Fermanagh and Omagh	170,632 (49%)	138,046 (40%)	21,608 (7%)	12,576 (4%)	342,863
Northern Ireland	1,724,115 (43%)	1,614,746 (40%)	396,451 (10%)	278,968 (7%)	4,014,281

Source: Northern Ireland Passenger Survey, NISRA 2013

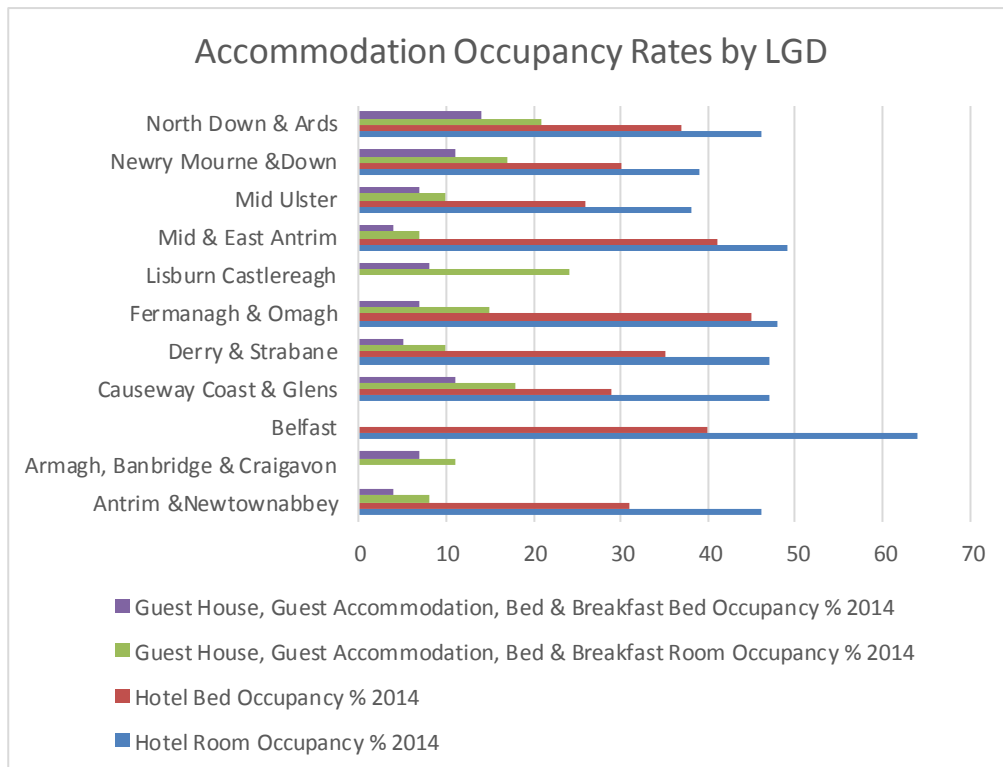
- 4.8 Fermanagh has a higher number of established tourism attractions than Omagh which is a possible reason for the higher number of visitors, overnight trips, nights and spend within Fermanagh (Appendix 2). This is reflected in the reason for overnight trips to both Fermanagh and Omagh with, 56% of trips taken in Fermanagh being for Holiday/Leisure and Pleasure (Table 2). This figure is well in excess of the Northern Ireland figure of 43% which would suggest a quality in terms of the available attractions and accommodation that exceeds those available in other parts of Northern Ireland. In contrast, the main reason for staying in the former Omagh district was to visit friends and relatives which may reflect a lesser provision of well-established tourist attractions.
- 4.9 Whilst it is the case that both areas have successful tourist attractions, there are a number that do not appear to generate a large number of overnight stays. As one of the main visitor attractions in the Fermanagh Area, Belleek Pottery experiences large numbers of bus tours on a daily basis with approximately 66% of those visitors from North America/Canada with the rest being from Ireland, United Kingdom and the rest of the world. As part of linked destination tours the coaches then leave the Pottery and travel north to Derry/Londonderry or south to Sligo/Galway. Similarly, the majority of visitors to the Ulster American Folk Park typically come to the area and leave again within the same day.
- 4.10 Tourists from within Northern Ireland provide the main share of the tourism market for Fermanagh and Omagh. Relative distance from the airports and accessibility to Fermanagh and Omagh may have an impact on those travelling to the area from Great Britain, Europe and Northern America with the Council Area measuring low against the majority of the other Council Areas. Even with accessibility issues the Fermanagh Area attracts more visitors from these areas than Omagh (Table 3).

**Table 3: Visitor Place of Origin 2013**

	Northern Ireland	Great Britain	Other European	North America	Other	All
Fermanagh	196,725	36,752	8,072	4,814	42,084	288,448
Omagh	24,148	18,148	3,488	2,653	6,053	54,490
Fermanagh & Omagh	220,458 <i>(3<sup>rd</sup> highest across LGDs)</i>	54,542 <i>(2<sup>nd</sup> lowest across LGDs)</i>	11,378 <i>(2<sup>nd</sup> lowest across LGDs)</i>	7,243 <i>(3<sup>rd</sup> lowest across LGDs)</i>	48,145 <i>(4<sup>th</sup> highest across LGDs)</i>	342,181 <i>(4<sup>th</sup> highest across LGDs)</i>
Northern Ireland	2,011,458	1,050,376	207,901	271,848	472,695	4,014,278

Source: NISRA, Northern Ireland Passenger Survey 2013. NB All of the figures are from the same source however the figure for Fermanagh & Omagh when added does not reflect the total of Fermanagh and Omagh (separate) when added together.

**Figure 3: Accommodation Occupancy Rates**



Source: NISRA, Tourism Statistics Branch 2014

- 4.11 Whilst NISRA 2014 figures indicate that Fermanagh and Omagh have a well-developed accommodation base, with 10% of available beds in commercial accommodation in Northern Ireland which accounts for 17% of self-catering beds in Northern Ireland, as well as having the second largest number of Guest House/Guest Accommodation/Bed and Breakfast beds across the 11 council areas. The majority of these (86%) are located in Fermanagh (Tables 4 & 5). In 2013, Fermanagh and Omagh had the third highest hotel bed-space occupancy at 48% after Belfast and Mid and East Antrim (Figure 3). Separate figures for Fermanagh alone indicate an occupancy rate of 60% which reinforces Fermanagh's further advanced position in terms of tourism infrastructure such as tourist attractions and accommodation base.
- 4.12 The lack of significant hotel and other accommodation in the Omagh area is a hindrance to attracting visitors, particularly those from overseas, to stay in the area. This was also highlighted in the Omagh Town Centre Masterplan which suggested the provision of a boutique style hotel aimed at the outdoor activity market and positioned within the town centre to support hospitality and retail.

**Table 4: Number of hotels, guesthouses, B&Bs, self-catering and hostels**

District	Hotel	Youth Hostel	Self-Catering units	Bed and Breakfast	Guest Houses	Guest Accommodation	Bunkhouse	All
<b>N. Ireland</b>	138	46	1,437	581	106	22	3	2333
<b>Omagh</b>	2	2	18	20	3	0	0	45
<b>Fermanagh</b>	11	3	162	46	14	2	0	238
<b>Fermanagh &amp; Omagh Total</b>	13	5	180	66	17	2	0	283

Source: NISRA, Northern Ireland Tourist Board Accommodation Stock 2014

**Table 5: Number of Bedspaces within Fermanagh and Omagh District 2013**

District	Hotel	Youth Hostel	Self-Catering units	Bed and Breakfast	Guest Houses	Guest Accommodation	Bunkhouse	All
<b>N. Ireland</b>	17,661	2,323	12,308	4,376	1920	652	42	39,282
<b>Omagh</b>	199	92	151	125	64	0	0	631
<b>Fermanagh</b>	895	164	1,902	344	224	286	0	3,815
<b>Fermanagh &amp; Omagh Total</b>	1,094	256	2,053	469	288	286	0	4,446

Source: NISRA, Northern Ireland Tourist Board Accommodation Stock 2014

## 5.0 Future Tourism Potential

5.1 The legacy councils dealt with tourism under the auspices of Fermanagh Lakelands and Tyrone and Sperrins in accordance with the 'destination area' approach promoted by the Draft Tourism Strategy. An indication of future tourism potential in the two areas is provided by the following documents – Fermanagh Lakelands Tourism Area Plan 2013-2020; the draft Tyrone and Sperrins Destination Management Plan 2013-2018; the Enniskillen Town Centre Masterplan and the Omagh Town Centre Masterplan.

5.2 Prior to the Fermanagh Lakelands Tourism Area Plan 2013-2020, the Destination Fermanagh Tourism Strategy (2005) provided a vision for tourism in the Fermanagh Lakelands which was to re-establish Fermanagh as the third largest tourism destination in Northern Ireland by 2016 with spend exceeded only by the Causeway Coast and the City of Belfast. The Fermanagh Lakelands Tourism Area Plan also takes account of the draft NI Tourism Strategy and sets ambitious targets of increasing visitor trips and visitor nights by 17% by 2020 and increasing visitor spend to £50 plus million by 2020. Its vision is that

'Fermanagh's Lakelands becomes one of Ireland's premier tourism destinations offering a unique experience of tranquillity and activity in balance with nature – a place to stimulate the senses'.

- 5.3 The Fermanagh Lakelands Tourism Area Plan cites the need to develop the Enniskillen bypass as a priority access issue as it would reduce traffic congestion and improve the presentation of Enniskillen town and potential for urban tourism (staging major events, creating heritage trails etc.). Increasing transport facilities across the area and enhancement of towns and villages such as the DSD funded facelift to Enniskillen's shop fronts prior to the G8 summit in June 2013, are also promoted.
- 5.4 It also recognised that in working to ensure the quality and protection of the natural and built environments for tourism in Fermanagh, there is also a need to facilitate necessary tourism development which would enhance the existing product. Key actions relevant to the local development plan include:
- Development of Lough Navar as a Recreational Activity hub
  - Expansion of Marble Arch Caves Global Geopark
  - Mountain bike trails
  - Castle Basin Project
  - Walking/cycling development
  - Cruising product development (e.g. construction of new service blocks at public moorings)
- 5.5 The Enniskillen Town Centre Masterplan also viewed Enniskillen as an under-utilised reserve from a tourism perspective and recommended a number of proposals in order to enhance its role in urban tourism including a dedicated marina, waterside access, suitable hotel accommodation in the town centre and improving the evening and night-time economy.
- 5.6 Unlike Fermanagh Lakelands which is a destination in its own right, Omagh forms part of the Tyrone and Sperrins Destination Area and is grouped alongside the former administrative areas of Strabane, Cookstown and Dungannon. The objective of the draft Tyrone and Sperrins Destination Management Plan 2013-2018 is to achieve sustainable growth for the tourism sector while the vision is: 'The natural Irish outdoors – an inspirational, iconic and ancient landscape where adventure is the everyday and every journey unearths our culture'.
- 5.7 The draft Tyrone and Sperrins Destination Management Plan sets out a list of key priorities covering leadership, marketing, enhancing the visitor experience and improving access to and within the destination. With regard to the need to enhance the visitor experience, it cites the need for:-

- extending the range of accommodation in the Tyrone and Sperrins area;
  - capitalising on the quality and variety of the archaeological and pre-Christian and Christian artefacts and sites;
  - further development of biking trails and experiences;
  - promoting the angling and fishing product of the area; and
  - promoting the hubs e.g. arts and culture in Omagh.
- 5.8 The Outdoor Adventure and Activity theme is particularly relevant and includes not only mountain biking/cycling but also walking/hiking, fishing, canoeing/kayaking, wildlife watching and horse riding. The revised Omagh Town Centre Masterplan also has links to this theme in its promotion of the ‘Outdoor Omagh’ brand which reflects the importance of the town’s relationships with its landscape setting, the nearby Sperrins as well as the farming traditions, the rivers and the emerging renewable energy sector.
- 5.9 The Masterplan also identified the lack of adequate visitor accommodation, particularly the presence of a hotel in Omagh town centre, together with a poor night-time economy offering, inadequate signage and lack of a strong tourism brand as obstacles to tourism growth. Recognition is given for the need to utilise the natural landscape of the area and maximise the potential of other key assets including the Ulster American Folk Park and Gortin Glen Forest Park as ‘hooks’ from which to build tourism opportunities which would increase visitor numbers and expenditure in the area.
- 5.10 Accessibility to the region also requires improvement and the draft Destination Management Plan states that a key to accommodating more visitors to Tyrone and the Sperrins is to manage traffic effectively and provide a more integrated public transport service ensuring that investments to improve basic infrastructure for visitors (car parking, coach stops, snack facilities, toilets, signage etc.) are given consideration in transport strategy and delivery.<sup>3</sup>
- 5.11 In relation to our own Council area, the draft Destination Management Plan describes the integration of Omagh and Fermanagh into the new local authority as an opportunity for the promotion of a very strong rural leisure tourism product which has an integrity and robustness of its own - because of the family based leisure market, the rural setting, the contrast of Lakelands with Omagh landscape quality and through the extensions of the range of outdoor activities e.g. the provision of mountain bike trails at Gortin Glen Forest (Both Gortin Glen Forest and Lough Navar are amongst 8 National Trail Centres to be put in place by 2024)<sup>4</sup>.

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<sup>3</sup> Draft Tyrone and Sperrins Tourism Management Plan July 2013

<sup>4</sup> Outdoor Recreation (NI) – Mountain Bike Strategy for NI 2014-2024 (May 2014)



## **6.0 Conclusions and Recommendation**

- 6.1 The contribution of the tourism sector to economic growth cannot be underestimated and can bring positive benefits to an area including social well-being and employment opportunities. It is evident that tourism in the Fermanagh and Omagh Council area has performed well in comparison to other councils and although Fermanagh generates more revenue from tourism than Omagh, Omagh's contribution is steadily increasing. It is also evident that there are two distinct tourism 'brands' or identities in operation – one which is long-established and focused on the attraction of the Lakelands and one which is focused on the natural appeal of the Sperrins and where there is further tourist potential. Both areas capitalise on their natural assets and their attraction for outdoor activities.
- 6.2 It is also recognised that the Council's tourism assets are not just confined to areas of unspoilt countryside, lakes and mountains but includes our cultural, archaeological, historic and built heritage. Tourism is an integral part of rural regeneration and diversification but is also important to our towns and villages helping to sustain local attractions such as museums, galleries, festivals and art and craft workshops.
- 6.3 Land use planning has an important role in ensuring tourist development is in the interests of the local economy and community, is not detrimental to the environment (and indeed helps to maintain or preferably improve it) and meets sustainable development criteria. As set out in both the existing PPS 16 Tourism and the draft SPPS, the formulation of a balanced tourism development strategy tailored to the needs and assets of the locality is required. The Council will soon be commencing the process of engaging consultants to undertake the preparation of a tourism strategy and it will be important that the associated tourism policies which flow from it to the Plan Strategy take into account the following:
- adequately safeguard key tourism assets;
  - uphold the principle of sustainable development;
  - take into account environmental considerations;
  - sustain a vibrant rural community and recognise the potential of settlements by supporting tourism development of an appropriate nature, location and scale; and
  - ensure a high standard of quality and design in relation to tourism development such as new tourist accommodation, amenity facilities.
- 6.4 The new local development plan can also give consideration to identifying potential growth areas. One such potential area could be the former Ulster History Park, Gortin helping to rekindle interest in this unique attraction and its links to the rich archaeological and Early Plantation heritage of the area and to the ongoing development at Gortin Glen Forest Park. Equally, there are areas such as the Islands

and Lough Shores and the high Sperrins which need to be sensitively managed and afforded a higher degree of protection so as not to destroy the very asset on which their popularity depends.

- 6.5 Members are requested to note the content of this paper and the role of the local development plan in regard to tourism development.

## APPENDICES

## Appendix 1

### **Extract of Policy T7 - Fermanagh Area Plan 2007 (Pages 27-37)**

The strategic guidance provided is intended to assist developers in choosing appropriate locations for tourism or recreational development in the vicinity of Lough Erne by advising on the relevant issues in each particular zone. The landscape character and capacity of each zone has been assessed, together with the nature conservation interest, the man-made heritage, existing facilities, potential pressure and opportunities.

#### **(i) Conservation Zones**

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

#### **(ii) Sensitive Zones**

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

#### **(iii) Opportunity Zones**

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

<b>Zone</b>	<b>Type</b>
Zone 1 Crom	Conservation Zone
Zone 2 Derryad / Trasna	Opportunity Zone

Zone 3 Colebrooke Estuary	Conservation Zone
Zone 4 Knockninny	Sensitive Zone
Zone 5 Tamlaght / Bellanaleck	Sensitive Zone
Zone 6 Enniskillen	Opportunity Zone
Zone 7 Castlehume / Ely	Opportunity Zone
Zone 8 Tully	Sensitive Zone
Zone 9 Magho Cliffs	Conservation Zone
Zone 10 Belleek	Sensitive Zone
Zone 11 Castle Caldwell	Conservation Zone
Zone 12 Boa Island / Kesh	Sensitive Zone
Zone 13 Lisnarick / Killadeas	Opportunity Zone

## Appendix 2

### Visitor Attractions in Fermanagh and Omagh and their Visitor Numbers by LGD 2011-2013

<b>Visitor Attraction</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>
<b>An Creagan Centre</b>	26,450	31,850	35,470
<b>Aughakillymaude Mummers Centre</b>	-	-	1,200
<b>Belleek Pottery</b>	165,297	165,509	187,025
<b>Castle Archdale Country Park</b>	180,000	200,000	-
<b>Castle Balfour</b>	15,000	20,000	-
<b>Castle Coole</b>	-	36,002	41,428
<b>Devenish Island Monastic Site</b>	45,000	40,000	40,000
<b>Dun Uladh Heritage Centre</b>	-	-	26,188
<b>Enniskillen Castle Museum (Inniskillings and Fermanagh Museum)</b>	-	31,995	34,595
<b>Fermanagh County Museum (part of Enniskillen Castle Museums)</b>	27,461	31,981	-
<b>Florence Court</b>	40,314	35,964	33,911
<b>Forthill Park and Cole's Museum</b>	-	1,500	1,500
<b>Gortin Glen Forest Park</b>	6,713	6,240	4,232
<b>Irvinestown Centenary Sculpture Garden</b>	-	-	2,000
<b>Orchard Acre Farm</b>	-	900	284
<b>Tully Castle</b>	8,800	12,000	-
<b>Ulster American Folk Park</b>	138,418	145,051	134,924
<b>White Island</b>	20,000	20,000	-
<b>Marble Arch Caves</b>	48,449	53,118	54,660

Source: NISRA