



Enniskillen Place Shaping Plan 2035

Baseline Assessment

Prepared for Fermanagh and Omagh
District Council

June 2022



Enniskillen Place Shaping Plan

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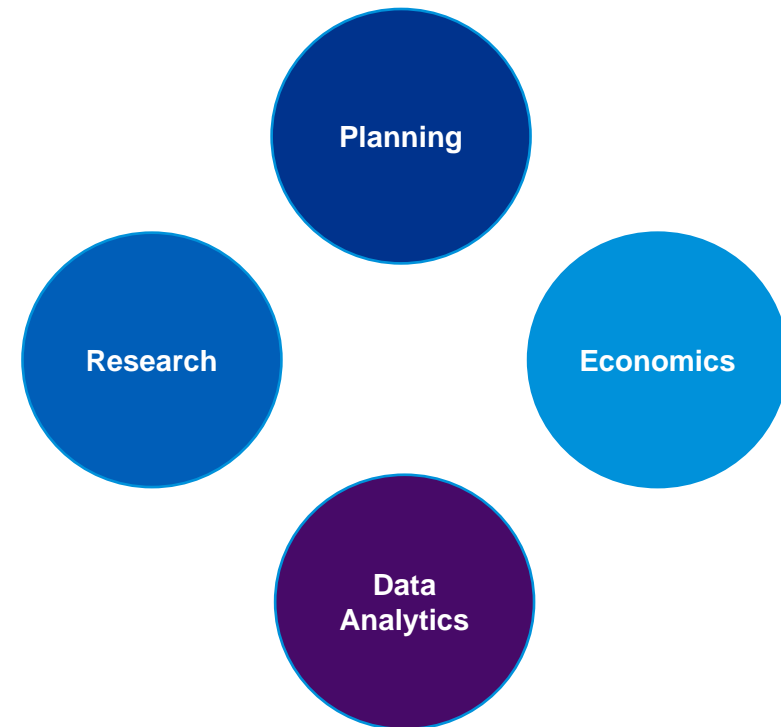
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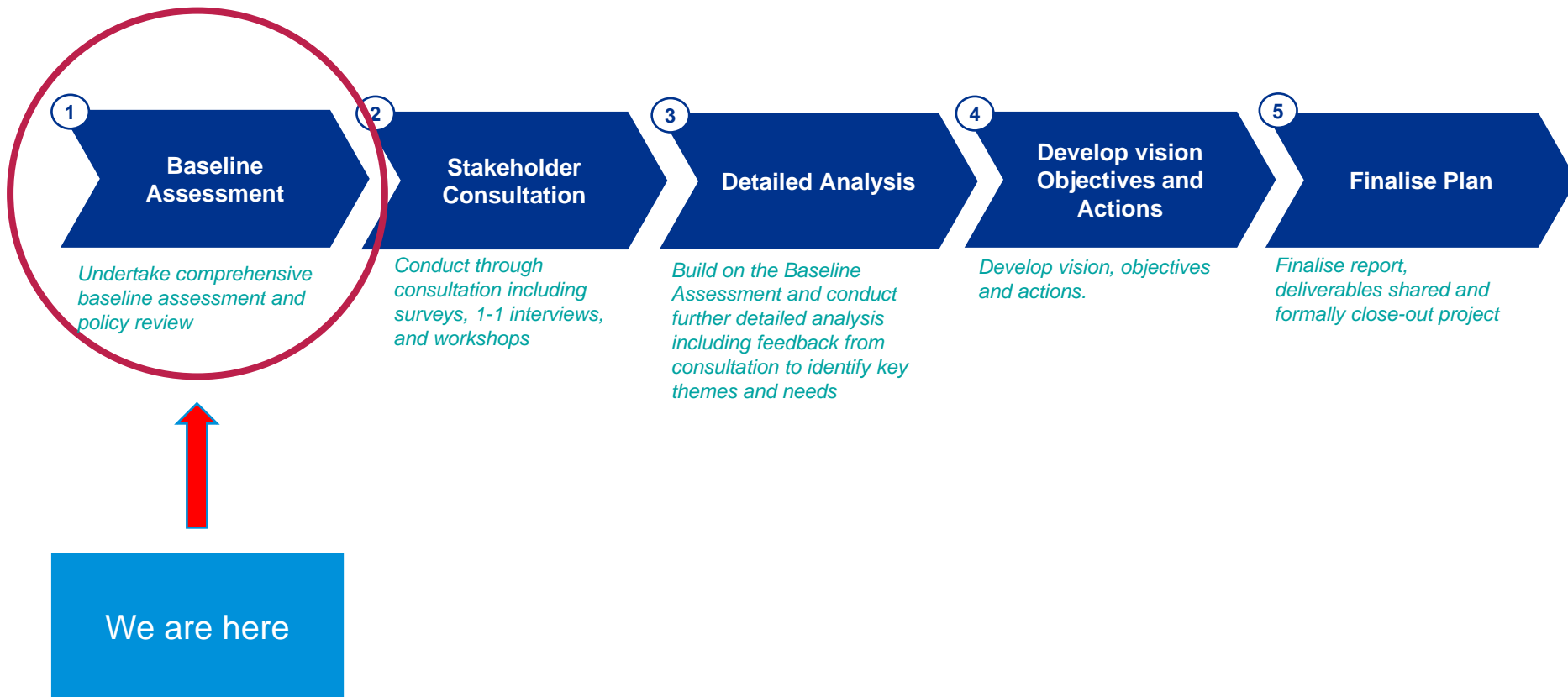
Introduction – About Us

Who we are:

- A professional Consultancy within the KPMG Deal Advisory Business Unit.
- Specialise in Planning, Research and Economics driven by data analytics.
- We work with Public and Private Sectors Clients. Also working extensively with the EC on applied research projects specifically in the areas of regeneration and urban resilience.
- A large multidisciplinary team with extensive experience in Ireland and overseas – Planners, Data Analysts, Researchers, Strategists, and Economists.
- Extensive experience working with local authorities involving comprehensive stakeholder engagement and consultation.



Enniskillen Place Shaping Plan 2035 - Progress



03 Policy Review

A policy review was conducted at NI, District and Local level to understand the current policy framework and its influence on the future of Enniskillen. From this policy review, key underlying themes have been identified with actions supporting each theme. A total of **17 policy documents** across NI, district and local levels were reviewed. Below is a sample of some of the key documents.

UK/NI Policy

Regional Development
Strategy 2035

The Levelling Up White Paper

District Policy

Fermanagh and Omagh 2030
Community Plan

FODC Local Development Plan
2030 – Draft Plan Strategy

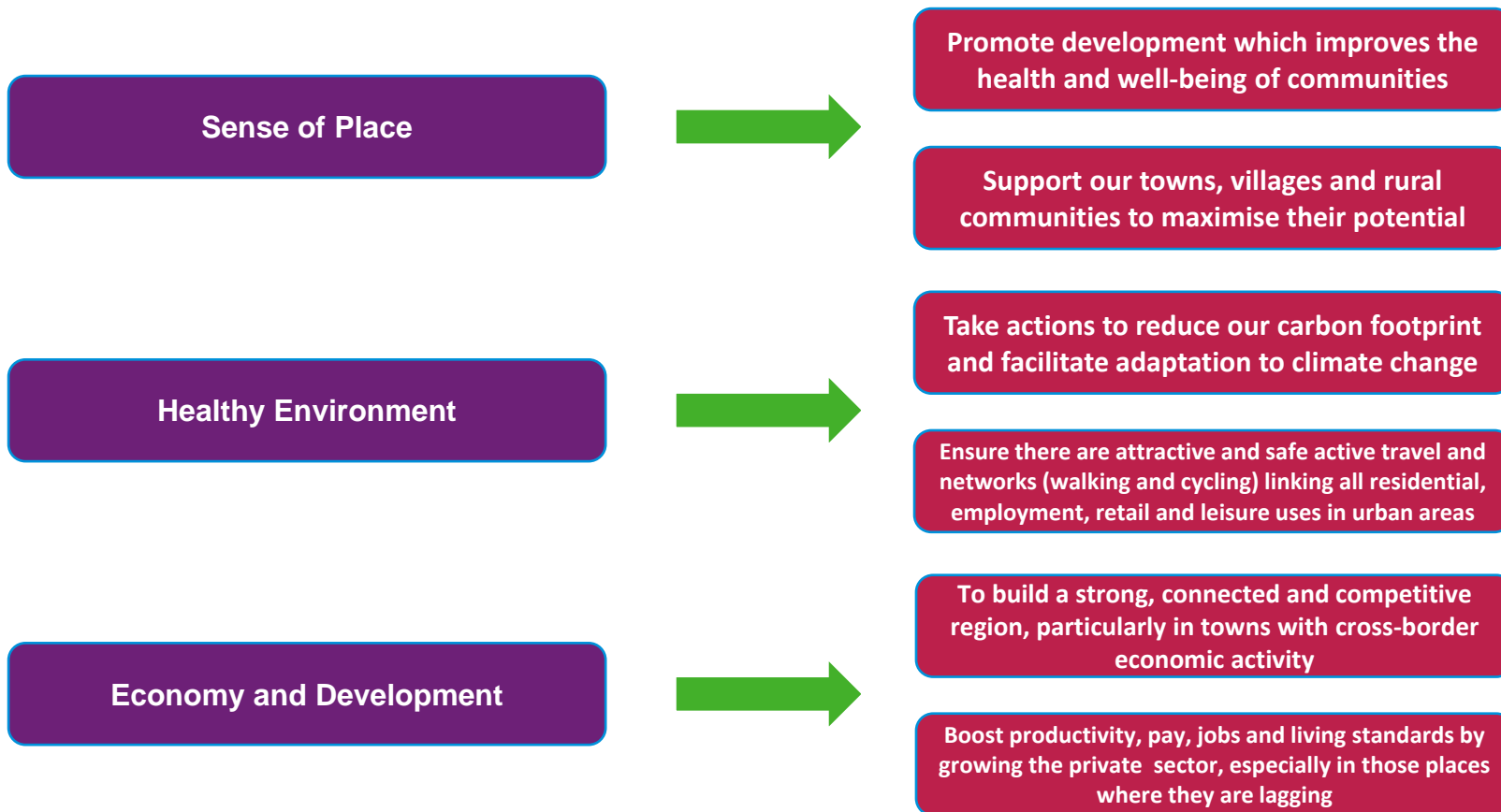
Local Policy

Enniskillen Town Centre
Masterplan (Nov 2012)

Experience Enniskillen: BID
Business Plan 2022-2027

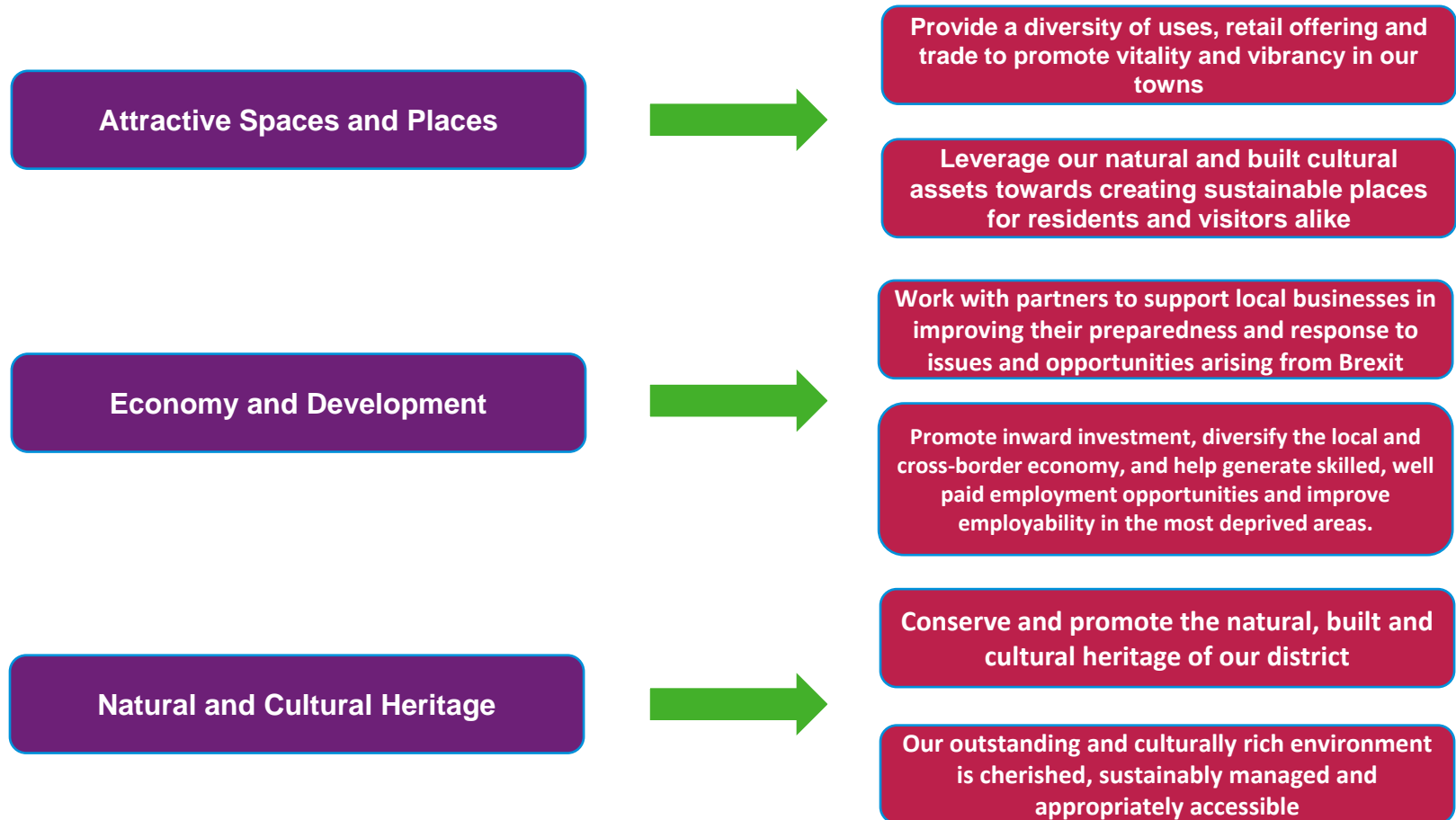
03 Policy Review

NI Level Policy – Emerging Themes



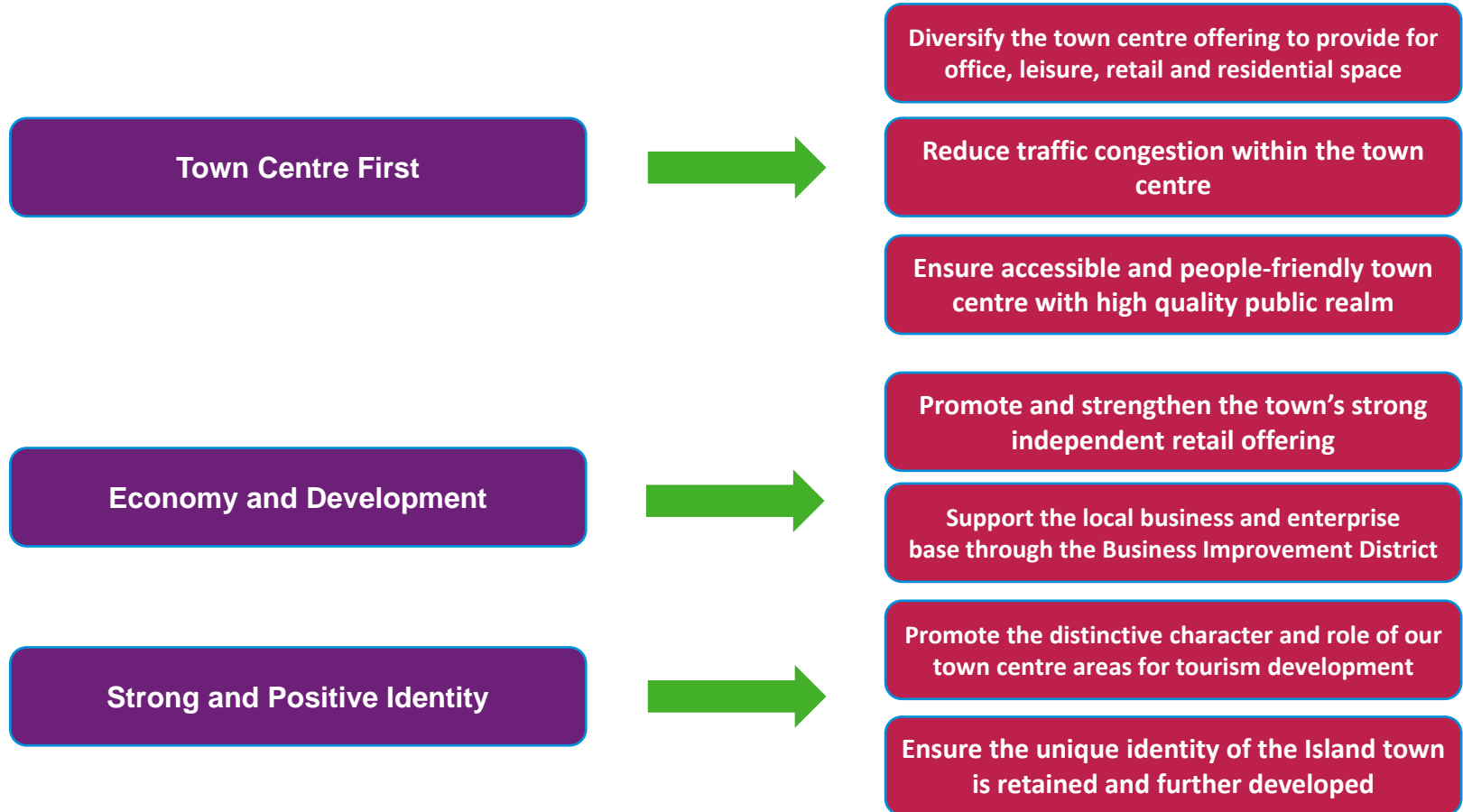
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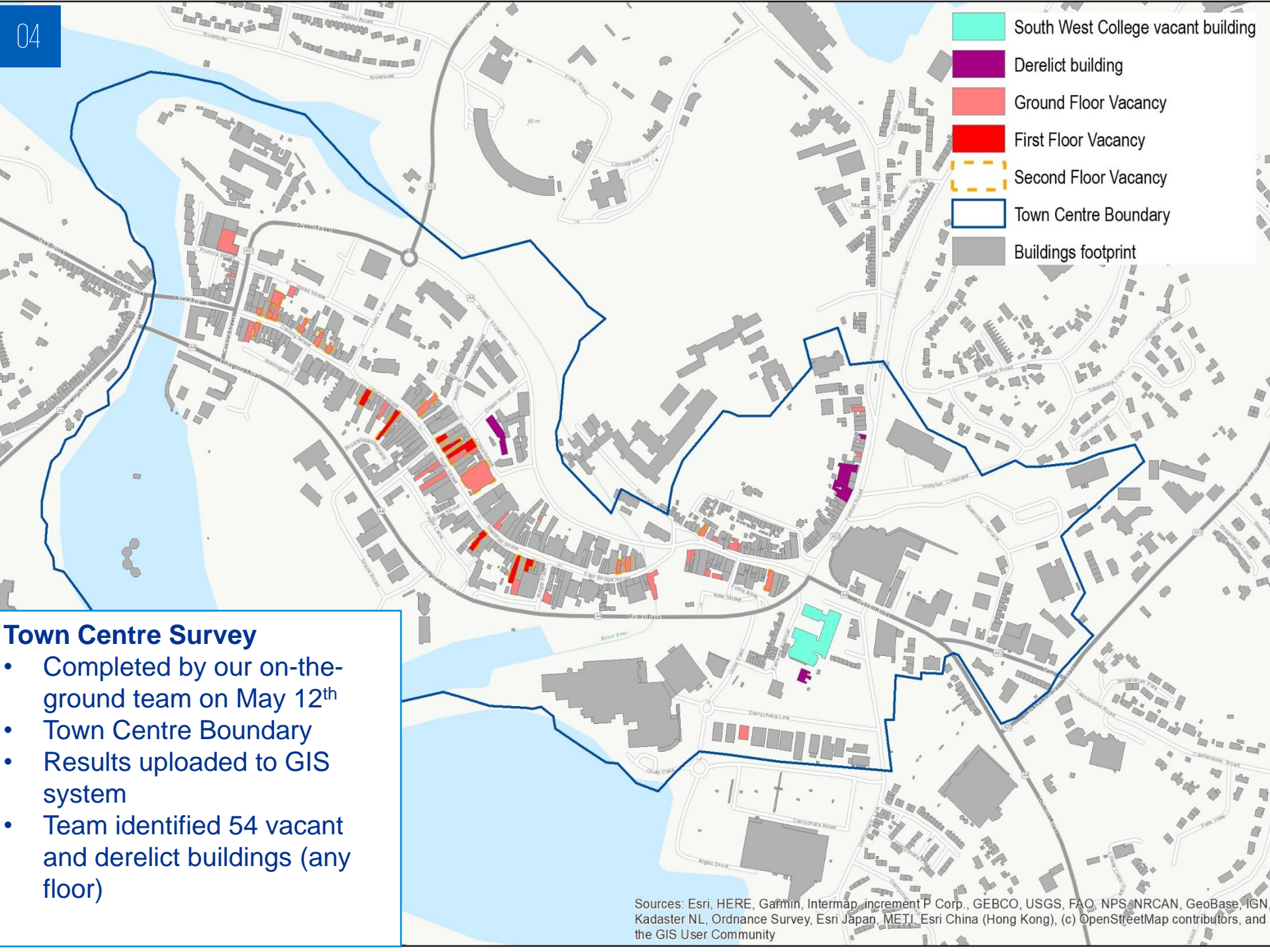
District Policy – Emerging Themes



03 Policy Review

Local Policy – Emerging Themes





Town Centre Survey

- Completed by our on-the-ground team on May 12th
- Town Centre Boundary
- Results uploaded to GIS system
- Team identified 54 vacant and derelict buildings (any floor)

Baseline Data

Note on Data

- Baseline data analysis includes information from 2011 census, BRES and other NISRA statistics covering a number of years up to and including 2019/2020.
- SOA , Ward, and DEA (i.e. Enniskillen) specific data used where possible.
- As we move further into the consultation process and more detailed analysis this will be supplemented with further data.



Areas Covered

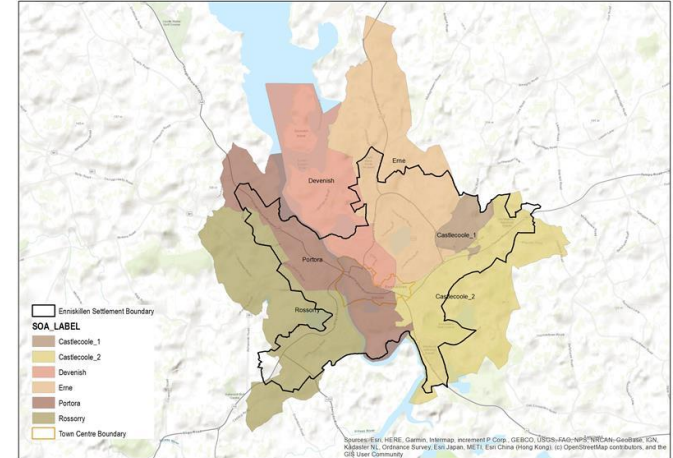
- Population
- Family, Household and Health
- Education
- Economic Activity and Employment



Overview of Findings

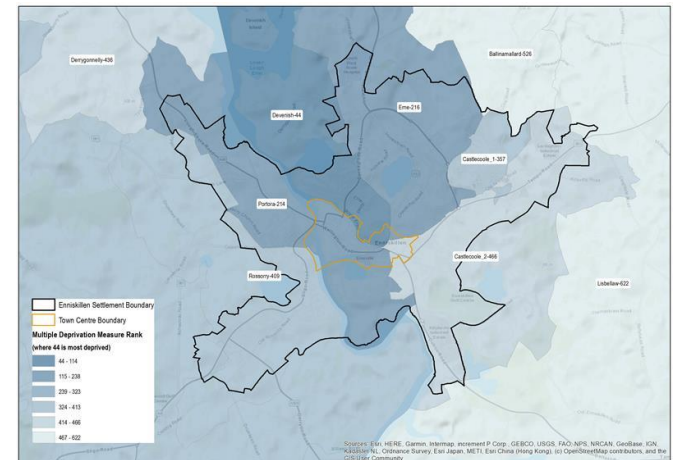
Population (mid-year projections 2020)

- The population of Enniskillen decreased approximately 1%, between 2010-2020 - if projections are correct. However, this appears to be reflecting a stagnation in population growth.
- From 2001-2020 the population grew by 2.1%.
- The cohort that has seen the biggest decrease since 2001 are people aged 16-39 with a decrease of 5.94% while people aged 65+ have increased by 5.44%.



Family, Household and Health

- The average household size in Enniskillen in 2011 was 2.35 persons, lower than the NI average of 2.56.
- Single person households accounted for 33% of households which is lower than the District and NI average.
- 5% of the population were recorded as in bad and very bad health in Enniskillen, which is lower than the NI average of 6%.
- The Devenish SOA has some of the lowest Multiple Deprivation rank scores in NI (44) and the highest proportion of pupils in post-primary schools with special education needs in NI.



Overview of Findings

Education, Training and Skills Development

- In 2019/2020, 58% of school leavers went on to higher education and 21.8% went on to further education, in comparison to the NI average of 47.9% (HE) and 29.2% (FE).
- In the same period 2.7% of school leavers were recorded in the unemployed/unknown category which is significantly lower than the NI recorded average of 4.7%.
- There has been an increase in those entering higher education from 45.5% in 2014/2015 to 58% in 2019/2020.
- Those achieving at least 5 GCSEs (A*-C) was recorded at 93.6% which is higher than NI average (91.3%) and a significant improvement from 78.5% in 2014/2015. Similarly those achieving 5 GCSEs (A*-C) including English and Maths was recorded at 80.9% which is higher than the NI average of 76.2%.



Economic Activity and Employment

- Top three industries for employment in 2019 were Wholesale And Retail Trade; Repair Of Motor Vehicles And Motorcycles (30%), Accommodation and Food Service Activities (13%), and Public Administration And Defence; Compulsory Social Security (10%).
- Since 2011-2019 the industries that have seen the largest growth in employment are classed in the categories of Real Estate Activities and Accommodation and Food Service Activities. The industries that have seen the largest declines are classed in the categories of Wholesale and Retail Trade and Human Health And Social Work Activities.
- Overall, employment by industry has recorded a decrease of approximately 2%, from 4,485 in 2011 to 4,396 in 2019.



Initial Observations from Site visit

- Island town in a beautiful natural setting with a waterside location
- Numerous heritage buildings and rich history e.g. Enniskillen Castle, the Buttermarket, the Workhouse, and Gaol.
- Dominated by traffic with multiple lanes of traffic running through the town centre
- Vacant South West College building dominates the area around the Dublin and Derrychara Roads.
- Town centre public realm offers potential for on-street events but currently dominated by traffic
- Forthill Park a “hidden gem” as it is obscured by mostly derelict buildings.
- PSNI site represents a fantastic opportunity for a functional facility with a number of heritage buildings.
- Many of the buildings turn their back on the water and despite the beautiful setting there is a low level of greenery in the town centre e.g. trees, plants etc.



Initial SCOT Findings

Strengths

- Thriving tourism location with great built heritage such as Enniskillen Castle, the Buttermarket, and the Town Hall and amenities including the Marina, Forthill Park and Ardhowen Theatre.
- The River Erne provides the town with a beautiful location and natural amenity.
- Strong tradition of independent and local retail and good hospitality offering.
- Strong educational attainment among school leavers in recent years.
- Enniskillen's people and the town's unique island identity.
- County town of Fermanagh and well positioned to benefit from cross-border trade and visitors.



Constraints

- Stagnation in population growth in recent years.
- Environmental and health impact associated with high rates of car usage.
- Traffic congestion through the town centre detracting from the town's beautiful location.
- Beautiful waterside location being underutilised by the town and businesses.
- Employment levels appear to have decreased since 2011.
- High levels of deprivation evident in Devenish.



Initial SCOT Findings

Opportunities

- Enhance connections between the town centre, the waterfront, it's associated amenities and sites of interest.
- Explore options to reduce traffic congestion in the town centre including the feasibility of pedestrianisation around East Bridge Street, Townhall Street, High Street and Church Street.
- Enhance the public realm and add more greenery to the town centre.
- Further promote and capitalise upon the town's natural, built and cultural heritage and history.
- The opportunity sites, in particular the PSNI site, represent great potential for further development of the town centre.



Threats

- Decreasing levels of young people and stagnated growth could lead to economic decline.
- Loss of EU Funding and uncertainty around UK replacement funding.
- Threat from online shopping to the significant retail sector in the town.
- Large Southwest College Building has the potential to become an eyesore in the area.
- Increased vulnerability to volatility from the EU Exit given the town's location.
- Clusters of vacancy in East Bridge Street, High Street and Darling Street could affect the vibrancy of the town centre if not addressed.



08 Surveys Update

- **Total Responses:** 260 responses
- **Public Survey:** 136 responses
- **Business Survey:** 14 responses
- **CVS Survey:** 8 responses
- **Young Persons Survey:** 98 responses
- **Primary School Survey:** 4 responses

Public Survey

Attracting Business

Vibrant Town Centre

Business Survey

Growth Potential

Access to Markets and
Labour

CVS Survey

Funding and Support

Opportunities and
Engagement

Student Survey

Education and Employment

Facilities and Activities

Primary School Survey

Transport

Your Perfect Enniskillen

08 Public Survey - Emerging Themes

Public Survey

- Attracting **more business, supporting existing businesses** and **enhancing local services and facilities** (health, education, transport etc.) highest rated priorities for generating growth in Enniskillen.
- **Enhanced access** to the waterfront and **reduced traffic** seen as most effective in improving the town centre
- **Access to services, employment opportunities** and **vacancy rates** outlined as biggest issues within Enniskillen



Business Survey

- **Quality of Life and Growth Potential** seen as Enniskillen's biggest strength as a place to do business
- However, majority of respondents said Enniskillen's business environment could be **significantly improved** in order to achieve enterprise growth
- **Access to services, markets** and **labour** outlined as the biggest constraints as a place to do business in Enniskillen



08 Public Survey - Emerging Themes

CVS Survey

- More **open space, training/education opportunities** and more **engagement with community groups** outlined as improving quality of life for the people of Enniskillen
- **50%** of respondents **agreed** that "people of all age groups, backgrounds and areas enjoy a good quality of life in Enniskillen"
- **Lack of funding and support** seen as the biggest constraint for CVS organisations



Young Persons Survey

- More **higher education and employment opportunities** seen as most effective efforts to encourage young people to stay in Enniskillen
- **Employment, retail and shopping opportunities** outlined as biggest challenges for the future development of Enniskillen for young people
- More **outdoor/meeting places** for young people, **water-based activities** and **better shopping/retail offering** seen as facilities which are not currently provided for young people in Enniskillen



08 Public Survey - Emerging Themes

Primary School Survey

- Majority of children get to school **by car** or **by bus**; **no children** walk or cycle to school
- Majority of children would like to see a **new foot path or cycle path** if they were to walk or cycle to school
- ***Your Perfect Enniskillen...***
- ***“Busy, clean, vibrant”***
- ***“Relaxing, friendly, welcoming”***



Next Steps

What's Next?

- Detailed consultation will commence over the coming weeks. We would ask you to encourage the community to get involved.
- Detailed analysis will begin and will include further data analysis on areas related to the economy, community, transport and traffic and scenario analysis related to COVID-19 and the EU-Exit.





Thank you



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