

Omagh Place Shaping Plan 2035



Fermanagh & Omagh
District Council

Comhairle Ceantair
Fhear Manach agus na hÓmaí

BASELINE ANALYSIS REPORT

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Document review and approval

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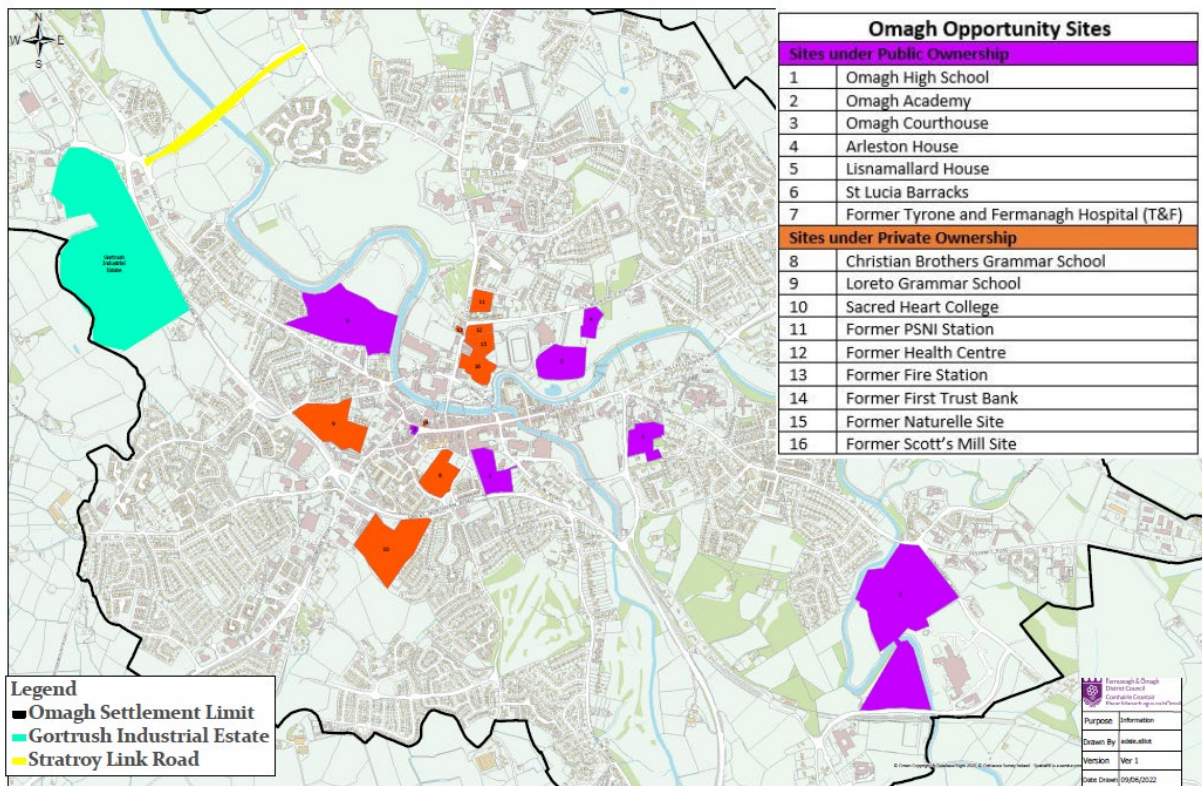
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Executive Summary

Purpose and Approach

The **objective of this plan** is to revitalise Omagh’s town centre, improve the attractiveness of the public realm, bring employment into the town and enhance the residential, business, hospitality, retail and tourism offerings in order to compete with other towns in the region. The plan will see the regeneration of the social, economic, and environmental wellbeing of Omagh as it seeks to recover from the unprecedented impacts of Covid-19 and Brexit. In doing so a **vision for Omagh in 2035** will be created, encapsulating the shared aspirations of its community and an overarching ambition that all those that visit, live and work in the town will be inspired by the heart of Tyrone.



Situation Analysis

A baseline analysis has been undertaken to understand and contextualise the local community, economy and spatial characteristics within Omagh town and more broadly across Fermanagh and Omagh and Northern Ireland. This comprehensive review strengthens our understanding on latest performance, dynamics and developments which are of relevance to place-shaping and the sustainable development of the town. This has been facilitated primarily through desktop-based research which has been supplemented by consultation activities along with field surveys that were undertaken in early 2022.

Demographic Profile

Overall analysis of the demographic profile points to **slow population growth** with an **increasingly ageing population**, with **specific areas of deprivation** in some parts of the town. Going forward, the projections indicate a **shift towards an older population and smaller households** with fewer children across the district. As such, Omagh needs to prepare for services and amenities to be in place to support vulnerable groups within the community such as the young, elderly, those suffering from illness and/or those with low incomes. Particular focus should be afforded to those relatively deprived groups along with targeted action on the particular domains of disadvantage that they experience. Key findings from this part of the analysis include:

- **Omagh has grown since 2011, but at a low rate** with a 0.88% increase in the population. However, there has been a long-term decline in the population of 2.73% between 2001-2020.
- Similarly, the projected population growth for Omagh (LGD 1992) between 2020-2040 of 1.16% is **significantly below the projected Northern Ireland growth rate** (4.26%) and below the projected growth rate for the FODC (1.25%) for that period.
- In relation to the comparator towns, with the exception of Enniskillen, the Omagh DEA has seen a significantly lower rate of population growth (0.72%) between 2011-2020 than Dungannon (10.43%), Armagh (8.14%) and Antrim (4.39%)
- **People aged 16-39 years have decreased by 7.5% during 2001-2020 while the proportion over 65 years has increased by 6.4%** and the proportion between 40-64 years has increased by 5.4% indicating a shift towards an older population in the town.
- **Level of deprivation in the town vary** with Gortrush_1, Killyclogher_2 and Coolnagard scoring well (i.e. lower levels of deprivation). However, Lisanelly_1 and Lisanelly_2 are amongst the most deprived SOAs in Northern Ireland (ranked 47th and 46th respectively)¹.
- The town also has a number of **notable positive attributes** in relation to living environment, with Killyclogher_2, Camowen, Coolnagard, Gortrush_1 all scoring highly.
- In relation to health, **more than three quarters of the population within Omagh town identified their health status as ‘very good’ or ‘good’** (slightly below the NI average of 79.4%) with just 7.1% overall identifying as ‘bad’ or ‘very bad’ (higher than the NI average of 5.6%). However, **Lisanelly_1 is identified as the second worst are in Northern Ireland for the ratio of people registered as having cancer** (Excluding non-skin melanomas).

Spatial Analysis

Located on the confluence of the Drumragh and Camowen rivers, **Omagh is strategically positioned within the region**, given its proximity to the border, location on the A5 Dublin-Derry road network, and central location within the Fermanagh and Omagh District Council administrative area. As with many other large market towns across Northern Ireland and the Republic, **Omagh experiences issues surrounding infrastructure provision** and the movement of people, goods and vehicles within and around the town’s built-up footprint. A **cluster of highly visible vacant and derelict opportunity sites has also been highlighted as a key issue**. Despite this, these constraints have the potential to provide opportunities regarding the improvement of the town centre, it’s accessibility and social and economic vibrancy. Key findings from this spatial analysis include the following:

- **A lack of infrastructure provision is evident across Fermanagh and Omagh District, with an absence of rail services, motorways and dual carriageways in Omagh. The**

¹ The deprivation data measures the 890 SOAs across Northern Ireland and ranks individual metrics from 1 (most deprived) to 890 (least deprived).

urban road network within Omagh town also experiences significant congestion with extended peak times.

- **Housing was generally the most extensive and well distributed land type**, with industry located towards the fringes whilst recreation/open space and landscaped areas generally designated along the river corridors and towards the centre of Omagh town.
- A review of planning applications that have been within Omagh town over the preceding five years was undertaken in January 2022. The **dominance of residential applications (over 90% of all grants) is indicative of limited commercial investment** that could drive economic growth. However, there are a number of approved commercial developments yet to be commenced, with the Fermanagh and Omagh Retail Needs Assessment 2020 update cautioning against further approvals of retail floorspace in the town owing in part to existing commitments.
- During field work in January 2022, a commercial vacancy survey of Omagh town centre was conducted. From the survey, 607 commercial buildings were identified, of which 54 were identified as vacant or derelict (**8.9%**). Upper floor vacancy was also assessed.
- The vacancy rate provided by the Department for Communities varies from the field work survey in January 2022 due to differences in methodology. However, both rates would suggest that **Omagh has a below average commercial vacancy rate in the town centre**.
- There are a **significant number of opportunity sites in Omagh**. While these sites undoubtedly present challenges and indeed risk to Omagh were they to lie vacant for many years, there is an equally significant opportunity to capitalise on the strategic opportunities that will arise in coming years.
- The **school sites in the town centre are unlikely to become vacant until 2026/2027**, while the likes of **Lisnamallard House and Arleston House present more immediate opportunities** to reimagine the town as a more attractive and vibrant place.

Permeability, accessibility and transport analysis

Omagh suffers from a lack of access to rail, limited connectivity to motorways and infrequent public transport. However, the town is compact and conducive to both walking and cycling, yet a **lack of supporting infrastructure curtails uptake**, with low levels of cycling particularly notable. Similarly, traffic congestion is an issue in the town centre, with a complex one-way system, exacerbating the problem. However, there **does appear to be significant parking available in the town**. There is an **opportunity for the town to capitalise on its compact nature, increase the provision of cycling and walking infrastructure and promote active mobility**. This can contribute to a reduction in traffic congestion, reduction in harmful emissions and healthier outcomes for the entire community.

Key findings include:

- **The town centre can be accessed by foot from the entirety of the Omagh built up area.**
- There is **strong potential for cycling**, with the town centre accessible by cycling from any point within 15 minutes, while the entire town could be traversed in no more than 30 minutes.
- However, the **lack of dedicated cycling infrastructure and narrow footpaths may discourage active mobility.**

- Increasing active mobility is particularly important in relation to the new Strule Shared Education Campus with the campus transport assessment assuming a 46.1% modal share of walking and cycling in trips to and from the Campus.
- There are **24 off-street car parks within 10 minutes' walk from the town centre**. However, poor signage, the complex one-way system and poor pedestrian linkage with the town centre may be contributing to **underutilisation and a perceived lack of parking**.
- There are **180 free of charge car parking spaces and 646 paid car parking spaces within a 5-minute walk from the town centre**.
- There are a total of **2,649 off-street car parking spaces within 10 minutes' walk of the town centre** - 1,823 free of charge spaces and 826 paid spaces.

Economy and Employment

From the analysis, it is clear **Omagh is an economic and public sector hub for the wider region**. However, when compared to 2011 data, **the town has seen a decrease in employee jobs and business numbers**. At a district level, employment and economic activity rates are also below the Northern Ireland averages. As such, **Omagh needs to build on existing clusters, attract further investment and ensure that opportunities exist to enhance the economy and employment levels**. Similarly, with housing that is more affordable than other districts, Omagh has an opportunity to attract people to the town if it can provide clear employment opportunities. Key findings include:

- Omagh town is reflective of the district in that **most companies are small or micro businesses**.
- Top three industries for employment in 2019 were Wholesale And Retail Trade; Repair Of Motor Vehicles And Motorcycles (25%), Education (15%), and Public Administration And Defence; Compulsory Social Security (14%).
- The **retail and hospitality sectors are key to the town's economy** accounting for approximately 63% of the total turnover in 2015 and 33% of employee jobs in 2019. However, there is little if any capacity for additional retail floorspace through to 2030.
- The **public sector is also a key employer** with industries such as education, health and public administration accounting for approximately 41% of employees in 2019. However, this leaves the town's economy open to shocks from public sector budget cuts.
- However, **employment by industry has recorded a decrease of 7.2%**, from 4,920 in 2011 to 4,566 in 2019.
- There is also **specific clusters and strengths around engineering, manufacturing, and agri-food**. This could be built upon to increase opportunities and contribute to the development of larger companies, with greater employment, in Omagh.

Community Infrastructure

A wide range of community networks, supports and services are provided for within Omagh. With regard to Omagh's Community and Voluntary Sector a small sample of existing services and supports available have been included including in areas such as trust and safety, diversity and inclusion, citizen activity and participation. Furthermore, given the wide breadth of community infrastructure assets in the town, a **social infrastructure audit** was conducted as part of mapping out Omagh's community infrastructure.

The results from a Social Infrastructure Audit conducted as part of mapping Omagh's community infrastructure recorded a total of **592 individual social infrastructure facilities and amenities** within the town's settlement boundary. A breakdown and categorisation of these individual facilities and amenities produced the following key findings:

Category	Number
Arts, Cultural and Tourism	22
Community and Civic Services	46
Education and Training	22
Healthcare Services	22
Open Space, Sport and Recreation	87
Religious Institutions and Burial Sites	22
Retail Centres and Services	371
Total	592

- The most prominent category identified within Omagh is that of Retail Centres and Services, with 371 facilities/amenities recorded in Omagh.
- 87 Open Spaces, Sport and Recreation areas were the second most prominent category identified in Omagh.
- The smallest recorded categories in Omagh were that of Healthcare Services, Education and Training, Religious Institutions and Burial Sites, and Arts, Cultural and Tourism services, which all recorded 22 individual facilities/amenities within the town's settlement boundary.

Education

Education provision in Omagh is strong with a substantial level of education infrastructure located across the town. This includes primary, post-primary and further and higher education, with the town acting as an educational hub for a wide catchment area. In recent years, educational outcomes amongst school leavers have been strong and continue to improve, yet **overall Omagh is below the NI average for educational achievement and levels of qualification.** There are also stark differences in educational outcomes with regards to those from the most disadvantaged backgrounds. These **areas of underachievement must be addressed to ensure the town remains competitive and to prevent increased deprivation.** Yet, while there is work to do, the overall trend is positive, with indicators pointing towards improved educational outcomes, with education as an emerging key strength of the town. Key findings include:

- In 2019/2020, **56.8% of school leavers went on to higher education and 31.2% went on to further education**, which is **significantly higher than the NI average** of 47.9% (HE) and 29.2% (FE)
- In the same period **4.5% of school leavers were recorded in the unemployed/unknown category** which is **lower than the NI recorded average** of 4.7%.
- For 2019/2020, those achieving at least 5 GCSEs (A*-C) was recorded at 89.9% which is slightly lower than NI average (91.3%) but a significant improvement from 78.9% in 2014/2015. However, those obtaining 5 GCSEs (A*-C) including English and Maths was above the NI average (76.2%) at 76.9%.

- **Underachievement is also evident** with only 33.4% of the working age population being recorded as having obtained a qualification classed at NVQ Level 4 or Above (NI Average 36.7%) in 2019.
- In 2019/2020, in relation to those from the most disadvantaged backgrounds, 56.9% of those entitled to free school meals (FSME) achieved 5 GCSEs grades A*-C including GCSE English and Maths compared to 85.1% of those not entitled to free school meals.
- Yet the trend is positive. Educational achievement in those entitled to free school meals is above the NI Average, those obtaining NVQ Level 4 or above has increased from 20.4% in 2011 to 33.4% in 2019 and those with no qualifications has reduced from a high of 27.7% in 2013 to 12.7% in 2019.

Natural, Built and Cultural Heritage

The town centre benefits from its strategic positioning at the confluence of the Drumragh and Camowen rivers, with **many of its greenways, parks, gardens and riverside walkways all within a 10-minute walking distance of Omagh's commercial centre.**

As noted in the Updated 2015 Town Centre Masterplan, the town has grown around the central streets of Market, Street, High Street and Campsie. High Street and Market Street remain Omagh's main retail and commercial areas with a number of narrow side streets that have been put into good use adding to the town centre's character.

Due to the architectural merit and heritage of Omagh's built heritage, a significant number of buildings both within the town centre and wider Omagh urban settlement are listed buildings of 'special architectural or historic interest', with the town centre being designated as a Conservation Area. Notable architectural styles present within the towns building stock include the Victorian, Edwardian and Neoclassical styles.

Today, **Omagh's heritage is underpinned by a strong arts and culture scene**, excellent educational and learning institutions, a colourful and independent retail environment and diverse communities and people with a deep pride and sense of identity with Omagh town and its surrounding landscape.

Tourism, Leisure and Marketing

Tourism is not currently a significant industry for Omagh, it is not positioned as a key destination town, and lacks both key visitor attractions and a range of accommodation offer. However, there is an opportunity to capitalise on the proximity of the Ulster American Folk Park, the proximity of the Sperrins Mountains and the Gortin-Glen Forest Park, as well as the heritage attributes of the town such as the attractive town centre architecture, river frontage and Arlestone Park.

There are many opportunities which could, with targeted investment, position Omagh for growth, broadening the offer and helping to position the town as a visitor destination commensurate with its status as a key regional town. These include

- Physical and promotional linkages to nearby visitor attractions,
- Capitalising on the increased demand for outdoor activities,
- Positioning as a strategic hub to visit attractions and activities in the area,
- Enhancing the physical environment of the town to foster a night time economy,
- Animation including a range of events and festivals to extend the visitor season,
- A comprehensive wayfinding system to enhance the legibility of the town, and,
- An integrated and phased promotional programme supported by Tourism NI.

Growing the tourism opportunity in Omagh is key to the success of this plan, in that regeneration opportunities can benefit tourism, and in turn increased numbers of visitors can bring vibrancy and vitality to the town centre.

Economic Outlook and Growth Scenarios

COVID-19 and the EU Exit had and will continue to have an impact on Omagh, its economy and the town’s growth into the future. The pandemic created significant challenges for many sectors, particularly in relation to hospitality, retail and construction. However, it also resulted in significant opportunities for certain sectors such as online retail and professional services, as well as an accelerated transition to remote working. Similarly, the EU Exit has resulted in staffing shortages particularly in relation to retail, hospitality, manufacturing and agri-business. It has also resulted in a funding gap, with Northern Ireland no longer able to benefit from the likes of the European Social Fund and European Regional Development Fund which are important in relation to SME and unemployment supports (both of which are important for Omagh).

However, Northern Ireland is also in an advantageous position, with companies in Northern Ireland facing less restrictions in trading with the EU than those based in Great Britain. **Cross-border trade is at an all-time high and as such opportunities may exist**, particularly for the agri-food sector that has a strong presence in Omagh. Considering the analysis on Omagh’s demographics and economy, as well as recent and historical economic growth in Northern Ireland and the Fermanagh and Omagh District, **four growth scenarios have been developed**. These are as follows:

Scenario	Narrative and rationale	Annual average economic growth rate, 2022-2030 ²	Related total estimated jobs growth 2022-2030	Scenario probability (KPMG viewpoint)
S1 Central A	<ul style="list-style-type: none"> The Town’s economy grows in line with the 3-year average growth rate pre-Covid (2017-2019) for NI overall Assumes recent trends pre-Covid extend into future 	0.5% p.a.	Jobs estimated to increase by 100	20%
S2 Central B	<ul style="list-style-type: none"> The Town’s economy grows in line with the 5-year average growth rate pre-Covid (2015-2019) for NI overall Captures recent growth per Central A as well as higher growth in years pre-Brexit referendum 	1.5% p.a.	Jobs estimated to increase by 300	45%
S3 Upside	<ul style="list-style-type: none"> The Town’s economy grows at a faster rate than it has grown at in recent years, and at a faster pace than the NI economy is expected to grow at overall Assumes the Town can achieve a step change in growth relative to NI 	2.5% p.a.	Jobs estimated to increase by 500	30%
S4 Downside	<ul style="list-style-type: none"> The Town’s economy does not grow materially over the entire period Scenario would arise only in context of an economic downturn that reduces annual average growth 	0.1% p.a.	No change	5%

To achieve the higher growth targets set in Central B (1.5% p.a.) and Upside (2.5% p.a.) Omagh needs to achieve higher levels of FDI, higher growth in indigenous exporting businesses, increased levels of R&D and skills development, investment in schools’ sites,

² ONS, KPMG Analysis

innovation hub spill overs, and additional induced spending arising from higher footfall through public realm improvements. This can be achieved by:

- **Ensuring SMEs in Omagh are provided with support and guidance** to maximise the opportunities for cross-border and export growth
- **Researching and embracing new approaches and technology**
- **Fostering collaboration and partnership** working between industry and academia
- **Growing the number of businesses in hubs and encouraging the development of clusters** at existing and future hubs to promote economic development opportunities
- **Investing in infrastructure** to support delivery of and improve access to skills development
- **Align any investment in schools with work undertaken as part of Strule Campus Development**
- **Strengthen the physical quality of the town centre and improve on pedestrian connectivity**
- **Develop existing relationships with other partner organisations** (e.g., Community Planning Partners, Councils, Community/Voluntary sector) to identify and maximise shared space and/or service delivery opportunities.

Policy Analysis

This section sets out the policy framework and principles to underpin the Omagh Place Shaping Plan 2035. This includes international, Northern Ireland level, regional, and local frameworks that set policy and best practice for social, economic and community development. This sets a strong foundation for shaping a vision and objectives for an attractive and vibrant Omagh in 2035. A total of **27 policy documents were outlined for review** and were included within this policy analysis. Some of the key policy documents reviewed included:

- *The 2030 Agenda – UN Sustainable Development Goals*
- *Northern Ireland Economic Recovery Action Plan*
- *Northern Ireland Domestic Tourism Strategy 2020*
- *Regional Strategic Transport Network Plan 2015*
- *Regional Development Strategy 2035*
- *MSW Regional Economic Strategy 2020*
- *FODC Corporate Plan 2020 – 2024*
- *FODC Local Development Plan 2030 – Draft Plan Strategy*
- *FODC Climate Change and Sustainable Development Strategy 2020 – 2030*
- *FODC 2030 Community Plan*

This review of relevant policies suggests **several key principles that the Omagh Place Shaping Plan 2035 can draw upon:**

- Creating a **strong sense of place** and identity within Omagh and among its communities.
- Promoting and maintaining a **healthy physical environment** which improves the health and well-being of Omagh's communities.
- Developing a **diverse, innovative and resilient local economy** to compete regionally and internationally.
- **Conserve and promote** the natural, built and cultural heritage of Omagh.

- Developing **sustainable, connected communities** to ensure prosperity and quality of life for generations of the future.

Consultation and Engagement

An **extensive community consultation and engagement exercise** was undertaken to capture the views and comments from a wide range of stakeholders associated with Omagh Town.

Public Survey – 240 respondents

- Almost half of respondents considered Omagh's greatest asset to be its local natural and environmental landscape
- The **most frequently cited challenges** were town centre vacancy rates, employment opportunities and access to services (such as healthcare, education and transport).
- The **top priorities to generate growth** in Omagh were to attract more businesses to the area, to provide better connectivity between Omagh and nearby visitor attractions and attract more visitors/tourists and to enhance local services (such as healthcare, education and transport).
- The **top priorities to improve Omagh town centre** were provision of accessible, affordable carparking, enhancement of the river frontage, and reduced traffic throughflow.

Business Survey – 29 respondents

- While **many respondents were positive about Omagh's business environment**, over a quarter considered Omagh's business environment could be improved significantly for enterprise to be realised.
- The **most frequently cited priorities to help drive economic development** in Omagh were to provide the necessary infrastructure for business, to provide enterprise support services and support workforce training/upskilling, and to work with Invest NI to attract FDI.
- Respondents considered Omagh's **main strength as a place to do business was its growth potential**.

CVS Survey – 24 organisations

- **While almost 60% of respondents thought Omagh offered 'some services' for their membership/organisation**, over a third of CVS respondents considered that Omagh offered poor services and opportunities to their membership/organisation indicating room for improvement.

Student Survey – 78 students

- Young people considered that the **three biggest challenges, issues or concerns for the future development of Omagh were recreation and leisure opportunities, followed by housing/accommodation availability and employment opportunities**. The latter possibly reflected that most respondents considered that Omagh offered some or few employment opportunities while only a small proportion considered Omagh offered significant employment opportunities.

Primary School Children – 25 children

- Most travelled to school by car but indicated that **a new footpath or cycle path and other road-based improvements would make them want to walk or cycle to school**. This desire for active school travel was reinforced by their views on the top three best things about Omagh which were the leisure centre, the playpark and green spaces, and the people.

Drop-in Events

- Attendees highlighted the **need for the A5 and an associated reduction in traffic congestion**, a **need for social housing** and a **desire for a wider range of leisure facilities and activities for young people**.
- They also wanted to see **improvements to the public realm and more green spaces**, **greater exploitation of the River Strule** and the surrounding countryside and **more employment opportunities**.

Steering Group Consultation

Key themes included the following:

- A need to **increase economic growth** by providing more jobs in Omagh and offering a wider range of skilled jobs and which in turn would help reverse the brain drain and retain young people. WFH/hybrid working models were seen as an opportunity for Omagh to position itself, spill-over investment region.
- A need to **develop the local infrastructure** including progressing on the A5, development of hotel accommodation to support increased tourism, as well as improve connectivity to tourist assets outside Omagh, and provide affordable housing for residents.
- An opportunity to **exploit the natural environment**, including the Strule River and maximising the town's proximity to scenic countryside, provide attractive green spaces and generally promote quality of life aspects associated with proximity to the countryside.
- An opportunity to **improve connectivity** between the town and surrounding countryside for both leisure and to attract visitors/tourists into Omagh; to redefine the relationship with the River Strule; and to reflect Omagh's connections with and support of surrounding towns and villages.
- A desire to build on the excellent **educational opportunities** as provided by SW College and the enhanced opportunities on the Strule Campus which could help raise educational underachievement while appealing to people with young families locating to/returning to Omagh.
- An absolute necessity to build on the **strong community relations and** maximise Omagh as a shared space, ensure inclusivity and a person-centred approach and ensure "no one is left behind".

Strategic Conversations

There was a **wide but common range of views** presented by consultees.

- They **highlighted the town's location**, while **recognising the need for the A5** to improve this and alleviate congestion.
- The **town centre is an attractive heritage town**, with a good range of independent shops and a vibrant night-time economy. Omagh's heritage, the Strule river, its leisure, arts and cultural offerings were highlighted as strengths. Its proximity to the natural countryside and associated assets such as the Gortin Glens were also highlighted as strengths, with a suggestion that **Omagh has not yet fully exploited**

these assets and could develop its tourism offering further. This offering needs to build on bringing tourists/visitors into the town.

- There were **concerns expressed over the level of town centre vacancies**, criticism of the limitations of the Oasis Plaza, and recognition that shared spaces need to be both shared and viewed as safe. The quality and usefulness of public signage (wayfinding) could be improved, but some public realm works such as alleyway murals and lighting were praised.
- There were **opportunities to build on the sense of physical and mental wellbeing and connection with the outdoors** as people emerge from the impact of Covid-19 and working from home (WFH)/hybrid working models offered increased job opportunities for Omagh.
- A **place shaping plan for Omagh needs to take account of its demographic profile as well as Omagh's role in the wider rural community**, and there was recognition that if a plan took account of the needs of people with disabilities, children and older people then it could be a plan for all.
- The **schools and College were highlighted as excellent** but correspondingly there was a need to retain young, qualified people in the locality **and alleviate a perceived brain drain**.
- The **range and scale of opportunity sites presented challenges** as well as opportunities, with a range of suggestions but a risk that sites continue to remain vacant or a long period.

Conclusion

The extensive stakeholder has presented a wide range of views but there are **several core common themes for Omagh**:

- There is a **need and desire for more jobs and more varied jobs in Omagh** to retain and attract young people, and hybrid working models plus exploitation of Omagh's surrounding natural assets offer opportunities for the town. However, there is a **need to develop the supporting infrastructure including the road infrastructure as well as tourism infrastructure**, while **supporting small business to grow and expand**.
- There are **opportunities to build on Omagh town's strengths** including its night-time economy, its leisure and parks and a corresponding need to address town centre vacancies and the range of vacant sites.
- There is a **need to ensure inclusivity**, and a place shaping plan for all demographics.

Case Studies

Several case studies were examined and analysed in areas of relevance to Omagh and the new Place Shaping Plan. It includes areas such as **adaptive reuse, regeneration, pedestrianisation, tourism (greenways) and wayfinding**. It also provides information on key aspects of Armagh City's forthcoming Place Plan. Together the case studies provide further inspiration and guidance on the potential direction Omagh can take in the development of the new Place Shaping Plan. These case studies are summarised below, with further detail available in Section 6 of this document.

Adaptive Reuse of Vacant School Site: Parkhead Public School is a historic heritage building located in Glasgow, Scotland, the publicly owned building has been readapted from its previous derelict school site into a community enterprise centre.

Regeneration of Barracks Sites: Located in Brighton, England, the Preston Barracks had been vacant and derelict for decades until a public-private partnership created a regeneration project seeking to develop a mixed-use site of SME and start-up office space, residential and student accommodation. Columb Barracks situated in Mullingar in Westmeath is a historic building constructed in the 1800's. It is currently undergoing a transformation with a focus on the provision of housing with the protected structures at centre of the development.

Pedestrianisation: In June 2021, Dublin City Council announced a series of highly successful trial pedestrianisation plans for Parliament and Capel Street to support the hospitality sector and facilitate outdoor dining. The trials ran from 18.30-23.30 from Friday-Sunday from June-September 2021. Owing to their success plans are now progressing for the permanent pedestrianisation of Capel Street in May 2022, making it the longest pedestrianised street in Dublin.

Tourism: The Waterford Greenway opened in March 2017 along the former Mallow and Waterford rail line and is the longest greenway in Ireland. The Greenway has contributed significantly to the local tourism industry, creating jobs and attracting large numbers of visitors.

Wayfinding: Legible Leeds is a pedestrian wayfinding system implemented in Leeds City Centre (UK). The system was developed to assist people to navigate the different districts (business, shopping and cultural) of the city centre on foot and highlight amenities close to the city centre.

Armagh Place Shaping: Armagh City, Banbridge and Craigavon Borough Council are currently finalising the Armagh Place Plan, which was developed in collaboration with stakeholders and the wider community. It focuses on four main pillars - A Connected City; A Green City; An Engaging City and A Healthy City.

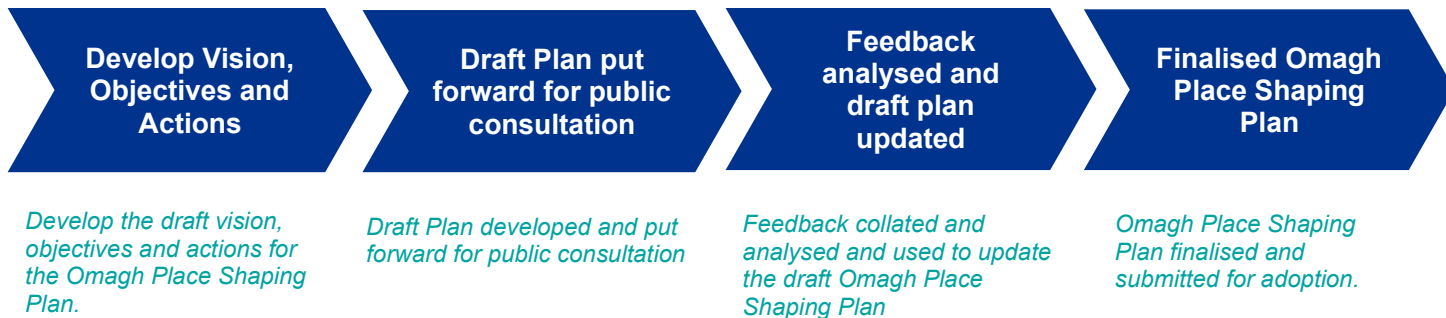
Strategic Priorities

Several strategic priorities have been identified from the qualitative and quantitative analysis of the town and the consultation with a wide range of stakeholders from across the community. They broadly look to address areas related to the strengths, constraints, opportunities and threats present in Omagh, and will be utilised in the development of the objectives and actions that will form the key components of the Omagh Place-Shaping Plan. The **high-level strategic priorities** are as follows:

- **Developing and promoting Omagh as an attractive place that people want to live, work and visit.**
- **Increasing employment opportunities and ensuring supports for existing businesses.**
- **Capitalising on the natural environment including in the town itself and the surrounding countryside.**
- **Identifying how to progress the many opportunity sites located in and around the town.**
- **Ensuring that Omagh is an inclusive place that has a community that is prosperous, well educated, vibrant and healthy.**
- **Improving connectivity and accessibility throughout the town**

Next Steps

The information and findings contained within this report will be used to develop the vision and the associated objectives and actions that will become the Omagh Place-Shaping Plan. Following development of the vision, objectives and actions, the draft plan will be put forward for public consultation. Feedback will be collated and incorporated before the Omagh Place-Shaping Plan is finalised and submitted for adoption.



1 Introduction

1.1 Approach

The objective of this plan is to revitalise Omagh's town centre, improve the attractiveness of the public realm, bring employment into the town and enhance the residential, business, hospitality, retail and tourism offerings in order to compete with other towns in the region. The plan will see the regeneration of the social, economic, and environmental wellbeing of Omagh as it seeks to recover from the unprecedented impacts of Covid-19 and Brexit. In doing so a vision for Omagh in 2035 will be created, encapsulating the shared aspirations of its community and an overarching ambition that all those that visit, live and work in the town will be inspired by the heart of Tyrone.

A baseline analysis has been undertaken to understand and contextualise the local community, economy and spatial characteristics within Omagh town and more broadly across Fermanagh and Omagh and Northern Ireland. This comprehensive review strengthens our understanding on latest performance, dynamics and developments which are of relevance to place-shaping and the sustainable development of the town. This has been facilitated primarily through desktop-based research which has been supplemented by consultation activities along with field surveys that were undertaken in early 2022.

While focus for this project is upon the town centre of Omagh, as indicated below in Figure 1.1, it is recognised that the town centre is part of the wider settlement of Omagh town which in turn is a key settlement of the Fermanagh and Omagh District. This is considered as part of the research undertaken to inform this baseline analysis.

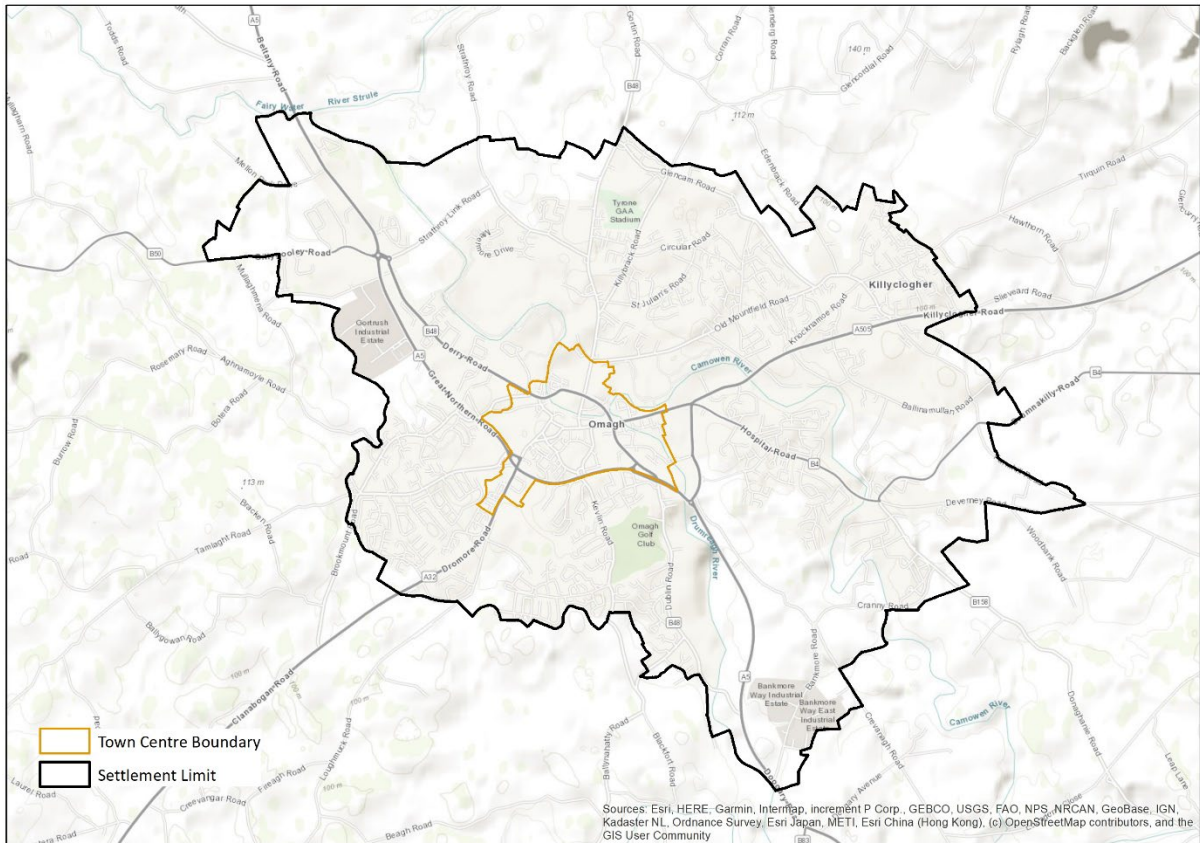


Figure 1.1.1 Omagh settlement boundary and settlement limit/project study area

There is the potential for this Place-Shaping Plan to impact on people and land at different spatial extents. Cognisance of published datasets along with local insights provides a considered, evidence-based approach to understand the characteristics across the most appropriate spatial districts. As such, UK and Northern Ireland data has been considered for comparative analysis where relevant, however the assessment has focused on the following areas:

- Omagh town has been defined as the 11 Super Output Areas³ of Camowen, Coolnagard, Drumragh, Dergmoney, Gortrush_1, Gortrush_2, Killyclogher_1, Killyclogher_2, Lisanelly_1, Lisanelly_2 and Strule;
- The Local Government District of Fermanagh and Omagh has been considered on the basis of its administrative boundary that was established in 2015;
- In order to broaden the context and understanding of how this data can be used to illustrate Omagh’s standing in Northern Ireland, four towns were selected for comparative analysis. The towns are Armagh, Antrim, Dungannon and Enniskillen. Specifically, this relates to the District Electoral Area and/or the town boundaries that were analysed as part of the development of the Town Centre Database that was undertaken by the Department for Communities with the relevant boundaries identified for individual datasets herein throughout this report.
- The towns were selected taking into account their location, and similarities to Omagh in relation to size, growth and strategic role (e.g. county town). Antrim was included as it had

³ Super Output Areas (SOAs) were a new geography that were developed by the Northern Ireland Statistics and Research Agency to improve the reporting of small area statistics. A set of slightly revised Super Output Areas (SOAs) were created for the 2011 census outputs.

a very similar population in 2001 to Omagh and to highlight the effect of proximity to Belfast in the Northern Ireland context.

- Statistics presented for other former, and in some cases superseded administrative or statistical boundaries (such as the former Omagh district, wards and/or small areas) have also been noted as appropriate throughout this report to provide as much detail as possible at the smallest available geographic scale where feasible.

2 Omagh Situation Analysis

2.1 Demographic Profile

Understanding the population and demographic profile enables effective baseline context and strategic policy making that targets community needs. An overview of the demographic characteristics of Omagh as well as comparisons to the district, NI average and selected comparator towns are presented in this section to provide context and understanding of the relevant composition of the current and future population with a particular focus on those of working age given their influence on the economic potential of the town.

2.1.1 Historic demographics

The 2020 mid-year population estimate from the Northern Ireland Statistics and Research Agency for Fermanagh and Omagh was 117,337 people, accounting for 6% of the NI population, of which 19,533 lived within Omagh town⁴. This represents a density of 1,116 people per km² and reflects a long-term decline, albeit approximately 1% growth was evident over the last decade, whilst a significant decline was experienced during the economic crash in the mid-2000s as illustrated in Figure 2-1. In contrast, Fermanagh and Omagh has steadily risen in population since 2001, when it was 105,751 people comprising approximately 1% compound annual growth rate.

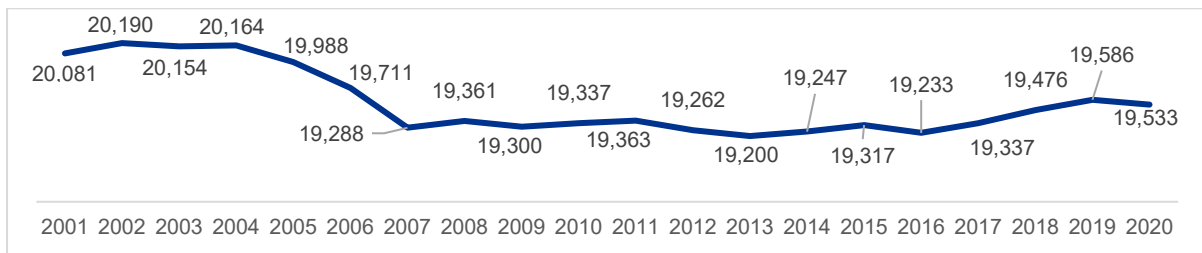


Figure 2.1: Historic population in Omagh town

The population dynamics during that period varied spatially across Omagh town as noted by the Northern Ireland Statistics and Research Agency (NISRA) and illustrated in Figure 2-2. Specifically, population decline was notable to the south and north-east whilst growth was evident towards the centre and north-west of Omagh town. Whilst the dynamics have fluctuated year-on-year, growth was particularly notable in Lisanelly_1 and Drumragh since 2018 whilst Dergmoney and Killyclogher_2 exhibited a decline during that time.

⁴ Mid-year projection for 2020 based on the SOAs

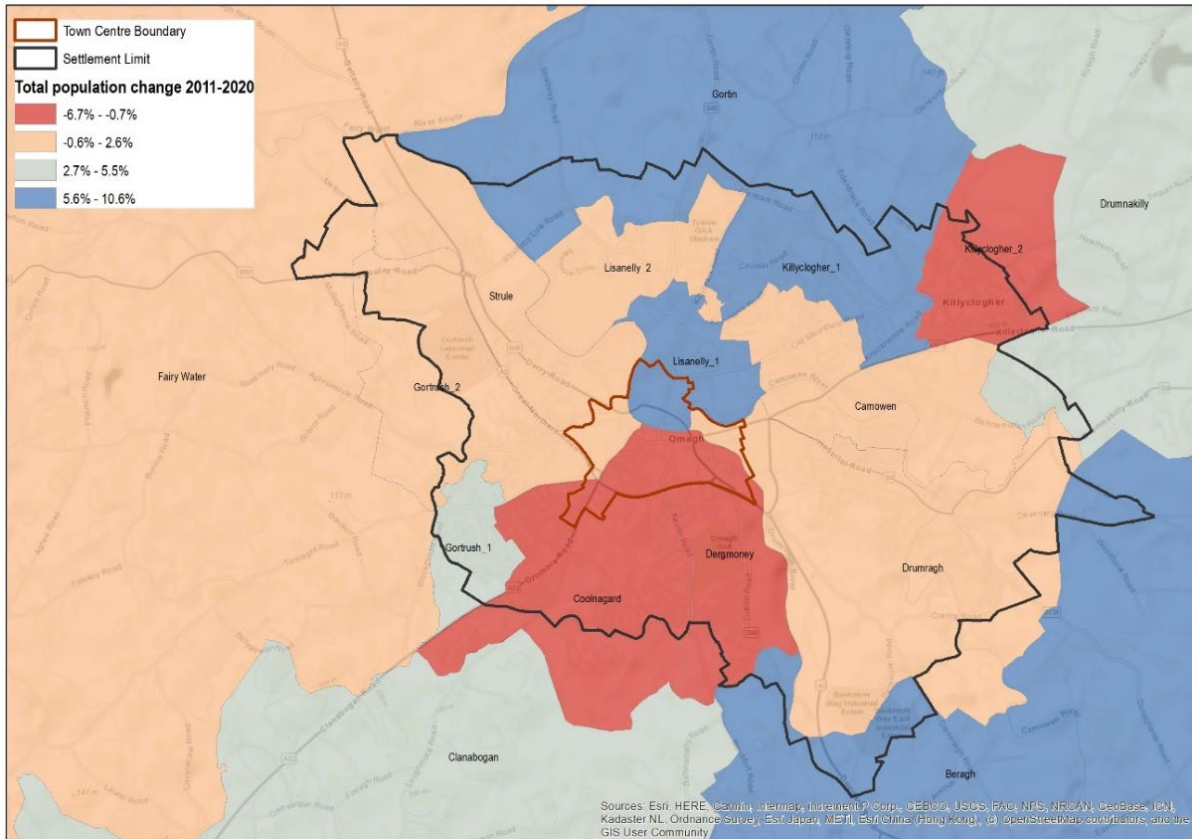


Figure 2.2: Historic population change by area in Omagh town

A comparison of population changes over the last decade against other towns⁵ from the Northern Ireland Statistics and Research Agency is presented in Table 2-1. Looking at District Electoral Area level (DEA), Omagh is the smallest of the DEAs (18,220 people in 2020), followed by Enniskillen (18,310 people in 2020), Dungannon (24,880 people), Antrim (23,300 people) and Armagh is the largest (32,400 people). Omagh experienced 0.72% growth since 2011 which was the second lowest rate of growth (Enniskillen was just 0.11%) whilst Antrim, Armagh and Dungannon grew by 4.39%, 8.14% and 10.43% respectively. Specifically, Omagh and Enniskillen declined year-on-year on four occasions during this period and only Enniskillen experienced a higher year-on-year proportional decline in population at any point during the last decade (0.82% decline in 2013-14). In contrast, Antrim and Armagh increased every year whilst Dungannon only exhibited a decline during 2019 – 2020.

Table 2.1: Historic rates of population change across DEAs⁵

	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20
Antrim	0.22%	0.09%	0.31%	0.53%	0.09%	0.22%	1.15%	1.00%	0.69%
Armagh	0.67%	0.63%	0.66%	0.75%	1.30%	1.06%	1.30%	1.00%	0.50%
Enniskillen	-0.05%	0.05%	-0.82%	-0.50%	0.39%	-0.39%	0.44%	0.88%	0.11%
Dungannon	1.60%	0.52%	2.09%	1.92%	1.63%	0.53%	0.78%	1.42%	-0.48%
Omagh	-0.50%	-0.39%	0.17%	0.39%	-0.44%	0.56%	0.66%	0.50%	-0.22%

With regard to the change by age groups within Omagh, the proportion of the younger population has generally decreased year-on-year whilst the older portion of the population, particularly those above 65 years, has increased as demonstrated in Table 2-2. Specifically, the proportion under 15 years has decreased by 4.4% whilst the proportion between 16 – 39

⁵ This relates to the DEAs of Antrim, Armagh, Enniskillen, Dungannon and Omagh.

years has decreased by 7.5% during 2001 – 2020. In contrast, the proportion over 65 years has increased by 6.4% whilst the proportion between 40 – 64 years has increased by 5.4% during that time. This was also reflected across Fermanagh and Omagh where the median age increased from 34.1 years in 2001 to 40.1 years in 2020, however this is generally in line with comparisons at the Northern Ireland level (34.7 years and 39.2 years respectively for Northern Ireland). Similarly, the largest age band within the district is the 40–64-year-old bracket, similar to the whole of Northern Ireland.

Table 2.2: Proportional split of the historic population by age group

	Under 15 years	16-39 years	40-64 years	Over 65 years
2001	24.5%	37.2%	27.4%	11.0%
2002	23.8%	36.9%	28.2%	11.1%
2003	23.3%	36.8%	28.8%	11.1%
2004	22.8%	36.5%	29.3%	11.5%
2005	22.4%	36.3%	29.6%	11.7%
2006	21.8%	35.9%	30.1%	12.1%
2007	21.6%	34.8%	31.1%	12.5%
2008	21.2%	34.5%	31.5%	12.8%
2009	21.1%	34.0%	31.7%	13.1%
2010	20.9%	33.8%	31.7%	13.6%
2011	20.8%	33.3%	31.8%	14.1%
2012	20.8%	32.6%	31.9%	14.7%
2013	20.4%	32.3%	32.1%	15.3%
2014	20.5%	31.9%	32.0%	15.6%
2015	20.6%	31.4%	32.1%	15.9%
2016	20.2%	31.2%	32.3%	16.2%
2017	20.3%	31.1%	32.2%	16.4%
2018	20.4%	30.7%	32.2%	16.7%
2019	20.2%	30.3%	32.5%	17.0%
2020	20.1%	29.7%	32.8%	17.4%

Across the various comparator towns, the change in age groups is generally aligned with the regional trends towards an aging population with an increase in the older group (i.e. above 65 years) and decreases in the youngest group across a number of the comparator towns. Specifically, all towns experienced a decline in the proportion of the population aged between 16-39 years and increase in the proportion of the population aged over 65 years during 2012 - 2020.

Within the Omagh DEA, the proportion under 15 years was the lowest of all the comparator towns by 2020 (19.81%) and it declined (by 0.6%) during that period whilst the proportion between 40-64 years increased (by 2.8%) to 32.9% in 2020. Meanwhile, the proportion above 65 years grew (by 2.7%) to 18% which was the second highest of all towns (just Enniskillen had a higher proportion of those above 65 years at 19.3% which represented 3.4% growth from 2012).

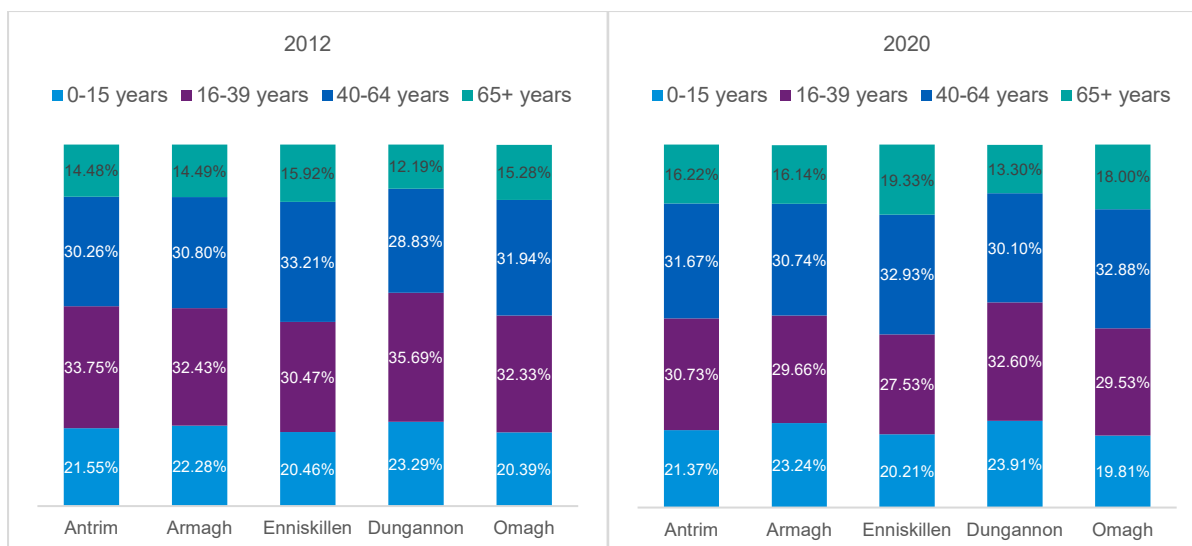


Figure 2.3: Historic split of population by age group by DEA⁵

2.1.2 Projected demographics

2.1.3 Population projections

NISRA projects that the population of the former local government district (1992) of Omagh⁶ will grow from 53,466 in 2020 to 54,084 in 2040 whilst the Local Government District of Fermanagh and Omagh is projected to grow from 117,962 people in 2020 to 119,440 people in 2040. The 1.16% growth in Omagh is significantly below the projected Northern Ireland growth rate (4.26%) and below the projected growth rate for Fermanagh and Omagh (1.25%) for that period.

Within Fermanagh and Omagh, the proportion over 65 years will increase from 17.5% in 2020 to 25.4% in 2040 whilst other groups will decline proportionally (under 15 years from 21.6% to 18.1%, 16 – 39 years from 28.4% to 25.8% and 40 – 64 years from 32.5% to 30.7%). An overview of the projected split of population from NISRA by age groups is presented in Figure 2-4.

Those age cohorts which will experience the most significant changes are generally at the extremes – i.e. the over 90s (101.3% growth), 85-89 years (87.2% growth), 80-84 years (78.5% growth), 5-9 years (17.4% decline), 10-14 years (15.4% decline), 0-4 years (15.1% decline) along with the 35-39 year (18.4% decline). The elderly are considered to be vulnerable and will potentially increase demand for health and community services as well as age appropriate housing that can easily access local services and transportation which will need to be accommodated. Similarly, the decreases projected in the younger cohorts will result in a lowering demand for education and consequently a reduction in workforce size.

By 2041, NISRA projects⁷ that Fermanagh and Omagh can expect that its youth dependency ratio will decrease from 34.6 to 31.6 (NI rate projected to be 30.7), while its elderly dependency ratio will increase from 27.3 to 41.2 (NI rate projected to be 37.7) per 100 of the working age

⁶ Note that population projections were not available at the SOA level, and hence the Former Local Government District is the smallest geographic area available, however for alignment with current administrative boundaries, this entire section generally presents information on the current Local Government District of Fermanagh and Omagh.

⁷ NISRA, 2016 Dependency Projections for Fermanagh and Omagh District.

population. This combined dependency ratio will put pressure on working adults to fund and to provide services to both the young and elderly.

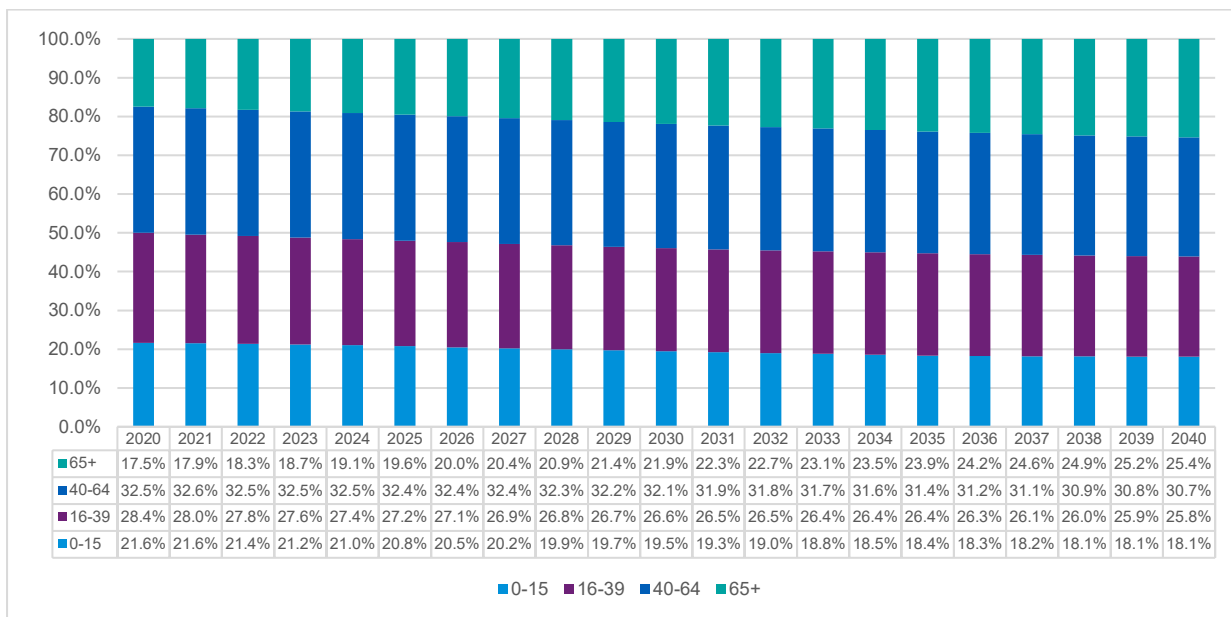


Figure 2.4: Projected split of population by age group in Fermanagh and Omagh

2.1.4 Household projections

NISRA anticipates that the dynamics within and composition of households across Fermanagh and Omagh are also expected to change during 2020 – 2040. Smaller households will become more dominant as the proportion of larger households (i.e. three or more persons) declines as illustrated in Figure 2-5.

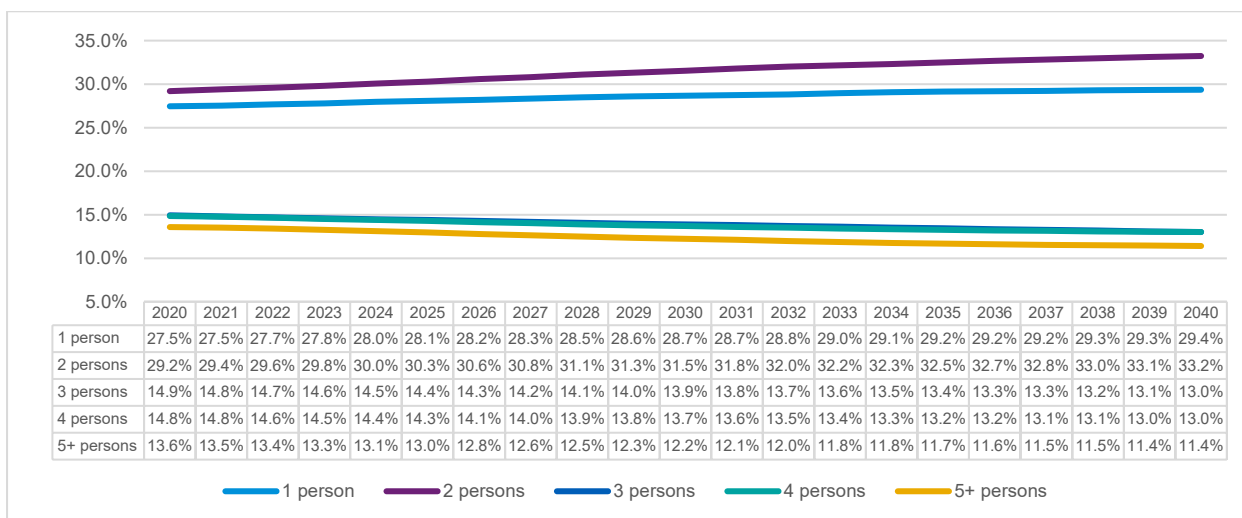


Figure 2.5: Projected split of households by size in Fermanagh and Omagh

This may be attributable to the rise in the elderly (as outlined in Section 2.1.3) which would give rise to more adult households without children and general decrease in households with children. Overall, this change aligns with the projected changes in household size as described above and affirms the need for age appropriate, accessible housing for the elderly and those living alone.

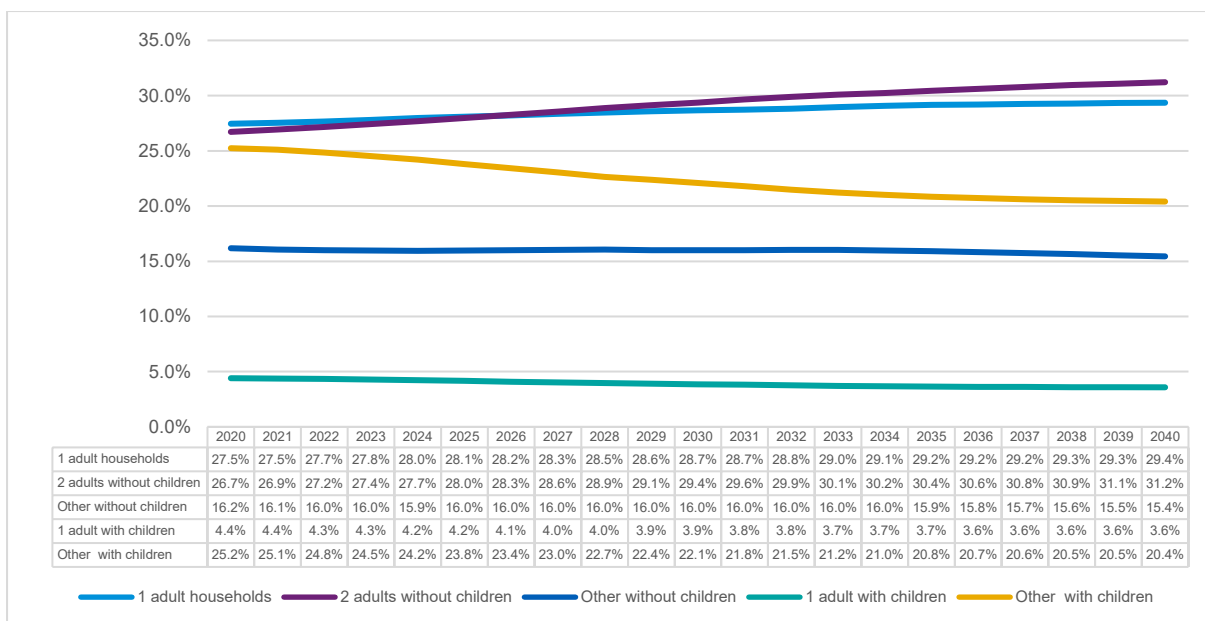


Figure 2.6: Projected split of households with children in Fermanagh and Omagh

2.1.5 Deprivation

Planning has a role in health, wellbeing, social and socioeconomic outcomes including reducing inequalities and inequities across communities. The multiple deprivation measure enables the contextualisation and understanding relative disadvantages within communities in a consistent and measurable way. Specifically, the updated Northern Ireland Multiple Deprivation Measures that were released on 23 November 2017 by NISRA enable understanding at the SOA level across the seven domains of deprivation and a spatial ranking which supports relative comparison across Northern Ireland.⁸ The deprivation data measures the 890 SOAs across Northern Ireland and ranks individual metrics from 1 (most deprived) to 890 (least deprived).

Deprivation varies within and across Omagh town, generally the north and west of the town are more deprived than the east and south. Generally, the more peripheral areas of Fermanagh and Omagh tend to be more disadvantaged when compared to the immediate hinterland of towns and along the river valleys.

Specifically, within Omagh town, Lisanelly_1 and Lisanelly_2 are amongst the most deprived in Northern Ireland (ranked 47th and 46th respectively⁹). Further, across Fermanagh and Omagh only Devenish, which is located in the centre of Enniskillen, is more deprived (ranked 44th). Lisanelly_1 scored poorly in relation to income, employment and health and disability domains (ranked 21st, 52nd and 84th respectively) whilst Lisanelly_2 scored poorly in relation to health and disability, employment and income (ranked 24th, 55th and 61st respectively).

In contrast, Gortrush_1, Killyclogher_2 and Coolnagard scored well (ranked 529th, 445th and 438th respectively) with the following particularly notable attributes evident across Omagh town:

⁸ The seven types or 'domains' of deprivation, include: Income Deprivation, Employment Deprivation, Health Deprivation and Disability, Education, Skills and Training Deprivation, Access to Services, Living Environment and Crime and Disorder. The seven domains contribute to the overall measure by a weighting system.

⁹ The deprivation data measures the 890 SOAs across Northern Ireland and ranks individual metrics from 1 (most deprived) to 890 (least deprived).

- Gortrush_1 ranked 705th in income; 675th in living environment and 769th in crime and disorder.
- Killyclogher_2 ranked 886th in living environment and 663rd in crime and disorder.
- Coolnagard ranked 796th in living environment, 524th in income and 500th in crime and disorder.
- Camowen ranked 818th in living environment.
- Dergmoney ranked 564th in education, skills and training and 585th in access to services.
- Gortrush_2 ranked 585th in living environment.
- Lisanelly_1 ranked 736th and Lisanelly_2 ranked 484th in access to services.
- Strule ranked 530th in access to services.

Yet despite these positive attributes, the Fermanagh and Omagh District Council 2021 Resident Survey¹⁰ suggests that work is still needed to improve the lives of residents in the town including in areas such as general life satisfaction, living accommodation, and financial situation.

Furthermore, Health and wellbeing is particularly important for communities and during the 2011 Census, more than three quarters of the population within Omagh town identified their health status as 'very good' or 'good' (slightly below the NI average of 79.4%) with just 7.1% overall identifying as 'bad' or 'very bad' (higher than the NI average of 5.6%). However, when compared within the town spatial variances are evident, e.g. 82.2% of Killyclogher_2 identified as 'very good' or 'good' compared to just 69.6% of Lisanelly_2.

As would be expected, this is reflected in the health deprivation and disability domain index rank where Lisanelly_2 is ranked 24th, Lisanelly_1 is ranked 84th and Gortrush_2 is ranked 97th, whilst Dergmoney is ranked 264th, Coolnagard is ranked 255th and Killyclogher_2 is ranked 231st. Specifically, Lisanelly_1 is identified as being the worst in Northern Ireland for the proportion of singleton births with low birth rate and second worst for the ratio of people registered as having cancer (Excluding non-skin melanomas).

More up-to-date health information is also provided from the findings of the Fermanagh and Omagh District Council 2021 Resident Survey. Notably, the Omagh DEA had the lowest percentage of respondents in the FODC area (70%) that identified their health status as 'very good or good', and the highest percentage of respondents (26%) that identified their health status as 'fair'. A further 4% in the Omagh DEA identified their health as 'bad or very bad', which was the 2nd highest in the FODC area. If these results are reflective of the wider population of the town, it would suggest a significant decline in those identifying as being in 'very good or good' health since the last census. Similarly, the Omagh DEA ranked lowest in the FODC when mental health was assessed using the Warwick-Edinburgh Mental Health Scale and residents of the Omagh DEA also had the lowest levels of satisfaction in the District in relation to physical, mental and emotional health and wellbeing.

Tackling deprivation and inequalities can contribute toward social cohesion and improve the labour market and public health within and across communities. Social inequalities are particularly marked in urban environments, with different population subgroups experiencing impacts to different degrees. Vulnerable groups within the community such as the young, elderly, those suffering from illness and/or those with low incomes can disproportionately suffer and experience poor outcomes. Particular cognisance should therefore be afforded to

¹⁰ Omagh District Council 2021 Resident Survey - telephone survey of 1002 residents of the Fermanagh and Omagh District.

those relatively deprived groups along with targeted action on those taking action on the particular domains of disadvantage that they experience.

2.2 Spatial Analysis

2.2.1 Introduction

This spatial analysis presents an **overview of the current and future land use in Omagh town**. As an historic town that has benefited from a riverside location and surrounding rural economy, an understanding of land use in Omagh is important to ensure integrated development and a strategic approach to future decision making that benefits local residents, businesses and the environment. The section is informed by analysis of land use, opportunity sites and vacancy.

Context

Omagh is in proximity to the Sperrin Mountain at the confluence of the Drumragh and Camowen Rivers, where the River Strule forms. This is a **strategic position within the region** given its proximity to the border and central location within the Fermanagh and Omagh District Council administrative area. The town also benefits from its location on a strategic road network which includes the A5 towards Strabane, the A505 towards Cookstown and A32 towards Enniskillen.

Land use and infrastructure are intrinsically linked and influence each other as well as the population and economy of any region. Broadly, a **lack of infrastructure provision is evident across Fermanagh and Omagh** given the absence of rail services, limited motorways and dual carriageways along with relatively poor provision and availability of broadband (although Omagh town has good broadband provision). The urban road network within Omagh town also experiences significant congestion with extended peak times, while public transport is provided through bus services that connect to local, regional and cross-border locations.

The existing built form in Omagh is similar to the development of other market towns in Ireland and the UK with development around the central areas of High Street, Market Street and Campsie, with High Street remaining the town's principal thoroughfare and commercial centre, with a network of narrower streets in proximity to the Courthouse and to the south of the Strule River. Whilst the rivers are important and attractive natural features, opportunities for leisure and recreation and their contribution to the vitality and vibrancy of the town core is limited overall.

Conservation is an important consideration in relation to land use given the designated conservation area and quantum of listed building and scheduled monuments throughout the town core which contribute to the urban form and landscape character. Further detail on the natural, built and cultural heritage is presented in Section 2.7.

Towards the south, Omagh town and its historical settlement boundary is contained by the Great Northern Road, however urban growth has been evident across Gortrush, Coolnagard and Dergmoney, particularly to the north-west of the Dromore Road and to the south and west of the A5. Towards the east, development has been evident in the vicinity of the hospital and along the Hospital Road corridor whilst it generally extends northwards towards Killyclogher and Healy Park. Overall, development towards the west is relatively limited compared to other parts of Omagh town and it generally extends along the B48 and the A5. The core of the town has extensive open space, particularly

along the riverbanks of the Strule and Camowen rivers. There are riverside walks under development to link these open spaces. Further detail on permeability and accessibility within the core of Omagh town presented in Section 2.3.

Historic Land Use

An overview of the historic land use across Omagh town, based on the digitalisation of the most recent zoning is presented in Figure 2-7. Housing was generally the most extensive and well distributed land type, with industry located towards the fringes whilst recreation/open space and landscaped areas generally designated along the river corridors and towards the centre of Omagh town. Existing recreation/open space is identified as a hatched area and the green lands are zoned for recreation/open space, with an important caveat that this map was created in 1987 and has not been updated.

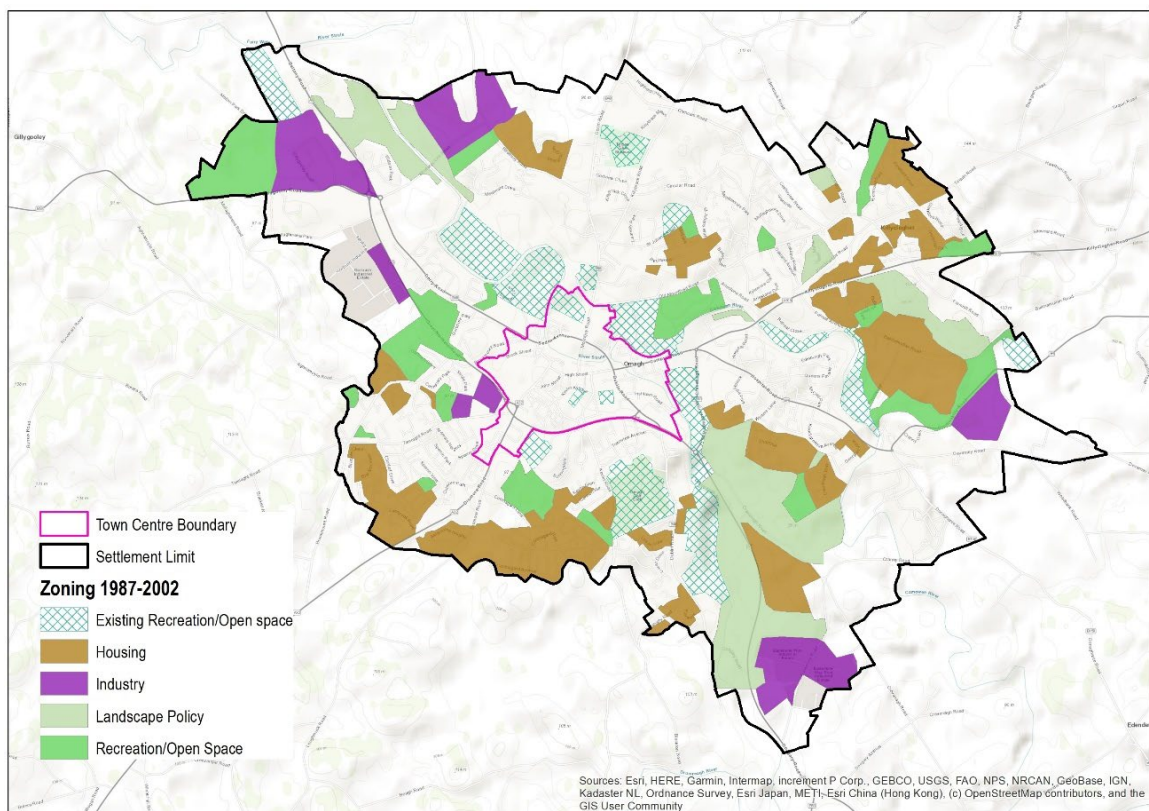


Figure 2.7: Land Use Zoning across Omagh town 1987-2002¹¹

More recently, the influence of commercial uses has been recognised in recent policy, with a particular focus on retail and the commercial importance of Omagh given its central position within the district along with the importance of the designated conservation areas within the historic and commercial core.

As would be expected with a town of this nature, retail centres and services are the most numerous types of facility, with particular dominance on Market Street, High Street and in the industrial parks on Dromore Road and at the Gortrush Industrial Estate on the

¹¹ This is the most up-to-date zoning map available

Great Northern Road. Detail on the retail offering in Omagh is discussed further in Section 2.4.

2.2.2 Future development

A review of planning applications that have been within Omagh town over the preceding five years was undertaken in January 2022. This review facilitates a robust understanding of forthcoming development and opportunities for Omagh town itself as well as the opportunity sites therein as determined in consultation with Fermanagh and Omagh District Council. 324 granted planning applications (2017—2022) were identified of which **293 were residential and 31 commercial**, as illustrated in Figure 2-8.

The dominance of residential (over 90% of all grants) is indicative of limited commercial investment that could drive economic growth. However, it is important to note that the Fermanagh and Omagh Retail Needs Assessment 2020 update judged that there is **no capacity for additional convenience and comparison goods floorspace in Omagh through to 2030** and this may be contributing to the relatively small number of commercial developments. The Retail Needs Assessment considers looks at population, expenditure, and commitments (permitted and/or not yet constructed developments) data to assess what capacity might exist for additional convenience and comparison goods floorspace. Effectively this means that there is no capacity/need for additional retail floorspace in Omagh through to 2030, partly owing to existing retail commitments which have yet to be built as well as population and expenditure data.

Still, this relatively small pipeline and associated growth across Omagh town supports the need for effective place-shaping over the long term. The provision, accessibility and growth of employment opportunities and generation of economic activity that such investments support can help retain residents and attract new arrivals. This in turn supports the supply chain of services (shops, cafes and restaurants) and demand for recreation and amenities, bringing about both direct and indirect benefits across the economy and communities.

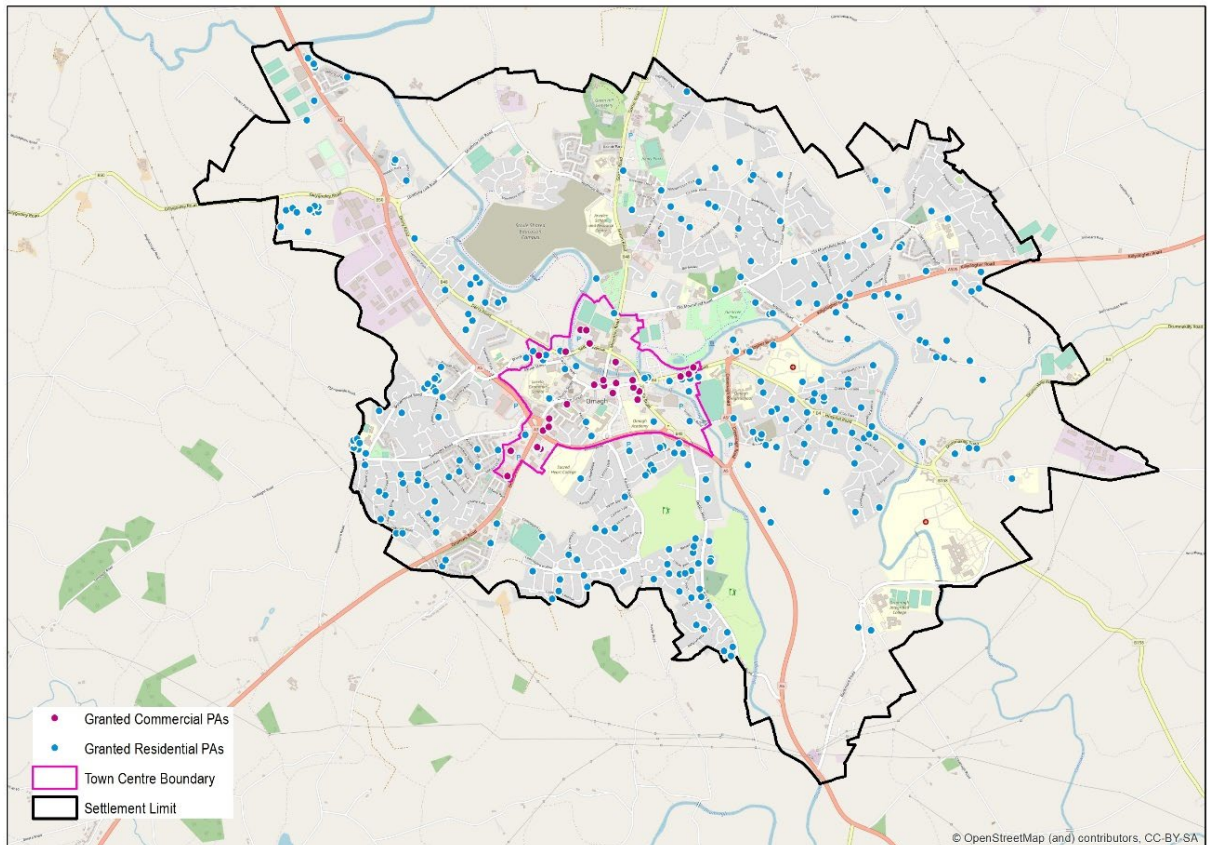


Figure 2.8: Granted planning applications across Omagh town

2.2.3 Opportunity sites

An overview of the **sixteen potential opportunity sites for Omagh town** is illustrated in Figure 2-9. These have been identified by Fermanagh and Omagh District Council as opportunity sites with the potential for significant development across Omagh town to support place-shaping, sustainable development and economic growth.

Seven of those sites are within public ownership (i.e. the High School, Omagh Academy, Omagh Courthouse, Arlestone House, Lisnamallard House, St Lucia, and the Former Tyrone and Fermanagh Hospital). Whilst the remaining ten, including a number clustered around Mountjoy Road, are under private ownership (Former PSNI Station, Former Health Centre, Former Fire Station, Former First Trust Bank, Former Naturelle Site, Former Scott's Mill Site, Christian Brothers Grammar School, Loreto Grammar, and Sacred Heart College).

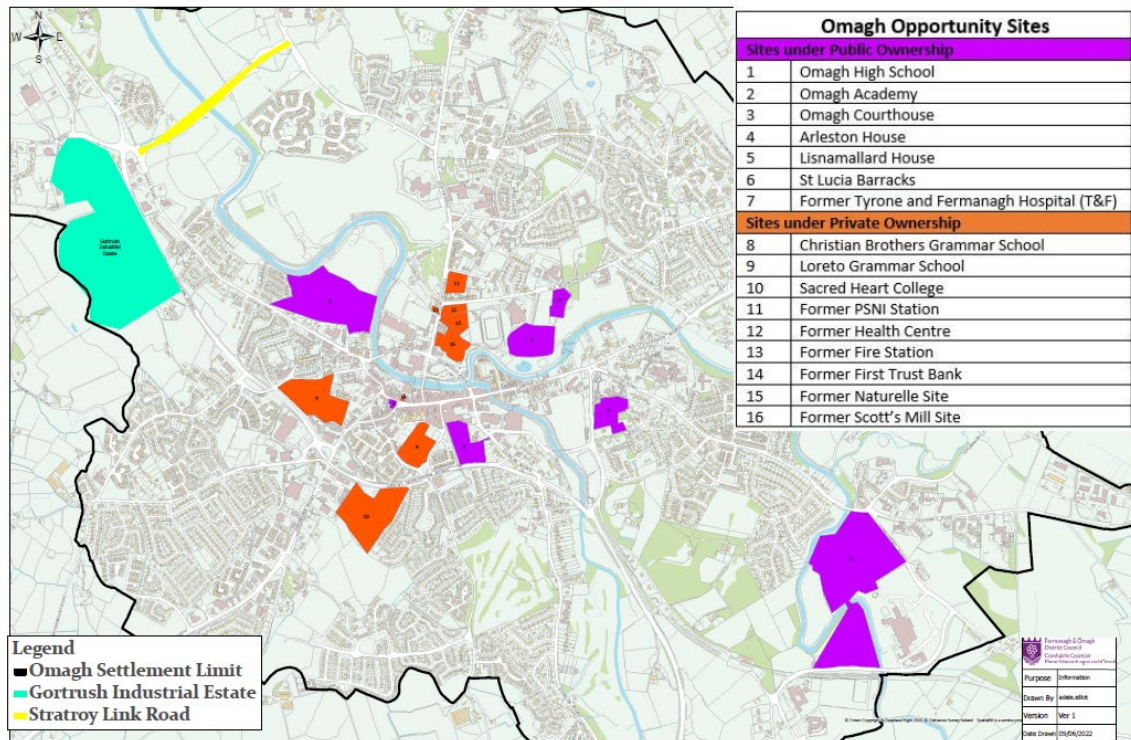


Figure 2.9: Opportunity sites in Omagh town

Table 2.3: Opportunity Sites in Omagh

Site	Comment
Christian Brothers Grammar School	2.08ha site owned by the Edmund Rice Schools Trust
Omagh High School	2.26ha site owned by the Education Authority
Omagh Academy	2.38ha site owned by the Education Authority
Loreto Grammar School	4.40ha site owned by Loreto Institute Property Trust with protected structures on site
Sacred Heart College	5.30ha site owned by St Canice's Educational Trust
Omagh Courthouse	Underutilised building in key location
Arleston House	Historic building dating from 1840-1859, owned by FODC
Lisnamallard House	Historic and listed building dating from 1820-1839, owned by FODC
St Lucia Barracks	Site partly owned by Ministry of Defence and part owned by Department for Infrastructure
Former Tyrone and Fermanagh Hospital	Very large site in public ownership with portions of the site still in use in relation to healthcare services.
Former PSNI Station	Privately owned vacant site just outside the town centre boundary
Former Health Centre	Privately owned vacant town centre building, current proposal to locate enterprise centre
Former Fire Station	Privately owned vacant town centre building
Former First Trust Bank	Privately owned vacant town centre building

Former Naturelle Site
Former Scott's Mill Site

Privately owned former industrial site
Privately owned former industrial site

There are a significant number of opportunity sites in Omagh town centre, varying from buildings on Main Street, to large industrial sites, schools which while currently occupied are expected/hoped to be vacant by 2026, and larger sites such as St. Lucia Barracks, which presents a range of development challenges.

While these sites undoubtedly present challenges and indeed risks to Omagh were they to lie vacant for many years, there is an equally significant opportunity to capitalise on the strategic opportunities that will arise in coming years. The school sites are unlikely to become vacant until 2026/2027 however other sites, such as Lisnamallard House and Arleston House present an opportunity to reimagine the centre of Omagh and to make the town centre a more attractive and vibrant place.

Each of the school sites has different characteristics and have been the subject of several studies and discussions which will continue in coming years. This plan will not define what will happen on each of the sites, but the final plan will consider optimum use for each site.

Similarly, St. Lucia Barracks presents a significant opportunity for the town to enable better integration and to provide a use that could enhance permeability.

2.2.4 Vacancy analysis within Omagh town

Analysis has been undertaken to look at commercial vacancy and dereliction within Omagh town centre. Desktop research of the published statistics was undertaken in late 2021 to establish and understand the property characteristics across the town and this was supplemented by a field survey that was undertaken during January 2022.

As part of this analysis, the following rates of commercial vacancy and dereliction were identified within Omagh town:

- During 2016-17, a vacancy rate of approximately **9-10%** was identified as part of the studies supporting the preparation of the Local Development Plan for Omagh town.
- At the end of October 2021, the Town Centre Database from the Department for Communities identified 692 non-domestic properties within Omagh town, of which 144 were identified as vacant (i.e. **20.8%**);
- On 8 November 2021, the Land and Property Services identified a vacancy rate of **17%**.
- During the field work in January 2022, 607 commercial buildings were identified, of which 54 were identified as vacant and derelict (i.e. **8.9%**). Further, an overview of vacancy and dereliction observed during the field survey is illustrated in and it should be noted that this reflects vacancy and dereliction by floor of the building.

The difference in these rates may be attributable to differing study areas as well as the categorisation and definitions around vacancy and dereliction, as opposed to rapid property activation and/or a dramatic volatility in vacancy and dereliction which was generally not observed.

Overall, **vacancy and dereliction were identified across the town core** as illustrated in Figure 2-10 below. To the north of the River Strule (i.e. at the junction of Drumragh Avenue and Bridge Street), dereliction was particularly notable whilst ground floor vacancy was identified further north at the junction of Mountjoy Road and Old Mountfield Road. In contrast, first and second floor vacancy was more apparent to the south of the River Strule along High Street. Despite this and the varying vacancy rates, it would appear that the commercial vacancy and dereliction in Omagh town centre is still below the NI average.

When considered in the context of footfall data for the town centre collected¹² by FODC for the period June 2021-February 2022, it is interesting that the highest pedestrian traffic for the period of monitoring was at the Currency Xtra on High Street (Where total traffic for the period was 386,434, equating to a daily average of 1,546). That location is adjacent to the hotspots of vacancies for first and second floor whilst the total pedestrian traffic recorded at the Riverfront Coffee House on Market Street for the period was 268,973 equating to a daily average of 1,076. This is unusual as lower levels of vacancy generally enhance the vibrancy and vitality of town cores; however, in this case, vacancy and dereliction were not seen as an inhibitor to attracting visitors and footfall. This may be partly attributed to the location of the Currency Xtra near to an entrance point to High Street and the footfall being driven by the nearby car parks and secondary schools. This further highlights the effect that the relocation of the secondary schools to the Strule campus may have on the footfall in the area. Notwithstanding there is limited data to the north of the River Strule in terms of footfall, **efforts to tackle this and drive economic development would further enhance the viability, attractiveness and vitality of Omagh town.**

¹² Footfall counters located on Omagh High Street outside Currency Xtra and Bob and Berts, and on Market Steet outside Bogues Jewellers and the Riverfront Coffee House

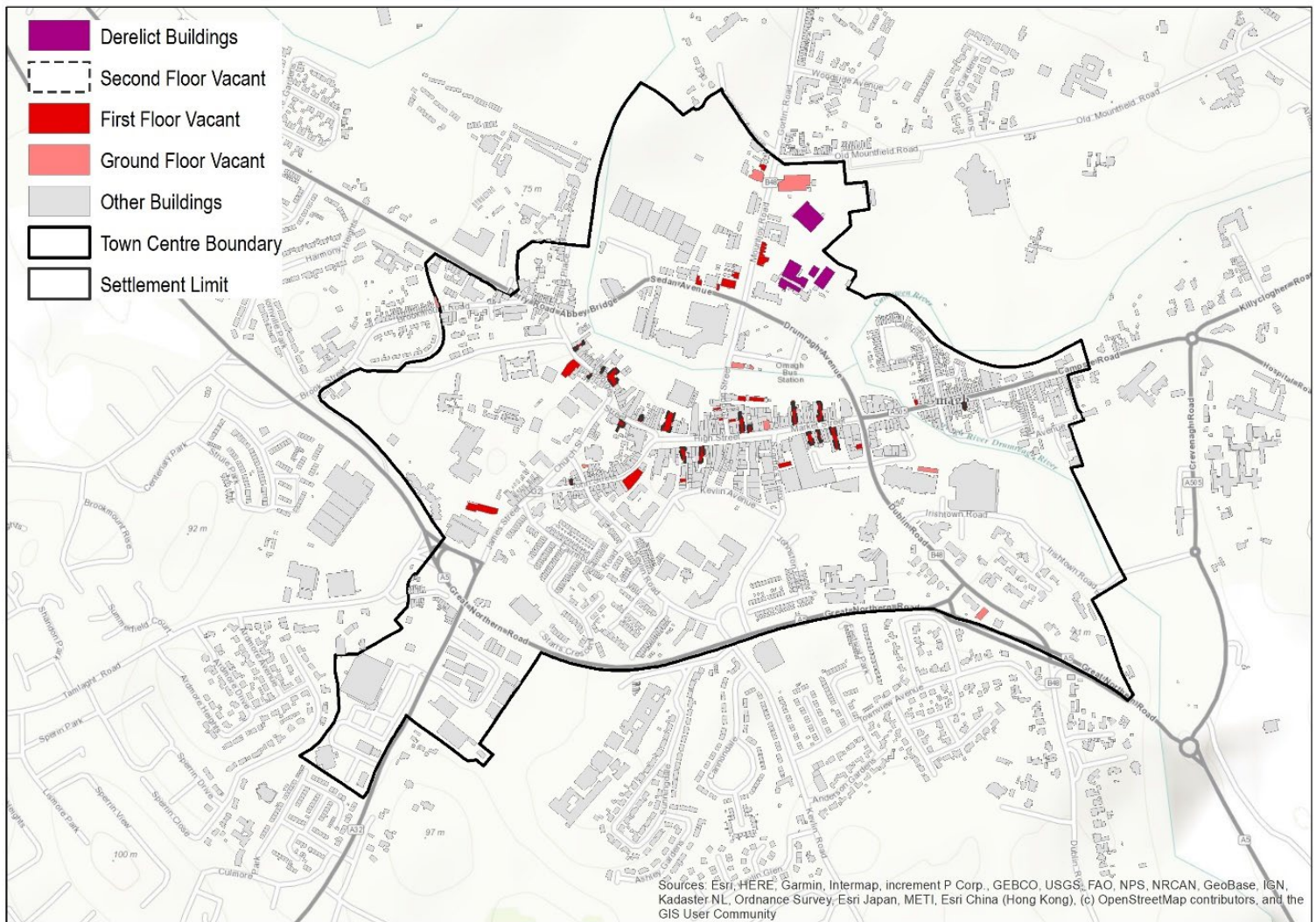


Figure 2.10: Overview of vacancy and dereliction identified in Omagh town during the field surveys in January 2022

Further to the above, a historic comparison of vacancy within Omagh and other towns has also been undertaken, with the historic vacancy rates for non-domestic properties as provided in the Town Centre Database from the Department of Communities (using Land and Property Services data) illustrated in Figure 2-11. This illustrates the general decline in commercial vacancy over the long term (excluding the period during the peak of the COVID-19 pandemic in May 2020), albeit the decline in commercial vacancy since then has been more rapid in Omagh town than other towns.

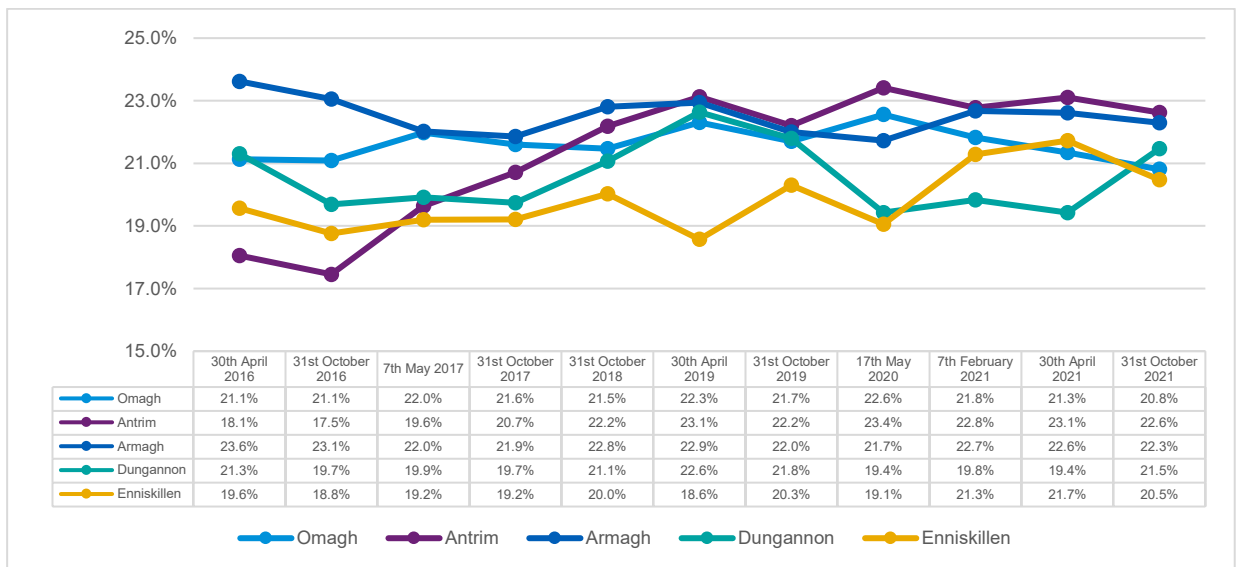


Figure 2.11: Historic vacancy rates for non-domestic properties in Omagh town

2.3 Permeability, accessibility and transport analysis

In order to create a connected town centre and to foster connected communities, the ease of movement for people, goods, services and vehicles, both within Omagh town and within the wider region, is a facet of town centre growth with growing importance. With a recent, renewed value in our sense of place for towns across the island of Ireland and the UK, the opportunity to revive, renew and regenerate our towns has never been greater. To fully realise these aspirations, close attention must be paid to the permeability, accessibility and inclusivity of our towns.

To provide a robust framework from which action can be taken to improve these aspects of Omagh’s town centre, an analysis of Omagh’s current permeability and accessibility has been undertaken. While this analysis is not exhaustive, it provides a comprehensive overview of Omagh’s strengths, constraints and opportunities with regard to the ease of movement within the town and aims to provide a broad context from which future town centre objectives and actions can be developed.

2.3.1 Key Documents

Omagh Town Centre Masterplan 2016, Paul Hogarth Company 2015

The Omagh Town Centre Masterplan was originally enacted in 2008. The Masterplan was updated in 2015, with the envisaged enactment of the renewed document in 2016. While the updated Masterplan, was ultimately not approved, it has nevertheless been reviewed to provide the context for transport-related considerations herein. The Transportation Analysis, which formed an appendix to the 2016 Masterplan has also been reviewed.

The 2016 Masterplan noted that there were “*relatively few trips on foot, bicycle, and by public transport*” in the Omagh area, as per data from the NI Travel Survey by the Department for Infrastructure, despite good potential for encouraging the use of sustainable modes. The development of riverside walks and the OASIS project, including a new pedestrian bridge over the River Strule, were noted as factors further enhancing walkability in Omagh. In the context of the Strule Shared Education Campus (currently

under development), it was deemed that its delivery would “*help to reduce town centre traffic congestion*”, however steps to minimise its localised traffic impact should be taken. In this context, the (subsequently completed) Strathroy Link Road was viewed as an important link to support the Strule Campus operations.

According to the 2016 Masterplan, walking and cycling opportunities in Omagh were constrained due to signage and cycle infrastructure, with connectivity across Strule deemed to be addressed by the provision of the OASIS footbridge. Traffic congestion issues in Omagh were highlighted, with “*significant through traffic movements and the central location of the car parks*” indicated as causes of congestion in the town centre core. While town-centre car parks were noted to be underutilised, this was attributed to access difficulties associated with traffic congestion, which is compounded by poor signage and a complex one-way system being in place. High traffic volumes in the town centre core make the area unwelcoming for pedestrians and cyclists. The Masterplan included a list of actions to address the identified transport-related issues, with an overarching aim to reduce the reliance on the private car in Omagh and encourage sustainable travel.

Local Development Plan Background Paper – Transportation, Fermanagh and Omagh District Council 2018

The Background Paper on transportation was prepared in 2018 to support the preparation of the Fermanagh and Omagh Local Development Plan. The Background paper considered a range of mobility-related items, including the characteristics and modal shares of all key travel modes, and provided baseline information in relation to those.

Citing multiple sources, the Paper established that the car was the dominant travel mode in Fermanagh and Omagh District, with a ca. 70-80% modal share (including driving and, to a lesser extent, carpooling and travelling by car as a passenger). Overall, the greater reliance on the private car as a mode of transport and the longer distances travelled by people living in the Fermanagh and Omagh administrative area were noted, compared to the residents of the more urbanised Belfast area. On the other hand, nearly one in five local households was noted to not own a car. Both walking and public transport accounted for significantly less than 10% of trips each.

The Paper established that local planning policy should support a modal shift to sustainable travel modes, however limited proposals for walking and cycling infrastructure proposals were identified and a possible reduction in public transport services at the time was noted. Notwithstanding, it was deemed that a modal shift “*could be best achieved by not only creating additional cycle and walkways but by distributing and zoning open spaces to create green areas, as well as increasing permeability within new housing developments*”. Opportunities for introducing improved active travel facilities along designated safe routes to school were noted. However, the modal shift was deemed achievable only in the two main District towns, i.e. Omagh and Enniskillen.

The Paper concluded by the following measures to be included in the Local Development Plan being proposed:

- Promote/ improve connectivity, particularly in rural areas.
- Promote more sustainable transport modes including walking, cycling, and public transport; and
- Protect road users and improve road safety for car users, public transport, cyclists, and walkers.

Fermanagh and Omagh Local Transport Study, Department for Infrastructure 2021

The Local Transport Study was produced by the Department for Infrastructure in collaboration with Fermanagh and Omagh District Council to support better integration of spatial and transport policy at a local level. The Study represents an evidence base for the delivery of a Local Transport Plan, which would integrate with the Fermanagh and Omagh Local Development Plan.

The Study considered several mobility-related themes, including regional connectivity, accessibility to local services, sustainable transport infrastructure in Enniskillen and Omagh, resident modal choices, road network speeds, collision history, parking provision in Enniskillen and Omagh, and legacy road alignments and other protected land. Study findings widely reflect the conclusions of earlier mobility analyses, highlighting a high-level of car-dependence and low use of alternative modes in the wider district.

In the context of Omagh, gaps in footpath provision, predominantly narrow footpaths, and lack of segregated cycling facilities have been noted. An analysis of the available bus services indicated that they *“would be most attractive to people without a car and for those who have free concessionary fares”*, including school children, due to uncompetitive travel times and low running frequencies.

Traffic congestion in Omagh town centre has been noted, however the study also notes significantly higher peak speeds on the Great Northern Road, indicating spare capacity of this southern town centre bypass. Issues related to traffic circulating around the town centre searching for car parking spaces have been noted, and it has been recommended that public parking be provided at the edge of town to reduce town centre congestion. The Study also found the level of urban traffic safety in Omagh to be deficient, indicating that pedestrians and cyclists are disproportionately often seriously injured in road collisions in urban environments.

Overall, the Study has identified 11 mobility measures recommended to assist in the future development of the Fermanagh and Omagh District Council area, with the following measures considered the most relevant hereto:

- Measure 6: town centre parking strategies should be developed as a central measure of the Study, considering the long and short-stay car parking locations and pricing, with a view to reduce town centre congestion and improve turnover of parking spaces;
- Measure 7: improved walking facilities in towns should be provided to remove network gaps and improve local levels of walking, with potential impact of such actions on traffic capacity being noted;
- Measure 8: attractive radial cycling routes in towns and interurban greenways should be developed as a central measure of the Study, so that a larger proportion of residential areas is served, with potential impact of such actions on traffic capacity being noted; and
- Measure 9: traffic management schemes should be implemented in urban areas to achieve an appropriate modal hierarchy, complementing physical infrastructure schemes.

Fermanagh and Omagh Parking Strategy and Action Plan, AECOM 2017

The Parking Strategy was developed by AECOM on behalf of the Fermanagh and Omagh District Council in the context of the Council assuming responsibility for all public off-street car parks (excluding Park and Ride/ Park and Share sites) in its area. The total

number of car parks operated by the Council at the time was 39, with 15 of those located in Omagh. The strategy aimed to address issues such as long-stay parking, tariff inconsistency, demand management, additional car parking provision opportunities etc.

The Strategy lifetime included the period 2017-2022. It was supported by a car park location and capacity review and an occupancy and duration of stay survey undertaken in September 2017 and encompassing both Council-operated and private car parks, with a total of 26 sites in Omagh (primarily in the town centre) being surveyed. It is noted that equivalent follow-up surveys were subsequently repeated in September 2018, March 2019, September 2019, and September 2020, with further survey iterations halted by the COVID-19 pandemic emergency.

The key part of the Strategy was formed by the Action Plan, setting out a total of 8 high-level actions recommended to be implemented by the Council within the Strategy lifetime. The strategy actions aimed to *“rebalance the parking supply with the majority of spaces becoming charged, as a function of the desirability and premium nature of space in the town centre”*, with free of charge car parking being available *“within a short distance from services, amenities and places of work”*. It is understood that while the recommendations related to the proposed parking fee structure (including the removal of £1 for 5 hours charge to ensure higher turnover) have been implemented, the delivery of VMS signage for car park availability has not yet been actioned

2.3.2 Road Infrastructure and Traffic

A desktop review of road infrastructure in Omagh has been undertaken, with particular regard to the roads in the town centre area, also informed by the review of the available mobility-related documents (see Section 2.3.1). The key findings of the initial review are as follows:

- Omagh can be accessed by A-class roads from the northeast (A505 from/ to Cookstown), the southeast (A5 from/ to Aughnacloy/ Dublin), the southwest (A32 from/ to Irvinestown/ Enniskillen) and the northwest (A5 from/ to Strabane).
- All A-class road accesses to Omagh converge into the A5 Omagh Through-pass (Great Northern Road), which enables through-traffic to bypass the town centre. The A5 Omagh Through-pass is noted to provide a relief to the B48 east-west corridor (Dublin Road, Drumragh Avenue, Derry Road) running through the northern part of the town centre.
- Other key roads include the north-eastern access (B48 from/ to Gortin) and western access (B50 from/ to Drumquin).
- While the B50 feeds directly into the A5 Omagh Through-pass, the movements between the B48 (Gortin Road) and other Omagh access roads can be routed either via the town centre, or via the recently opened road corridor bypassing the town centre to the north (Strathroy Link Road and Strathroy Road). The existing directional road signage at the approaches to the town (as per Google Street View records) is noted to advise the former routing for movements between the B48 and A5 (north) and A32, however the latter is advised for all other movements.
- The area considered as the town centre core is bounded by the B48 (Dublin Road, Drumragh Avenue, Derry Road) to the north, the A5 (Great Dublin Road) to the south, and Brook Street the west. In this area, a relatively complex one-way system is in place, which allows movements from the northeast (the B48 Drumragh Ave/ Market St Junction) to the southwest (John St/ James St

Junction) and from the southwest (John St/ James St Junction) to the northwest (Castle St/ Brook St Junction) and north (Bridge St/ B48 Drumragh Ave Junction). This is illustrated in Figure 2-12 below.

- It is noted that the shortest route between the B48 Gortin Road and the A32 is through the town centre proper. Such routing may also be used to access the A5 Omagh Through-pass. Beyond the provision of the one-way system, no measures have been noted to be in place to prevent through traffic through the town centre core and channel it by the preferred route via B48 Drumragh Avenue, Dublin Road.

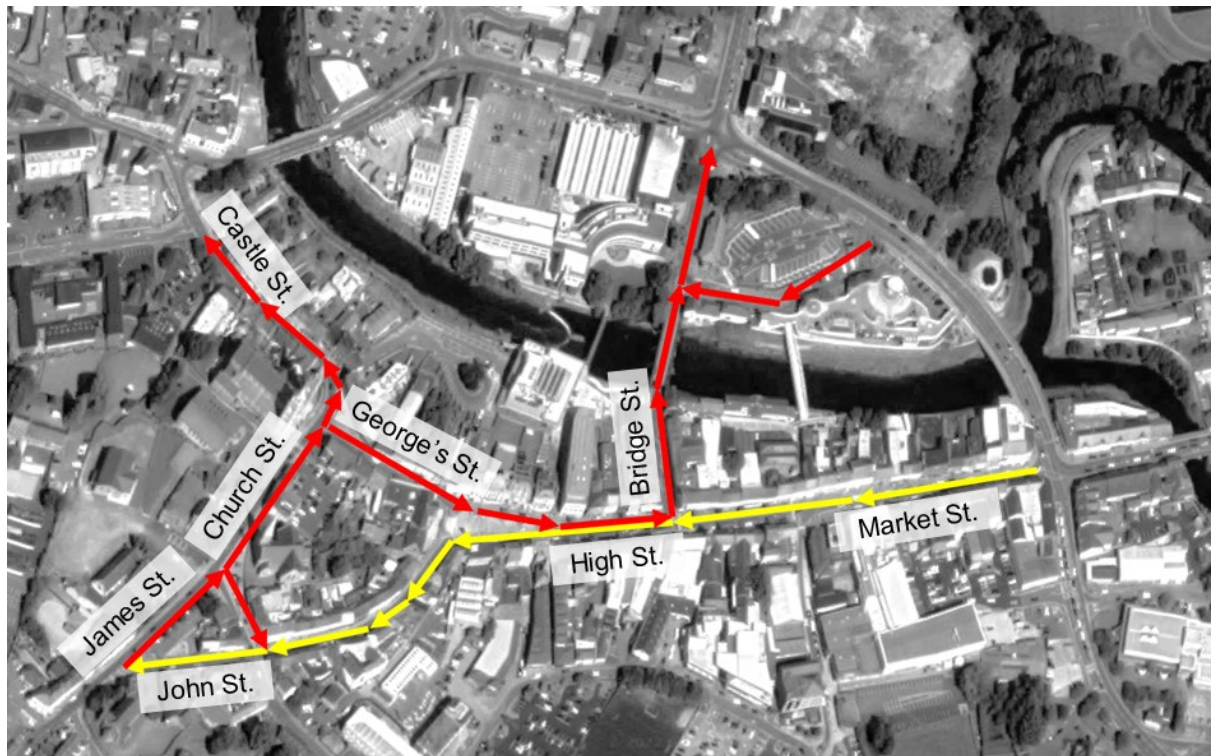


Figure 2.12: Town Centre One-Way System

- A moderate to high level of traffic congestion in the town centre core has been observed, both during a site visit and based on the available Google Traffic records. This is deemed to stem from significant circulating traffic volumes, searching for a car parking space (as per the Fermanagh and Omagh Local Transport Study), and compounded by through-traffic.

Identified future road infrastructure improvement schemes in Omagh include the A5 Western Transport Corridor and the road widening scheme at Mountjoy Road and Gortin Road. Both of the above schemes have been considered by the project team based on the materials available in the public domain.

The relevant findings in relation to the A5 Western Transport Corridor scheme are as follows:

- The scheme will include the provision of a southwestern bypass of Omagh town routed outside of the currently built-up urban area. The proposed new road will provide a relief to the existing A5 Omagh Through-pass.

- Three accesses to the new Omagh Bypass are proposed: J11 to the north of Omagh, in vicinity of the existing A5/ Drumleagh Rd S junction; J12 to the west of Omagh, via the A32; and J13 to the south of Omagh, in vicinity of Doogary.
- The opening of the scheme should result in re-routing of the existing through-traffic from the Omagh Through-pass to the new Omagh Bypass, creating an opportunity for reducing the permeability impact of the Through-pass and a significant improvement in connectivity between the southern part of Omagh and Omagh town centre, with a particular focus on opportunities to enhance provision for active travel modes.
- The scheme will not include any new links to the A505 or B48, bypassing Omagh from the east, therefore it appears unlikely that it will give rise to any significant changes to traffic demand within Omagh town centre. As a result, additional traffic management measures are likely to be required to reduce the current high volume of through-traffic in the town centre by re-routing to more circuitous routes, in particular the Strathroy Link Road.

The relevant findings in relation to the Mountjoy Road and Gortin Road widening scheme are as follows:

- The scheme will involve a widening of the B48 (Gortin Road and Mountjoy Road) from the Strathroy Road junction to the B48 Drumragh Avenue junction. The existing single triple lane carriageway will be widened to four traffic lanes.
- The primary purpose of the proposed scheme is to facilitate the operation of the adjacent Strule Shared Education Campus, allowing for drop off and pick up on the inside lanes along the B48 Gortin Road without obstructing the free flow of traffic on the outside lanes.
- By itself, the scheme is deemed unlikely to have a significant impact on traffic volumes along the B48 north-south corridor or the Omagh town centre, with the primary aim to protect the through-traffic flow from the localised adverse impact of drop-offs and pick-ups in the Strule Campus' vicinity rather than to increase capacity along the entire corridor. The impact of the Strule Campus has been addressed in Section 2.3.6 of this report.

2.3.3 Accessibility

An accessibility assessment of Omagh has been undertaken by means of an isochrone analysis. For this purpose, walking time isochrones have been generated for a notional town centre point, located at the High Street/ George's Street junction (i.e. the western end of High Street, in front of the courthouse), using a network comprising the existing roads and pedestrian links. A walking speed of 5 km/ h has been assumed. While not exact, such approach has been deemed to deliver a reliable overview of the opportunities for navigating the town by active travel modes, subject to an attractive walking and cycling environment being created. The obtained isochrone map is presented in Figure 2-13 which follows.

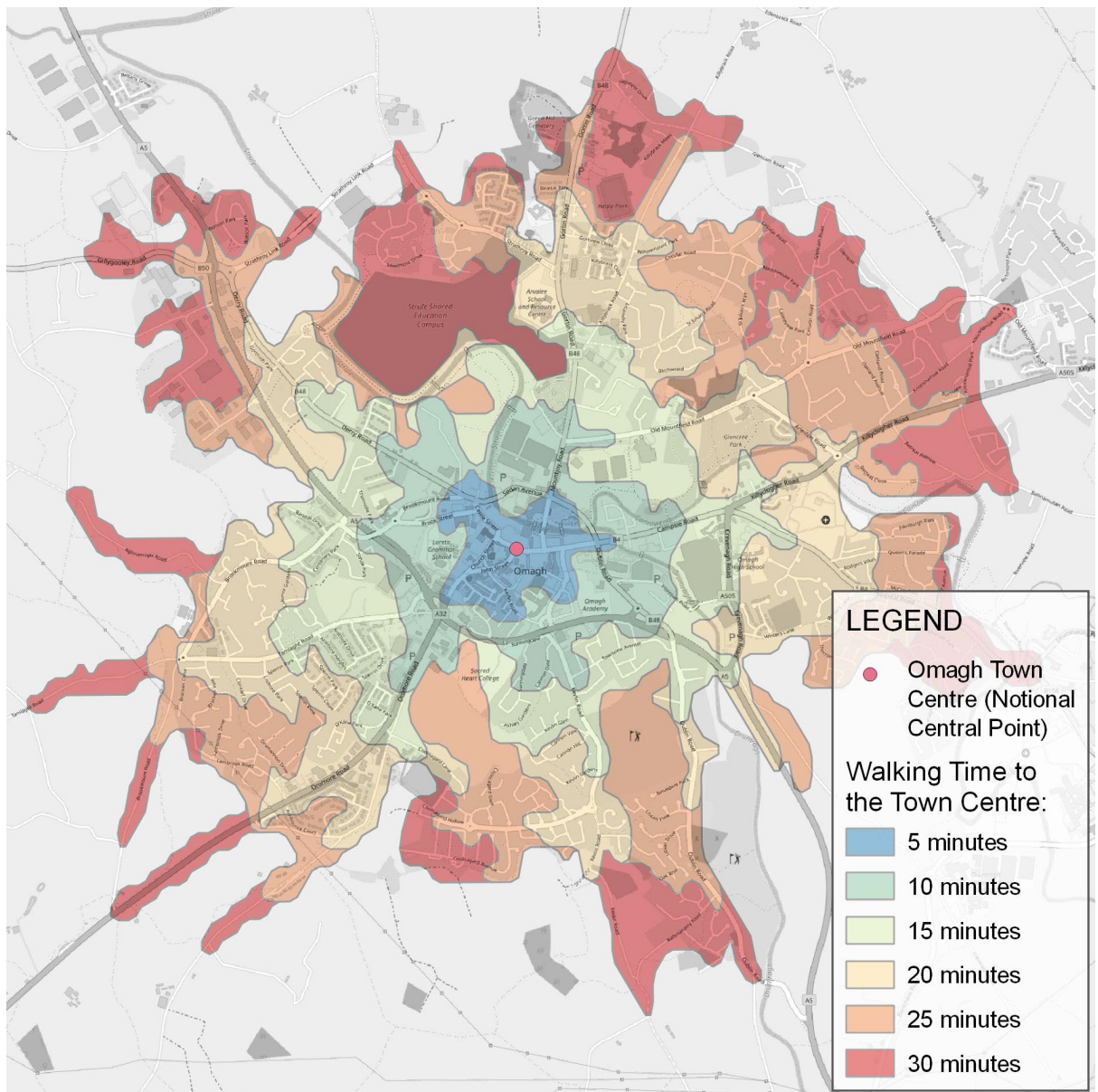


Figure 2.13: Walking Time from Omagh Town Centre

As can be seen in the preceding figure, the isochrone analysis has shown that the town centre can be accessed on foot from the entirety of the Omagh built-up area. A significant proportion of the residential areas falls into the 20-minute travel time band, which corresponds with a ca. 1,700 metres distance. This demonstrates that the town is compact and conducive to walking, subject to non-distance-related hindrances to walking (e.g. narrow/ uneven footpaths, personal safety issues) being minimised.

While a separate travel time analysis with respect to cycling was not undertaken, it may be assumed that a cyclist would move at an average speed two to three times higher, compared to a pedestrian. This indicates that the town centre could be reached by cycling from any point across the town in no more than ca. 15 minutes, while the entire town could be traversed in no more than 30 minutes. As such, **the scale of Omagh offers strong potential for cycling as a means of daily utility travel** (i.e. travel to work, school, shopping etc.). It is also noted that higher average cycling speed could be

achieved on interurban routes where segregated cycling facilities are provided, indicating a potential for accessing the town by non-motorised modes from its rural hinterland, with the areas to the west and south deemed the most conducive due to the generally flatter elevation profile.

2.3.4 Car Parking

Current off-street car parking provision has been reviewed based on the available information, including the relevant earlier studies (see Section 2.3.1) and the spatial dataset provided by the Client and including location and capacity of private and Council-operated car parks in Omagh town centre. The above information has been examined in the context of the walking accessibility assessment outputs (see Section 2.3.3) and town centre road infrastructure assessment (see: Section 2.3.2). The output of this work is presented in Figure 2-14 below. The figure has been marked up to include the one-way system operating in the town centre, so that additional context for the current car park locations is presented.

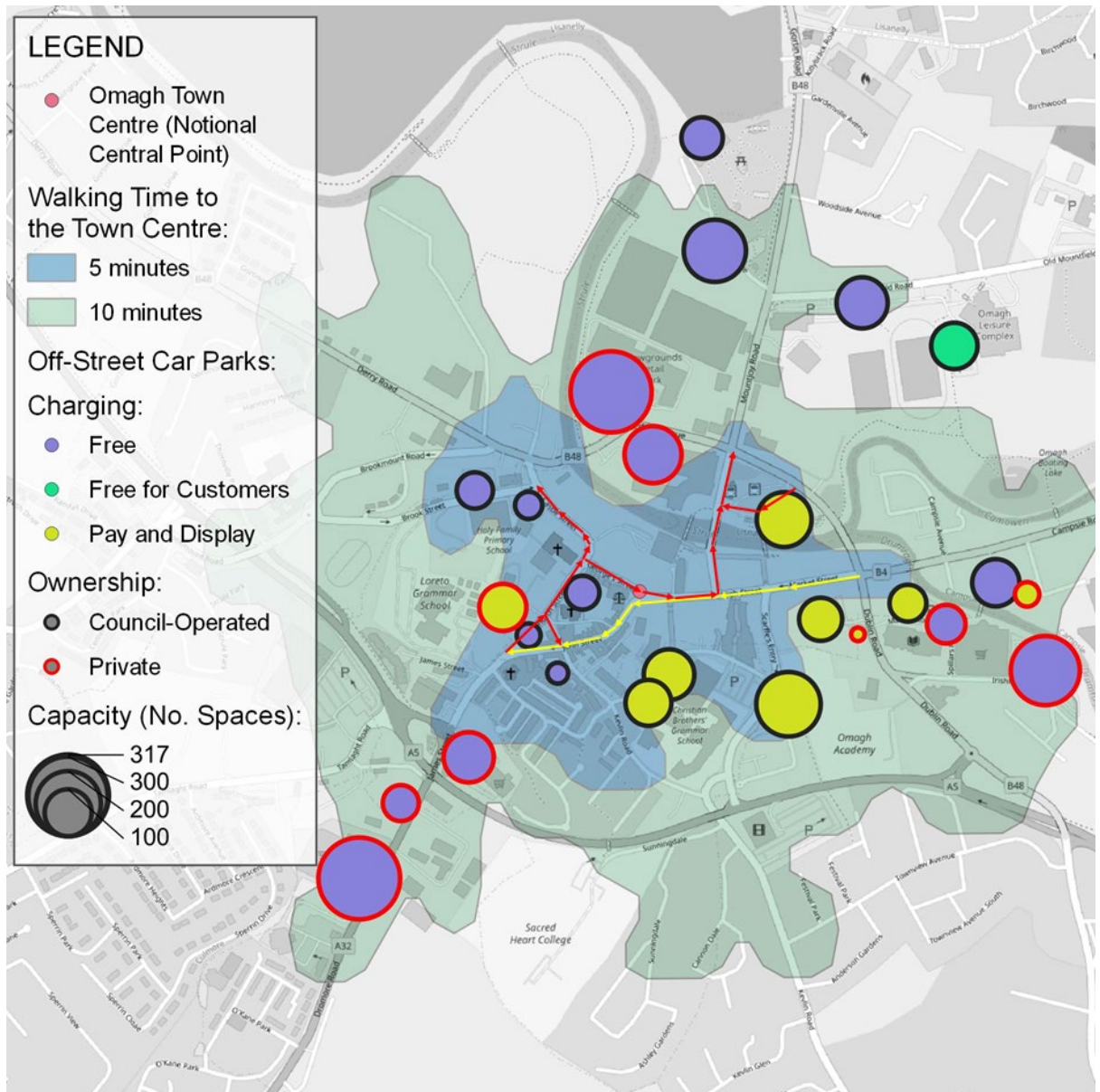


Figure 2.14: Map of Off-Street Car Parking Omagh Town Centre

Based on the information presented in the preceding figure, the following observations are made:

- There is a total of 10 off-street car parks within a 5-minute walk from the notional town centre point, and a further 14 off-street car parks in the 5–10-minute walking time band, for a total of 24 car parks within 10 minutes’ walk from the town centre. Detailed breakdown by walking time band, car park ownership and charging regime is provided in Table 2-4 which follows.

Table 2.4: Breakdown of Off-street car parks Omagh Town Centre

	Council-Owned				Private			
	Free of Charge		Charged		Free of Charge		Charged	
- Walking Time to/ from the Notional Town Centre Central Point	No. Sites	Average Capacity	No. Sites	Average Capacity	No. Sites	Average Capacity	No. Sites	Average Capacity
no more than 5 minutes	5	36	4	137	-	-	1	100
5 to 10 minutes	3	134	2	71	7	177	2	19
no more than 10 minutes	8	170	6	208	7	177	3	119

- There is a total of 180 free of charge car parking spaces and 646 paid car parking spaces within a 5-minute walk from the notional town centre point. Further 1,643 free of charge car parking spaces and 180 paid car parking spaces are provided in the 5–10-minute walking time band. Overall, there is a total of 2,649 off-street car parking spaces, including 1,823 free of charge spaces and 826 paid spaces, within 10 minutes' walk from the town centre. Detailed breakdown by walking time band, car park ownership and charging regime is provided in Table 2-5, which follows.

Table 2.5: Breakdown of Off-street Car Parking Spaces Omagh Town Centre

Walking Time to/ from the Notional Town Centre Central Point	Off-Street Car Park Capacity (No. Spaces)						
	Council-Operated			Private			Grand Total
	Free of Charge	Pay and Display	Total	Free of Charge	Pay and Display	Total	
no more than 5 minutes	180	546	726	-	100	100	826
5 to 10 minutes	402	142	544	1241	38	1,279	1,823
no more than 10 minutes	582	688	1,270	1241	138	1,379	2,649

- As can be seen in the two preceding tables, the majority of off-street car parking spaces in the closest proximity to the town centre are provided in Council-operated paid car parks, whereas in the 5–10-minute walk time band the majority of spaces are provided in free of charge car parks, primarily in private ownership. It is noted that duration of stay limitations may be in place in the private car parks and have not been considered as part of this analysis.
- As shown in Figure 2-14, the majority of paid off-street car parks are located in the eastern part of the town centre (with the exception of the private car park at St Columba's), whereas the free of charge car parks in the 5-minute walking time band are located in the western part of the town centre.
- Overall, limited consistency in charging policy in the Council-operated car parks is observed, with some car parking spaces in the town centre core being paid and some being available free of charge.
- With respect to the one-way system in place in Omagh town centre proper, it is noted that the motorists approaching from the east (via Market Street) will likely

pass by the paid car park access routes before approaching the free of charge car parks. The motorists approaching from the south (via James Street) will only pass by the free of charge car parks before being diverted out of the town centre core onto the B48 Drumragh Avenue. In both cases, having passed by the free of charge car parks, motorists do not appear to have a direct route to a paid car park without needing to circumnavigate the town centre core via the B48 Drumragh Avenue. Some motorists are likely to only consider stopping at a paid car park after having found no space at the free of charge ones, the current one-way system may compound the circulating traffic issues in the town centre proper.

- Considering the compact nature of the town centre, **there are opportunities for relocating car parking facilities away from its core part without significant impact on accessibility.** This would apply in particular to long stay car parking (e.g. staff car parking), where a potential increase of walking time between the car parking space and the ultimate destination by a couple minutes would be negligible relative to the overall duration of stay (and could be offset, if the time needed to find an available car parking space is reduced).
- An existing free-of-charge park and ride facility at Crevenagh is noted to be located within a ca. 20-minute walk from the town centre. While such distance is likely to affect its attractiveness for town centre visitors, it may represent an alternative car parking location for longer stays (e.g. for commuting purposes), subject to disincentives for long-stay car parking in locations closer to the core town centre being put in place. Urban realm and walking infrastructure improvements along the route between the car park and the town centre could also contribute to its usage in trips to the town centre, with potential opportunities for providing a riverside walk along the river Drumragh.

2.3.5 Walking and Cycling Provision

Active travel infrastructure provision in Omagh was previously assessed in detail by the Fermanagh and Omagh Local Transport Study (see Section 2.3.1). As noted therein, while footpaths are provided along most of the roads within the town, their width is at times insufficient. **A lack of segregated cycle facilities across the town** is also noted, with shared use footways being the only form of cycle infrastructure available in Omagh. The location of the currently provided shared use footways is presented in the following Figure 2-15 (Source: *Fermanagh and Omagh Local Transport Study*, DfT 2021). The map in the figure is noted to exclude the riverside walk and cycle trail, which is presented, whose layout is presented in Figure 2-16 overleaf.

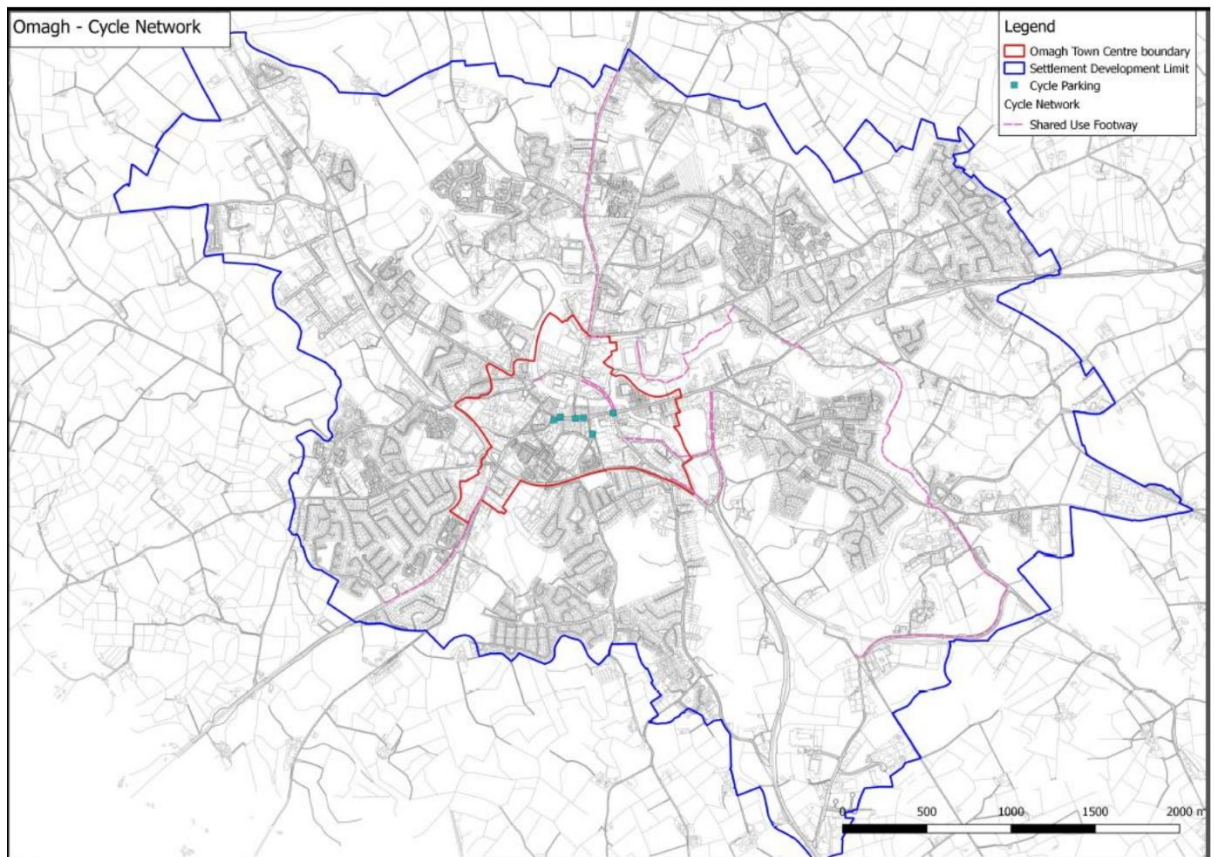


Figure 2.15: Map of Shared Use Footways

As can be seen in the preceding figure, the lack of segregated cycling facilities is compounded by the disjointed layout of the provided shared use footways, which do not form a network and therefore do not allow for completing the majority of trips by bicycle without merging with vehicular traffic. It is also noted that the marked shared use footpath along the B48 Gortin Road section north of Healy Park is too narrow to facilitate safe passing of pedestrians by cyclists on either side of the road. Furthermore, while the Cycle Route 92 and the Sustrans North West Trail run through the northern part of Omagh, continuous cycling infrastructure (either shared or segregated) has not been provided along their route.

The following Figure 2-16 presents the layout of the riverside walk and cycle trail (with individual project phases highlighted by colour coding).

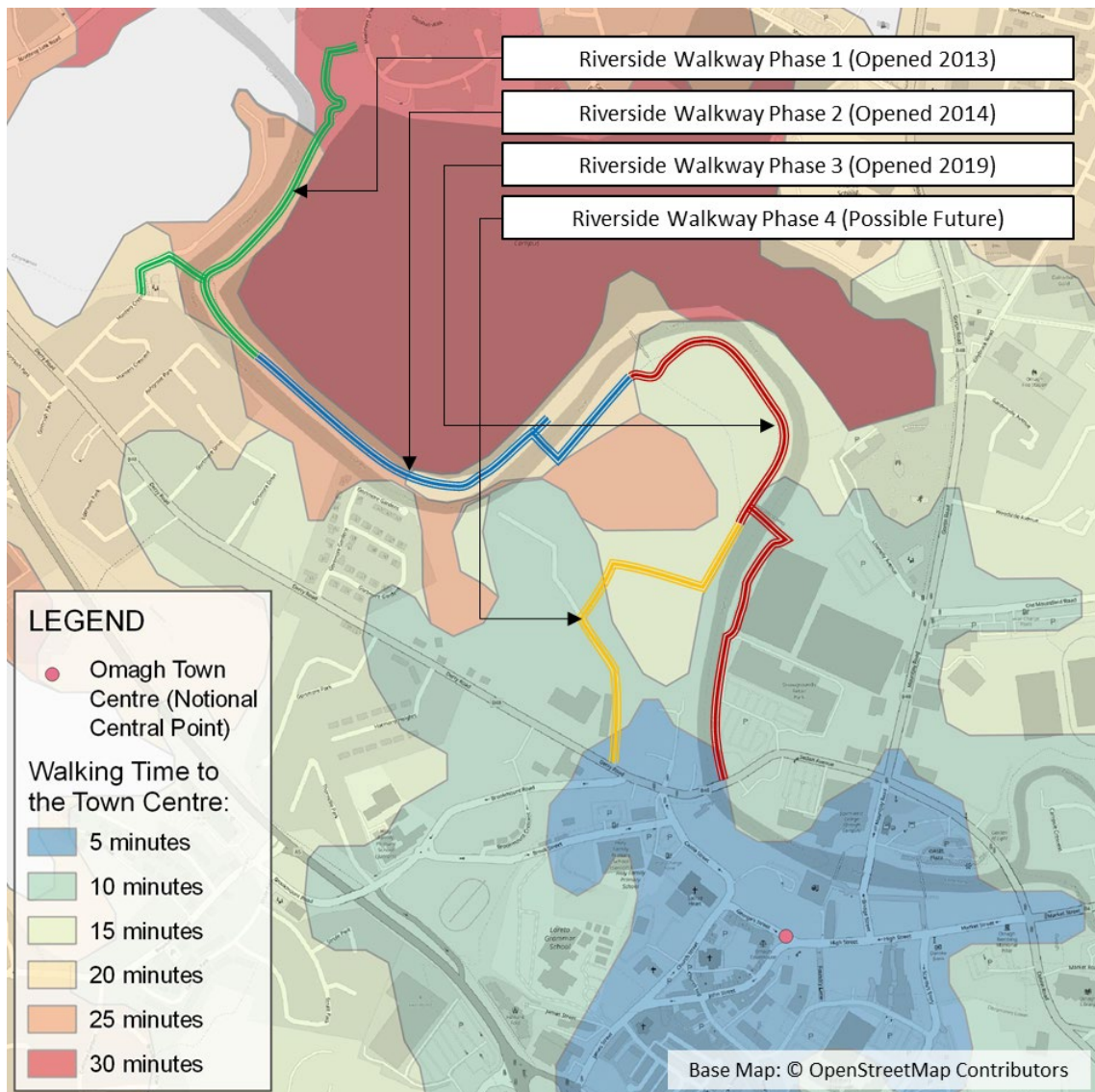


Figure 2.16: Map of Riverside Walk and Cycle Trail

As can be seen in the preceding figure, the riverside trail contributes to improved active travel connectivity between the northern and central parts of Omagh. However, its indirect routing following the River Strule rather than along the most direct desire lines may reduce its attractiveness for utility travel (e.g. commuting, shopping). This limitation could, however, be significantly mitigated, if all-day walking and cycling permeability through the Strule Shared Education after its construction, between the riverside walkway phase 1 and Meelmore Drive area, can be ensured.

In the context of movements in the town centre, **the lack of dedicated cycling infrastructure is compounded by the complex one-way system in place**, which results in longer, more circuitous routing. While the available riverside walking and cycling route may form an alternative for east-west movements, no viable alternative in form of a segregated active travel link exists for the north-south movements. Furthermore, **congestion in the town centre may act as a deterrent for pedestrians**, as observed in the 2016 Omagh Town Centre Masterplan (see: Section 2.3.1).

As noted in Section 2.3.3, the compact nature of Omagh is deemed conducive for the use of active modes as a means of daily travel, however the **existing infrastructure may discourage residents from sustainable modal choices, in particular from cycling.**

2.3.6 Strule Shared Education Campus Impact

The Strule Shared Education Campus scheme, currently at the tendering/phased development stage, will involve a relocation of five secondary schools from the southern and western part of Omagh town centre to the former Lisanelly military barracks site ca. 1 kilometre to the north of the town centre. Collectively, the schools are attended by ca. 4,200 pupils. A comprehensive Transport Assessment of the Campus was undertaken by Kevin McShane Ltd. in 2016, finding that it would have no significant adverse impact on the surrounding road network, subject to a number of mitigation measures being put in place. The mitigation measures proposed included notably the delivery of Strathroy Link Road (currently in place) and Gortin Road and Mountjoy Road widening schemes, in addition to traffic signalling improvements.

However, it is noted that the Transport Assessment assumed a 46.1% modal share of walking and cycling in trips to and from the Campus. This compares to the current modal share of walking of less than 10% (with the cycling modal share being negligible) in trips in the Fermanagh and Omagh District, as established in the Local Development Plan Background Paper.

While the relocation of schools from the town centre creates an opportunity for changing the use of the previously occupied, centrally located sites, **it is deemed essential that town-wide measures are considered and implemented to enable and encourage sustainable access to the Strule Campus.** Such measures should ensure that the ambitious modal split assumptions of the Campus Transport Assessment can be fulfilled and the Campus' traffic impact on the road network, both in its direct vicinity and within wider Omagh town, is minimised.

2.4 Economy and Employment

Omagh as the County Town of Tyrone and the largest settlement in the Fermanagh and Omagh District Council Area, fulfils an important role as a location for employment and public services centre for the community it serves. As such the Town has an important function in driving economic development in the region. To understand fully the town's current situation and opportunities for the future, an analysis of the economy has been undertaken through examination of economic activity and employment. It includes information on economic activity, the identification of the key sectors of employment for the town, potential areas for growth and an overview of the retail capacity.

2.4.1 Economic activity

Examination of the existing and historic data around economic activity including employment, incomes, educational status and economic inactivity from the Northern Ireland Statistics and Research Agency can provide useful context on socioeconomic status and labour market dynamics, particularly when compared to other locations. When considered in the context of the demographics as set out in Section 2.1, this can be particularly influential in terms of place shaping by benefiting and optimising local market dynamics to generate inward investment and enhance educational and employment opportunities for the local community. Analysis of the latest Labour Force Survey (published in April 2022) has been undertaken to understand these indicators and dynamics at the relevant geographic levels, albeit it should be noted that information for Omagh town is relatively limited (i.e. the 11 SOAs are only explored as part of the annual report, the latest of which represents 2020 data) as the quarterly Labour Force Survey is a sample survey of around 2,500 households across Northern Ireland.

The NI average and local rate of employment during 2020¹³ including breakdown by gender in each Local Government District is illustrated in Figure 2-17. This specifically relates to the proportion of the working age population (i.e. those aged 16 – 64 years) who are employed which is a key indicator for sustainable growth and economic resilience as it represents a source of reliable income to households and families. It should be noted that the working age population within Fermanagh and Omagh is the fourth smallest of all Local Government Districts across Northern Ireland. Overall, the rate of employment in Fermanagh and Omagh (67.2%) is slightly lower than the NI average (70.9%) and the third lowest of all Local Government Districts, however it has increased in three of the last five years. Disparities in the rate of employment between males and females are evident within Fermanagh and Omagh (absolute difference of 12.6%) and the gender gap is larger than the NI comparison (8.7%). However, in terms of employment rates, this inequality by gender is greater in four other Local Government Districts. Female participation in the labour force has historically been a driver of economic growth and gender diversity across all types and levels of employment should be encouraged.

¹³ This relates to the employment rate by sex and Local Government District from the Labour Force Survey January to December 2020.

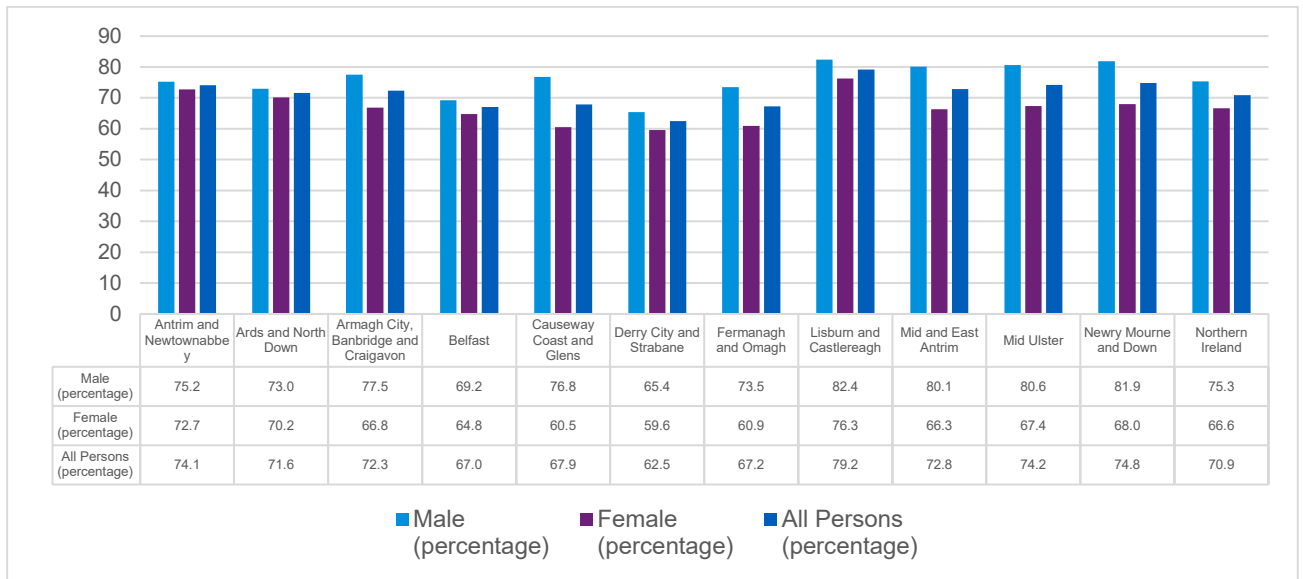


Figure 2.17: Employment rate by gender during 2020 in each Local Government District (aged 16-64)

Similarly to employment, the rate of economic activity¹⁴ (i.e. labour market engagement) for all persons aged 16-64 is relatively low in Fermanagh and Omagh during 2020 (69.2% which is the second lowest of all Local Government Districts) when compared to other areas and the NI rate (73%) as presented in Figure 2-18. This may be attributable to the relatively low rate of economic activity for females (63%) and gender disparity is again notable across Fermanagh and Omagh (i.e. 75.3% economic activity rate for males, equating to absolute difference of 12.3%) when compared to the national rates (9% difference).

¹⁴ Labour Force Survey January to December 2020, Economic activity by sex and Local Government District, Aged 16 to 64



Figure 2.18: Economic activity rate during 2020 by gender in each Local Government District (aged 16-64)

Analysis of the historic trends in economic activity along with structure of the labour market in terms of qualifications within Fermanagh and Omagh is illustrated in Figure 2-19. The rate of economic activity is closely aligned with the rate of employment as would be expected and in recent years, the general increase in qualifications is generally coincident with an increase in employment and economic activity. By 2020, this long-term increase has seen Fermanagh and Omagh reach close to those peaks that were evident in 2015 when economic activity was 77.2% and employment was 73.8%.

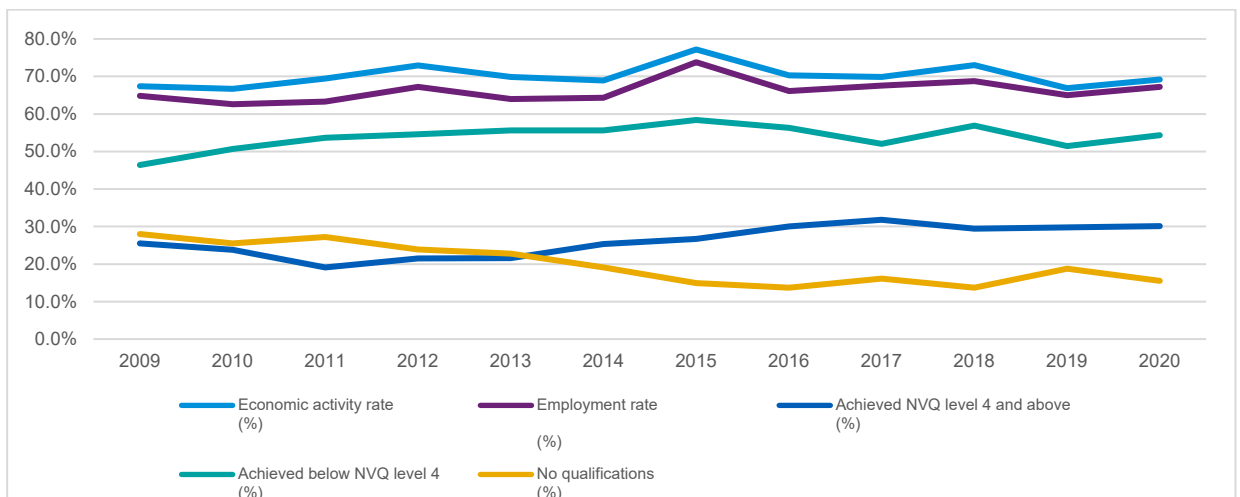


Figure 2.19: Rates of economic activity, employment and qualifications in Fermanagh and Omagh 2009 – 2020

Figure 2-20 illustrates the comparison between the NI average and local rates of economic activity and employment. The peak for Fermanagh and Omagh during 2015 is even more pronounced as both employment and economic activity exceeded the NI average rate with 2018 also faring well as economic activity was slightly higher than the NI average rate. Overall, it should be noted that the temporal trends in Fermanagh and Omagh are more volatile than the national comparison.

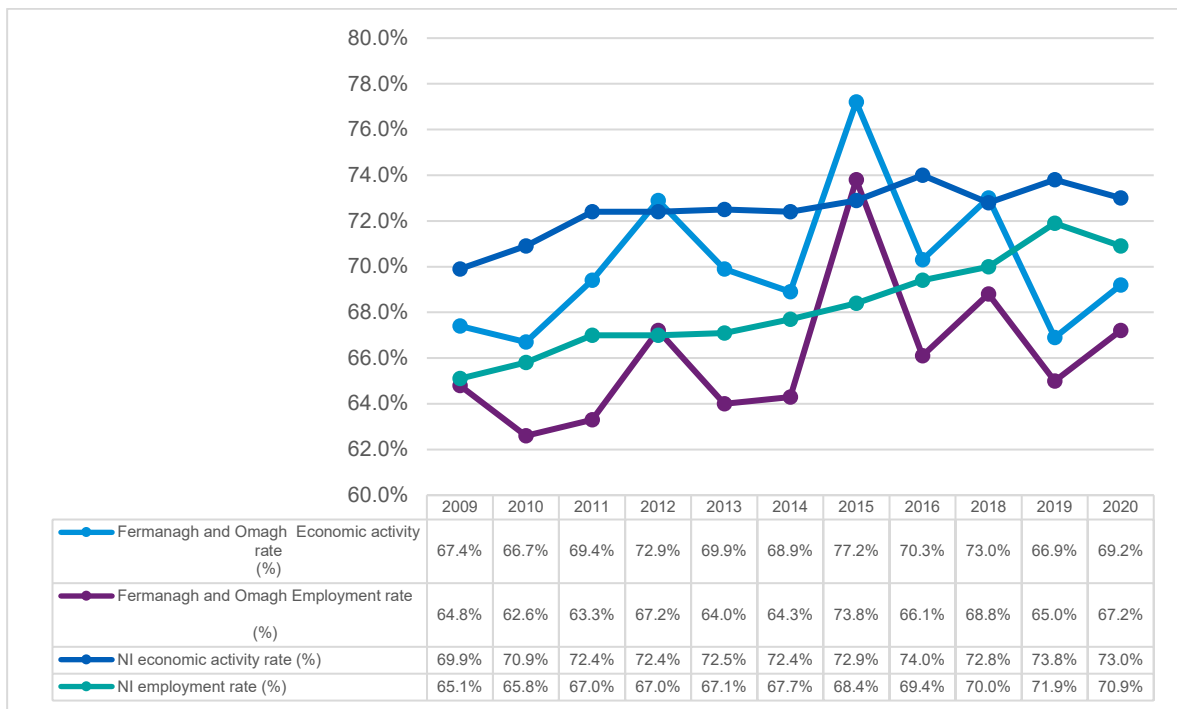


Figure 2.20: Rates of employment and economic activity in Fermanagh and Omagh and Northern Ireland 2009 - 2020

The converse of economic activity is the proportion of the working age population (aged 16-64) that are neither in employment nor unemployed and thus considered economically inactive. In 2020, this stood at 30.8% for Fermanagh and Omagh which is slightly higher than the NI average (27%) as illustrated in Table 2-6.¹⁵ When the skill profile of those that are economically inactive is examined, “35% of the economically inactive have no formal qualifications, compared to only 11% of those in employment” further highlighting the link between qualifications and economic activity.¹⁶ Addressing economic inactivity, particularly among the younger age cohorts, can help unlock the labour market potential and one such mechanism can be improving educational along with employment opportunities which can enhance socioeconomic circumstances as well as overall wellbeing and community equitability.

Table 2.6: Overview of economic inactivity during 2020 by Local Government District (aged 16-64)

Local Government District	Number	Rate (%)
Antrim and Newtownabbey	21,000	23.7
Ards and North Down	25,000	26.5
Armagh City, Banbridge and Craigavon	34,000	25.9
Belfast	66,000	30.1
Causeway Coast and Glens	26,000	30.6
Derry City and Strabane	34,000	36.0

¹⁵ Labour Force Survey January to December 2020, Economic Inactivity by Local Government District, Aged 16 to 64

¹⁶ NISRA, Skills profile of the economically inactive in FODC, 2019 cited in FODC & UUEPC, *A Socio-Economic Profile of the Fermanagh and Omagh District (2022)*

Fermanagh and Omagh	22,000	30.8
Lisburn and Castlereagh	18,000	19.4
Mid and East Antrim	20,000	25.6
Mid Ulster	23,000	23.4
Newry Mourne and Down	26,000	22.9
Northern Ireland	314,000	27.0

Whilst the data is not available at this geographic level, different age cohorts exhibit differing economic status across Northern Ireland and the UK during 2020 as summarised below:

- Of those between 16 – 24 years, 17.3% in Northern Ireland and 13.2% in the UK were economically inactive;
- Of those between 25 – 34 years, 6.8% in Northern Ireland and 5.7% across the UK were economically inactive;
- In Northern Ireland 6% of those between 35 – 44 years and 7.5% of those between 45 – 54 years whilst in the UK 7.6% of those between 35 – 49 years were economically inactive;
- In Northern Ireland 15.7% of those between 55 – 64 years were economically inactive,
- In the UK 17.8% of those between 50 – 64 years were economically inactive; and
- Of those over 65 years, 46.7% of those in Northern Ireland and 55.7% of those in the UK were economically inactive.

Further, of those that are economically inactive in Northern Ireland, 28.6% considered themselves as students, 14.96% were looking after family or home, 10.2% were retired, 37.7% were sick or disabled and 8.6% identified other reasons for being economically inactive. When compared to the UK, the proportion that were sick or disabled was slightly higher in Northern Ireland (28.7% across the UK) whilst the proportion identifying as looking after family/home or being retired was slightly lower (19% and 13.4% in the UK respectively).

An overview of the claimant count¹⁷ within Omagh town is provided in Figure 2-21. A rise in claimants coincided with the evolution of the COVID-19 pandemic during 2020 and the first half of 2021. The number of claimants has decreased in recent months in alignment with the overall regional trends, albeit the quantum of claimants in March 2022 was slightly above that of March 2020 (370 and 300 respectively).

Within Omagh town, Coolnagard and Lisanelly_2 generally had the highest number of claimants with Drumragh increasing in recent months. In terms of the proportional rate of claimants within the population, Omagh Town generally has a proportionately higher claimant rate than Fermanagh and Omagh during 2020. Labour market interventions are therefore particularly important to target those who could be economically active but are not to reduce the quantum of claimants, particularly in those younger age cohorts.

¹⁷ This is the monthly count of all people seeking the Jobseeker's Allowance and some out-of-work Universal Credit claimants.

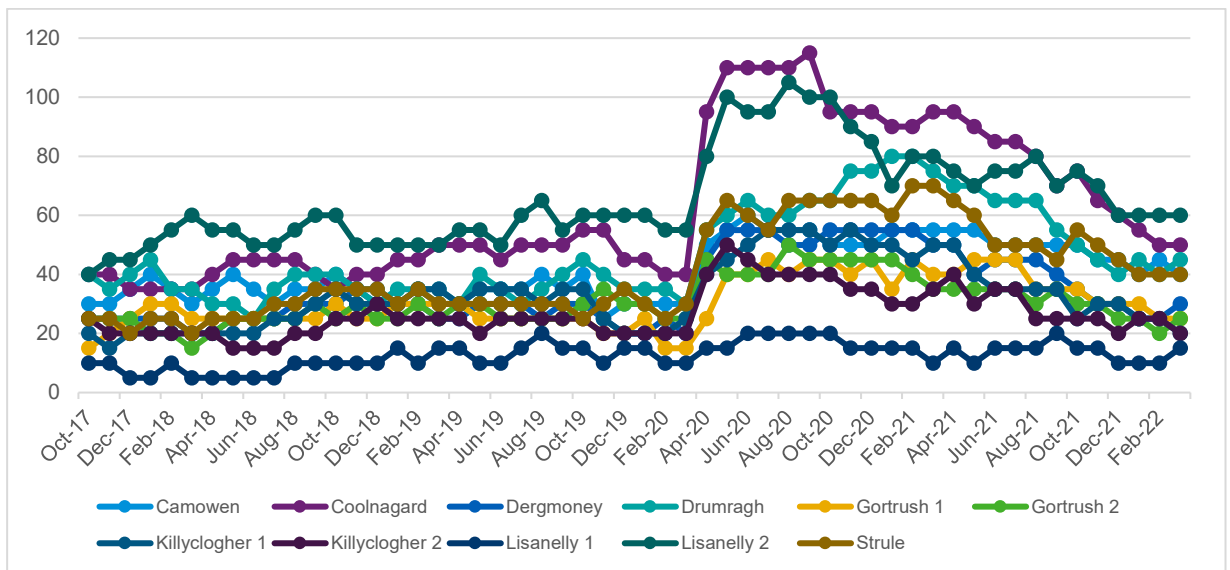


Figure 2.21: Claimant count within Omagh town during 2017 - 2022

In terms of income¹⁸, the mean annual wages across all persons during 2014 – 2021 is presented in Table 2-7. As would be expected, the mean wages in Belfast are consistently the highest of all whilst the lowest are evident in Causeway Coast and Glens and Ards and North Down. A general increase has been evident over time across all areas, with Fermanagh an Omagh rising to an average wage of £23,339 in 2021 which constitutes an increase of 30.6% from 2014.

Table 2.7: Mean annual wages for all persons by Local Government District 2014 - 2021

	2014	2015	2016	2017	2018	2019	2020	2021
Antrim and Newtownabbey	23,170	23,912	25,120	25,845	25,921	25,850	26,616	27,115
Armagh City, Banbridge and Craigavon	20,506	21,298	23,166	25,844	25,656	25,414	26,380	27,123
Belfast	25,767	27,108	27,871	28,454	28,554	29,447	31,373	31,430
Causeway Coast and Glens	18,657	19,453	18,629	19,367	21,654	21,693	23,098	23,134
Derry City and Strabane	20,481	21,039	20,794	22,107	20,981	21,872	22,700	24,047
Fermanagh and Omagh	17,864	20,341	19,866	21,435	21,967	22,988	23,767	23,339
Lisburn and Castlereagh	19,868	20,719	22,100	22,301	24,147	24,431	24,751	27,670
Mid and East Antrim	23,018	25,658	25,816	23,539	25,605	25,392	24,333	23,875
Mid Ulster	20,229	21,300	23,046	22,524	23,116	24,012	24,203	25,683
Newry, Mourne and Down	19,499	21,175	22,155	21,310	24,216	26,692	25,713	24,404
Ards and North Down	19,186	18,701	20,189	20,275	20,454	21,541	22,446	23,277

¹⁸ This relates to the gross annual pay of employees on adult rates who have been in the same job for at least 12 months, including those whose pay was affected by absence.

Significant differences in the average wage for males and females during 2021 were evident across all Local Government Districts as illustrated in Figure 2-22. Within Fermanagh and Omagh, this was moderate compared to other regions with a difference of £7,818 evident (£27,766 for males and £19,948 for females). It should be noted that the gender pay gap measures a broader concept than just pay discrimination alone and can reflect other inequalities women face in access to work, progression and rewards and is a broader societal issue that is not unique to Fermanagh and Omagh. Within Fermanagh and Omagh, the pay gap by gender may be associated with the different rates of employment and economic activity by gender as highlighted in Figure 2.17 and Figure 2.18.

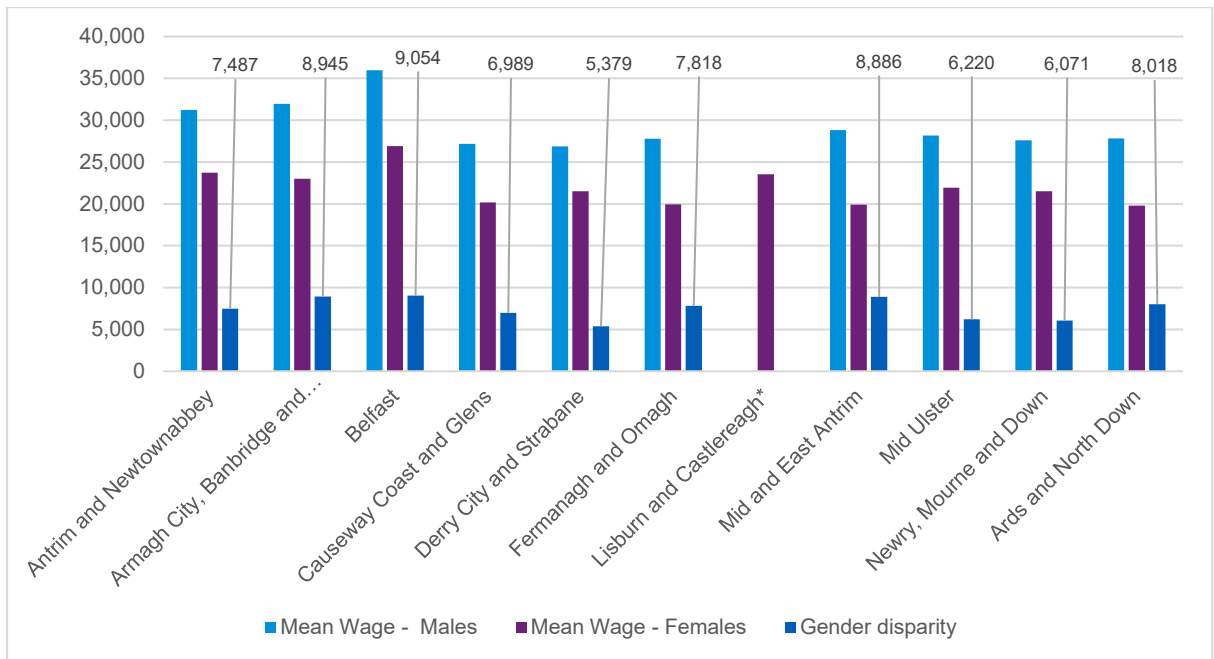


Figure 2.22: Mean wages for males and females and the gender gap during 2021

2.4.2 Employment

To identify key sectors of employment in Omagh, the Northern Ireland Town Centre Database from the Department of Communities has been analysed which includes data on business turnover, business demography and employee jobs. As outlined in the table below, the top three industries for employment in 2019 in Omagh were Wholesale And Retail Trade; Repair Of Motor Vehicles And Motorcycles (25%), Education (15%), and Public Administration And Defence; Compulsory Social Security (14%). Taken together Wholesale and Retail trade, and Accommodation and Food services accounted for approximately 33% of employment in Omagh in 2019 and approximately 63% of the total business turnover of the town in 2015.¹⁹ This highlights the predominance and importance of the retail and hospitality sectors for Omagh’s economy.

Table 2.8: Employment by industry section 2011 and 2019

Industry Section	Employee Jobs 2011	% of Total Employees 2011	Employee Jobs 2019	% of Total Employees 2019

¹⁹ Most recent data available

Agriculture, Forestry And Fishing	*	*	*	*
Mining And Quarrying	N/A	N/A	N/A	N/A
Manufacturing	116	2%	*	*
Electricity, Gas, Steam And Air Conditioning Supply	*	*	*	*
Water Supply; Sewerage, Waste Management And Remediation Activities	N/A	N/A	N/A	N/A
Construction	24	0%	*	*
Wholesale And Retail Trade; Repair Of Motor Vehicles And Motorcycles	1150	23%	1160	25%
Transportation And Storage	165	3%	162	4%
Accommodation And Food Service Activities	472	10%	362	8%
Information And Communication	106	2%	97	2%
Financial And Insurance Activities	201	4%	180	4%
Real Estate Activities	44	1%	19	0%
Professional, Scientific And Technical Activities	243	5%	229	5%
Administrative And Support Service Activities	59	1%	297	7%
Public Administration And Defence; Compulsory Social Security	647	13%	618	14%
Education	739	15%	671	15%
Human Health And Social Work Activities	778	16%	579	13%
Arts, Entertainment And Recreation	59	1%	89	2%
Other Service Activities	111	2%	72	2%
Total	4920	Total	4566	

* Data has been suppressed to prevent disclosure

Between 2011-2019 the industry that seen the largest increase in relation to its share of total employment was Administrative and Support Service Activities (increasing from approximately 1% to 7% of total employee jobs) and the biggest decline was in Human Health and Social Work Activities (decreasing from approximately 16% to 13% of total employee jobs). The decline recorded in Health and Social Work can be attributed in part to changes to the health services provision in Omagh over the course of 2011-2019, although it should be noted that this industry section still accounts for the 4th largest industry in the town. However, when overall employment by industry is examined, a decrease of -7.2% was recorded in employee jobs from 4,920 in 2011 to 4,566 in 2019. Similarly, the number of businesses recorded in Omagh has decreased from 470 in 2012 to 445 in 2019 representing a drop of -5.3%.

Furthermore, as outlined in the figure below, NISRA records the main occupation within the district in 2020 as Skilled Trades (20%), followed by Elementary and Professional Occupations (15%). Less common occupations are Managers, Directors & Senior Officials (4%) and Associate Professional & Technical occupations (7%).

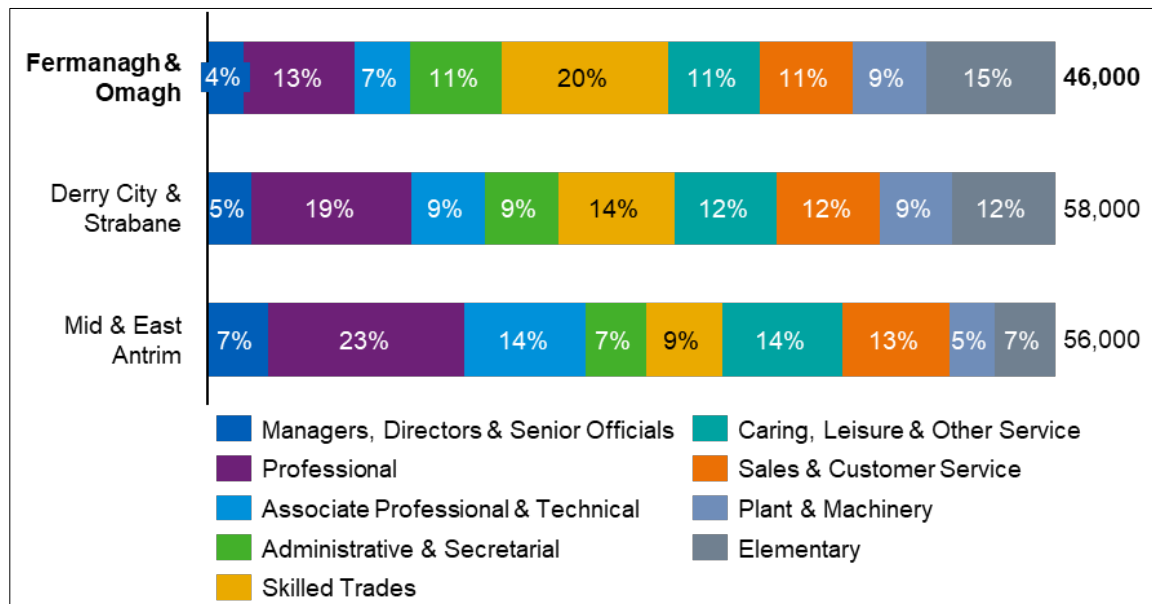


Figure 2.23: District employment by occupation 2020

Similarly, examining district level data from Invest NI also allows for further insight into the economy of Omagh town and to identify additional sectoral strengths that are not easily identifiable from the Town Centre database. Invest NI supports 124 businesses in the Fermanagh and Omagh District Council area which in 2020 accounted for over 6,700 jobs, £479m in exports and £1.4bn in total sales. The 3 largest sectors of employment for Invest NI supported businesses are Agri-Food (36%), Advanced Engineering & Manufacturing (29%), and Construction (21%). Other sectors include Financial Professional & Business Services (6%), Leisure & Tourism (5%), Life & Health Sciences (2%), and Digital & Creative technologies (1%). Notably 35% of businesses supported were micro-businesses (0-9 employees) and 44% of businesses were small businesses (10-49 employees) while 15% were classed as medium businesses (50-249 employees) and 6% large businesses (250+ employees). In relation to sales, the top 3 sectors were Agri-food £628m (45.8%), Construction £336m (24.5%) and Advanced Engineering & Manufacturing £327m (23.9%).

This data broadly aligns with a number of known employers in Omagh with specific clusters identified around engineering, manufacturing and agri-businesses. In 2020, 4 of the top 10 investors in the FODC area as indicated by Invest NI had a presence in Omagh including Naturelle Consumer Products (manufacturing – consumer products), Terex (manufacturing – machinery for mining, quarrying and construction), Kenwell Engineering (manufacturing - metal products), and Power Grid Civils (engineering services). The town is also home to a number of agri-business related companies such as Kerry Group, Foyle Food Group, Strathroy Dairy, and Fane Valley which aligns with the agri-food sector identified from the Invest NI data. Similarly, the predominance of small and micro businesses in the FODC area is also reflected in the Inter-Departmental Business Register in 2021 with 94% of registered businesses in the FODC consisting of 9 or less employees. As outlined above, while Omagh town does have a number of significant employers, it is expected that the business composition of the town broadly aligns with the Invest NI and IDBR data at district level and that majority of companies are small and micro businesses.

The below tables compare Omagh to the selected comparator towns in relation to the number of businesses recorded and employee jobs by industry section. In comparison,

in relation to the number of businesses recorded, it is found that Dungannon also recorded a similar decrease to Omagh of -5.2%, whereas Enniskillen (+2.4%), Armagh (+3.3%), and Antrim (+2.6%) all recorded increases in the number of businesses recorded between 2012-2019.

Table 2.9: Number of Businesses by Comparator Town 2012 and 2019

Town	No. of Businesses 2012	No. of Businesses 2019	% Change 2012 - 2019
Omagh	470	445	-5.3
Enniskillen	415	425	2.4
Dungannon	290	275	-5.2
Armagh	450	465	3.3
Antrim	195	200	2.6

In relation to the number of employee jobs recorded by industry section in each town, with the exception of Armagh which recorded an increase of 2.7%, all other comparator towns recorded a decrease with Enniskillen recording a decrease of -2%, Dungannon a decrease of -12.9%, and Antrim a decrease of -6.3%. Omagh's decrease of -7.2% in employee jobs between 2011-2019 was the second largest of the selected comparator towns.

Table 2.10: Number of Employee Jobs by Comparator Town 2011 and 2019

Town	Employee Jobs 2011	Employee Jobs 2019	%Change 2011-2019
Omagh	4920	4566	-7.2
Enniskillen	4485	4396	-2
Dungannon	2751	2397	-12.9
Armagh	4569	4691	2.7
Antrim	2224	2083	-6.3

However, despite the decreases recorded in the number of businesses and number of employee jobs between 2011-2019, Omagh's status as an economic hub is clear, with only Armagh, a fellow county town, recording higher numbers of businesses and employees in 2019. Notably, Antrim, a town that has experienced substantial population growth since 2001, has a significantly lower number of businesses and employee jobs than Omagh, which potentially highlights its role as a commuter town for Belfast based employees.

2.4.3 Remote Working

The shift towards remote and hybrid working also presents opportunities for growth in smaller towns and villages through the attraction of workers that would otherwise be based in larger cities. The global Covid-19 pandemic has accelerated the transition to remote and hybrid working, with local authorities across the UK and Ireland keen to capitalise on the potential economic benefit that changes to the traditional working environment may offer. A UUEPC Report²⁰ on the remote work in Northern Ireland highlighted that less than 10% of Northern Ireland's workforce were either partially or

²⁰ The Future of Remote Working in Northern Ireland, Ulster University Economic Policy Centre, 2022

fully working from home pre-pandemic. This rose to 41% in April 2020, and although it subsequently declined, it remained at 17% in February 2022. Importantly, the report noted that in the ONS Opinion and Lifestyle Survey (September 2021), 82% of the working population expected to work remotely at least in part post-covid. Similarly, analysis completed by ONS BICS and the UUEPC found that the percentage of employers who expected to increase “the level of homeworking” as part of their permanent business models increased between October 2020 - June 2021²¹. However, while the UUEPC report highlighted that between 40%-61% of jobs could be conducted remotely (at least in part), it noted that sectors such as agriculture, construction and manufacturing had lower potential for remote working.

Omagh may be able to capitalise on this shift towards hybrid working particularly in areas such as ICT (forecast to experience 6% growth at FODC level between 2020-2030) and professional services (forecast to experience 22% growth at FODC level 2020-2030) which the UUEPC report identified as being more suitable for remote and hybrid working.²² The public sector in the town may also benefit from this shift, with Omagh selected as a location for an NI Civil Service Connect2 Hub. These hubs aim to provide strategically located work and collaboration spaces for civil service staff. They will support the new ways of working, promote regional economic balance, reduce commuting times (and emissions) and promote a better work-life balance. However, more generally, caution should be used in the development of remote working hubs, with the majority of those surveyed for the UUEPC remote working report indicating a preference to work from home rather than hubs and taking into account widespread hybrid approaches by employers that may still require lengthy commutes for employees working from more distant locations.

2.4.4 Housing Affordability

In 2020 the mean annual pay by place of residence for FODC was £21,628, below the NI average of £24,870. However, as the average house price in FODC is £142,000 and below average for NI, the region is one of the most affordable in which to buy in NI.

The increased opportunity of remote working provides the local population the option of earning a higher Belfast salary while living and spending this income locally. This could result in increased expenditure in Omagh, and an increase in average income. Changing working patterns could also impact the type of houses in demand, with a preference emerging for gardens and space to work from home in.

²¹ See: The Future of Remote Working in Northern Ireland, UUEPC, 2022

²² See: The Future of Remote Working in Northern Ireland, UUEPC, 2022

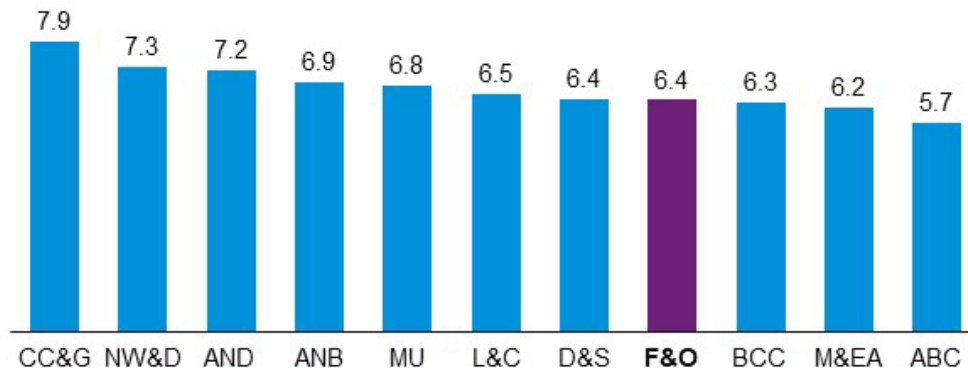


Figure 2.24: Standardised house price/median annual earnings ratio per council

Compared to other local councils, FODC has a lower house price to earnings ratio, showing that houses in the area are more affordable compared to local incomes than other locations. Affordable housing makes an area more attractive to live, especially for encouraging young professionals to stay in the area. Ensuring a long-term plan for new housing supply will help maintain affordability in the face of uncertainty around macroeconomic influences, such as interest rates and high inflation.²³

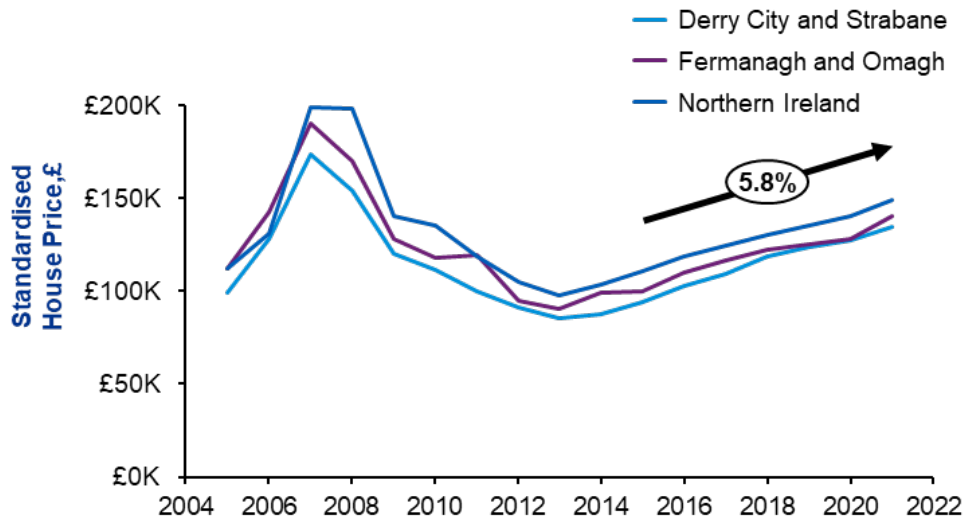


Figure 2.25: Standardised house price, £, 2005 - 2022

Over the past 5 years the average house price for FODC has increased by 28% (5.8% p.a.). This increase has largely been attributed to a post-lockdown surge in demand for homeownership, and a fall in the supply of available housing stock. The all-time low interest rates have also contributed to the increase in demand.

Local house prices will continue to be affected by wider, macroeconomic influences, such as central bank interest rates. Determining land use, granting planning permission and encouraging housing investment can be controlled locally and should be a key consideration for the future of the town.²⁴

²³ Source: NISRA, InvestNI, KPMG analysis

²⁴ Source: NISRA

2.4.5 Retail Capacity

The retail capacity of Omagh can be assessed through examination of the Fermanagh & Omagh Retail and Commercial Needs Assessment 2017 and 2020 update. The assessment separates the Fermanagh and Omagh District area into 5 zones (including catchment areas outside the district) plus a 6th Zone in the Republic of Ireland. Omagh is included in Zone 1 which covers the urban and rural areas surrounding the town including a number of villages such as Fintona and Newtownstewart.

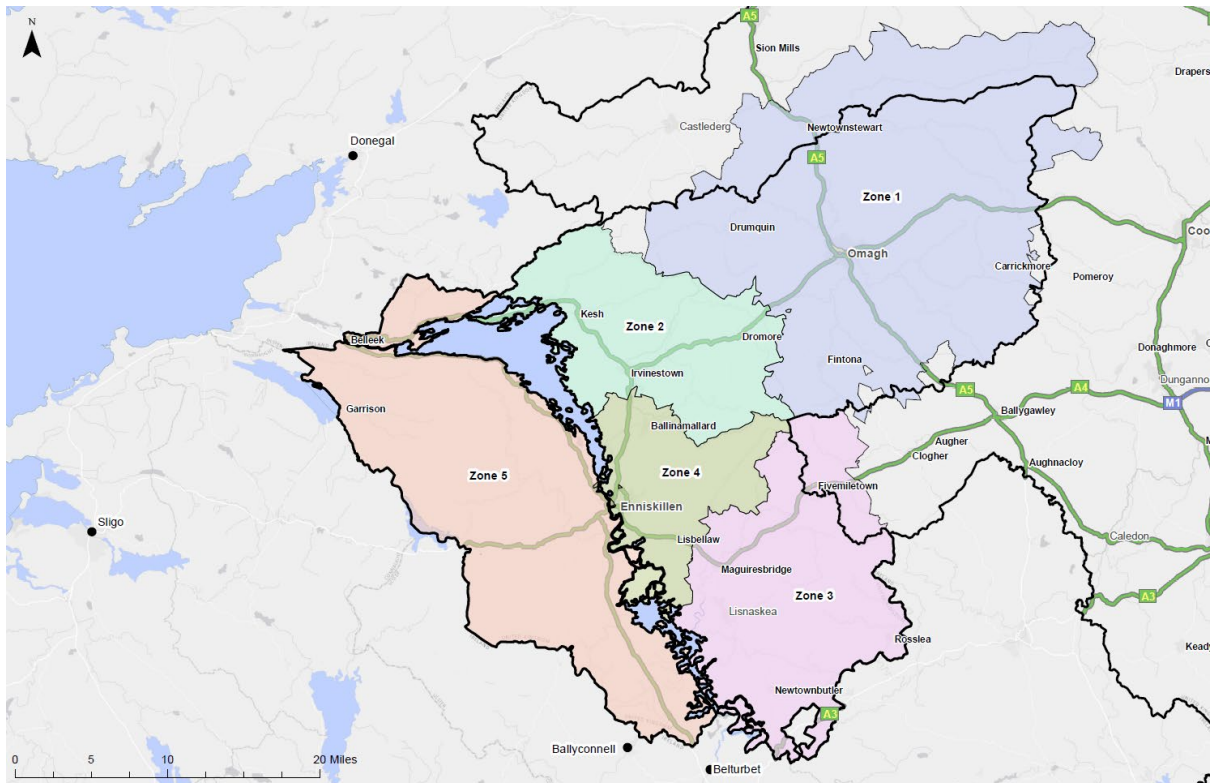


Figure 2.26: Map of Survey Area Zones from Fermanagh and Omagh Retail and Commercial Leisure Needs Assessment 2017

For Omagh town, the main retail areas are along High Street, Market Street, Bridge Street, John Street and George’s Street. The assessment found that the percentage of convenience units (6.7%) was similar to the UK average (8.6%), while there was a significantly lower level of retail services (38.5%) compared to the UK average (47.8%) and a higher level of comparison units (40.5%) compared to the UK average (32.1%). The larger level of comparison units in the town centre was attributed to the fact that Omagh had avoided the development of out-of-centre retail parks which has in turn contributed to a healthy town centre.

As noted in the assessment, **Omagh town has a significant market share** and provides well for its residents in relation to both convenience goods (main food and top-up shopping) and comparison goods (a wide range of goods from clothing to furniture). As such **comparatively low levels of leakage to other destinations were identified**. For instance, in relation to main food shopping, it found that Omagh accounts for approximately 83% of its resident’s expenditure, with a smaller amount recorded for “top-up shopping” at approximately 59%. In relation to main-food shopping in the FODC area, outside of Omagh town, Fintona was the largest destination accounting for 4.1% of

expenditure, while outside of the study area, shops in Strabane (3%), Cookstown (1.9%) and Dungannon (1.4%) accounted for the largest percentages of expenditure of Zone 1 residents. In relation to top-up shopping, outside of Omagh town expenditure was spread across a large range of shops in the immediately surrounding area as well as a small level of expenditure outside of the study area in places such as Dungannon and Cookstown. In relation to comparison goods, in Zone 1 of which Omagh is part, approximately 83% of expenditure on comparison goods was carried out in Omagh, highlighting the strong provision of the town for both its urban and surrounding rural populations. Similar to the above, in relation to trade leakage for comparison goods, Newtown Stewart, Belfast and Strabane accounted for the largest proportion of expenditure from Zone 1 residents outside of Omagh town.

A number of trends were also identified in the assessment including increased expenditure on convenience goods between 2016-2019 and a decline in comparison goods expenditure. The increased use of online shopping was also highlighted which was noted to have a particular impact on local comparison goods expenditure. However, the global pandemic has further accelerated the use of online shopping with online and mobile retail expenditure increasing by approximately 27% in Northern Ireland between 2019 and 2020.²⁵ Although online shopping expenditure remained broadly flat in Northern Ireland in 2021 and is expected to decrease in 2022 due to the effect of cost pressures and the lifting of Covid-19 restrictions, it is still expected to remain above 2019 levels.²⁶ As outlined in the graphic below, online shopping is likely to experience weaker growth over the next number of years before growing from 2025-2027. Similarly, the Covid-19 pandemic had a somewhat positive effect on convenience goods, with grocery shopping sales increasing due to initial stockpiling in the early phases of the pandemic as well as increased at home dining driven by restrictions over the course of 2020-2021.²⁷ However, with the lifting of restrictions in 2022 and increasing cost pressures, it is expected that grocery shopping expenditure will return to something similar to pre-pandemic levels.²⁸

Table 2.11: Mintel Online Retailing Forecast

Now (2022)	Next (2023-2024)	Future (2025-2027)
Good Growth	Flat/Weak Growth	Good Growth
Online Retailing	Online Retailing	Online Retailing
Shopping online increased in popularity during COVID-19 as consumers found new ways to adapt during the pandemic. Consumers realised the benefits of grocery shopping online e.g., the convenience of choosing a time of delivery, whilst also finding it easier to adhere to a set budget	With current conflict in Ukraine causing prices to rise across several industries, consumers will be looking at price when shopping. Consumers may opt for shopping in person compared to online to avoid custom tax or even delivery charges in order to save money.	New trends will begin to emerge amongst online retailers as they find new ways to reach their consumers via online methods. Using platforms such as the metaverse may begin to grow in popularity as companies use new and innovative ways to reach their consumers, encouraging them to return to online shopping as they offer more products in an original way

Source: Mintel Group Ltd.

²⁵ Mintel, Online and Mobile Retailing – Ireland Report, 2022

²⁶ Mintel, Online and Mobile Retailing, 2022.

²⁷ Mintel, Changing Attitudes towards Grocery Retailing- Ireland Report, 2021

²⁸ Mintel, Changing Attitudes towards Grocery Retailing, 2021

In relation to additional floorspace, considering the data on population, expenditure and existing development commitments, **the 2020 Retail Needs Assessment found that there was no capacity for additional convenience and comparison goods floorspace in Omagh through to 2030.** As such, it cautioned against the granting of planning permission for any new non-central retail floorspace in Omagh and recommended that the Council should not seek to allocate non-central retail floorspace in the emerging County Development Plan. Given the findings and forecasts outlined above in relation to increased online shopping and a return to pre-pandemic levels of grocery shopping expenditure, **the recommendations in the 2020 Retail Needs Assessment remain valid.**

2.5 Community Infrastructure

2.5.1 Social Infrastructure Audit

A Social Infrastructure Audit of Omagh Town was undertaken to record the social infrastructure contained within the town centre boundary. Seven categories were used which are outlined in the following table:

Table 2.12 – Social Infrastructure categories

Category	Facility Type
Healthcare Services	Health Centres, General Practitioner (GP) Practices, Dental Practices, Physiotherapist, Pharmacies, Nursing Homes and Specialist Services.
Education and Training	Primary Schools, Post-Primary Schools, Further Education and Training Facilities, Childcare.
Community and Civic Services	Credit Unions, Post Offices, Community Facilities, Emergency Services, Police Stations, Fire Stations and Libraries.
Open Space, Sports and Recreation	Parks, Playgrounds, Dedicated Public Open Space and Amenity Areas, Sports Centres and Formal Club Facilities, Green Corridors, Natural / Semi Natural Green Spaces and Other Open Spaces.
Religious Institutions and Burial Sites	Churches/Places of Worship, Burial Grounds.
Arts, Cultural and Tourism	Theatre, Museum, Performance and outdoor events spaces, Music, Speech / Drama and Dance, Tourism Amenities, Tourist Accommodation.
Retail Centres and Services	District, town, neighbourhood, and local retail shops and services

The findings show that Omagh town contains a total of 592 social infrastructure facilities and amenities within the settlement boundary. An overview of the spatial distribution of the social infrastructure across Omagh town is presented in Figure 2-27 below.

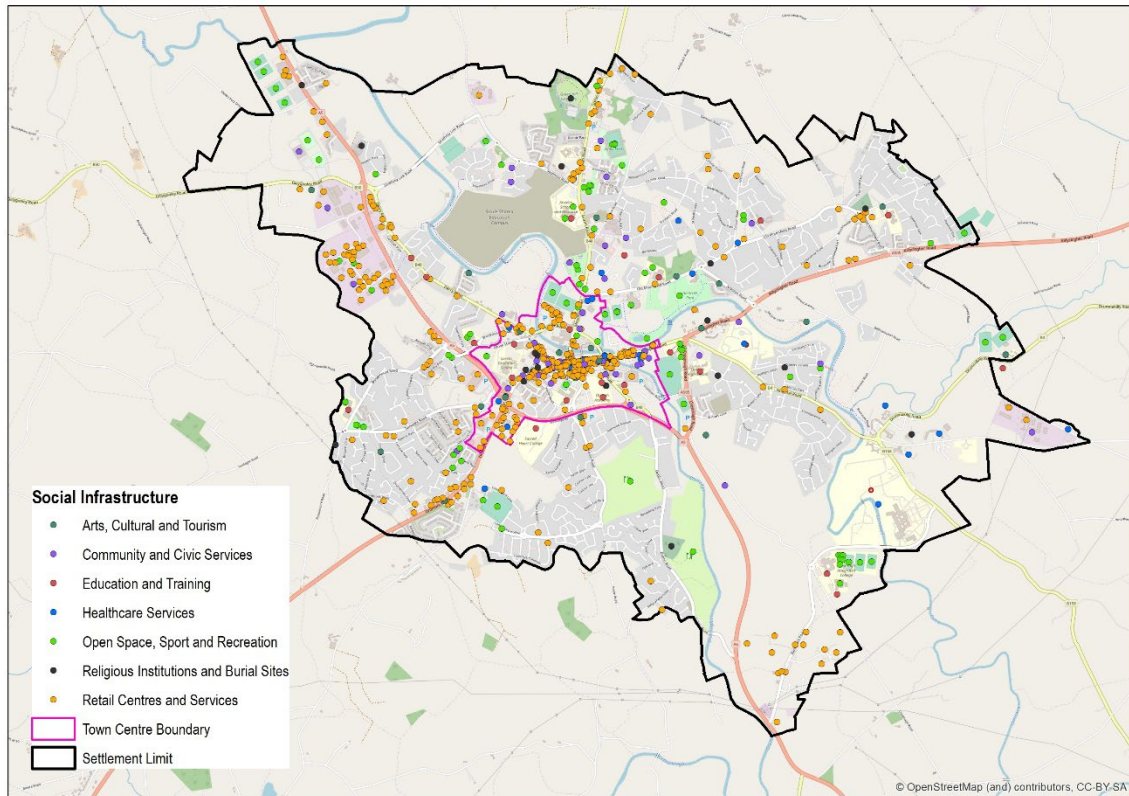


Figure 2.27: Distribution of social infrastructure across Omagh town

A breakdown of the categories consists of 22 Healthcare Services, 22 Education and Training centres, 46 Community and Civic Services, 87 Open Space, Sport and Recreation areas, 22 Religious Institutions and Burial Sites, 22 Arts, Cultural and Tourism centres and 371 Retail Centres and Services. Further information on each category is provided below.

Table 2.13 – Social Infrastructure Count

Category	Number
Arts, Cultural and Tourism	22
Community and Civic Services	46
Education and Training	22
Healthcare Services	22
Open Space, Sport and Recreation	87
Religious Institutions and Burial Sites	22
Retail Centres and Services	371
TOTAL	592

Healthcare Services: In relation to healthcare services, 22 facilities were recorded in the town. The Omagh Hospital and Primary Care Complex is a significant healthcare facility containing two wards with 40 single in-patient rooms and 22 recovery beds for patients recuperating from Day Case Surgery. A network of four GP practices are located in the facility, offering a wide range of general medical services to all registered patients:

Drumragh Family Practice, Grange Family Practice, Strule Family Practice and 3 Spires Family Practice.

Education and Training: There is considerable provision of education facilities within Omagh, including the South West College. Outside of educational institutions, the town is also the location of several further education and training centres, such as the Western C2K Centre. Omagh also contains several preschools, primary and post primary education institutions which have been included in a detailed analysis of education provision for Omagh below in Section 2.6.

Community and Civic Services: Omagh is also a hub of community and civic services with 46 facilities located across Omagh. This includes being a location for offices of government bodies such as the Northern Ireland Housing Executive, the Education Authority and Invest NI. The town also hosts numerous other services, such as post offices, multiple banking institutions as well as 3 FODC community centres - Strathroy Community Centre, CKS Community Centre and Hospital Road Community Centre.

Open Space, Sports and Recreation: In relation to the open space, sports, and recreation category, 87 areas, amenities and facilities were identified. The identified amenities and facilities contribute to the health and environmental well-being of Omagh. Significant open spaces and recreation areas within Omagh include the OASIS plaza, Omagh Memorial Garden, Arleston Park and Grange Park. Significant sports facilities within Omagh include Omagh Leisure Complex, Healy Park (home ground of Tyrone County GAA and St. Enda's GAA), Omagh Golf Club, and Omagh Lawn Tennis Club.

Arts, Culture and Tourism: There is a relatively small number of Arts, Cultural and Tourist facilities and amenities in Omagh, with 22 facilities and amenities identified in this category. The Strule Arts Centre is a significant arts and cultural facility in the town. However, there is a notable absence of tourist accommodation facilities within the town, with the only significant high-capacity accommodation being the Silverbirch Hotel. However, this study does not include tourism facilities and amenities outside of the town settlement boundary. Attractions close by include the likes of the Sperrin Mountains and the Ulster American Folk Park that contribute considerably to the tourism industry of Omagh. A detailed analysis of Omagh's tourism and hospitality offering is included in Section 2.8.

Retail Centres and Services: As would be expected in towns of this size and nature, the most prominent category recorded in Omagh was retail centres and services, with 371 facilities and amenities located within the town. The study found that this category was particularly focused around Market Street, High Street and in the industrial parks on Dromore Road and at the Gortrush Industrial Estate on the Great Northern Road. There is a high level of individual retailers highlighting the role that independently owned businesses play in the town and more generally the importance of the retail sector in the town's economy. However, as noted in Section 2.4.5 there is little capacity for further growth in retail floorspace in the town through to 2030.

Overall, the assessment of social infrastructure in the town, highlights and reaffirms Omagh's role as an economic, public services and educational hub for the surrounding area. While it has significant provision around open spaces and sporting facilities, it has a relatively small number of arts, cultural and tourism facilities and amenities, particularly in relation to tourist accommodation. However, with attractions and amenities just outside the town, there may be potential to grow the tourism sector in Omagh, which is discussed further in Section 2.8.

2.5.2 Community and Voluntary Sector

The Community and Voluntary Sector (CVS) in Omagh, given its large catchment area, is a well-established and important facet of the town. The sector provides vital services and supports across a number of different areas that contributes to the overall wellbeing and cohesion of the community in Omagh and its wider hinterland. Though many of the occupied commercial units within Omagh operate under conventional retail and trade functions, the town has several CVS organisations operating within the town centre including the Omagh Volunteer Centre, Omagh Forum for Rural Associations and Omagh Women's Area Network. The 2021 Fermanagh and Omagh District Council Resident Survey²⁹ identified that 16% of respondents in the Omagh DEA regularly took part in local groups or community activities, although this was notably lower than the FODC average of 28%.

FODC also provide a wide range of community networks and support services within Omagh, with the Community Services Department offering individual and organisational support within the community and voluntary sector. This includes in areas such as trust and safety, diversity and inclusion, and citizen activity and participation, which all contribute to a sense of place and community well-being. A small sample of some of the activity in these areas in Omagh is outlined below.

Trust and Safety: A sense of trust and safety within individuals within their communities is paramount for developing and maintaining positive social capital and to contribute to the well-being of the town's residents. The Fermanagh and Omagh Policing and Community Safety Partnership (PCSP) is a partnership between the Council, statutory providers and the community. The partnership is made up of elected and independent members and representatives from the statutory sector. The overall purpose of the PCSP is to help make communities safer and to ensure that the voices of local people are heard on policing and community safety issues. Several initiatives led by the PCSP include neighbourhood watch schemes, hosting community safety events, and the PCSP e-Newsletter.

Diversity and Inclusion: Several council and non-council organisations and services promote and support diversity and inclusion within Omagh and the wider FODC region. Council-led services and initiatives include the Fermanagh Omagh Interagency Forum for Older People (FOIF) and annual Age Friendly conferences as part of FODC's membership of the Age-Friendly Network NI. Non-council organisations which provide support for diversity and inclusion include the Omagh Ethnic Communities Support Group and the Family Support Hub Omagh.

Citizen Activity and Participation: The ASPIRE Programme, an FODC-led employability programme, provides assistance to anyone aged sixteen or over that are currently unemployed or not in full-time education through a range of free tailored support packages including skills training, work placements, interview skills and CV development.

While the above represents only a small selection of supports and organisations that are active in Omagh, it is clear that the Community and Voluntary Sector plays an important role in the town and positively contributes to the overall sense of place and community. As such, the sector should continue to be supported in relation to the important services

²⁹ 2021 telephone survey of 1002 residents of the Fermanagh and Omagh District Council area.

they provide, with **opportunities to enhance collaboration to maximise service delivery and further benefit from shared spaces and resources.**

2.6 Education

The provision and capacity of education and schools are key components that can serve as ‘magnets’ or ‘attractors’ for people and businesses looking to locate in Omagh. The education provision in Omagh is strong with a substantial level of education infrastructure located across the town. This includes primary, post-primary and further and higher education, with the town acting as an educational hub for a wide catchment area. With the development of the Strule education campus, which will be one of the largest shared campuses in Europe, the education provision of the town will be further enhanced. The Strule campus will also have a wider effect on the future development of the town with a number of schools currently located in the town centre due to relocate to the new campus. As such, the education sector in Omagh will play a pivotal role in the future of the town, not only in preparing the community for employment and attracting investment, but also on the physical environment of the town centre itself.

2.6.1 Higher and Further Education

Further and higher education is provided through the South West College (SWC) Omagh Campus located within the town centre. Offering both higher education and further education courses and qualifications, South West College provides excellent opportunities for both students, industry and the local economy through its wide range of foundation degrees, BSc Top Ups, apprenticeships, specialisms and pathways across a number of different subjects. As outlined in the table below SWC Omagh provides the town with significant number of graduates and apprentices each year, with the notable drop in 2021 being attributed to the effect of COVID-19 restrictions on course provision. SWC Omagh has particular strengths in automotive repair, with the college also seeing opportunities related to electric vehicle maintenance and cybersecurity.

Table 2.14 SWC Omagh Finishing Graduating Students 2018-2021

Year	2018/2019	2019/2020	2020/2021
Students finishing/graduating	5,009	4,118	2,665

2.6.2 Post-Primary

There are seven post-primary schools in Omagh. These are outlined in the table below.

Table 2.15 Post-Primary Schools in Omagh

School	Description
Arvalee School and Resource Centre	Enrols children and young people aged 3 to 19 years who have moderate and severe learning difficulties
Christian Brothers Grammar School	All-boys Catholic school enrolling between the ages of 11 and 19 years of age
Drumragh Integrated College	Non-selective secondary school enrolling girls and boys aged from 11 to 18 years of age

Loreto Grammar School	All-girls Catholic school enrolling between the ages of 11 and 18 years of age
Omagh Academy	Co-educational grammar school enrolling girls and boys between the ages of 11 and 18 years of age
Omagh High School	Non-selective secondary school enrolling girls and boys between the ages of 11 and 18 years of age
Sacred Heart College	Co-educational secondary school enrolling girls and boys between the ages of 11 and 18 years of age

Of the seven schools offering post-primary education located within Omagh town, five of these schools are planned to relocate to the Strule Shared Education Campus (SSEC) by 2026, with Arvalee School and Resource Centre currently located at the Strule site. **The shared campus will see over 3,800 pupils relocate from the town centre to the Strule site.** Located on a large site to the north of Omagh town centre, the shared campus will vacate several former school sites within the town centre, opening up lands within the town centre core for redevelopment. As outlined in Section 2.2.3, the sites are as follows:

Table 2.16 School Opportunity Sites

Site	Comment
Christian Brothers Grammar School	2.08ha site owned by the Edmund Rice Schools Trust
Omagh High School	2.26ha site owned by the Education Authority
Omagh Academy	2.38ha site owned by the Education Authority
Loreto Grammar	4.40ha site owned by Loreto Institute Property Trust with protected structures on site
Sacred Heart College	5.30ha site owned by St Canice's Educational Trust

These five sites represent a significant opportunity to shape a new future for the town centre that supports the growth and prosperity of Omagh through the identification of appropriate uses that contributes positively to the vitality of the town's core. However, they also represent a significant risk for the town centre with the 5 large sites set to become vacant at the same time. **Should the sites remain vacant for a significant amount of time there is a risk that will contribute to an economic decline of the town centre. Therefore, it is of the utmost importance that a clear plan is established with the owners for a coordinated disposal strategy for the sites.**

2.6.3 Primary

In relation to primary level education, there are 13 primary schools located within Omagh town. These are as follows:

- All Saints Primary School
- Arvalee School and Resource Centre
- Christ the King Primary School
- Gaelscoil Na gCrann
- Gibson Primary School
- Gillygooley Primary School
- Holy Family Primary School
- Omagh County Primary School

- Omagh Integrated Primary School
- Sacred Heart Primary School
- St. Mary's Primary School
- St. Ronan's Recarson Primary School

2.6.4 Education Outcomes

To assess educational outcomes in Omagh, School Leaver data (DEA level) from the Department of Education, and Economic Activity and Qualifications data from the Labour Force Survey (LGD 1992 level) have been examined. **Overall, Omagh has performed strongly in recent years in relation to education outcomes.** However, there is an element of underachievement in certain areas still evident in the data, although when examined over time, there is positive progression towards enhanced educational outcomes and attainment.

For instance, looking at the School Leaver data for Omagh DEA, in 2019/2020, 56.8% of school leavers went on to higher education (HE) and 31.2% went on to further education (FE), which is significantly higher than the NI average of 47.9% (HE) and 29.2% (FE), and a marked improvement on the 52.8% of school leavers that went to higher education in 2014/2015. In the same period, 4.5% of school leavers were recorded in the unemployed/unknown category which is lower than the NI recorded average of 4.7%.

In relation to educational attainment, those achieving at least 5 GCSEs (A*-C) was recorded at 89.9% which is slightly lower than NI average (91.3%) but a significant improvement from 78.9% in 2014/2015. Similarly, 76.9% of school leavers in the 2019/2020 academic year achieved at least 5 GCSE's grades A*- C or equivalent, including English and Maths which is slightly above the NI average of 76.2%. This is an increase of approximately 15.5% on the low of 61.7% recorded in the 2015/2016 academic year.



Figure 2.28: School leavers by destination in 2019/20

When analysed in relation to the comparator towns, it can be seen that Omagh performs strongly in relation to school leavers entering Higher Education with only Enniskillen recording a higher percentage in 2019/2020, reflecting the high-level of educational achievement in the Omagh DEA. Similarly, in 2019/2020, Omagh experienced the second highest achievement levels (amongst the comparator towns) among school leavers that achieved at least 5 GCSE's grades A*- C or equivalent, including English and Maths at 76.9%. Enniskillen ranked highest in this category, with an achievement rate of 80.9% in the 2019/2020 academic year.

However, despite Omagh's strong performance in these areas, educational underachievement is also evident from the data. When data on school leavers related to those entitled to free school meals (FSME) (those from the most disadvantaged backgrounds) is examined, the difference in achievement is stark. In 2019/2020, 56.9% of those entitled to free school meals Achieved At Least 5 GCSEs grades A*-C (or equivalent) including English and GCSE Maths, in comparison to 85.1% of non-FSME school leavers. Despite the difference in achievement in Omagh, the 56.9% recorded was above the average FSME achievement rate in NI of 55.7%. However, as outlined in the table below Omagh has the second largest difference (%) in attainment in relation to Non-FSME and FSME school leavers between the comparator towns, highlighting the need to continue work to narrow the educational achievement gap in this area.

Table 2.17: School Leavers that Achieved At Least 5 GCSEs grades A*-C (or equivalent) inc. GCSE English and GCSE Maths 2019/2020

DEA	Non-FSME	FSME	Difference
Antrim	82.2%	45.0%	37.2%
Armagh	81.7%	59.4%	22.3%
Dungannon	75.1%	54.1%	21.0%
Enniskillen	85.4%	70.7%	14.7%
Omagh	85.1%	56.9%	28.2%

In relation to overall educational attainment in Omagh, Economic Activity and Qualifications data from the Labour Force Survey (LGD 1992 level) has been examined. In 2019, 33.4% of the working age population were recorded as having Achieved NVQ Level 4 and above which is below the NI average of 36.7%. Similarly, 53.8% of the working age population were recoded as having achieved below NVQ level 4 which is above the NI average of 49.5%. Taken together these point towards underachievement in overall educational attainment in Omagh. However, as outlined in the table below, when examined over time educational attainment is improving with those Achieving NVQ Level 4 and above increasing from 20.4% in 2011 to 33.4% in 2019, and those with No Qualifications decreasing from a high of 27.7% in 2013 to 12.7% in 2019 (which is below the NI average). **Therefore, while there is work to do to bring Omagh’s overall educational attainment level in line with NI averages, the overall trend is positive.**

Table 2.18: Educational attainment within the working age population over time in the Omagh 1992 LGD area

	Achieved NVQ Level 4 And Above (%)	Achieved Below NVQ Level 4 (%)	No Qualifications (%)
2011	20.4	55	24.6
2012	25.2	49.9	24.9
2013	26.2	46	27.7
2014	29.5	49.5	21
2015	30	53.1	*
2016	31.9	53.2	*
2017	33.6	57.1	*
2018	25	61.1	*
2019	33.4	53.8	12.7

2.7 Natural, Built and Cultural Heritage

2.7.1 Natural Heritage

Town Centre

The town of Omagh is situated along the confluence of the Strule, Drumragh and Camowen Rivers. Due to the town’s strategic location at the meeting point of these three rivers, the town centre benefits from having these significant waterways in close proximity to its commercial core, with greenways, parks, gardens and riverside walkways within a 10-minute walking distance from the town centre. Due to its location within the floodplain of the Strule and Camowen river confluence, the town centre has a relatively low and flat topography, rising gently to the west along High Street towards the Courthouse, Church Street and James Street.

Surrounding Landscape Character

Beyond Omagh’s built-up settlement boundaries, the landscape character of the surrounding natural landscape contains several distinct character areas. As per the Landscape Character Assessment of the FODC Development Plan, ‘Omagh Farmland’ is the prevailing landscape character area surrounding Omagh town. The surrounding landscape is defined as a ‘drumlin lowland landscape’ which extends from Omagh to Fintona and includes the river valley landscapes of the Camowen River to the north and

the river systems of Drumragh River, Ballynahatty Water and Quiggery Water to the south.

The farms of the landscape are generally located in sheltered areas within the slopes of the drumlin areas of the region and are linked by narrow local access lanes. These farms are an important aspect of the surrounding green and environmental infrastructure of the area. The hedgerows, agricultural fencing and laneways of these farm sites provide natural green corridors for flora and fauna, which help link the green cores of the wider region.

While not in the immediate surrounds of Omagh, other significant amenities which add value to the region's wider natural capital include the South Sperrins, Gortin Glen Forest Park and Lakes to the north-east, Baronscourt Estate and Fairy Water Valley to the north-west, Sloughan Glen Springs and Lough Bradan to the west, the Brougher Mountains area to the south and the Camowen Valley river catchment to the east.

Designations

Omagh town centre is designated as a Conservation Area, comprising 4 distinct sub areas: High Street/Market Street, the Churches Area, Gaol Square and the Strule River and Environs, with this designation's objective concerned with the protection, maintenance and enhancement of Omagh's protected buildings and their surroundings. Outside the town's settlement boundary, there are also several designations for natural conservation sites in the immediate and wider surrounds of Omagh. The Sperrins Mountains, located to the north-east of Omagh, are designated by the UK Government as an Area of Outstanding Natural Beauty (AONB). Several sites in the wider Fermanagh and Omagh district region are designated as Special Protection Areas (SPAs) or Special Areas of Conservation (SAC) as part of the Natura 2000 network, Areas of Special Scientific Interest (ASSI) and RAMSAR sites. A comprehensive list of these sites can be found within the FODC Countryside Assessment document.

These designations aim to protect, promote and enhance the quality of sites identified as having valuable functions as core breeding and resting sites for rare and threatened species.

Overall, Omagh is located within an attractive rural area and there are opportunities to enhance linkages from the town centre to the surrounding countryside.

2.7.2 Built and Cultural Heritage

The town of Omagh was founded in 1610, replacing Dungannon as the key town of County Tyrone in 1768. Campsie Bridge, Bells Bridge and the Courthouse date from the early 19th century, with the Sacred Heart Church, Omagh Methodist Church and Church of Ireland being built toward the end of the 19th century, along Church Street and James Street. These buildings have become strong features of the town since their construction. Due to their elevated position in the town centre, they are prominent physical and cultural landmarks both within the town centre and around the wider Omagh area.

As noted in the Updated 2015 Town Centre Masterplan, the town has grown around the central streets of Market, Street, High Street and Campsie. High Street and Market Street remain Omagh's main retail and commercial areas with a number of narrow side streets that have been put into good use adding to the town centre's character.

The built environment of Omagh town centre contains a varied arrangement of buildings and structures, belonging primarily to the Victorian and Edwardian styles of architecture, such as the Ulster Bank building on High Street, while earlier and more prominent buildings, such as the Courthouse, built in 1814, belong to the Neoclassical style.

Due to the architectural merit and cultural significance of Omagh's built heritage, a significant number of buildings both within the town centre and wider Omagh urban settlement are listed buildings of 'special architectural or historic interest'.

Given Omagh's long-standing and prominent role as a major market town, historically within County Tyrone and more recently within the Fermanagh and Omagh District, the town's rich cultural heritage has significantly shaped the development and identity of the town and its people. Similarly, the Strule, Drumragh and Camowen Rivers have had an important role in shaping the built and cultural identity of Omagh, with many of the town's open space, amenities and events being located or taking place alongside the banks and lands adjoining these rivers and their riparian zones.

Today, Omagh's heritage is underpinned by a strong arts and culture scene, excellent educational and learning institutions, a colourful and independent retail environment and diverse communities and people with a deep pride and sense of identity with Omagh town and its surrounding landscape. In recent years, a number of significant community assets have been developed, adding to Omagh town centre's sense of place and identity. This includes the Strule Arts Centre, the OASIS (Omagh Accessible Shared Inclusive Space) Plaza and the riverside walk.

2.8 Tourism and Hospitality

The wider Fermanagh and Omagh District Council area attracted £79 million spend in 2019 and attracted 0.4 million trips, which is 7.5% of the total trips to NI.³⁰ Almost two thirds of overnight trips can be attributed to the domestic market. Key markets include ROI & other (18%), Great Britain (14%). Comparatively few visitors from further afield come to the District with 3% of visitors coming from Mainland Europe, and 2% from North America. The District and Omagh Town has potential for further development of tourism activities and attractions, and for growing the international market.

Current Tourism Products

The Strule Arts Centre is strategically located in the Omagh Town Centre parallel to Strule River and close to the Bridge St., accessible by both active mode and public transport. It is an art venue and accommodates theatre performances, exhibitions, and workshops that attracts visitors interested in cultural heritage and abstract art (Strule Art Centre). The Centre development can transform the perception of Omagh, stimulate the future development of tourism and position and differentiate Omagh's regional tourism offer. Historic landmarks, including Crevenagh House and Ulster American Folk Park, are located on the outskirts of the town centre and connected via the A5 road. Crevenagh House is a two-storey house built in 1820 and, as its significance stems from its architecture and mosaics throughout the House and location, its further development would potentially attract visitors interested in recreational activities and heritage - based tourism. Ulster American Folk Park is conveniently located along A5 and Beltany Rd, only 4 miles from the town centre. The Park offers an exploration of the human drama behind emigration from the thatched cottages of Ulster to the new world homesteads of

³⁰ <https://www.nisra.gov.uk/sites/nisra.gov.uk/files/publications/LGD-Infographic-Fermanagh-Omagh-2019.pdf>

the American frontier and is one of the most known attractions in the Omagh area. The Park's premise is equipped by coach tour and visitor parking spots, visitor services such as gift shop and stand-by staff and hospitality offer in their on-site restaurant and a coffee shop.

Cross promotion and marketing campaigns stemming from the Park, would position the town as a visitor hub and a starting point for the day excursions to the Park. The development of outdoor activities in Omagh and its immediate surroundings, opens up the window of opportunity for the town to market itself as an active service and retail centre for its spending market. Regional and international visitors would benefit from a Greenway development alongside the Camowen River that would link the town to the Folk Park, providing opportunities for heritage interpretation

Omagh's current offering includes the **Memorial Garden**, equipped with sun reflecting poles, flower beds and water pond and the **Oasis Plaza**, strategically located above the car park. The Plaza includes concrete and metal infrastructures such as an outdoor gym and sun loungers and podium. The open space can potentially serve as a hub for public events and gatherings. Natural attractions include Lovers Retreat – a natural preserve and an outstanding beauty spot where herons nest in summer and fish leap upstream to the Sperrins.

Omagh is near the **Sperrins Mountain Range** where biking and hiking are the main visitor attractions. To accommodate visitors the Translink run a Sperrins Rambler – bus service that runs from Omagh to Magherafelt. Visitors can specifically enjoy the Sperrins and Killeter Walking Festivals that run on an annual basis and offer walkers the walks with some of Ireland's most picturesque scenery. Tourism in the Sperrins allows families to demonstrate their abilities in the 26km Davagh Forest biking trail for adults, bike skills course and high - quality play equipment for children. While the Davagh Forest bike trail is located outside of the FODC area, it's strategic location within the Sperrins Mountain Range can leverage opportunities for linked tourism and cross-district, cross-regional visitor attractions. **Gortin Glen Forest Park** includes horse trails, café and toilet facilities and visitors can enjoy the biodiversity of the local area as well as the new range of mountain biking and walking trails, which significant investment by FODC. An Creagán is strategically located and serves as a base to explore the Sperrins and archaeology. Visitors will soon be able to experience the cultural heritage of the Sperrins through the **Sculpture Trail, which passes through 3 district council areas** and includes artwork installation at key locations. The sculptures are individual attractions yet linked together by a story that is complete once all sculptures are visited. Natural heritage tourism can attract numerous tourists in the Omagh town centre for a longer period of time and an opportunity for investment in the region through hospitality services and activities-based tourism.

Hospitality

At present, Omagh has two main accommodation providers: **Rooms at Rue** located in the city centre area, containing 14 bedrooms and the **Silverbirch Hotel**, 15-minute walk from the Omagh centre. There are a range of other accommodation such as country inns, lodges and bed & breakfasts. Tourism and hospitality activities such as farmer's markets, St. Patrick's parade, and numerous restaurant and accommodation facilities that benefit the local community through employment opportunities. Bars and restaurants in the town centre, such as Sally's of Omagh and the Rue, also offer an outdoor seating space for locals and visitors.

Opportunity

Omagh is strategically positioned between the city of Derry/Londonderry and Fermanagh Lakelands. This positioning can potentially play a vital role in tourism development of

Omagh with an emphasis on differentiation between offerings present in the two neighbouring towns. By improving infrastructure, Omagh can become more inviting and vibrant town for locals as well as tourists passing through. Riverfront development would link the town's centre to the river, rather than turning the town's centre away from the river, as well as providing opportunities to link the town to the surrounding countryside and visitor attractions.

There is potential for more accommodation development such as boutique hotels, guest houses and self – catering accommodation that would serve the outdoor activity market, supporting retail and hospitality sectors. Inhibition to tourism growth can perhaps be contributed to the town's traffic system and signage which both make it hard to navigate and cause confusion among visitors. The existing Omniplex cinema is in a disadvantageous position located at the edge of the town and would be unlikely to contribute directly to the town centre's night services (bars, restaurants).

To drive Omagh towards becoming a more visitor friendly destination, the private and public sectors need to work together and promote tourism products and services. Identifying and segmenting visitors' markets can enable the creation of more tailored promotional campaigns as well as promoting Omagh as a sustainable, historic, cultural, and picturesque destination, a hub for the Fermanagh and Omagh District.

Improvements to the town's infrastructure, branding, wayfinding and marketing are crucial for the growth of tourism in Omagh.

2.9 Leisure and Recreation

As outlined in Section 2.5.1, in relation to the category of open space, sports and recreation, Omagh has a relatively healthy provision with 87 amenities and facilities recorded within the town boundary. As well as the recreational areas such as Grange Park and Glenree Park there are also a number of sports clubs and playing fields located across the town. There is also Omagh Leisure Complex which includes a fitness suite, swimming pool, outdoor pitches, running track and bowling green. In addition, the 3 FODC community centres located in the town offer a range of sports and leisure activities.

The assessment completed as part of this study can be further supplemented through examining the quantitative analysis of the leisure capacity completed for Omagh Town Centre by Nexus Planning as part of the Retail and Commercial Leisure Needs Assessment in 2017.

As noted in that report, the town provides well for its residents in relation to leisure activity, with Omagh being the most popular destination for Health & Fitness, Cinema, Restaurant, Pubs and Bars, and Swimming. However, in relation to the category of Ten Pin Bowling, the most popular destination was Derry and in relation to Theatre/Concert/Museum/Gallery, the most popular destination for residents of the town was Belfast. Through survey analysis completed as part of the Assessment in 2017, it was established that the most popular potential leisure requirement for the future would be the provision of a new bowling pin facility, as well as improvements to hotel accommodation provision in the Omagh area. However, many survey respondents from the Omagh area could not identify any future leisure needs.

These findings broadly align with the assessment of social infrastructure in Section 2.5.1 which notes a relatively small number of facilities and amenities in the town in relation to the Arts, Culture and Tourism category. Similarly, the desire for a new bowling alley was

noted during the consultation process, but demand for such an amenity would need to be carefully assessed. Since the completion of the assessment in 2017, Omagh has also seen the addition of another cinema, with two cinemas now located in the town. However, while some gaps in provision exist, **the assessment from the 2017 report that the Council does not need to plan for any significant new leisure or community facilities through to 2030 appears to remain valid** owing in part to the limited forecasted population growth and existing provision. Notwithstanding this, improvements to the hotel accommodation offering and more generally the arts, culture and tourism offering in Omagh could benefit the town and attract further visitors.

2.10 Marketing and Branding

Omagh as a destination is promoted by Tourism NI as a sub-regional hub and as a retail, leisure, commercial and tourist attraction. A visitor information centre is hosted within the Strule Arts Centre, providing information on visitor accommodation, attractions, and activities in the area. A new Omagh brand has been developed recently with the logo outlined below.



Figure 2.29 Omagh Place Brand

It is essential that a **coordinated and phased approach be taken to the branding and promotion of Omagh** as a vibrant place to live, work, study and visit. Clear recommendations will be provided as an output of this study and are required to ensure that Omagh can be **re-positioned and effectively relaunched as a regional hub** for tourism, services, education, culture and retail.

As indicated above, Omagh currently **lacks a cohesive wayfinding approach** that links orientation, directional and interpretation signage together under a brand that reflects the towns offering. Investing in an effective and well-designed wayfinding system would enhance the identity of the town and enable residents and visitors to discover more of Omagh.

A phased approach to marketing and promotion should be aligned to investment in product and place within the town, as well as an enhanced range of events and activities that animate and enliven the town centre. Leveraging key partners would be essential including Tourism NI, SW College and local businesses.

3 Economic Outlook and Growth Scenarios

This section presents trends for Fermanagh and Omagh and demonstrates economically where the area’s strengths, weaknesses and opportunities are. Considering the analysis in the previous sections in relation to population, employment and housing affordability, this section examines economic indicators (GDP and sales), historical occurrences and forecast trends for Omagh in the coming years. It also examines the effect that the COVID-19 pandemic and the EU-Exit will have on Omagh’s economic outlook.

From this analysis, four scenarios for the outlook of economic growth in Omagh are discussed, with suggestions for how the higher growth rates could be achieved and how the lower outturn could be avoided. Omagh has many strengths to offer to the region and should focus on maximising the opportunities identified to achieve the GDP growth rates at the higher end of the forecast range.

3.1 Economic Growth

Economic growth, measured by total GDP/GVA and changes to these indicators over time, indicates the strength of an economy. Contributions by location or sector can be used to identify stronger economies, as well as comparisons to highlight where there is growth potential.

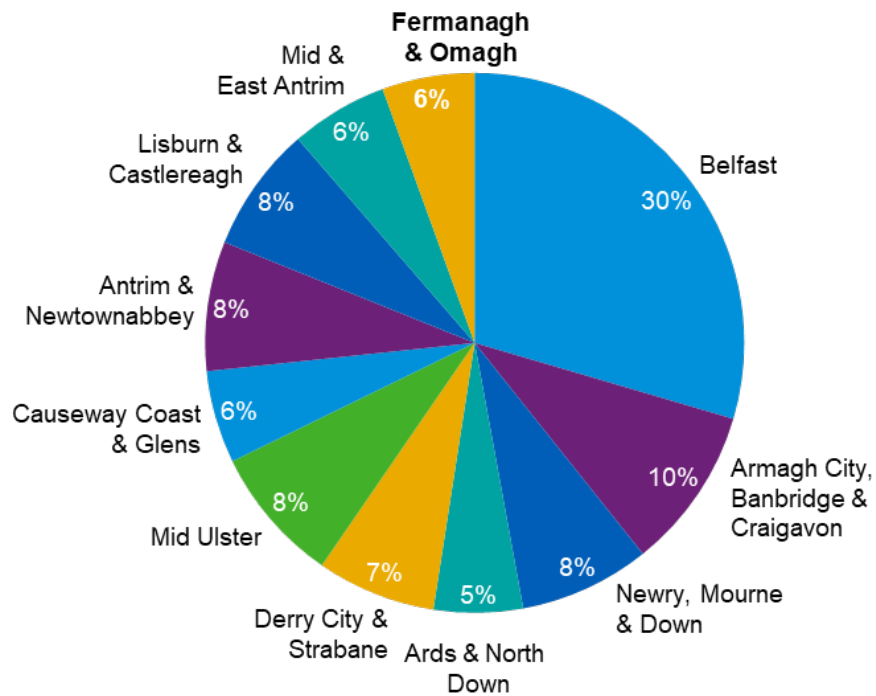


Figure 3.1: Breakdown of Northern Ireland GDP (2019), % (Total GDP £48,585m) ³¹

Pre-covid (2019), NI GDP was £48,585m with Fermanagh and Omagh contributing 5.5% (£2,693m). This contribution has been consistent across the previous 20 years with Fermanagh and Omagh GDP ranging between 5.3% and 5.6% of NI total GDP. Fermanagh and Omagh has the lowest population of the 11 district councils and contribute more per population than 6 of the other councils.

³¹ Source: ONS

While data on Omagh district's contribution to GVA is unavailable, on a population basis this would be £1,217m (45% of total).

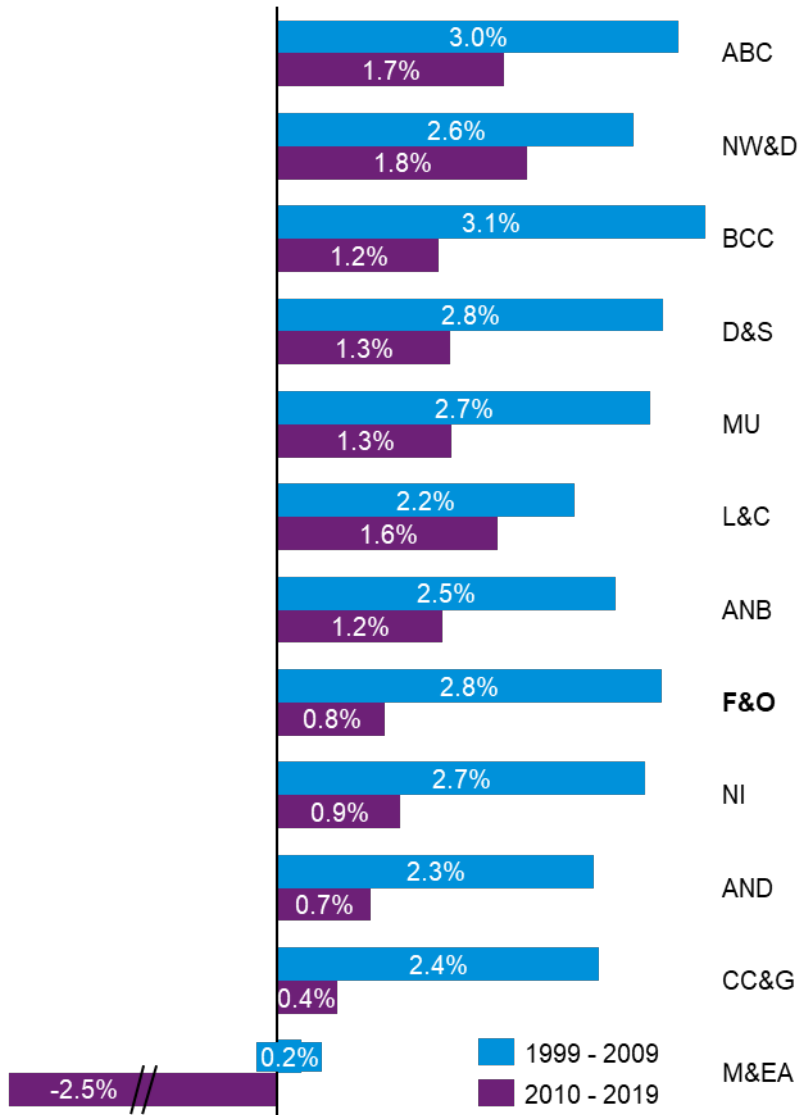


Figure 3.2: Average GDP Annual Growth Rates %, 1999 - 2009 & 2010 - 2019³²

The average annual GDP growth rate for FODC was 1.9% between 1999-2017, with lower levels of 0.5% in 2018 and 0.1% in 2019. However, in light of ambitions in the 10X economy agenda and the regional growth deals, forecasted growth may reach 3.6% for 2022, decreasing to 1.7% in 2023 due to increased inflation pressures and tightening of monetary policies.

As well as looking at GDP contributions, total sales per sector provides an indication of the contribution to economic output per industry and per person. Total sales from Fermanagh and Omagh have increased in recent years, to £1,369m in 2020, with the pandemic generating significant opportunities for a range of sectors in which the region

³² Source: ONS

has key strengths. The sectors providing the majority of sales in the district are Construction, Advanced Engineering & Manufacturing and Agri-Food.

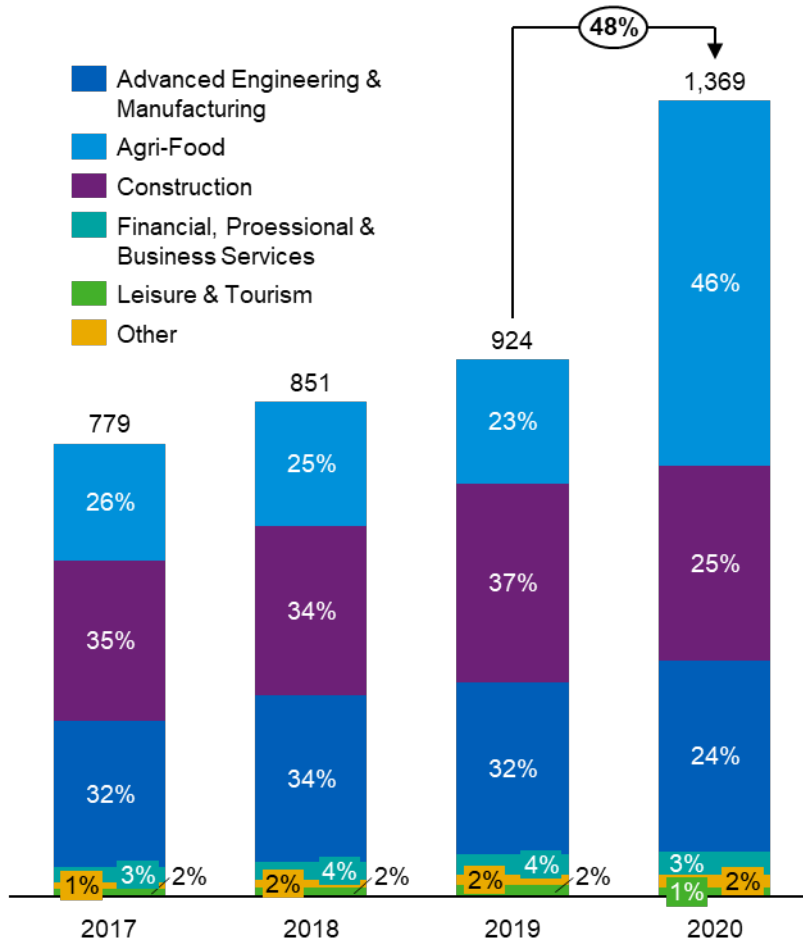


Figure 3.3: Fermanagh & Omagh District Sales per Sector, £m, 2017-20³³

On a sector level, there has been a substantial increase in sales in the agri-food industry from £200m in 2017 to £628m in 2020, accounting for 45.8% of total sales. Within the district, 24% of 2020 sales were within Advanced Engineering and manufacturing, notable key players in Omagh are Naturelle Consumer Products, Kenwell Engineering and Power Grid Civils: these firms invested a combined £9m in 2020.

³³Source: NISRA

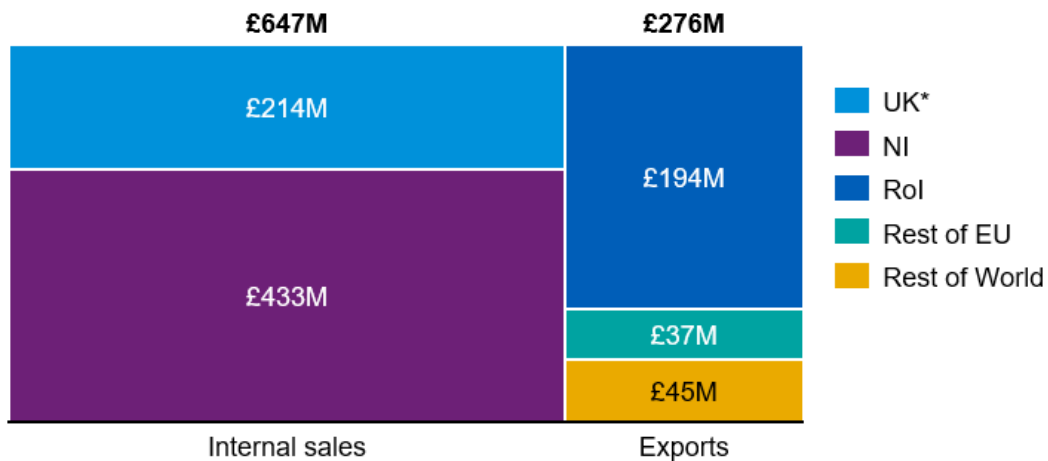


Figure 3.4: Breakdown of FODC 2020 Sales (Total sales £924 million)³⁴

Since 2017, the share of sales from Fermanagh and Omagh going to Great Britain and throughout Northern Ireland has reduced slightly by 2.3% and 5.2% respectively, whilst exports to EU (inc. ROI) have increased by 5.9%. This increase in EU sales reflects the unique position and opportunity provided to NI as the only land border between the UK and EU.

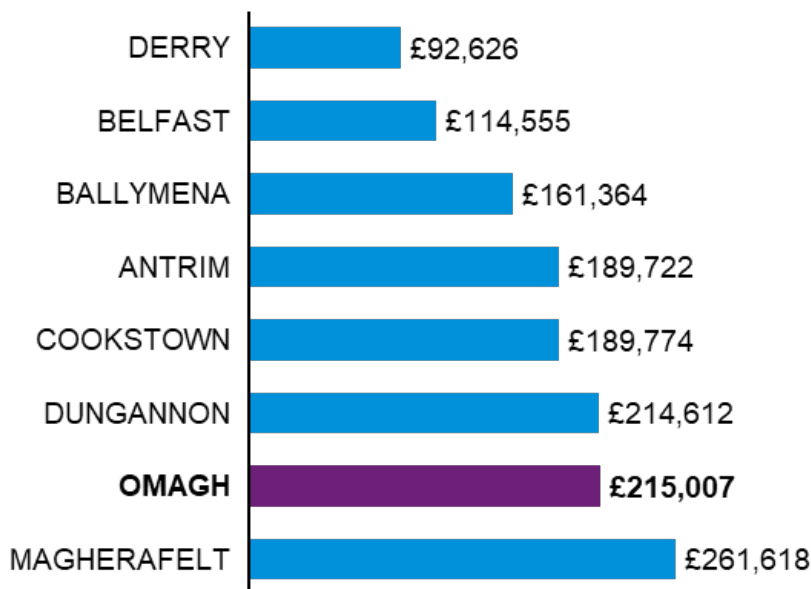


Figure 3.5: Sales per FTE 2020 (LGD 1992) ³⁵

In terms of sales per worker, Omagh (LGD 1992) ranks above average when compared with the 25 other old councils. In 2020 the average sales per FTE worker was £185,848, which Omagh exceeded with £215,007. Omagh has maintained this positioning from 2016 and had an increase in sales per worker from £211,063 in 2016. This high and improving productivity shows a competitive advantage for businesses to locate in Omagh compared to other councils.

3.2 Future economic outlook

Omagh, like the rest of the world, will continue to be impacted by the ongoing Covid-19 pandemic with some 67% of those surveyed in the Omagh DEA as part of the Fermanagh

and Omagh District Council Resident Survey in 2021 indicating that the pandemic had a negative impact on household income³⁶. Potential movement restrictions, health provision and work absences will all hinder the economic outlook of the district. However, some industries are well-placed to grow from the pandemic. Similarly, whilst there will be reductions in EU funding and negative consequences from EU Exit, Northern Ireland’s land border between the UK and Europe provides opportunity for the area to provide a unique service. Figure 3-6 below shows the impact of Covid-19 and EU Exit on key industries in Fermanagh and Omagh. The implications are discussed in more detail below.

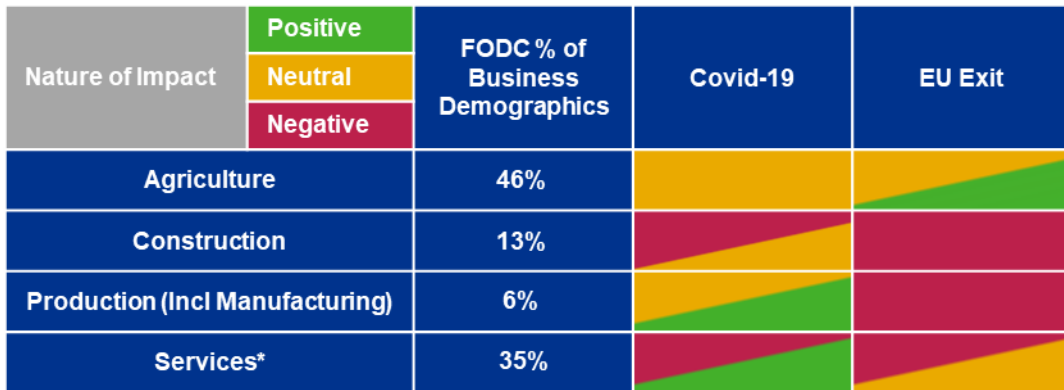


Figure 3.6: Impact of Covid-19 pandemic and EU Exit on key industries in FODC (KPMG outside-in perspective)³⁷

EU land border

The leading industries in Omagh are agri-food, advanced engineering & manufacturing, and construction. Since the NI Protocol came into force at the start of 2021, certain goods, particularly agri-food products, are being checked at Northern Ireland ports when being received from Great Britain which can then move freely to the Republic of Ireland. In terms of the UK, NI is in a unique position to trade with ROI, therefore agri-food manufacturing leaders in Omagh such as Fane Valley, Kerry Group and Strathroy Dairy are less exposed to EU Exit complications. However, issues around staffing shortage as a consequence of EU Exit have occurred across sectors, particularly production as seen in Omagh Meats and Foyle Meats. Similar staffing issues have also been experienced in the retail and hospitality sector having staffing difficulties for evening and weekend work due to staff migration.

Manufacturing NI have suggested that in 2022 the main concern coming from manufacturers across NI is the lack of staff within the sector rather than the NI Protocol. 60% of manufacturers reported labour as their biggest issue. NI has faced a continuous loss of EU migrant workers since 2016, with a reduction of approximately 1/3rd of the migrant workforce.

³⁴ Source: Invest NI Key Performance Indicators

³⁵ Source: Invest NI Key Performance Indicators

³⁶ FODC Resident Survey 2021 - telephone survey of 1002 residents of the Fermanagh and Omagh District Council area

³⁷ NISRA, KPMG Analysis

* Services include; wholesale & retail trade, transportation & storage, accommodation & food service, information & communication, financial & insurance, real estate, professional, scientific and technical, administrative and support service, public administration & defence, education, human health & social work, arts, entertainment & recreation, and other service

Despite the challenges arising from the UK exiting from the EU, cross border trade is at an all-time high, with food & live animals, chemicals & related products, and manufactured goods the most widely traded goods increased by ~56% in 2020-2021, totalling ~£5.9bn. Cross-border trade has increased in the agri-food sector, which highlights the potential to cooperate on cross-border agricultural opportunities.

EU funding gap

Omagh and the rest of Northern Ireland will no longer benefit from the European Social Fund and the European Regional Development Fund, which Omagh previously received funding for SMEs, small businesses and long-term unemployed programmes. This funding will end in March 2023, which is a £70m annual loss across Northern Ireland. This will have impacts throughout the economy, local communities and retail sites which relied on and benefitted from EU funding.

Despite EU Exit, almost £1bn will be available over the next seven years in Peace Plus funding. The UK has also established a £2.6bn Shared Prosperity Fund in the Governments 'Levelling Up' agenda with the aim of replacing EU funding. Fermanagh and Omagh District Council should be ready to respond to requests for business cases (when funding projects over £1m), bid for grants and demonstrate the value government investment could bring to the town.

Covid-19 Pandemic

The pandemic created significant challenges for many sectors with lockdown measures halting activity (e.g., hospitality, retail, construction) and economic growth declined in a number of these sectors. During the recovery phase, while there have been some returns to growth, several sectors are struggling to fill labour vacancies. This has been worsened by the loss of migrants from the UK exiting the EU. However, the pandemic generated significant opportunities for a range of sectors (e.g. online retail and professional services) including the transition to remote-working for the majority of office-based workers.

3.3 Sectoral analysis

Omagh has a range of successful sectors in the town and wider district. As outlined in the figure below Fermanagh and Omagh GVA per head for manufacturing and retail & wholesale are both above the Northern Ireland averages whereas construction and services are both below average. Lower construction GVA per head may stem from sector employees working outside of the FODC area.

Furthermore, the IDBR Business Demography identified 20 high growth³⁸ businesses in Fermanagh and Omagh every year during 2015 – 2020. The high growth rate³⁹ in the FODC area during 2020 (4.4%) was above the NI average (4.3%), ranking second of all District Council areas in NI only behind Belfast (4.8%). Those industries that experienced the largest high growth rates across NI in 2020 included Information & Communication (9.5%), Education (5.9%), Construction (5.3%), production (5%) and health (5%).

³⁸ High growth measures businesses, who had at least 10 employees in 2017, that had an average growth in employment of greater than 20% per year between 2017 to 2020.

³⁹This high growth rate is expressed as a percentage of the 2020 active businesses with 10 or more employees (Businesses born in 2017 are not included).

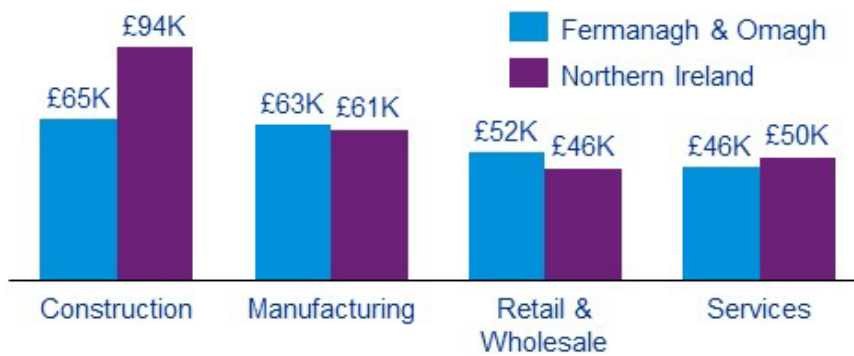


Figure 3.7: FODC GVA per head by industry (2019)⁴⁰

An overview of sectoral employment forecasts at FODC area level for 2020-2030 is provided through a local model developed by the Ulster University Economic Policy Centre (UUEPC)⁴¹. This forecast indicates significant growth in the sectors of Construction (20%), Professional & Scientific (22%), and Arts & Entertainment (11%) at FODC area level.

As outlined in section 2.4.2, significant sectors of employment for Omagh town include Wholesale And Retail Trade, Education, Health and Public Administration And Defence. When examined through the UUEPC local model, at FODC area level a decline of -8% is forecast for the retail sector, with increases in Public Administration (5%), Education (3%), and Health (5%). In relation to the hospitality industry, Accommodation is forecast to experience 9% growth at FODC area level along with 11% growth in Arts and Entertainment. However, there has been little change in the number of non-domestic properties in Omagh town between 2018 & 2021.



Figure 3.8: Omagh town number of non-domestic properties, 2018 & 2021⁴²

Further information on a select number of key sectors for Omagh is discussed below, highlighting the opportunities for future growth.

⁴⁰ Source: Invest NI Key Performance Indicators

⁴¹ Local model developed as part of the UUEPC Spring Outlook 2021 cited in FODC & UUEPC, *A Socio-Economic Profile of the Fermanagh and Omagh District* (2022).

⁴² Department for Communities

Tourism and hospitality

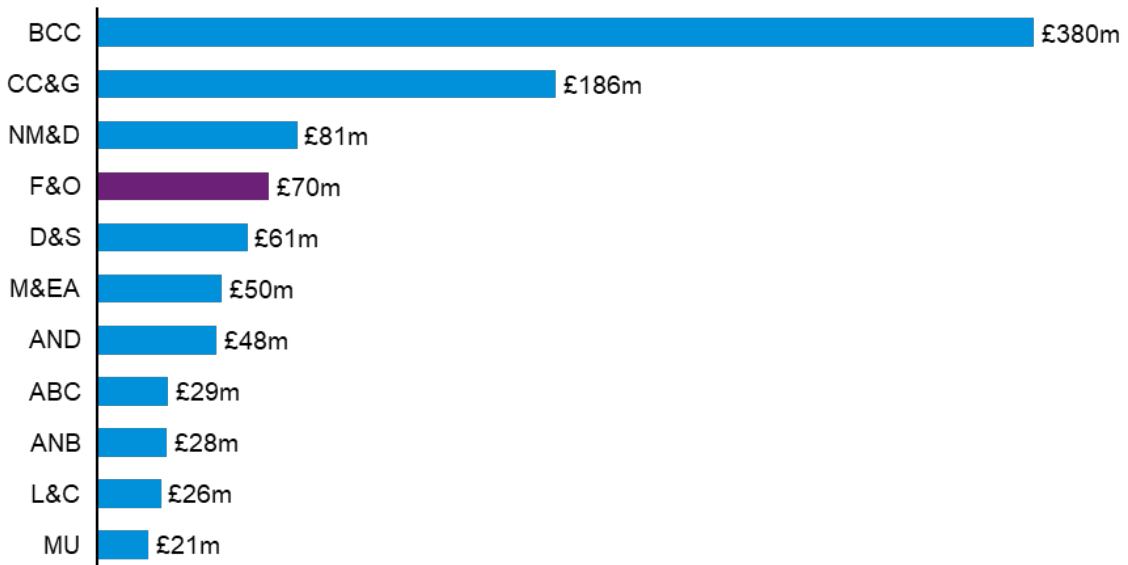


Figure 3.9: Expenditure of Overnight Trips by Local Government Districts Moving Average 2017-19 NI Total £1bn⁴³

The broader Fermanagh and Omagh area has the potential to build on existing tourism to increase expenditure and overnight stays. In 2017-2019 the main reason for overnight trips was holiday/leisure, accounting for 57% of trips, followed by 36% visiting friends and relatives and 6% for business. Fermanagh and Omagh account for an estimated 8% of overnight trips in NI in 2019 with a gradual growth in stays from 304,855 in 2016 to 427,568 in 2019. As such there is also opportunity for Omagh town to capitalise on its tourism potential and further develop its tourism offering. However, as outlined in Section 2.8, this will require improvements to the town’s infrastructure, branding and marketing if these ambitions are to be achieved.

Section 2.8 *Tourism and Hospitality* provides greater detail on the current tourism facilities offered within Omagh town.

Retail

Retail makes up the largest portion of employment within Omagh town. The split of retail sales sold per type of good is shown below with the sale of convenience goods having the largest contribution to retail trade. In 2019 over half of annual convenience goods sales was from Asda, Dromore Rd (£49.9m) followed by Dunnes Store, Irishtown Rd (£8.7m). Sales of clothing in Omagh has seen a decrease between 2016 and 2019. This is likely because the data doesn’t capture internet sales.

⁴³ Source: NISRA

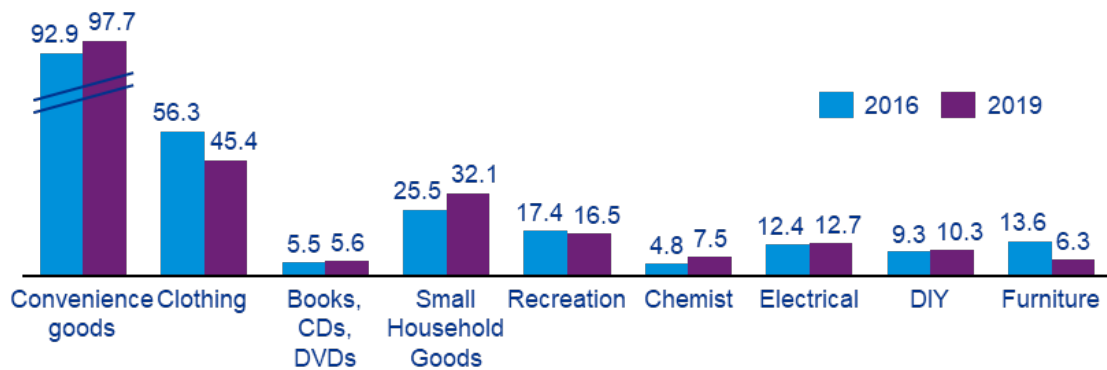


Figure 3.10: Retail trade in Omagh town, £ millions 2016 and 2019⁴⁴

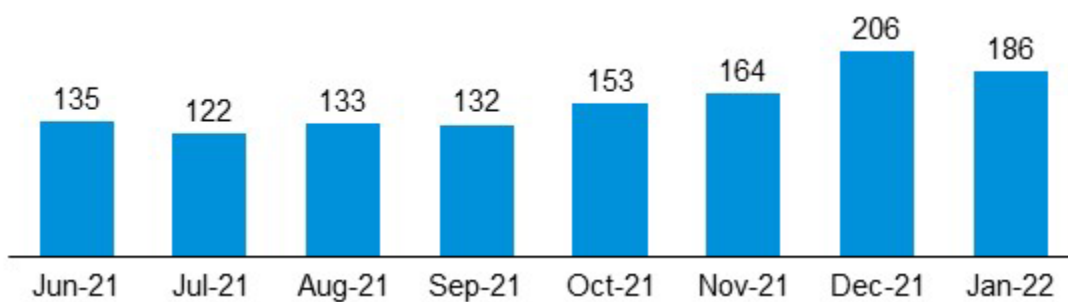


Figure 3.11: Monthly footfall in Omagh town centre (000s) ⁴⁵

Omagh town footfall totalled 1,231,638 between June 2021 and January 2022 with almost half of this footfall in Q3 Oct 21- Dec 21. This reflects the ease in Covid-19 restrictions and peak retail time in the lead up to Christmas. It suggests that when people are able, they are keen to visit the town centre.

Construction

The construction sector makes up 9% of GVA and 8% of the employment within the Fermanagh and Omagh district. This sector has since seen significant growth in recent years with a 15% increase in employment between 2016 to 2020. Key businesses include Woodvale Construction and Adman. The sector is likely to face challenges in supply chains driven by UK Exit, Covid-19, and the conflict in Ukraine. This could place pressure on businesses and households to meet the costs of completing construction projects. Government support may be required to maintain employment and ensure key infrastructure is completed and maintained.

Figure 3-6 above displays the negative impacts EU Exit and Covid-19 have had on the sector with Covid-19 halting activity and EU Exit creating uncertainty around supply chains.

Advanced Engineering & Manufacturing

The manufacturing sector makes up 16% of GVA and 14% of the employment within Fermanagh and Omagh district. This industry has greatly contributed to the recent increase in GVA for the region with a 30% increase in sales between 2017 to 2020. Key engineering & manufacturing businesses in Omagh include Terex GB, Naturelle Consumer Products, Kenwell Engineering and Power Grid Civils. The large contribution

⁴⁴ Source: Nexus Planning - Retail and Commercial Leisure needs Assessment 2017 & 2020

⁴⁵ Source: Fermanagh & Omagh District Council Data

to growth in GVA from this industry and Omagh should ensure there is the right environment to support further opportunity for growth. However, the sector is struggling with staff shortages due to EU Exit.

Agri-Food

The agriculture sector that makes up majority on businesses demographics within the FODC area has seen little negative impact as a result of impact Covid-19 and EU Exit. They have seen an increases in costs of inputs however this has been offset by the increased price of their outputs.

In 2020, 45% of the businesses within Fermanagh and Omagh were Agriculture businesses, employing 36% of the total employed. The sector contributed £628m in sales, accounting for 45.8% of total sales in 2020, an increase from 23.1% in 2019.

3.4 Future Scenarios

Analysis for the region’s historic growth, population, sales, employment, and sectors has been undertaken to develop four different scenarios to inform Omagh’s potential growth rate between 2022 to 2030. Given the uncertainty in the economy and external influences over the next 20 years, the scenarios reflect a range of outcomes which may arise.

The Northern Ireland economy saw signs of significant recovery and high growth towards the end of 2021. However, the outlook for the region is uncertain with the war in Ukraine and increased inflationary pressure. Forecasts provided by Danske Bank, Ulster University and NISER predict GVA to increase between 3% to 4% in 2022. Decreasing to 1% to 2% for 2023 and 2024 as shown in the table below.

Table 3.1: 3rd party NI gross value-added forecasts

Scenario	2021	2022	2023	2024	Average 2021-24
Danske Bank ⁴⁶	6.8%	3.6%	1.7%	-	4.0%
UUEPC16 ⁴⁷	5.8%	4.1%	2.2%	1.8%	3.5%
NIESR ⁴⁸	4.6%	2.9%	1%	0.8%	2.3%
Average of estimates	5.7%	3.5%	1.6%	1.3%	3.3%

Four scenarios have been created to forecast growth for Omagh to 2030. These scenarios are displayed in Table 3-2 below each with a different proposed annual growth rate and the probability for each scenario occurring. The scenario that has the highest probability of occurring is Central B with an annual average growth rate of 1.5% per annum.

⁴⁶ <https://danskebank.co.uk/-/media/danske-bank/uk/business/economic-analysis/g>

⁴⁷ https://www.ulster.ac.uk/_data/assets/pdf_file/0009/883683/UUEPC-Summer-2021-Economic-Outlook.pdf

⁴⁸ <https://www.niesr.ac.uk/wp-content/uploads/2022/02/UK-Economic-Outlook-Winter-2022.pdf>

Table 3.2: Omagh scenarios considered

Scenario	Narrative and rationale	Annual average economic growth rate, 2022-2030 ¹	Scenario probability (KPMG viewpoint)
S1 Central A	<ul style="list-style-type: none"> ▪ The Town's economy grows in line with the 3-year average growth rate pre-Covid (2017-2019) for NI overall ▪ Assumes recent trends pre-Covid extend into future 	0.5% p.a.	20%
S2 Central B	<ul style="list-style-type: none"> ▪ The Town's economy grows in line with the 5-year average growth rate pre-Covid (2015-2019) for NI overall ▪ Captures recent growth per Central A as well as higher growth in years pre-Brexit referendum 	1.5% p.a.	45%
S3 Upside	<ul style="list-style-type: none"> ▪ The Town's economy grows at a faster rate than it has grown at in recent years, and at a faster pace than the NI economy is expected to grow at overall ▪ Assumes the Town can achieve a step change in growth relative to NI 	2.5% p.a.	30%
S4 Downside	<ul style="list-style-type: none"> ▪ The Town's economy does not grow materially over the entire period ▪ Scenario would arise only in context of an economic downturn that reduces annual average growth 	0.1% p.a.	5%

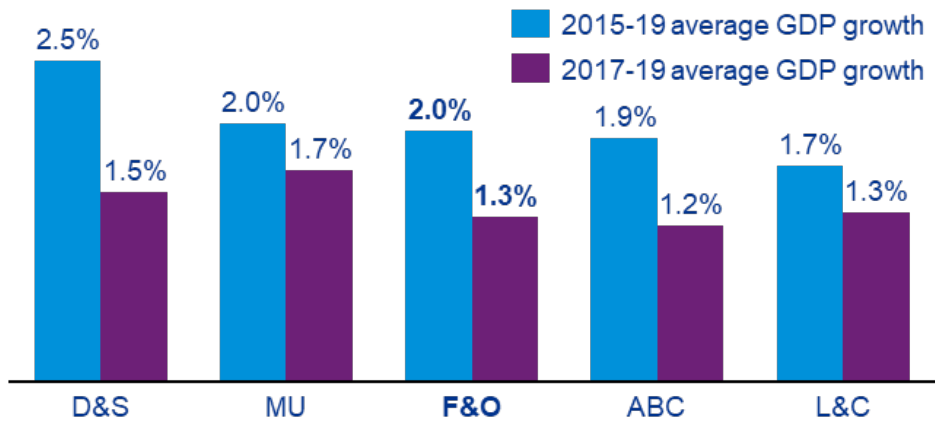


Figure 3.12: Average GDP growth at peer councils, %⁴⁹

Fermanagh and Omagh’s historic growth rates have been compared against those of other similar councils to confirm that they align and can be used to help forecast Omagh growth. For the pre-Covid period 2015-2019:

- Fermanagh and Omagh district had an annual growth rate of 0.1% to 3.7% (averaging 2.0% p.a.)
- Derry City and Strabane had an annual growth rate of 1.1% to 6.7% (averaging 2.5% p.a.)
- Armagh City, Banbridge and Craigavon had an annual growth rate of 0.9% to 4.3% (averaging 1.9% p.a.)

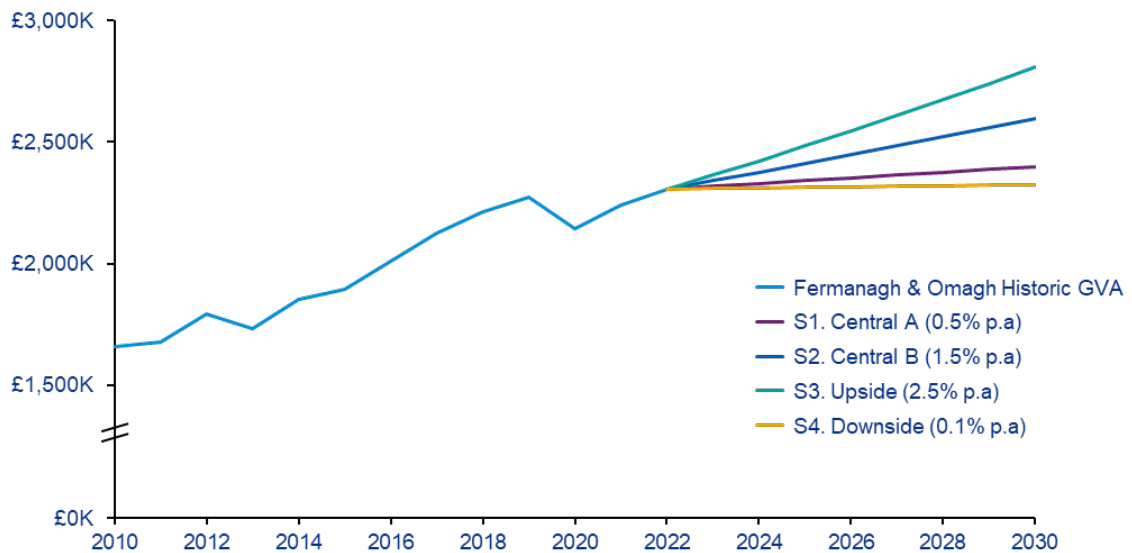


Figure 3.13: Fermanagh and Omagh district GVA, 2010-2030, £⁵⁰

⁴⁹ Source: ONS

⁵⁰ Source: ONS, KPMG analysis

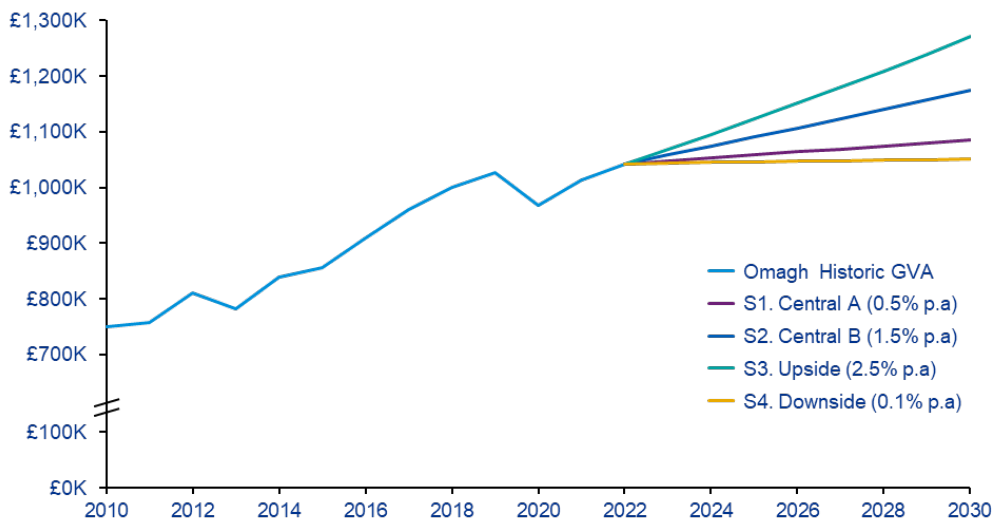


Figure 3.14: Estimated Omagh district GVA (based on population), 2010-2030, £⁵¹

The impacts on the four scenarios on Omagh district are displayed above. Due to historic GVA only being calculated for Fermanagh and Omagh district the GVA for Omagh is calculated based off Omagh population share of Fermanagh and Omagh.

- The cumulative difference between Central A and Central B for 2022 to 2030 is estimated to be £393 million GVA for Omagh.
- The cumulative difference between Central B and Upside for 2022 to 2030 is estimated to be £412 million GVA for Omagh.

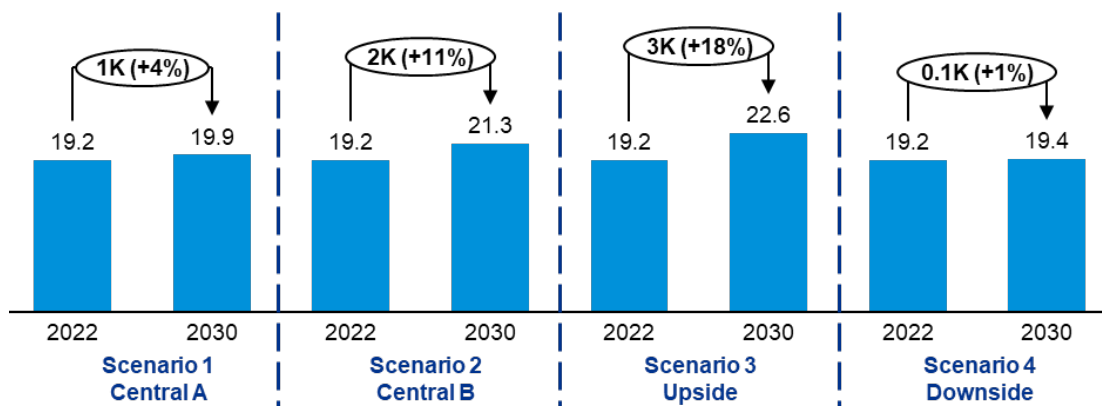


Figure 3.15: Expected job growth for Omagh District 2022 and 2030⁵²

The total estimated employment in Omagh District in 2022 is 19,200, based on the population split between Fermanagh and Omagh district. Under Scenario 2 Central B the number of jobs in Omagh District is estimated to increase by ~2,100 (11%) between 2022 and 2030. This is an average of 1.2% increase per annum. The services sector is expected to increase the most with ~2,300 additional jobs created by 2030.

⁵¹ Source: ONS, KPMG analysis

⁵² Source: NISRA, KPMG analysis

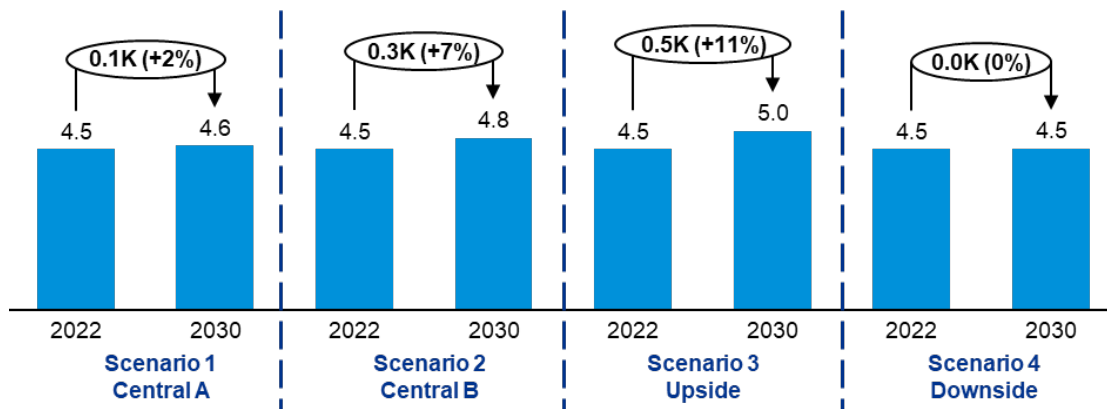


Figure 3.16: Expected job growth for Omagh town 2022 and 2030⁵³

The total employee jobs in 2022 is 4,500 based on the NI Town Centre Database. Under Scenario 2 Central B the number of jobs in Omagh town is estimated to increase by ~300 (7%) between 2022 and 2030, with growth of 0.8% per annum. Omagh town has a lower forecasted percentage change than Omagh District because of the high growth manufacturing jobs being located outside of the town.

To achieve the higher growth targets set in Central B (1.5% p.a.) and Upside (2.5% p.a.) there is a need for higher levels of FDI, higher growth in indigenous exporting businesses, increased levels of R&D and skills development, investment in schools' sites, innovation hub spill overs, and additional induced spending arising from higher footfall through public realm improvements. This can be achieved by:

- Ensuring SMEs in Omagh are provided with support and guidance to maximise the opportunities for cross-border and export growth
- Researching and embracing new approaches and technology
- Fostering collaboration and partnership working between industry and academia
- Growing the number of businesses in hubs and encouraging the development of clusters at existing and future hubs to promote economic development opportunities
- Investing in infrastructure to support delivery of and improve access to skills development
- Strengthen the physical quality of the town centre and improve on pedestrian connectivity
- Develop existing relationships with other partner organisations (e.g., Community Planning Partners, Councils, Community/Voluntary sector) to identify and maximise shared space and/or service delivery opportunities.

⁵³ Source: Department for Communities, KPMG analysis

4 Policy Analysis

4.1 Introduction

This section sets out the policy framework and principles to underpin the Omagh Place Shaping Plan 2035. This includes international, European, Northern Ireland level, regional, and local frameworks that set policy and best practice for social, economic and community development. This sets a strong foundation for shaping a vision and objectives for an attractive and vibrant Omagh in 2035. This policy foundation suggests several key principles that the Omagh Place Shaping Plan 2035 vision can draw on:

A table of policies reviewed as part of this analysis is included below.

Table 4.1: Policy Review

Scale	Policy Document
International	The 2030 Agenda – UN Sustainable Development Goals
Northern Ireland	Northern Ireland Economic Recovery Action Plan
	Northern Ireland Domestic Tourism Strategy 2020
	Regional Development Strategy 2035
Regional	MSW Regional Economic Strategy 2020
	Fermanagh and Omagh District Council Corporate Plan 2020 – 2024
	FODC Local Development Plan 2030 – Draft Plan Strategy
	FODC Climate Change and Sustainable Development Strategy 2020 – 2030
	Fermanagh and Omagh 2030 Community Plan – 2020 Update

4.2 The 2030 Agenda – UN Sustainable Development Goals

The 2030 Agenda for Sustainable Development, adopted by all United Nations Member States in 2015, provides a shared blueprint for peace and prosperity for people and the planet, now and into the future. At its heart are the 17 Sustainable Development Goals (SDGs), which are an urgent call for action by all countries - developed and developing - in a global partnership. They recognize that ending poverty and other deprivations must go together with strategies that improve health and education, reduce inequality, and spur economic growth – all while tackling climate change and working to preserve natural environment and biodiversity. As the United Kingdom of Great Britain and Northern Ireland are one of these participating states, the SDGs and their targets must be implemented as a supranational set of frameworks for which to base future national and regional policies. These SDGs are heavily linked to national and regional planning policy within the UK and Northern Ireland and other participatory member states. These goals are integrated and reflected in Northern Ireland’s policy framework and the supporting regional and local policy hierarchy. As such, they inform and shape policy in Northern Ireland across all scales.

Of these 17 SDGs, there are SDGs which are particularly relevant. Goals such as Goal 11: Sustainable Cities and Communities and Goal 17: Partnerships for the Goals have a particular applicability and relevance to the Northern Ireland region. These SDGs contain within them several targets and indicators to develop a platform for which to begin understanding and implementing the SDGs at national, regional and local levels:

Target 11.3: By 2030, enhance inclusive and sustainable urbanization and capacity for participatory, integrated and sustainable human settlement planning and management in all countries

Target 11.2: By 2030, provide access to safe, affordable, accessible and sustainable transport systems for all, improving road safety, notably by expanding public transport, with special attention to the needs of those in vulnerable situations, women, children, persons with disabilities and older persons

Target 11.4: Strengthen efforts to protect and safeguard the world’s cultural and natural heritage

Target 17.16: Enhance the global partnership for sustainable development, complemented by multi-stakeholder partnerships that mobilize and share knowledge, expertise, technology and financial resources, to support the achievement of the sustainable development goals in all countries, in particular developing countries

Target 17.17: Encourage and promote effective public, public-private and civil society partnerships, building on the experience and resourcing strategies of partnerships Data, monitoring and accountability.

4.3 Northern Ireland Economic Recovery Action Plan

The purpose of the *Northern Ireland Economic Recovery Action Plan* is to both revitalise Northern Ireland’s economy and to embrace the challenges presented by the Covid-19 pandemic in building a more competitive, inclusive and greener economy for Northern Ireland. The Action Plan sets out a range of decisive actions to kick-start economic recovery over the 12 to 18 months from the Plan’s adoption in February 2021.

The framework of the Plan is structured with the aim of delivering decisive interventions that will contribute to:

- Building a **higher skilled** and **agile workforce**
- Pursuing and securing **better jobs**
- Producing a more regionally **balanced economy**.

The successful delivery of the Action Plan will require an additional £290m in the 2021-22 year. This additional funding is distributed into 4 key action areas:

Table 4.2: NI Economic Recovery Action Plan - Action Areas

Action Areas	
1. R&D and Innovation (£20m)	2. Greener Economy (£20m)
3. Highly Skilled and Agile Workforce (£50m)	4. Investment Trade and Exports (£200m)

Within the Action Plan, each action area highlights several high-level objectives accompanied with past, current and future actions implemented by the Department for the Economy. A sample of these are provided below

Table 4.3: NI Economic Recovery Action Plan - Sample of high-level objectives

Objective	Theme
Launching a new Northern Ireland Skills Strategy, to help employers and individuals attain the skills needed to grow our economy and boost productivity, by addressing existing skills imbalances, improving lifelong learning, with a focus on the digital spine which cuts across all sectors	Labour and Skills
Assisting SMEs to gain the skills they need to engage in innovation activities	Research and Development
Fostering collaboration and partnership working between industry and academia	Research and Development
Stimulating demand for local businesses including retail, restaurants and hotels	Investment, Trade and Exports
Ensuring SMEs in Northern Ireland are provided with support and guidance to fully benefit from opportunities for cross-border growth	Investment, Trade and Exports
Delivering a net zero carbon energy transition	Green Economy

4.4 Northern Ireland Domestic Tourism Strategy 2020

In 2018 the domestic tourism accounted for 44 percent of all overnight trips taken in Northern Ireland and 31 percent of all spend. In real terms this equates to approximately 2.2 million overnight trips and an estimated expenditure of £300 million by Northern Ireland residents. The domestic market is a critical part of Northern Ireland’s tourism economy. Its continued development will be key to Northern Ireland achieving its overall tourism ambitions. The domestic tourism strategy aims to capitalise on the domestic tourism market’s opportunities for growth. It outlines a situational analysis of the current state of the domestic market, sets out the scale of ambition for the future, details the new segmentation model, and outlines the strategy and key actions required to support the future development and growth opportunities.

In order to deliver the desired growth for the domestic market, the strategy focuses on four key pillars:

- Effective Communications
- Compelling experiences, attractions and events
- Citizen and community engagement and advocacy
- Industry and stakeholder engagement

Each pillar outlines its overarching objective along with a suite of initiatives to realising these objectives. Key performance indicators are also set out in accordance with the strategy and its objectives and actions. The review and strategy for growth these aspects of the strategy have produced provides clear direction on the key actions to be taken within the domestic tourism sector in Northern Ireland.

Table 4.4: Sample of Key Initiatives from NI Domestic Tourism Strategy

Key Initiative	Theme
Developing peoples’ knowledge of the regional offer	Effective Communications

Development of the night-time economy	Compelling Experiences, Attractions and Events
Infrastructure, facilities development and policy	Compelling Experiences, Attractions and Events
Establish and develop a domestic tourism advocacy strategy/programme	Citizen and Community Engagement
Building on the WorldHost Programme, create a systemic approach to recruitment, training and supporting local volunteers to contribute to tourism experience.	Citizen and Community Engagement

4.5 Regional Development Strategy 2035

The Regional Development Strategy 2035 (RDS) is the spatial strategy of the Northern Ireland Executive. The RDS provides an overarching strategic planning framework to facilitate and guide the public and private sectors in the nature of spatial planning and development in Northern Ireland out to 2035. The RDS contributes to the Programme for Government and Investment Strategy for Northern Ireland by co-ordinating policies with a spatial dimension and providing the strategic spatial policy context for decisions by both central and local Government. The Strategy is comprised of 4 key elements:

1. A **Spatial Framework** which divides the region into 5 components based on functions and geography
2. **Guidance** at two levels:
 - a) A Regional level that is to be applied to all parts of the region and
 - b) Specific guidance for each element of the Spatial Framework
3. A **Regionally Significant Economic Infrastructure** section which identifies the need to consider strategic infrastructure projects
4. **Implementation:** This section sets out how the strategy will be implemented.

The Strategy also sets out its overarching vision for the plan period, which strongly aligns with the sentiments found within the Programme for Government’s aims and objectives:

“An outward-looking, dynamic and liveable Region with a strong sense of its place in the wider world; a Region of opportunity where people enjoy living and working in a healthy environment which enhances the quality of their lives and where diversity is a source of strength rather than division.”

This vision is supported by 8 high-level aims

Table 4.5: Regional Development Strategy High-level Aims

High-level aims	High-level aims
1. Support strong, sustainable growth for the benefit of all parts of Northern Ireland	2. Strengthen Belfast as the regional economic driver and Londonderry as the principal city of the North West
3. Support our towns, villages and rural communities to maximise their potential	4. Promote development which improves the health and well-being of communities
5. Improve connectivity to enhance the movement of people, goods, energy and information between places	6. Protect and enhance the environment for its own sake
7. Take actions to reduce our carbon footprint and facilitate adaptation to climate change	8. Strengthen links between north and south, east and west, with Europe and the rest of the world.

In order to realise the implementation of the vision and accompanying aims of the RDS, two types of Strategic Guidance are outline: Regional Guidance (RG) and Spatial Framework Guidance (SFG).

Regional Guidance is shaped by three thematic areas: Economy, Society and Environment, with each of these thematic areas containing a suit of regional guidance objectives to be applied throughout all parts of Northern Ireland.

The Spatial Framework Guidance relates to the 5 key components of the Spatial Framework, with specific guidance in addition to the Regional Guidance for each component of the Spatial Framework:

1. The Metropolitan Area centred on Belfast.
2. Londonderry principal city of the North West
3. Hubs and Clusters of Hubs
4. The rural area
5. Gateways and corridors

Omagh is identified within the Spatial Framework as a Hub. The main SFG for Omagh is primarily related to the improvement of its public realm, its importance as a key hub along the Western Economic Corridor which connects Omagh with Londonderry and Dublin, as well as strengthening Omagh as a skills and knowledge-based economy, underpinned by its educational campuses. The SFG also identifies need to continue to build a strong Small and Medium Enterprise base in Omagh extending across manufacturing, services and construction.

In addition to this, the Strategy contains chapters on Strategic Infrastructure and Strategy Implementation:

- **Strategic Infrastructure improvements** are structured around four main areas: Transport, Telecoms, Renewable Energy and Waste and Climate Change.
- The Strategy Implementation contains delivery mechanisms for both central and local government, in addition to collaboration with international neighbours and monitoring and review procedures.

Table 4.6: Sample SFGs

SFG	Theme
SFG10: Identify and consolidate the roles and functions of settlements within the clusters	Economy and Development
SFG11: Promote economic development opportunities at Hubs	Economy and Development
SFG12: Grow the population in the Hubs and cluster of Hubs	Demographics and Society

4.6 Regional Strategic Transport Network Plan 2015

The Regional Strategic Transport Network Transport Plan 2015 (RSTN TP) has been prepared by the Department for Regional Development. The Plan is based on the

guidance set out in the Regional Development Strategy (RDS) and the Regional Transportation Strategy (RTS). The RSTN of Northern Ireland comprises the complete rail network, five Key Transport Corridors (KTCs), four Link Corridors, the Belfast Metropolitan Transport Corridors and the remainder of the trunk road network (see figure overleaf).

The Plan consists of proposals for the maintenance, management and development of this transport network up to the end of 2015. The Plan takes a realistic view of the scale of possible investment by closely following the funding levels envisaged in the RTS, which have been extrapolated to match the longer period of the RSTN TP. The Plan presents a number of key outcomes compared against a benchmark of the situation in 2001. To monitor the implementation of the Plan, these outcomes have been converted into targets, which the Plan is expected to achieve. The objectives of the RSTN TP are:

- To support the Spatial Development Strategy in the RDS based on hubs, corridors and gateways
- To develop and maintain the RSTN to enhance accessibility on an integrated basis for all users, including freight
- To examine access to regional gateways and cross border links with an emphasis on improving connections from the 5 key transport and 4 link corridors
- To contribute appropriately to the RTS targets
- To conform to the relevant expenditure by mode envisaged in the RTS, or in a few cases present a case for a different approach
- To set out plans for short, medium and longer-term proposals taking account of the RTS budget profile
- To identify a set of targets, performance indicators and other outputs that can be used to measure progress against strategic objectives
- To provide input into local development plans prepared by DoE Planning Service.

Measures within the Plan also fall into four categories. These categories support the key initiatives, objectives and actions, investment framework and assumed funding as a result of the proposals set out in the Plan:

- Walking and Cycling
- Bus
- Rail
- Highways

The implementation, monitoring and review of the Plan is set against the four key outcome areas of the RTS:

- Environment
- Safety
- Economy
- Accessibility

It is envisaged that the implementation of the Plan over the coming years will start to bring significant benefits to users of the RSTN alongside a wide range of other benefits related to the four key outcome areas of the Plan and wider RTS.

4.7 MSW Regional Economic Strategy 2020

The Regional Economic Strategy (RES) for the Mid South West region (MSW) sets out the vision and ambition for the MSW region economy. It identifies the opportunities and challenges faced by the region and sets out the priority pillars around which future

investment and actions to realise the region’s ambitions will be framed. The Strategy establishes four pillars for action in key priority areas:

1. Future-proofing the skills base: skills and access to labour are both a major current and future constraint to growth and competitiveness in MSW.
2. Enabling Infrastructure: investment in infrastructure is a critical enabler to realising growth ambitions in all other areas of the RES.
3. Boosting Innovation and Digital Capacity: crucial enabling technologies such as data analytics, robotics, automation, Industry 4.0, machine learning, artificial intelligence, augmented reality, advanced materials and production techniques, and to exploit the growth opportunities these technologies hold for the region.
4. Building a High-Performing Visitor/Tourist Economy: focus within the RES will be on selective product development only within MSW alongside positioning the region much more within the ‘all-island’ visitor economy.

Within each of these four pillars are a suit of potential actions and project concepts for future development and prioritisation.

The Strategy also contains a socio-economic analysis of the MSW region to illustrate a current profile of the region. Key features of the MSW region presented include regional GVA, labour force population, exports and sectoral employment figures. These metrics and subsequent socio-economic analysis provide a foundation from which to best chart the future of the MSW region for its economy and its communities.

Furthermore Pillar 2: Enabling Infrastructure contains measures relating to placemaking, in particular, with actions surrounding the ‘future-proofing’ high streets. These actions are proposed to be supported by a High Street Challenge Fund aimed at supporting rejuvenation and transformation through targeted funding for the regeneration of properties and sites.

4.8 Fermanagh and Omagh District Council Corporate Plan 2020 – 2024

The Fermanagh and Omagh District Council Corporate Plan 2020 – 2024 sets the strategic direction for Fermanagh and Omagh District Council for the period 2020 out to 2024. The Plan sits within a framework of regional and local plans which, when taken together, aim to improve wellbeing for all. It aims to contribute towards delivering the six long-term outcomes which communities outlined as the key factors to improving quality of life in Fermanagh and Omagh:

- Outcome 1:** Our people are healthy and well – physically, mentally and emotionally
- Outcome 2:** Older people lead more independent, engaged and socially connected lives
- Outcome 3:** Our communities are inclusive, safe, resilient and empowered
- Outcome 4:** Our people have the best start in life, with lifelong opportunities to fulfil their potential
- Outcome 5:** Our economy is thriving, expanding and outward looking
- Outcome 6:** Our outstanding and culturally rich environment is cherished, sustainably managed and appropriately accessible.

These six outcomes are supported by the UN Sustainable Development Goals. The outcomes are further structured under three overarching themes which are consistent

across both the Corporate Plan, Community Plan and Local Development Plan. The three themes also relate to the three sustainable development pillars – social, economic and environment:

1. People and Communities
2. Economy, Infrastructure and Skills
3. Environment

In support of both the three overarching themes and six long-term outcomes, the Plan adopts a suite of actions within each outcome area, with these actions falling under both high-level and on-the-ground implementation.

The Vision for the plan reinforces the sentiments of the three thematic areas and six long-term outcomes in delivering a safe, connected, prosperous and sustainable district:

“Our Vision for Fermanagh and Omagh is of a welcoming, shared and inclusive district, where people and places are healthy, safe, connected and prosperous; and where our outstanding natural, built and cultural heritage is cherished and sustainably managed.”

To resource and support the work of the council in delivering the Corporate Plan, four enablers are identified as galvanising the delivery of the Plan over the plan period:

- | | |
|--------------------------------|-------------------------------|
| 1. People | 3. Estates and Infrastructure |
| 2. Governance and Partnerships | 4. Finance |

Section 4 of the plan, ‘Improving Our Services’, identifies priority areas which are key to delivering a sustainable, liveable and prosperous district. These priorities are overlaid by the specific outcomes which will have a direct impact on realising the improvements outlined for these priority areas. The priority areas range from positive climate action, supporting health and wellbeing to jobs, the local economy and tourism and tackling disadvantage.

Table 4.7: Sample Actions from the FODC Corporate Plan

Action	Theme
Establish Fermanagh and Omagh as an Age Friendly District through delivery of the Age Friendly Strategy and Action Plan	Age Friendly
Develop and deliver a sustainable action plan for inclusive and accessible play spaces and play provision across the district that meets the play needs of children and young people	Placemaking
Work with partners to support local businesses in improving their preparedness and response to issues arising from Brexit	Economy and Development
Conserve and promote the natural, built and cultural heritage of our district	Natural and Cultural Heritage
Deliver on our responsibilities to improve the quality of the local environment through the Clean Neighbourhoods and Environment (NI) Act 2011, including working with communities to develop initiatives aimed at creating and promoting community pride in local neighbourhoods	Natural and Cultural Heritage

4.9 FODC Local Development Plan 2030 – Draft Plan Strategy

The Draft Plan Strategy for Fermanagh and Omagh Local development plan (LDP) sets out how the area will change and grow over the period up to 2030. The draft plan Strategy provides a plan-led policy framework for making day-to-day decisions to help Fermanagh and Omagh District Council deliver sustainable development including future housing, employment, retail and infrastructure provision across the district. The plan Strategy is the first of two development plan documents which will comprise the LDP.

The Strategy is structured in three parts:

Part One provides a legal and policy context to the district which is accompanied by a socio-economic and spatial profile of the district. The Strategy for future growth is based on an understanding of the unique and distinguishing features of this district profile. This is accompanied the vision and objectives of the document, the spatial growth strategy, the distribution of growth as well as strategic policies.

Part Two This section comprises the development management policies which will apply across the district. These policies are framed across several areas, including development and design, people and places, economy, environment and infrastructure. A monitoring and review section sets out how these policies will be effectively delivered over the plan period, with the FODC's Annual Monitoring Report providing the basis for any future review, be it minor changes or a more comprehensive review, of the LDP's policies and proposals.

Part Three comprises all the appendices and other areas of guidance which forms part of the plan. It includes specific guidance for developments which vary in scope, scale, site location and sector. It also contains the council's Wind Energy Plan. Within the Strategy, Omagh, along with Enniskillen, is designated as a Main Town within the district, being a focal point for housing, retail, employment, leisure, cultural and social functions.

4.10 FODC Local Development Plan 2030 – Draft Plan Strategy Proposed Changes

Following the receipt of representations and issues by FODC, Council is proposed a number of changes to the Draft Plan Strategy. These changes included recalculation of targets surrounding housing needs, development guidelines and standards among other changes outlined within the document. Changes within the document specifically related to Omagh included a reduction in housing need within Omagh from the 2019 to 2030 period.

4.11 Fermanagh and Omagh 2030 Community Plan

The Fermanagh and Omagh 2030 Community Plan is the overarching Community Plan for the Fermanagh and Omagh district, bringing together the knowledge, expertise and collective resources of a wide range of partners across the public, private and community and voluntary sectors - all working towards a single agreed vision for the area. The Plan demonstrates how FODC plans to meet its new statutory responsibility for community planning.

The Plan is structured similarly to both the FODC's Corporate Plan and Local Development Plan, with the key overarching themes framing the Plan being those of the aforementioned Plans:

1. People and Communities
2. Economy, Infrastructure and Skills
3. Environment

Within these overarching themes are 8 key evidence-based priority areas. These priority areas are made accountable and actionable through the 8 long-term outcomes informed by the priority areas. These actions align closely with those of the FODC's Corporate Plan and are similarly focussed on improving quality of life in Fermanagh and Omagh:

- Outcome 1:** Our people are healthy and well – physically, mentally and emotionally
- Outcome 2:** Older people lead more independent, engaged and socially connected lives
- Outcome 3:** Our communities are inclusive, safe, resilient and empowered
- Outcome 4:** Our people have the best start in life with lifelong opportunities to fulfil their potential
- Outcome 5:** Our economy is thriving, expanding and outward looking
- Outcome 6:** Our district is a connected place
- Outcome 7:** Our outstanding natural environment and built and cultural heritage is sustainably managed and, where possible, enhanced
- Outcome 8:** Our district is an attractive and accessible place.

Progress on these outcomes is monitored and measured through the use of key performance indicators (KPI's) specific to each outcome.

Table 4.8: Sample Indicators from the FODC 2030 Community Plan

Indicator	Theme
% of people aged over 65 years in good health	Older people lead more independent, engaged and socially connected lives
% who feel they can influence local decision making	Our communities are inclusive, safe, resilient and empowered
The number of jobs	Our economy is thriving, expanding and outward looking
% of journeys made on public transport and active travel	Our district is a connected place
% of commercial premises that are vacant	Our district is an attractive and accessible place
Provision of car parking spaces, including disabled spaces	Our district is an attractive and accessible place

4.12 Fermanagh and Omagh 2030 Community Plan – 2020 Update

With the onset of the Covid-19 pandemic and subsequent public health restrictions, an update to the Fermanagh and Omagh 2030 Community Plan was adopted in 2020. This updated Plan identified and produced a revised set of priorities over the short to medium term in light of the changes that the Covid-19 pandemic has brought to daily life. These priorities also have direct links to the sentiments of the outcomes outlined in the Community Plan:

- Priority 1:** Support Positive Mental Health
- Priority 2:** Reduce Social Isolation & Loneliness

Priority 3: Tackle Poverty and Disadvantage

Priority 5: Trauma Aware Communities

Priority 7: Promote Green Recovery

Priority 4: Nurture the CVS to enhance capacity and resilience, including promotion of volunteering

Priority 6: Deliver on Tourism and Economic Recovery

Priority 8: Build on the strong foundations of partnership working

4.13 FODC Climate Change and Sustainable Development Strategy 2020 – 2030

The FODC Climate Change and Sustainable Development Strategy sets out the steps the district can take over the coming years to minimise climate change. It sets out a framework to help work towards the achievement of the United Nations' 17 Sustainable Development Goals by moving closer to building an inclusive, sustainable and resilient future for society, the environment and economy of the district. To support the delivery of the Strategy and the Strategy's vision of developing a *“welcoming, shared and inclusive Fermanagh and Omagh, where people and places are healthy, safe, connected and prosperous, and where our outstanding natural, built and cultural heritage is cherished, and sustainably managed”*, the following three themes have been identified:

1. Sustainable Communities
2. Sustainable Council
3. Sustainable Environment

Each of these thematic areas are supported by a series of outcomes and accompanying actions towards realising the sentiments of these three thematic areas. This includes actions related to retrofitting, sustainable production and consumption, air quality monitoring, supporting opportunities for environmental enhancement and the promotion of cycling, walking and running.

The Strategy will be supported by, and implemented through, detailed Action Plans, outlining responsibilities and timeframes for delivery. The Council's Cross-Party Climate Change Resilience Group will monitor progress at their quarterly meetings. An overall progress report will be presented to Council on an annual basis and made available on the Council website. The Strategy will provide a framework to guide Council actions over the next ten years and will be subject to review every three years.

5 Consultation and Engagement

5.1 Overview of Approach

This chapter summarises consultation undertaken to inform this study. This includes the outcome of online surveys that were prepared to capture the views of the resident and business community in Omagh. To seek the input of community, businesses, community/voluntary and schools sectors surveys were issued in February 2022 for a period of four weeks. A total of 240 responses were received for the public survey, 29 responses for the business survey, 24 for the community and voluntary sector, and 25 for the schools; each demonstrating the depth of interest and engagement with the perceived issues, solutions to address issues, and possible interventions required. Targeted strategic conversations were also held with a range of key stakeholders, listed in Appendix 1, to elicit their views on the future of Omagh. Together these have provided valuable insights for the study.

5.2 Online Survey Findings

Ensuring a plan which is comprehensively informed by the views, opinions and experiences of all relevant stakeholders is paramount to producing an effective strategy which is dynamic and versatile in addressing the current and future challenges and opportunities in Omagh.

As part of the study, five online surveys were produced and issued with a focus on engaging:

- 1 The people and communities of Omagh
- 2 The businesses and enterprises of Omagh
- 3 The community and voluntary sector of Omagh
- 4 The students and young people of Omagh

To ensure the online surveys succeeded in stimulating engagement across all the relevant stakeholder groups and parties, the surveys were promoted through various social media platforms, digital participatory platforms, the Fermanagh and Omagh District Council and Public Participation Network.

The surveys garnered 395 responses collectively:

- Public Survey – 240 responses
- Business Survey – 29 responses
- CVS Survey – 24 responses
- Student Survey – 78 responses
- Primary School Survey - 24 responses

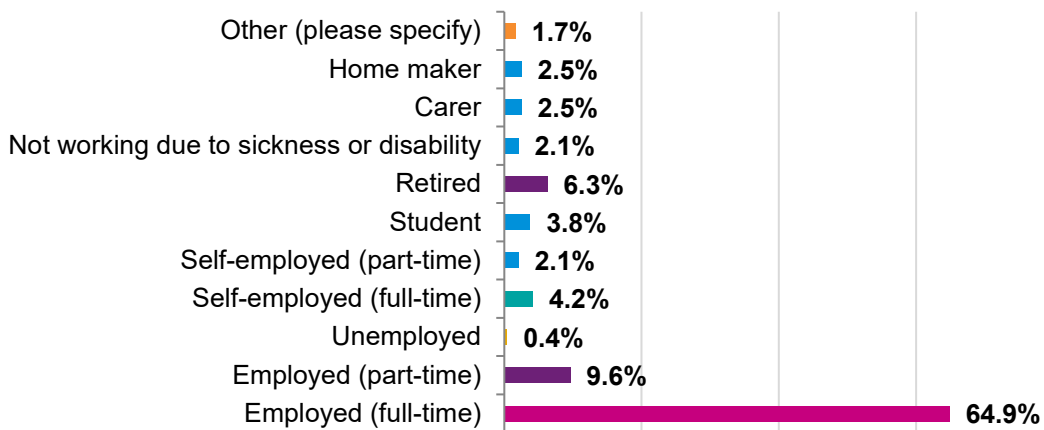
5.2.1 Public Survey

A total of 23 questions were included as part of the public survey. These questions ranged from profiling-style questions to SWOT-style and open-end response-style questions. Each style of questioning focused on particular aspects of Omagh, it's people, businesses, strengths, weaknesses and opportunities to identify key trends and themes

to be carried forward throughout the life of the project. It is hoped that these emerging trends and themes help inform the outputs of the Plan and to ensure the Plan is representative of the views, values and needs of Omagh’s communities.

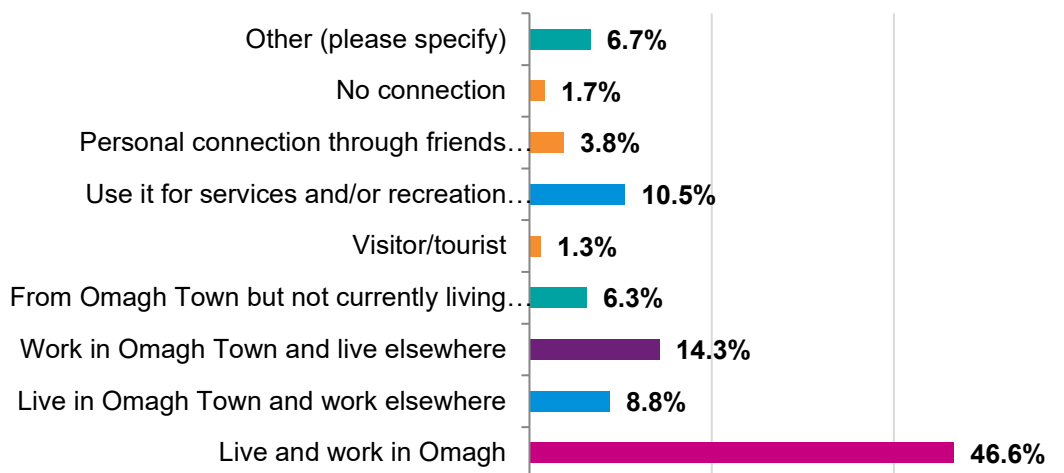
5.2.1.1 Profiling Questions

How would you best describe your present principal status?



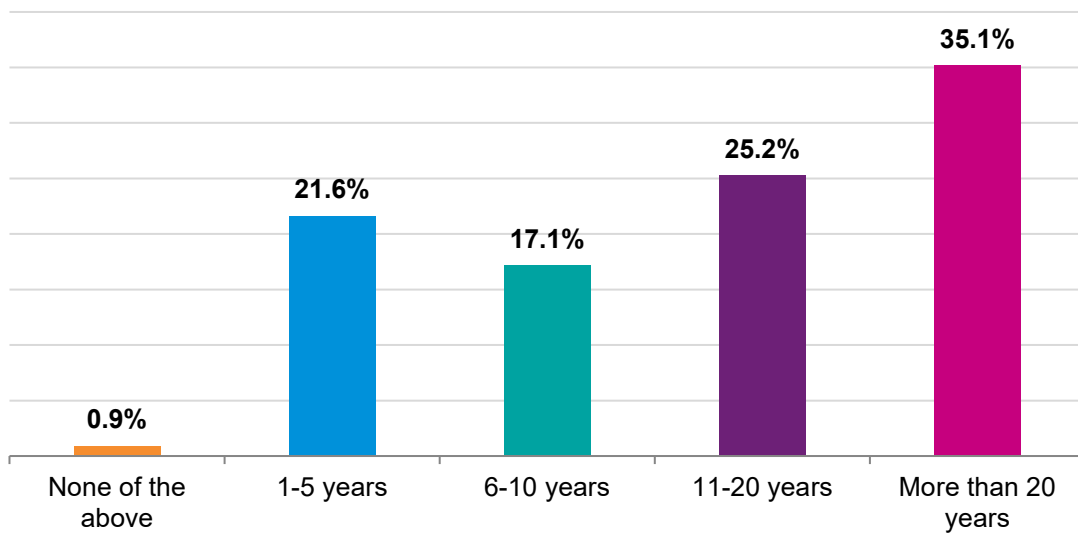
80.8% of respondents were employed either full-time or part-time.

How would you best describe your connection with Omagh?



60.9% of respondents worked in Omagh town centre, with 46.6% both living and working in Omagh. 78.8% of respondents have lived in Omagh for more than 20 years, with 60.3% of respondents having worked in Omagh for more than 10 years.

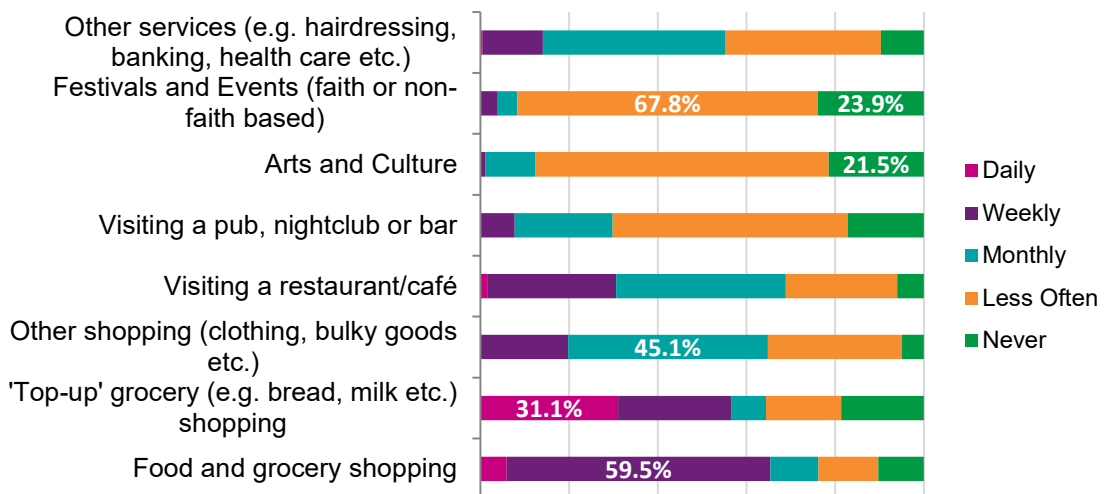
How long have you worked in Omagh?



52.4% of respondents indicated a preference to working from home more often post-Covid, with 37.6% of respondents indicating an ability to work from home more often due to the nature of their work.

5.2.1.2 SWOT-Style and Ranked Questions

Frequency of Visits



'Top-up' grocery was the most frequent 'daily' activity among respondents, at 31.1%.

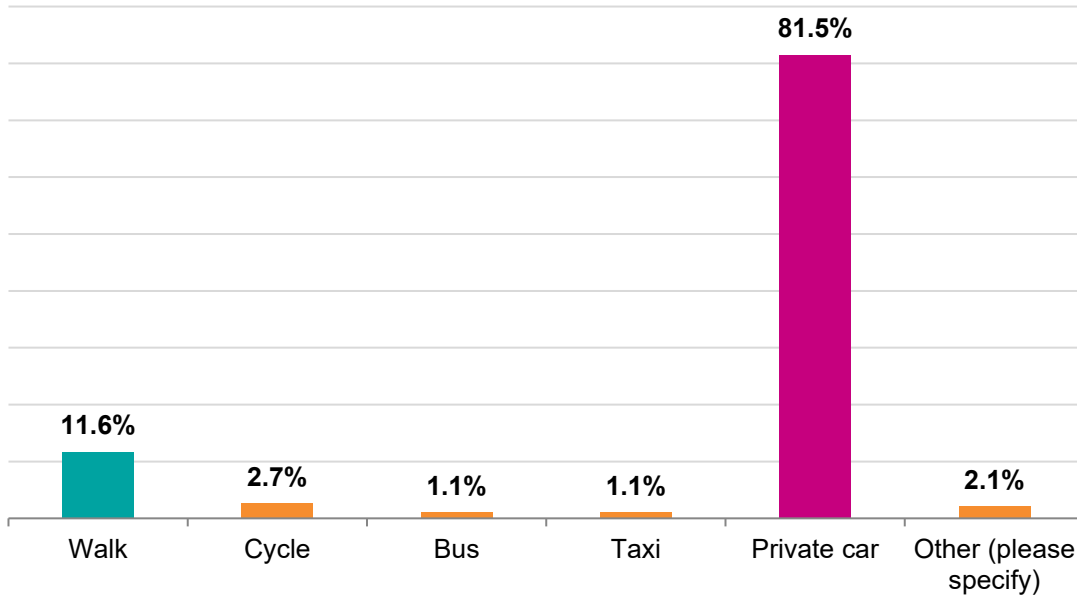
'Food and grocery shopping' was the most frequent 'weekly' activity among respondents at 59.5%.

'Other shopping' was the most frequent 'monthly' activity at 45.1%.

'Festivals and events' most frequent 'less often' activity at **67.8%**.

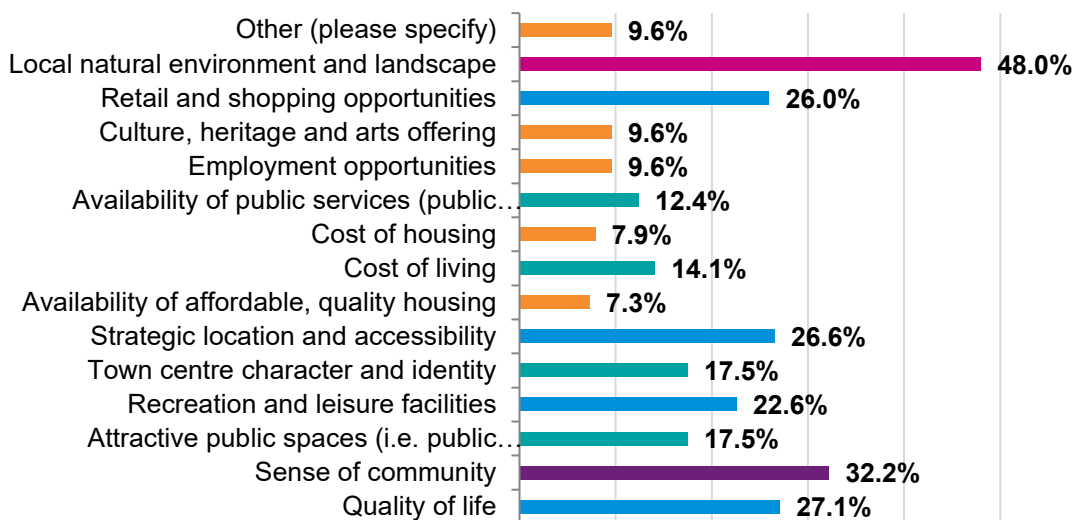
Arts and culture second-most frequent 'never' activity at **21.5%**.

What is your primary mode of travel to and around Omagh?



82.6% of respondents travelled by private car or taxi as their primary mode of transport to and around Omagh. **15.4%** of respondents used 'Green transport' (walk, cycle or bus) as their main mode of transport to and around Omagh. **56.4%** of respondents outlined 'A new footpath or cycle lane' as the most important change which would make them

What are Omagh's greatest assets? Please select the 3 you feel are most significant.



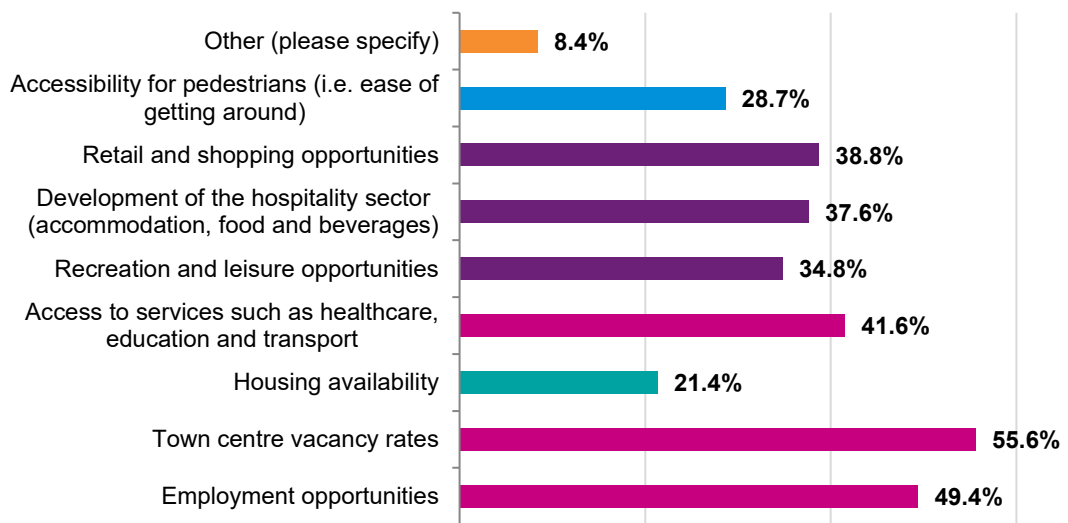
want to cycle or walk to and around Omagh more often.

'Local natural and environment landscape' outlined as Omagh's greatest asset, selected by **48%** of respondents.

'Sense of community' second greatest asset, selected **32.2%** of respondents.

'Availability of affordable, quality housing' least selected asset, at **7.3%**.

What are the 3 biggest challenges, issues or concerns for the future development of Omagh? Please select the 3 you feel are most significant.

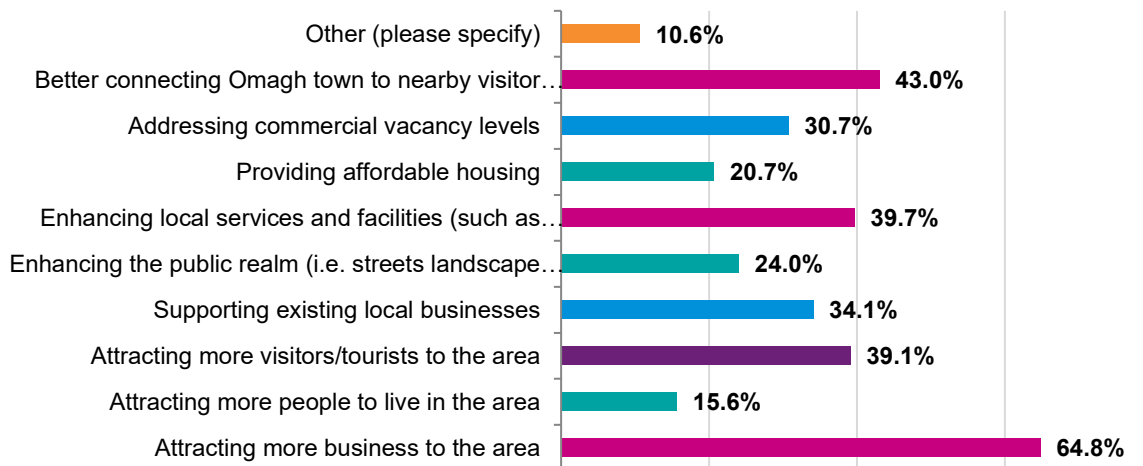


'Town centre vacancy' was outlined as Omagh's biggest challenge, selected by **55.6%** of respondents.

'Employment opportunities' was outlined as the second biggest challenge, selected by **49.4%** of respondents.

'Access to services such as healthcare, education and transport' was outlined as the third biggest challenge, selected by **41.6%** of respondents.

In general, what key objectives would you prioritise to generate growth in Omagh? Please select the 3 you feel are most significant.

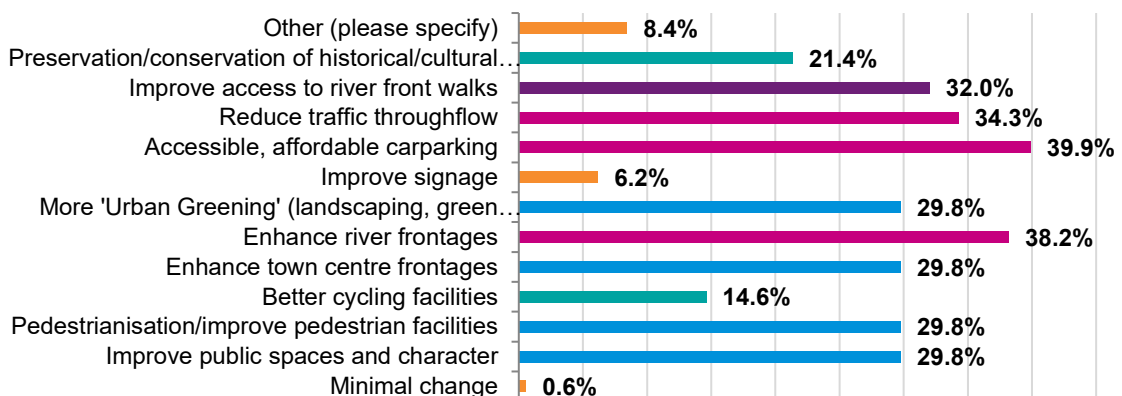


'Attracting more business to the area' was outlined as the most significant objective for generating growth in Omagh, selected by **64.8%** of respondents.

'Better connecting town and nearby visitor attractions' was the second most significant objective, selected by **43%** of respondents.

'Enhancing local services and facilities (health, education, transport etc.)' was the third most significant objective, selected by **39.7%** of respondents.

What would be the top 3 priorities to improve Omagh town centre? Please select the 3 you feel are most important.



'Accessible, affordable parking' outlined as the most important priority for improving Omagh town centre, selected by **39.9%** of respondents.

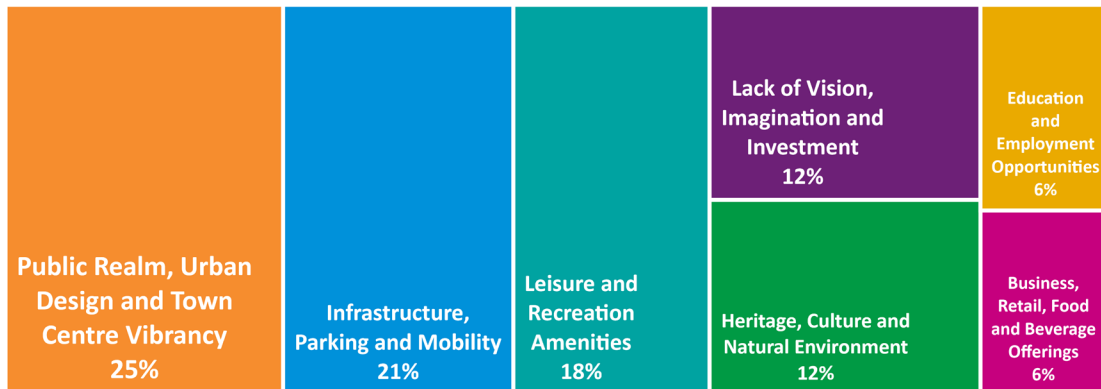
'Enhanced river frontages' was the second most important objective, selected by **38.2%** of respondents.

'Reduced traffic throughflow' was the third most important objective, selected by **34.3%** of respondents.

5.2.1.3 Open-ended Questions

Respondents were asked to outline important issues or goals that should be given priority for the development of Omagh out to 2035.

The Future Development of Omagh to 2035



Public Realm, Urban Design and Town Centre Vibrancy: *“River could be used as a feature in the town rather than an inconvenience.”*

Infrastructure, Parking and Mobility: *“There is a bias towards thinking about how the town works for car users.”*

Leisure and Recreation Amenities: *“Safe open shared spaces for families and older people in the town centre... Consider youth in the area - what is there to entertain them?”*

Lack of Vision, Imagination and Investment: *“Planners & decision makers to become more transparent - listen to the people of Omagh more. Let the people give views, ideas, solutions more openly. The people usually have all the answers.”*

Heritage, Culture and Natural Environment: *“Council should be more proactive in protecting the historical and conservation value of the town centre, this would create a more attractive core...”*

Education and Employment Opportunities: *“If we want young people to remain there we need jobs and social entertainment for them.”*

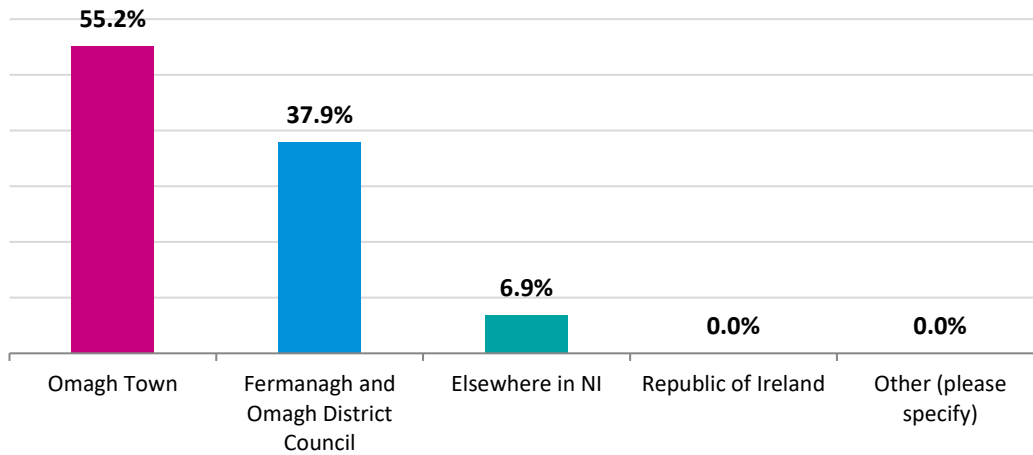
Business, Retail and Food Offering: *“Support given to the smaller local businesses... Better restaurants for all, not just pub eating.”*

5.2.2 Business Survey

A total of 29 questions were included as part of the public survey. These questions ranged from profiling-style questions to SWOT-style and open-end response-style questions. Each style of questioning focused on particular aspects of Omagh, its businesses and enterprise environment regarding strengths, weaknesses, opportunities and threats to identify key trends and themes to be carried forward throughout the life of the project. It is hoped that these emerging trends and themes help inform the outputs of the Plan and to ensure the Plan is representative of the views, values and needs of Omagh’s business community.

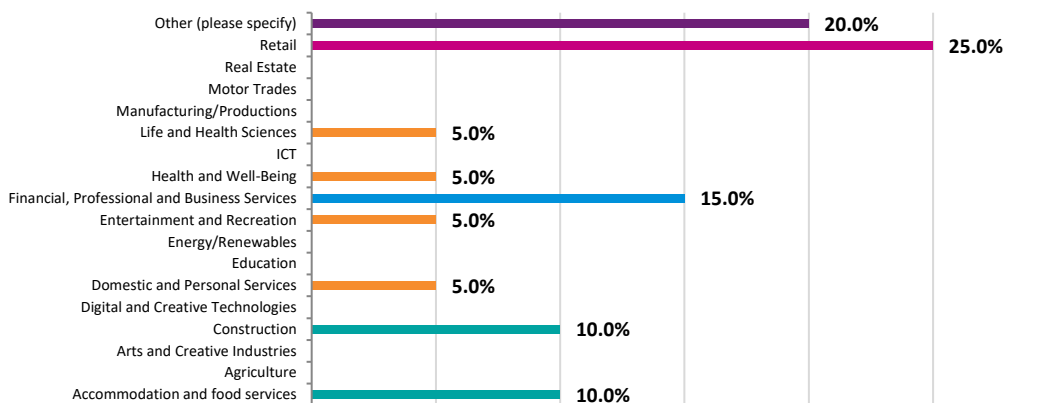
5.2.2.1 Profiling Questions

Where is your business/organisation based?



55.2% (16) of respondents are based in Omagh town, with **37.9%** (11) based in the wider Fermanagh and Omagh District Council administrative area. Other respondent locations include Clanabogan and Dromore.

What best describes the sector in which your business/organisation operates?

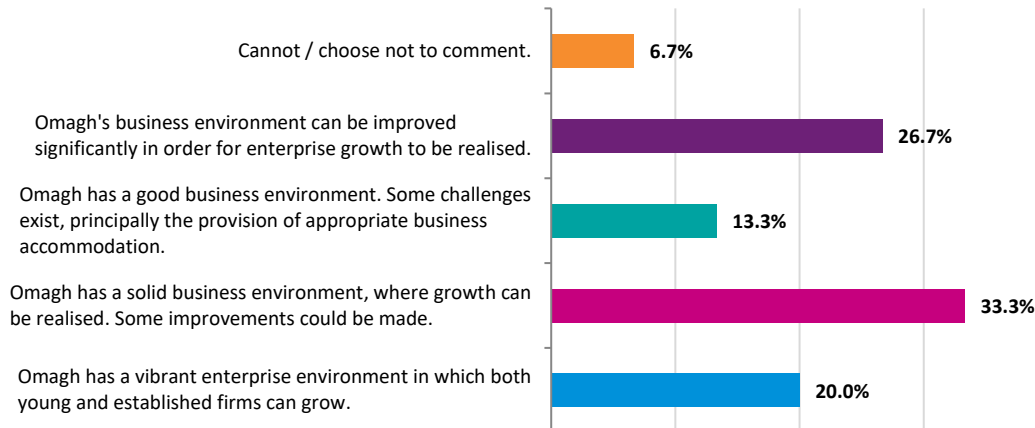


The 'Retail' sector was the most common operating sector chosen by respondents, at **25%** (5).

The 'Financial, Professional and Business Services' sector was chosen by **15%** (3) of respondents. Other sectors identified include *Hair and Beauty*, *Guided Tourism* and *Social Services*.

5.2.2.2 SWOT-Style and Ranked Questions

How would you respond to the question "Is Omagh an attractive place to do business"?

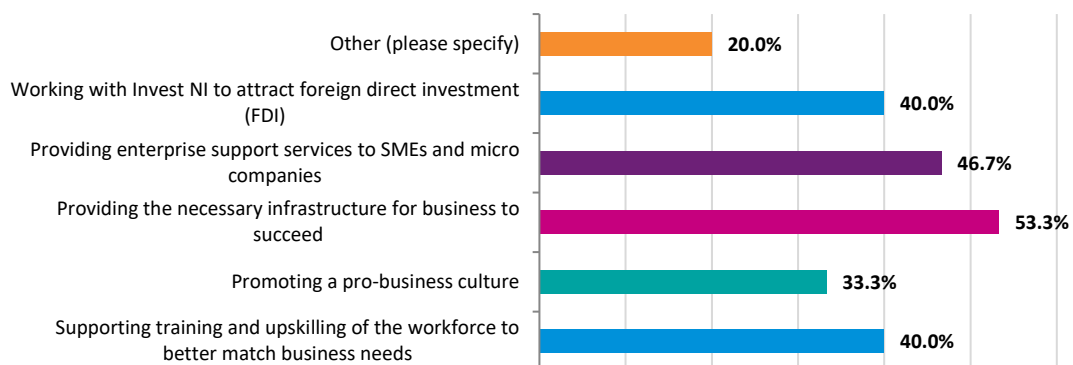


33.3% (5) of respondents described Omagh as having a *'solid business environment'*.

26.7% (4) of respondents described the Omagh business environment as having *'room for improvement'*.

20% (3) of respondents described Omagh as having a *'vibrant business environment, where both young and established firms can grow'*.

What would you recommend as the top priorities to help drive economic development in Omagh? Please select those you feel are most significant.

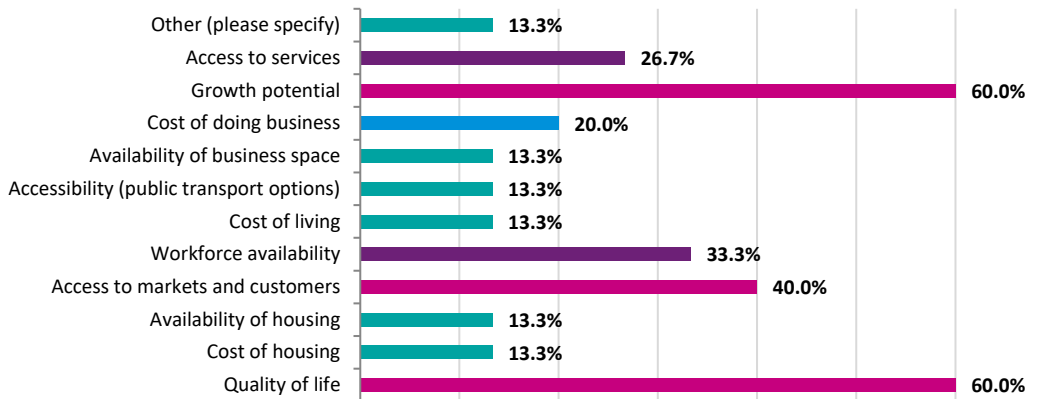


'Providing the necessary infrastructure' was outlined as the most significant priority for driving economic development in Omagh, selected by **53.3%** (8) of respondents.

'Providing enterprise support services to SME's and micro companies' was the second most significant priority, selected by **46.7%** (7) of respondents.

Other priorities outlined included developing a more *creative, multicultural and vibrant* business environment.

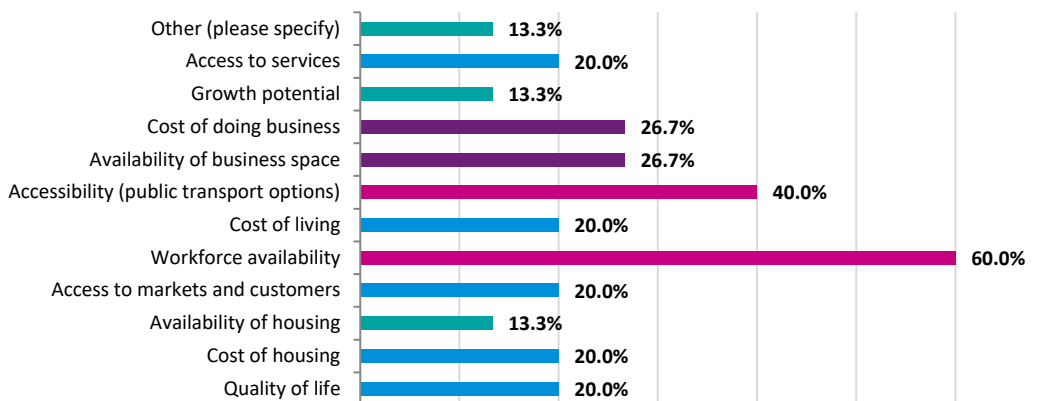
In your opinion, what are Omagh's 3 main strengths as a place to do business? Please select the 3 you feel are most significant.



Growth potential and *Quality of Life* was outlined by respondents as Omagh's greatest strengths as a place to do business, being selected **60%** (9) of respondents each.

Access to markets and customers also seen as a strength, selected by **40%** (6) of respondents. Other strengths outlined included the *friendliness of people* in Omagh.

In your opinion, what are Omagh's 3 main constraints as a place to do business? Please select the 3 you feel are most significant.



Workforce availability outlined by respondents as Omagh's biggest constraint as a place to do business, selected by **60%** (9) of respondents.

Accessibility (public transport options) seen as the second biggest challenge in Omagh, selected by **40%** (6) of respondents.

Cost of doing business and *Availability of business space* also seen as significant constraints among the business community, selected by **26.7%** (4) of respondents each.

5.2.2.3 Open-ended Questions

From analysis of open-ended (qualitative) question responses within the survey, emerging themes were identified and prioritised visually through the use of tree diagrams. These emerging themes have been included below.



Quality of Life: Seen as a strength of the region in attracting business, labour and investment.

Growth Potential: A proxy of high-perceived quality of life, respondents saw Omagh as having a solid business environment in which growth potential is present.

Access to Labour and Infrastructure: Seen as a prevailing weakness of doing business in Omagh, limiting the town's ability to grow and attract commerce and trade.

Room for Improvement: Respondents saw Omagh as having significant room to improve the town's business environment for both new and existing enterprise.

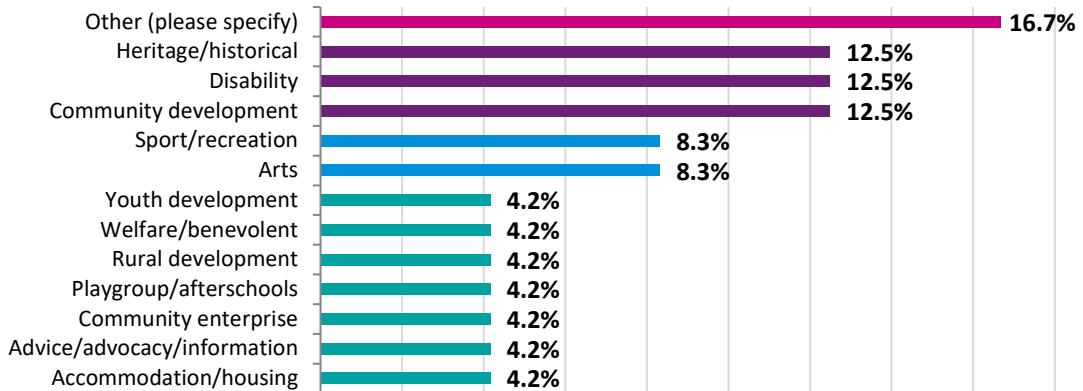
Supports for SME's and Upskilling: More enterprise support services for SME's and micro companies alongside upskilling programmes to better match business needs.

5.2.3 CVS Survey

A total of 5 questions were included as part of the public survey. These questions ranged from profiling-style questions to SWOT-style and open-end response-style questions. Each style of questioning focused on particular aspects of Omagh, its community and voluntary sector (CVS) and social enterprise environment regarding strengths, weaknesses, opportunities and threats to identify key trends and themes to be carried forward throughout the life of the project. It is hoped that these emerging trends and themes help inform the outputs of the Plan and to ensure the Plan is representative of the views, values and needs of Omagh's community and voluntary sector.

5.2.3.1 Profiling Questions

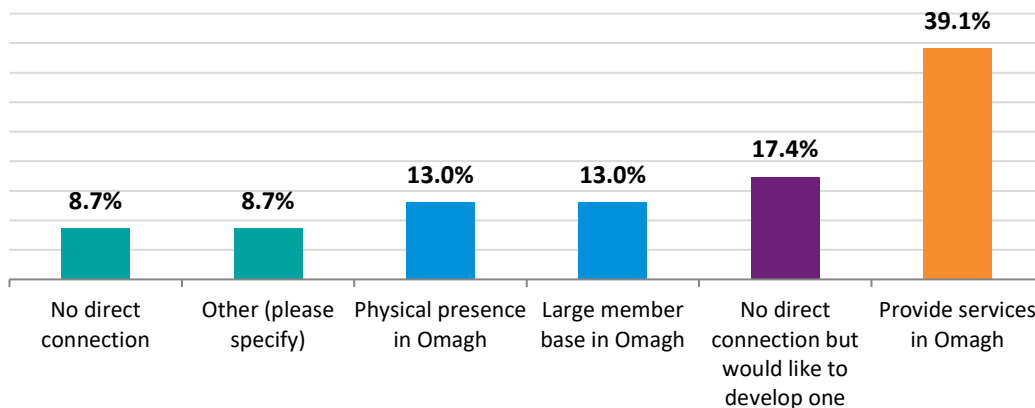
What is the primary purpose of your organisation? Please select one only.



Heritage/historical, Disability and Community Development were the most selected purpose among respondents, with **12.5% each**.

Other purposes included *Elderly Support* and *Mental Health* services. *Sport/Recreation* and *Arts* were also represented.

How would you describe your organisation's connection with Omagh Town? Please select one.



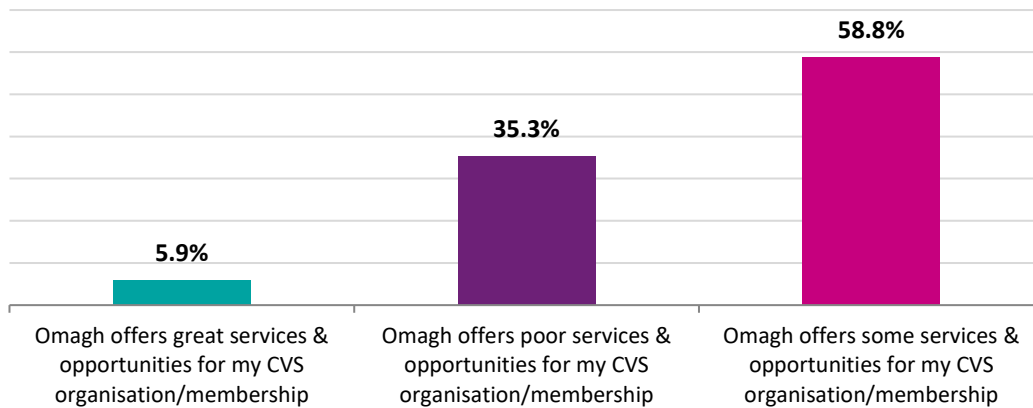
52.1% of respondents had a direct connection with Omagh, through the provision of services in Omagh or having a physical presence within Omagh itself.

26.1% of respondents have either no direct connection with Omagh or would like to develop one in the future.

Other connections include linked resources between the council and organisations in rural areas such as Gortin.

5.2.3.2 SWOT-Style and Ranked Questions

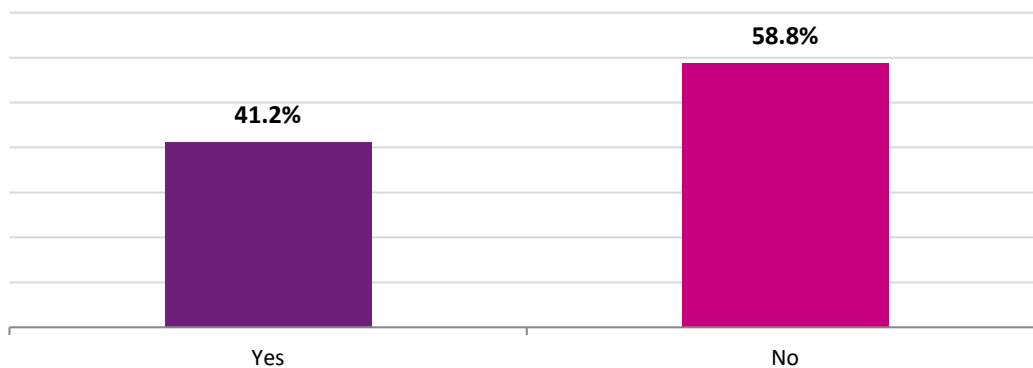
Which statement best describes your organisation's views on Omagh?



58% of respondents described Omagh as offering *some services and opportunities* for their CVS organisation/membership.

35.3% of respondents described Omagh as offering *poor services and opportunities* for their CVS organisation/membership.

From your organisation's perspective, do you agree with the statement "people of all age groups, backgrounds and areas enjoy a good quality of life in Omagh"?



58.8% of respondents *did not agree* that people of all age groups, backgrounds and areas enjoy a good quality of life in Omagh.

The remaining **41.2%** of respondents *agreed* that people of all age groups, backgrounds and areas enjoy a good quality of life in Omagh.

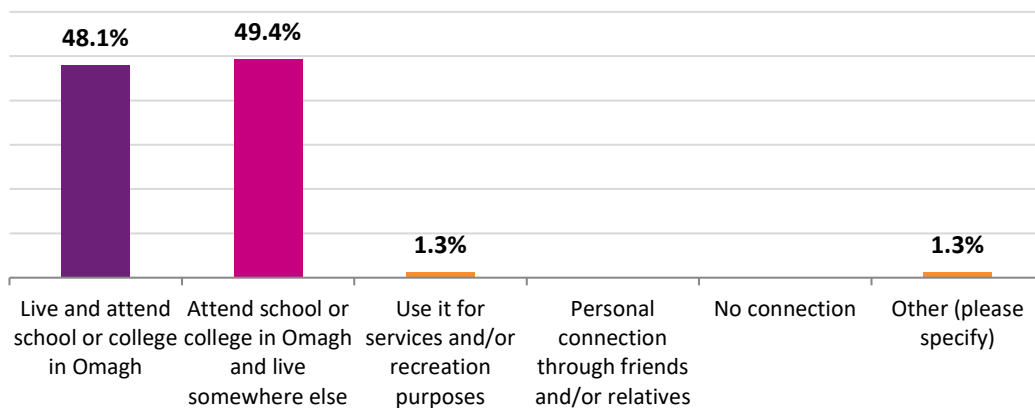
5.2.4 Student Survey

A total of 8 questions were included as part of the public survey. These questions ranged from profiling-style questions to SWOT-style and open-end response-style questions. With the voices of Omagh's students and young people heavily influencing the future

growth of Omagh, each style of questioning focused on particular aspects of Omagh, it's the perceptions and relationship it has with its students and young people, its strengths, weaknesses and opportunities to identify key trends and themes to be carried forward throughout the life of the project. It is hoped that these emerging trends and themes help inform the outputs of the Plan and to ensure the Plan is representative of the views, values and needs of Omagh's students and young people.

5.2.4.1 Profiling Questions

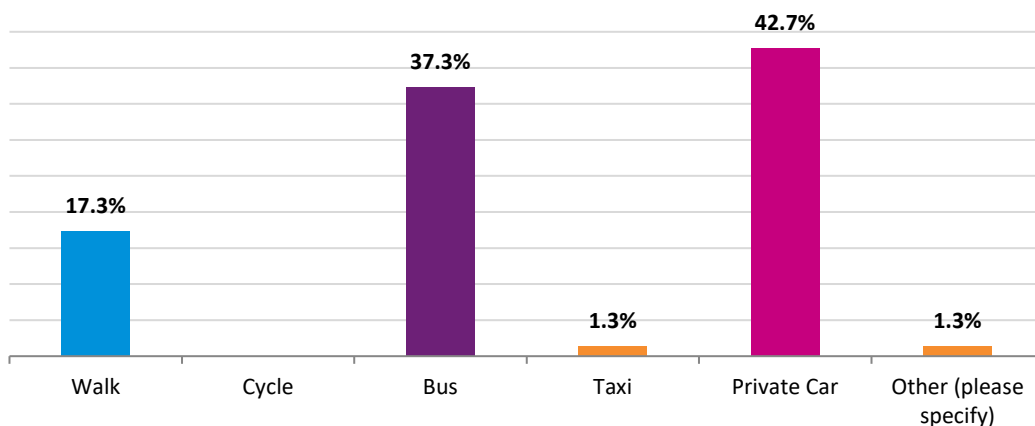
How would you describe your connection with Omagh? Please select one.



49.4% of respondents attend school or college in Omagh and *live elsewhere*.

48.1% of respondents *live and attend* school or college in Omagh.

What is your primary mode of travel to school/college? Please select one.



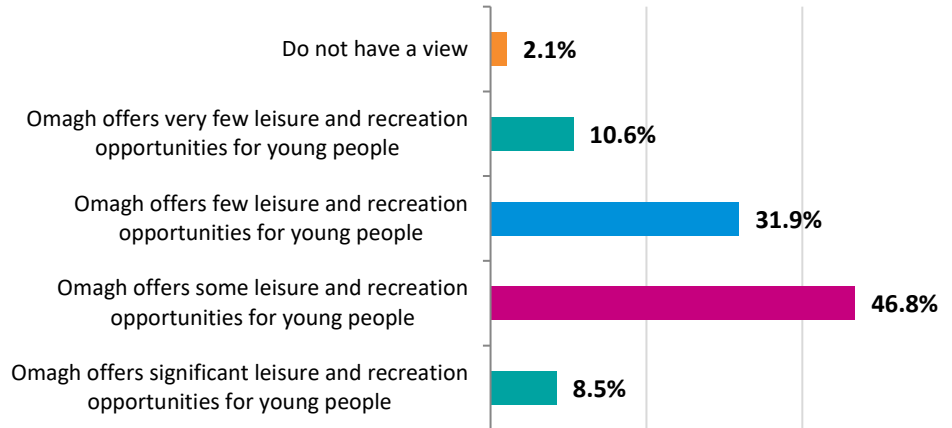
56.4% of respondents used *green transport* (walk, cycle or bus) as their primary mode of travel to school or college.

44% of respondents used *private transport* (private car or taxi) as their primary mode of travel to school or college.

No respondents cycled as their primary mode of travel.

5.2.4.2 SWOT-Style and Ranked Questions

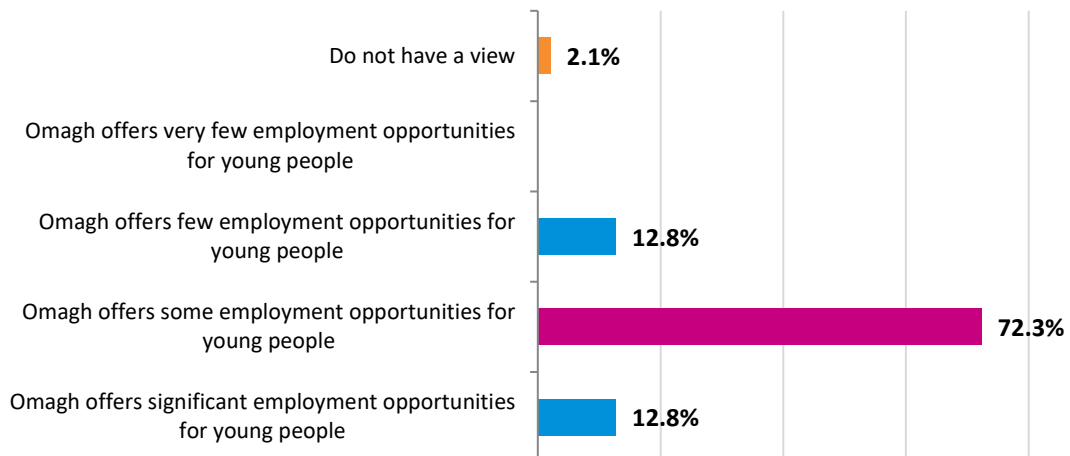
Which of these statements do you most agree with? Please select one.



55.3% of respondents described Omagh as having *some or significant* leisure and recreation opportunities for young people.

42.5% of respondents described Omagh as having *few or very few* leisure and recreation opportunities for young people.

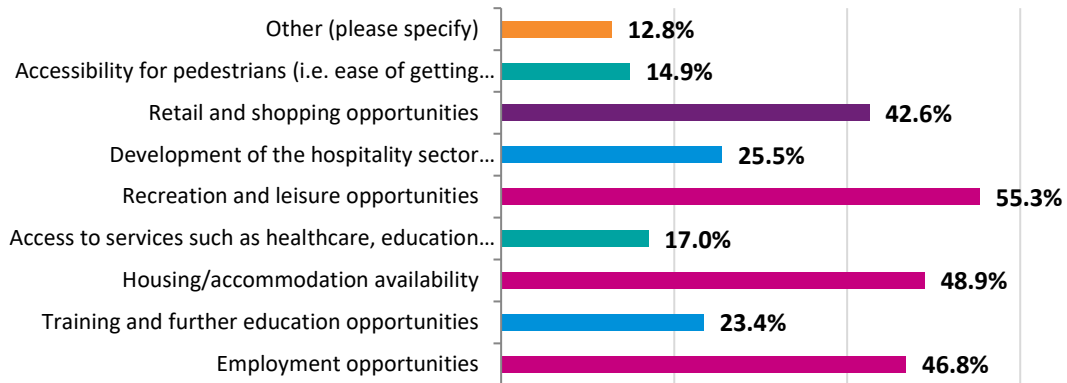
Which of these statements do you most agree with?



85.1% of respondents described Omagh as having *some or significant* employment opportunities for young people.

12.8% of respondents described Omagh as having *few or very few* employment opportunities for young people.

What are the 3 biggest challenges, issues or concerns for the future development of Omagh for young people? Please select 3 which you feel are the greatest challenges.

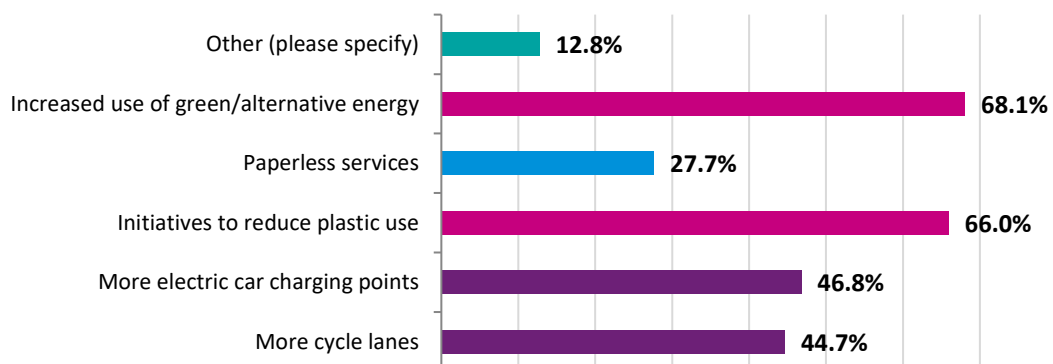


Recreation and leisure opportunities were seen as the biggest challenge for the development of Omagh for young people, being selected by **55.3%** of respondents.

Housing/accommodation and *Employment opportunities* were outlined as Omagh's second and third biggest challenges for young people respectively, with either one or both selected by **95.7%** of respondents.

Retail and shopping opportunities were also seen as a significant challenge for young people, being selected by **42.6%** of respondents.

Which of the following green initiatives would you see benefiting Omagh the most? Please select 3 which you see as being most beneficial.



Increased use of green/alternative energy was seen by respondents as the green initiative which could benefit Omagh the most, being selected by **68.1%** of respondents.

Initiatives to reduce plastic use was the second most selected potential green initiative for Omagh, selected by **66%** of respondents.

Other initiatives highlighted by respondents included *more waste bins in Omagh town and surrounds*.

5.2.4.3 Open-ended Questions

Respondents were asked to outline important issues or goals that should be given priority for the development Omagh out to 2035. These individual responses were recorded and categorised under overarching emerging themes which are included below.

Important Issues or Goals for Omagh Place Shaping Plan 2035



Town centre enhancement: *“Give us a reason to walk around Omagh... Develop riverfront e.g. restaurants facing the water.”*

Inclusive, Welcoming and Safe: *“Creating an inclusive, diverse and safe environment for everyone... Need more opportunities and events for different communities to come together and meet those in their area.”*

Leisure, Recreation and Facilities for Young People: *“Please provide more leisure places for teens... Unless you are involved with a football or other sports club there's very little to do, even more so if you have little money.”*

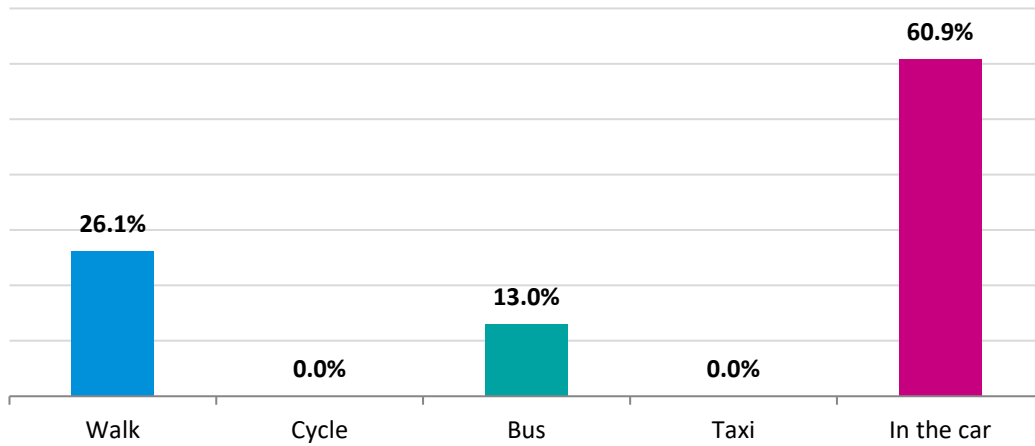
Climate Change and Going Green: *“I think prioritising environmental issues is essential... We must do everything we can to slow climate change... The biking situation in Omagh is bad there should be cycle lanes near every road.”*

5.2.5 Primary School Survey

A total of 4 questions were included as part of the public survey. With the voices of Omagh's young people heavily influencing the future growth of Omagh, each style of questioning was tailored towards engaging young people and focused on particular aspects of Omagh, in particular, the perceptions and relationship the town has with its young people to help identify key trends and themes to be carried forward throughout the life of the project. It is hoped that these emerging trends and themes help inform the outputs of the Plan and to ensure the Plan is representative of the views, values and needs of Omagh's students and young people.

5.2.5.1 Getting to School

How do you usually get to school?



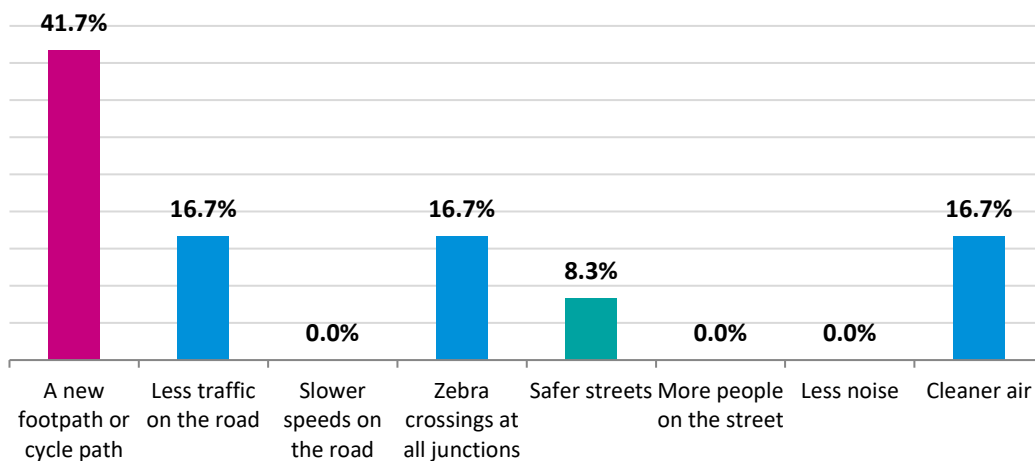
60.9% of respondents used *private transport* (private car or taxi) to get to school.

39.1% of respondents used *green transport* (walk, cycle or bus) to get to school.

No respondents cycled to school.

5.2.5.2 Using Green Transport

What changes would make you want to cycle or walk to school?

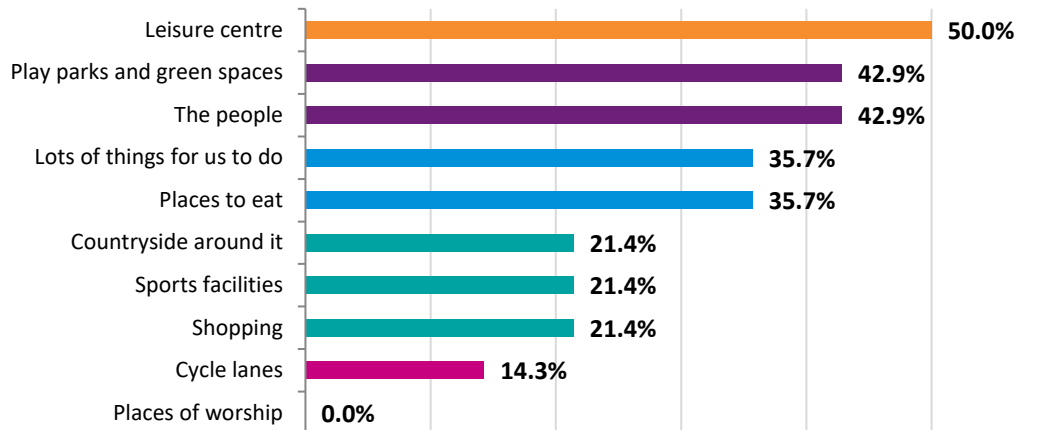


41.7% of respondents outlined *a new footpath or cycle path* would make them walk or cycle to school.

50.1% of respondents outlined *road-based improvements* (less traffic, safer streets, more zebra crossings and cleaner air) would make them walk or cycle to school.

5.2.5.3 Omagh's Strengths

What are the 3 best things about Omagh?



The Leisure Centre was the most frequently chosen 'best things' about Omagh, selected by **50%** of respondents.

Play parks and green spaces and The people also had a high frequency selection at **42.9%** each.

Cycle lanes was the least selected option at **14.3%**.

5.2.5.4 Perfect Omagh in 3 Words

"Fun, happy, splendid."

"Clean, friendly, lively."

"Best wee town."

"Home Sweet Home."

"Colourful, busy, lots of music."

"Friendly, kind, supportive."

5.3 Drop-in Events

A series of four drop-in events were held at key venues in Omagh for the public to contribute and provide their views and comments. The four venues were: CKS Community Centre; Hospital Road Community Centre; Strathroy Community Centre; and Strule Arts Centre.



The following reflects comments and views posted at these events.

What are the issues facing Omagh?

- Increase employment
- Increase tourism product
- Reduce traffic congestion
- Social and private housing
- A5 upgrade urgent, consideration of railway further down the line
- The UAFP and Gortin Glens attract thousands over the year – have a bus/ transport service hourly to bring these tourists into Omagh town centre; gift incentives could be used e.g., free coffees
- Everything
- Poor infrastructure; lack of use of waterfront connectivity
- Give an allowance for installation of solar panels as there are lots of flat roofs in the town
- Traffic congestion 24-7
- Lack of outdoor facilities; too many in disrepair
- Lack of indoor facilities, recreation included.

What are the opportunities for Omagh?

- New jobs as people can work from home
- Centre of the population, county town and opportunity for investment / social events
- Good community relations and enhance activity / provision of shared spaces for recreation
- Outdoor skatepark and more cycle lanes
- Development of St Lucia Barracks

- Main focus point in Omagh – the Courthouse – should be floodlit at night from 8pm to 12pm
- Open up public buildings at night
- Use for sites – children’s facilities
- Reinvent the use of our town centre
- Complete the Riverwalk properly – enable people to walk and cycle across the town
- Change the culture at night-time?
- To move forward with the times, for all councillors to work together to help promote the town of Omagh and help the general public enjoy Omagh life
- Recovering from the global pandemic – a wakeup call; plan strategies and opportunities in the town.

What is unique about Omagh?

- County town of Tyrone, good community relations, a river runs through it, Shared Education Campus (eventually 2026)
- Fantastic cross community friendly hub, great mix of town centre corporate, independent shops, coffee houses and office which could be expanded, badly in need of another town centre hotel
- The hills and spites, good urban rural mix, sense of community, surrounded by the Sperrin Mountains, nice river scenes/opportunities, outdoor sports nearby
- Historic garrison town.

What does Omagh need?

- More swimming places, public transport, clean air around Omagh
- More care homes
- More funding for parks, community colleges, local lakes
- More jobs, better transport connectivity, enhanced entertainment opportunities, more for children and young people
- New roads, more transport, waterpark and more walkways
- More social / affordable housing
- Skatepark, bowling alley, amusement park
- Development of St Lucia Barracks, possibly for hotel provision
- Beach, another bus depot, trampoline park
- Water parks and less traffic
- Bigger car parks, more river walks, more homes for the homeless more trees, more busses, more shops, more hotels rooms
- Higher level apprenticeships
- More jobs and houses and car parks and buses and river walks and playgrounds and care homes
- Waterpark, more night clubs, more parking, make a beach
- More road crossing symbols and crossing lights across roads
- More activities and food and water options
- More internet
- Public transport
- River side clean up necessary and Oasis Plaza tidy up
- Bowling alley, more offices leading to centres of excellence, clean signage in and around the town and power wash the pavements
- Family friendly facilities – children need space too; footpaths that start and end at appropriate places; cycleways please; clean well looked after public spaces;

infrastructure – what other major region in the world lacks rail across 50% of its area?!!

- Working recharging points for hybrid/electric cars
- Green areas with access to cycle paths and facilities for cafes with outdoor seating; more connections with cycle paths and wider pathways – Manchester is doing this; pedestrianisation of the town centre
- More river walks and pubs, cafes and restaurants alongside the river; more play areas; make shop fronts more cohesive (attractive); more trees
- Central community hub with indoor and outdoor (like Victoria Square without the shops); a meeting ground where people can join in with community classes, toys, sandpit etc for mothers and toddlers
- Footpaths are continually being dug up by BT, NIE, Fibrous, Road Service, Water Service; there is no coordination between them or limited times when they are allowed to work
- More contact with community groups directly so they hear about events in time
- Town centre electric charging points
- Football club
- Forest walkways that can be used by families, picnic areas, small playparks etc
- More areas aimed for teenagers only, skatepark, safe hangouts
- More job opportunities – all sectors included, public, private, voluntary
- Revamp of certain buildings in the town
- Revamp of scenic walkways

What are your suggestions for the opportunity sites in Omagh?

- Affordable housing
- Waterpark
- Petrol station
- Scott's Mills to be redeveloped as a carpark
- Lisnamallard/ Arleston House would make a fantastic country style bed and breakfast with cookery school / vegetable and herb growing allotment attached
- Scot's Mills, Naturelle and ex-Health Centre a green area with trees, pathways, picnic area etc, café, outdoor seating with café, perhaps a small cultural village (tourism) with a local craft, history, bandstand; rather than a play park which may take away from the Grange, have an obstacle course alongside pathways to encourage active children who find walking boring
- Real opportunities for high quality town centre development (residential) with planned streetscapes with indigenous trees
- Ex-PSNI station to be a large glass soft play area where kids can safely play in the centre and adults can sit around the outside in a café area, with a raised viewing platform
- The builders' merchants (McDermott's) represent an opportunity for a carefully conceived mixed development with a river walkway on the eastern side
- Ex PSNI station for early years provision
- Ex Health Centre to be tossed and provide more parking spaces for the public and more spaces for workers/users at the nearby OCC
- Scott's Mills and Naturelle sites to be used as events area, all year round, and markets – seasonal, weekly etc
- Tyrone County Hospital site for walkways and cycleways, similar to the area behind Omagh leisure centre

- Ex Fire Station as a two-way lane, linking up users of the facilities near the old fire station
- Former First Trust bank as a pool hall and snooker hall, bring the braise back to Omagh
- St Lucia Barracks – broad and state of the art pitches; grass, small stands; football pitches; local teams could use; have a variety of games going in that area; changing facilities provided to be included
- Courthouse seating at top of town
- Tyrone County Hospital– new housing and ensure good connection to town centre and play facilities
- Scott’s Mills opportunity for shopping market and parking.

5.4 Workshops Findings

A workshop was held with the Omagh Place Shaping Plan Steering Group. The following reflects the Steering Group’s comments and views.

What are the challenges and issues?

- Economy – need for more jobs, matched to future trends
- Population growth needed to enhance Omagh’s regional status
- Need for improved roads infrastructure – to enhance A5 corridor and links to Letterkenny, Derry/Londonderry, Dublin
- Lack of hotel accommodation
- Brain drain whilst excellent educational attainment there is a lack of skilled employment opportunities
- Educational underachievement – too many failed by school
- Educating young people to leave
- Types/ range of employment opportunities available
- Ownership of some opportunity sites identified (schools in private)
- Health issues and accessibility of services including a hidden unmet need.
- Silo working / more collaboration
- Equity of place shaping and Ensuring 'No one gets left behind' S75 groupings - Principles and Values in PSS
- Lack of affordable / social housing and increased waiting lists
- Single housing occupancy is increasing in population growth figures so likelihood loneliness will be an issue
- Need right type of housing to enable the town to grow
- Disconnect with Town centre and some key assets i.e. Ulster American Folk Park in relation to a 'connected place' and linkages between the town and the park
- Derelict sites
- Town centre derelict / empty properties and likely to increase due to decline/challenges in retail v online shopping (e.g. Primark undertaking a review of sites)
- Town turns its back on the river
- Transport
- Ensuring surrounding towns and villages part of process - Omagh has to cater for rural populations. Many rural populations see Omagh as their hub and we need to re-enforce the rural-urban synergy in the town.
- Lack of uniqueness i.e. including employability

- Social housing turnover and lack of affordable housing, few co-op options
- Lack of volunteers for voluntary sector
- Difficulty in the retail sector due to the changing nature of shopping (online etc)

What are the opportunities?

- Capitalise on MSW Growth Deal potential particularly in relation to Tourism
- Bringing people back to the place reference jobs security - make it an attractive place, sell to investors through prospectus, as a spill over investment region from Belfast and in relation to education with the SWC campus, secondary investment for employers, smart region project (Sligo)
- Remote working e.g. reuse of derelict sites such as health centre as digital hub
- Green spaces in council ownership to maximise the attractiveness of the place
- Grow visitor experiences in Omagh
- A5 strategic corridor gives opportunity for it to be better connected on the Island of Ireland / Dublin corridor
- Place shaping has ability to join services together i.e. Health's Integrated Care Partnerships
- Utilising previous work on 'Outdoor Omagh '
- Centre of Excellence for a particular sport
- Maximise shared space and embody community cohesion to combat loneliness
- Active Travel Plan - should link up and connect all the assets
- Rural Policy Investment Plan
- Omagh becoming a city by 2035
- Build on links with SW College, expand courses and opportunities with vocational links with businesses (talk to businesses for needs assessment)
- Agri-food growth opportunity which needs further research and development of local market + farming profits – entrepreneurship/diversification
- Proximity to countryside – emphasising quality of life
- Shared campus as a vehicle to address shared accommodation across communities and economic/social strata
- Apprenticeships as a route for young to earn and learn – role for council here + college
- Shared campus – state of the art facilities; help raise educational underachievement and also appeal to young people starting families/settling down to relocate back to Omagh due to good schools.

What is unique in Omagh?

- Natural countryside and outdoor space i.e. Sperrins, Gortin Glens – gateway to the Sperrins, connection to the natural environment
- Ulster American Folk-park
- River running through town centre
- County Town of Tyrone
- 2nd largest population base
- Major strategic route
- Attractive town
- Good schools
- Tyrone GAA
- Can compete with wealthier places due to these attributes
- Sport – rugby, football, GAA
- Friendly place, good community relations

- Strong night-time economy e.g. people travelling from Letterkenny
- Uniqueness...was a challenge, but need to find a USP to differentiate, to sell and to set Omagh apart

What does Omagh need?

- Investment in the place, and infrastructure e.g. wastewater
- Enhance tourism product offer e.g. hotel, hiking holidays, dark skies, nature breaks
- Better positioning through promotion, promote quality of life
- Jobs – quality jobs + high/decent wages
- Enhance the aesthetics of the town, capitalise on positives
- A plan, hope, positivity
- Build on musical heritage
- Clear implementation plan
- Stronger brand to encourage people to live work invest and study
- To keep people in the area through providing high quality jobs
- Needs to find its niche – can it aim for a university town (example only), what type of employment can we target – digital?
- Maximise Omagh as a shared place
- Affordable housing
- A train / train station
- “Brand Omagh” – need to move away from negative narrative about Omagh and sell the positives associated with Omagh – so external employers etc can relate.

Other points raised

- Trustees of school own some of the sites need to be mindful they are in private ownership. Shared Campus funding ARUP report who liaised with individual owners with thoughts and views. Hierarchy of ownership of sites. Disposal of strategy for school sites was in place but issues around validity in the current landscape and what is still valid
- Lack of focus on info provided towards tourism presented in presentation overall (Alignment MSW growth deal etc)
- Attract people to come work in Omagh
- Ensuring a person-centred approach to place shaping - Omagh PSP has to be for the wider area
- Consideration given to physical presence of engagement/consultation in rural hinterlands.

5.5 Strategic Conversations Overview

Strategic conversations were held with over 40 individuals and groups of people representing key focus areas. A list of consultees is included in Appendix 1.

Principal points made echo many of the comments made by those completing online surveys and attending the drop-in events. The main themes and key points are presented below.

Themes	Principal Points
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<p>Omagh Town Location</p>	<ul style="list-style-type: none"> - Omagh is strategically located and accessible. - There is a widespread view that the A5 is needed to enhance connectivity to Omagh and alleviate congestion; and acknowledgement that the Great Northern by-pass adds to congestion in the town.
<p>Omagh Town Centre</p>	<ul style="list-style-type: none"> - The town centre has an attractive street scene and a good range of independent shops. - The town has a vibrant night-time economy, and this is developing further with new bars and a boutique hotel planned but there was scope to increase the offering for coffee shops i.e., non-licensed premises to increase footfall in the evenings. - The town centre is dominated by traffic and resulting congestion, with many suggesting that this puts them off coming into /using the town centre. - There are mixed views to the concept of pedestrianisation. Some are in favour, highlighting it would encourage more footfall, people would stay longer and there would be additional benefits such as, for example, improvements in air quality. However, others suggest that local businesses may be opposed to this concept, fearing it would reduce trade. Coleraine and Limavady were suggested as examples which were not successful, leading to dead town centres; however, Lisburn was highlighted as a successfully pedestrianised town centre. - The idea of temporary pedestrianisation, coinciding with major events and trading seasons e.g., Christmas, summer period is viewed positively.
<p>River</p>	<ul style="list-style-type: none"> - Similar to many towns, Omagh town has turned its back on the river and more should be done to exploit/develop this asset. There has been some development along the riverfront to date but there is scope to do much more regarding riverside walks. - Any such proposals need to take account of a range of considerations including, for example: the riverbank land is in quasi-public sector ownership; managing flood risks and flood management is essential; the development of walkways along one side of the river will displace wildlife to the opposite bank, but development along both banks tends to displace wildlife altogether; lighting and safety features are necessary so the public are confident in using such facilities while simultaneously discouraging anti-social behaviour and/or youths congregating which deters use by the wider public and/or a sense of endangerment.
<p>Heritage</p>	<ul style="list-style-type: none"> - There is a heritage element to Omagh which has not been exploited and it is unclear if visitors to the town get a sense of Omagh's history. - Heritage sites included St Lucia Barracks.
<p>Urban Design – Lighting and Wall Murals</p>	<ul style="list-style-type: none"> - The murals on the alleyways e.g., from Market Street to Old Market Place (the back market) are highlighted as attractive, effective and cost-effective mechanisms to brighten up the urban environment and provide a more welcoming entry way. - Painting the back of the buildings from Community House to Bogan's Bar would enhance that aspect of the town; the cantilevered veranda at Bogan's bar is complimented and highlighted as an example of what could be done to help re-align buildings with their river frontage. - Omagh should enter the Best Kept Town and Village awards (which would also promote volunteerism).
<p>Leisure, Arts and Culture - Sports</p>	<ul style="list-style-type: none"> - Omagh has a strong sporting culture, with a popular and well attended half marathon, cycling and running clubs. Arleston Park is used for a regular park run. - There is a vibrant music, culture and arts scene, with an award-winning Strule Arts Centre, regular country music events in a local hotel, and an annual Bluegrass Omagh Festival at the UAFF; Arty McGlynn, renowned and gifted musician was from Omagh. - The renowned Irish dramatist Brian Friel (works include Philadelphia, Here I Come; Dancing at Lughnasa) was a native of Omagh. - The Irish writer and broadcaster Benedict Kiely was from Omagh and there is an annual literacy festival in his name. - The Arts Centre is highlighted as a key asset and needs to be exploited more.
<p>Walking and Cycling (Well-being – Physical and Mental Health)</p>	<ul style="list-style-type: none"> - The impact of Covid 19, associated lockdowns and social distancing, coupled with increased WFH means that more people appreciate the need to undertake regular exercise and are using parks and open spaces more. Omagh's river frontage and close proximity to attractive countryside offers scope to increase connectivity and offer safe greenways options for cyclists and walkers. - There is potential for a greenway to connect Omagh with both Enniskillen and with other close assets including the Gortin Glens and the UAFF, potentially using the old railway line infrastructure. - Transport and infrastructure policies are increasingly taking account of the social and environmental aspects, as well as the economic aspects, looking at, for example, actions to encourage modal shift and reduce private car use.

	<ul style="list-style-type: none"> - The secondary schools moving to the new Strule Campus offered opportunities to increase active school travel but require both the necessary greenways infrastructure and programmes/initiatives to achieve model shift. - Housing developments / public buildings need to be designed to discourage car use, increase accessibility for walkers and cyclists.
Omagh Bomb	<ul style="list-style-type: none"> - Omagh will always be associated with the 1998 car bomb resulting in the death of 29 people and unborn twins and it is important this is reflected in any place shaping plan while at the same time ensuring that Omagh is not defined by this tragic event. - The town has demonstrated a resilience, supported by strong community relations and community cohesion.
Identify / USP of Omagh	<ul style="list-style-type: none"> - Many consultees struggled with or highlighted Omagh's lack of a clear identify and/or unique selling point (USP). - Historically, Omagh is the county town of Tyrone, and has had a strong identify as a market town and service centre with good connectivity to the wider region. - There is a pride in the town and surrounding area of being the county town of Tyrone. - There is potential for a tourism brand / offering; for example, Omagh offers a base to access the Sperrin Mountains. It also has the potential to offer a high-quality eco-tourism offering. - Omagh and Mid-Ulster has a strong engineering / manufacturing base and agri-food sector and growing digital community. - It has a strong sense of community, and positive community relations and offers a good quality of life for its residents.
Vacant Town Centre	<ul style="list-style-type: none"> - Office accommodation should not be cited on small industrial estates but relocated to town centre sites. - There were opportunities to look at a Living Over the Shops (LOTS) concept, albeit it is recognised that accessibility and regulatory requirements could prohibit this in some circumstances. - Plans to redevelop the Old Provincial Building into a boutique hotel and the potential sale of the vacant AIB building into apartments is welcome, as it would create footfall in the High Street, especially in the evening times.
Carparking	<ul style="list-style-type: none"> - Carparking should be pushed to the edge of the town and on street parking to be an expensive option (but free to blue badge holders).
Oasis Plaza	<ul style="list-style-type: none"> - Oasis Plaza is not deemed to be an attractive nor effective public space. - The Plaza is limited in what it can host and the numbers it can hold and there are no facilities such as a coffee dock for the public to linger. - The Plaza and its basement car park tend to attract youths "hanging around" in the evenings which deters the public and adds to a perception that it is unsafe in the evenings.
Signage	<ul style="list-style-type: none"> - Place finding and way finding signage could be improved, offering an integrated and coordinated approach across the town. - Such signage needs to be less corporate in both design and approach, more attractive in design and be more informative (e.g., this walk is 1.5 miles) and less rule based (e.g., do not xx). - Improved signage could lead to increased use of, for example, Arlestone Park and other walking routes. - There is limited tourist information on what to do in Omagh and the surrounding area. - Substantially better signage and planting is needed at the Crevenagh Road roundabout and bridge over the Drumragh River. This is the main entry point to Omagh from the west and the south and is considered to be poor, uninspiring and uninformative.
Anti-social behaviour	<ul style="list-style-type: none"> - Some concerns were expressed that some public spaces are used for perceived anti-social behaviour and/or attract large numbers of young people "hanging around" and deters the public from using these spaces. Arlestone Park and the Oasis Plaza were singled out. - Reported crime stats do not evidence safety concerns nor suggest there is a crime / safety issue in Omagh town.
Shared spaces	<ul style="list-style-type: none"> - Place shaping plans need to consider all of the community. - Shared spaces are shared by more than one group, but any community safety concerns and issues can be addressed by practical measures and/or infrastructure solutions.
Other Villages and Settlements	<ul style="list-style-type: none"> - Omagh is an important lynchpin for surrounding villages and settlements, which look to Omagh for, for example, jobs, services, facilities and other activities. - There is a large farming / rural community around Omagh.

	<ul style="list-style-type: none"> - A place shaping plan needs to accommodate and meet the needs of those beyond the town itself.
Broadband connectivity	<ul style="list-style-type: none"> - Broadband connectively was deemed to be good albeit there are pockets with poor connections. - Project Stratum will improve broadband connectivity in the surrounding rural communities.
Affordable Housing	<ul style="list-style-type: none"> - There is a need for affordable housing in Omagh especially for vulnerable groups such as those at risk of homelessness and those escaping domestic abuse. - Affordable housing is also required to attract staff especially in those sectors experiencing recruitment difficulties; hospitality and health care were two key sectors impacted. - NIHE does not favour large scale social housing developments, preferring developments of mixed tenure. It is therefore only supportive of small-scale housing applications (from housing associations). NIHE is requesting 10% of all housing developments of over 20 units to be for social housing.
Railway Line	<ul style="list-style-type: none"> - Some consultees wish for better connectivity via a railway line (restating the original rail network), but others recognise that this is a very expensive option, required a critical mass of people using it to make it viable and it would take a long time to put the physical infrastructure in place.
Population Demographics and Needs	<ul style="list-style-type: none"> - Omagh's aging population mean that alternative models of living, and socialising could be required, with possibly older people wanting to be closer to services and activities in the town centre.
Age, disability friendly and child friendly	<ul style="list-style-type: none"> - The Omagh place shaping plan must take account of the needs of people with disabilities, children and older people. - It should include play parks catering for younger children and children with disabilities; urban architecture to take account of, for example, wheelchair users, older vulnerable people with mobility issues, confusion (but not necessarily dementia) by providing safe seating areas. - The town's topography (different levels and steep hills) presents challenges to those with mobility issues and is not easily overcome, but urban design and appropriate street architecture can help improve access; examples include improved lighting, staggered and comfortable seating areas, and consideration of street paving i.e., not cobblestones. - Derry was highlighted as being a child friendly town.
Opportunities for Young People	<ul style="list-style-type: none"> - There are mixed views on the degree of leisure opportunities for young people, with some considering young people are well catered for, for example citing the local leisure centres, while others considered there are limited safe opportunities for young people, indicating, for example, there is no teenage disco for young people. - Similarly, while some suggest that more could be provided for young people such as a bowling alley, skateboard park, others indicate that such facilities are expensive at the point of entry and attendance would be infrequent, e.g., monthly, rather than weekly, possibly making them financially unviable. - Arlestone Park has no playpark for children.
Tourism - Omagh's Natural Assets & Visitor Attractions	<ul style="list-style-type: none"> - Omagh is fortunate to be surrounded by a range of natural assets such as the Gortin Glens and the Sperrin Mountains and by proximity to tourist attractions such as the Ulster American Folk Park (UAFP) - There is a view that Omagh undersells itself and could do much more to maximise its proximity to these assets, provide better connectivity between the town and these assets thus bringing tourists/visitors (i.e., spend) into the town and exploit its tourism potential. There have been poor linkages between the town, the countryside and its natural assets. - Omagh does not have the same range and scale of assets as Enniskillen and so should not compete but could look at a complimentary offering and e.g., encourage a two-stage destination for tourists/visitors. - Omagh has tended to undersell itself but there is potential to draw in more tourists and visitors. - The work to date in the Gortin Glens is viewed very positively, with suggestions for further exploitation of this asset and more marketing to e.g., mountain bike clubs in the UK etc. - The initial investment in the Gortin Glen is seen to have kick-started /acted as a catalyst to other (private sector) development such as Glenpark Estate (on the site of the defunct Ulster History Park) and it is noted there is recent planning permission granted for glamping pods near the Gortin Glens.

	<ul style="list-style-type: none"> - There is a need for better / more tourist information and for the Tourist Information Centre to be open for extended hours. - There is potential for DfI funding for green and active travel and to support development of a greenway from Omagh to the UAFFP, potentially using the original railway tracks (which are still in situ).
Tourism – Hotels	<ul style="list-style-type: none"> - There is a lack of hotel offering in Omagh, but it is unclear if this reflects a lack of demand from overnight visitors / tourists or if the lack of accommodation offering deters visitors / tourists staying overnight. - While Omagh could be a hub to access the Sperrin Mountains, the accommodation network here is not well developed. - Current hotels are limited in their capacity to host large scale events.
Education	<ul style="list-style-type: none"> - Education provision is good. - Omagh has excellent primary and secondary schools. - South West College Omagh Campus offers a range of training options and career progression for young people.
Strule Campus	<ul style="list-style-type: none"> - The Shared Campus / Strule Campus is viewed positively in terms of helping to raise educational attainment in the locality and offered a unique opportunity for students in terms of access to high quality resources. - This unique educational offering has the potential to be an incentive for people with school age children to move to/relocate/return to Omagh. - There is a need for greater connectivity via walkways and cycle paths between the town and the Campus, both to encourage more active travel for school children and to maintain the connection with the town centre – encouraging school children back into the town and thereby reducing the impact of a reduction on school children spend on town centre shops. - The move of five schools to a shared campus has the potential to impact on local town centre business which may see a drop off in footfall and associated trade. - Conversely, some businesses may benefit as it is suggested that some people avoided the town centre due to both the large congregation of schoolchildren at key times (morning, lunchtime and around 3pm) and associated traffic congestion with the volume of private cars and busses. - There is a need for a coordinated approach to the demolition of existing buildings and disposal of all five sites to achieve the maximum outcome for the use of the sites and to minimise the impact of all five sites coming to market at the same time and some/all potentially remaining vacant for a considerable period. This would compound the issue of the number of existing vacant sites.
Brain Drain	<ul style="list-style-type: none"> - There is a perception that parents encouraged young people to leave Omagh for better training and/or jobs elsewhere. However, this brain drain could be reversed by a number of actions: <ul style="list-style-type: none"> o Young people and their parents to have a better understanding of the range of jobs and opportunities in and around Omagh. o WFH models offer new opportunities for workers to remain/relocate to Omagh and/or FDI business locating in Belfast to consider Omagh as a satellite location. o Rebranding / repositioning Omagh through identification of an Omagh proposition and accompanied always with a focus on positive messaging to help attract inward investors. o Role for SW College in providing foundation degrees and higher-level apprenticeships.
Employment	<ul style="list-style-type: none"> - The bulk of employers are SMEs or micro businesses employing less than 50 staff. - There is a wide range of SMEs and micro businesses in and around Omagh, but some are constrained in their growth plans due to lack of suitable premises to move as they outgrow their existing premises. - There is a wide range of employers in the locality, paying good wages but this may not be parents' and young peoples' perception.
Connect 2 Hub	<ul style="list-style-type: none"> - The Department of Finance plans for a Connect 2 Hub at County Hall to facilitate those civil servants previously travelling to Belfast and who are now deemed hybrid workers. - However, correspondingly, DoF indicated there is a surplus of civil service accommodation in Omagh. There is therefore a risk that in the longer term, DoF could vacate some office accommodation in the town, thereby adding to vacancy rates.
WFH	<ul style="list-style-type: none"> - The impact of Covid 19 and increased numbers of people likely to work on a hybrid model offers opportunities for Omagh – it has good schools, ready access to the natural environment, is reasonably central to many other main towns in NI. - High quality flexible working spaces could attract hybrid workers into the town occasionally and they would be more likely to use local cafes/shops etc. as their trips to Omagh would serve multiple purposes.

<p>Opportunity Sites</p>	<ul style="list-style-type: none"> - There is a range of opportunity sites in Omagh, and many have been vacant for a considerable period. - The size and scale of the Scott’s Mill and ex-Naturelle sites is viewed both positively - offering unlimited potential development opportunities - and negatively - the sites had been derelict for a consideration period, with no clear plans for development. Housing, carparking, and a supermarket were suggested. - There is a risk that the five vacant schools’ sites (anticipated to occur in 2026) may add to a perception of dilapidation in the town. [By way of example, it was highlighted that the original Thornhill College site in Derry/Londonderry remained vacant for c15 years]. - Suggestions for the vacant school sites included one or more to be used for a community garden / allotment; hotel; outdoor based youth activities e.g., skateboard park, trampoline park, etc. - A proposed digital Innovation Centre on the ex-health centre site is viewed favourably and seen as a sustainable model especially given that many businesses will adopt a hybrid office/Working from Home (WFH) model. - Lisnamallard and Arleston House offer opportunities to enhance Arleston Park and to open up this area and offer a wider range of activities to visitors; Arleston House and its range of outbuildings has the potential for, for example, a cafe and community arts and leisure hub, offering e.g., craft workshops, yoga studio etc. although it is important that this not displace community offerings elsewhere. The grounds at Arleston House offer opportunities for, for example a Forest School; Lisnamallard House could be suitable for a boutique hotel; there is a desire to see both these facilities brought back into use and the fact they are Council properties is seen to be helpful. - Consultees want to see all the derelict sites brought back in to use, but most have no firm ideas on what the best use of such sites is.
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5.6 Summary

An extensive community consultation and engagement exercise was undertaken to capture the views and comments from a wide range of stakeholders associated with Omagh Town.

Public Survey

- A total of 240 people responded to the public survey. Almost half of respondents considered Omagh’s greatest asset to be its local natural and environmental landscape while almost a third suggested Omagh’s sense of community was its greatest asset. Their most frequently cited challenges were town centre vacancy rates, employment opportunities and access to services (such as healthcare, education and transport).
- Respondents considered that the top priorities to generate growth in Omagh were to attract more businesses to the area, to provide better connectivity between Omagh and nearby visitor attractions and attract more visitors/tourists and to enhance local services (such as healthcare, education and transport).
- Respondents considered that the top priorities to improve Omagh town centre were provision of accessible, affordable carparking, enhancement of the river frontage, and reduce traffic throughflow.

Business Survey

- A total of 29 business responded to the business survey, with over half based in the town. While many respondents were positive about Omagh’s business environment, over a quarter considered it could be improved significantly for enterprise to be realised.

- The most frequently cited priorities to help drive economic development in Omagh were to provide the necessary infrastructure for business, to provide enterprise support services and support workforce training/upskilling, and to work with Invest NI to attract FDI.
- Respondents considered Omagh's main strengths as a place to do business were its growth potential and its quality of life while its most frequently cited constraint was workforce availability.

CVS Survey

- A total of 24 organisations responded to the CVS survey, representing a broad range of specific interest groups and almost two-fifths provided services in the town.
- Over a third of CVS respondents considered that Omagh offered poor services and opportunities to their membership/organisation.

Student Survey

- A total of 78 students responded to the student survey and almost half lived in Omagh.
- Young people considered that the three biggest challenges, issues or concerns for the future development of Omagh were recreation and leisure opportunities (possibly reflecting that over two-fifths considered Omagh offered few or very few leisure opportunities for young people), followed by housing/accommodation availability and employment opportunities. The latter possibly reflected that the majority of respondents considered that Omagh offered some or few employment opportunities while only a small proportion considered Omagh offered significant employment opportunities.

Primary School Children

- A total of 25 primary aged children responded to the primary school survey. Most travelled to school by car but indicated that a new footpath or cycle path and other road-based improvements would make them want to walk or cycle to school.
- This desire for active school travel was reinforced by their views on the top three best things about Omagh which were the leisure centre, the playpark and green spaces, and the people.

Drop-in Events

- Attendees at a series of drop-in events highlighted the need for the A5 and an associated reduction in traffic congestion, a need for social housing and a desire for a wider range of leisure facilities and activities for young people.
- They also wanted to see improvements to the public realm and more green spaces, greater exploitation of the River Strule and the surrounding countryside and more employment opportunities.

Steering Group Consultation

Key themes included the following:

- A need to **increase economic growth** by providing more jobs in Omagh and offering a wider range of skilled jobs and which in turn would help reverse the brain drain and retain young people. There was also potential to position Omagh as a spill-over investment region, and WFH/hybrid working models could help facilitate this. Such an approach would need to be underpinned by developing a strong and positive “Brand Omagh” to attract investment, employers and workforce.
- A need to **develop the local infrastructure** including progressing on the A5 to improve connectivity to Omagh and help alleviate traffic congestion in and around the town. However, there is also a need to develop hotel accommodation to support increased tourism, as well as improve connectivity to, for example, the Ulster American Folk Park (UAFP) as well as ensure provision of affordable housing for residents.
- An opportunity to **exploit the natural environment**. This includes the River running through the town and maximising the town’s proximity to the Sperrin Mountains and the Gortin Glens, and to provide attractive green spaces and generally promote quality of life aspects associated with proximity to the countryside.
- An opportunity to **improve connectivity** between the town and surrounding countryside for both leisure and to attract visitors/tourists into Omagh; to redefine the relationship with the River Strule; to reflect Omagh’s connections with and support of surrounding towns and villages; and to focus on active travel to help with this connectivity.
- A desire to build on the excellent **educational opportunities** as provided by SW College and the enhanced opportunities to be provided by the new shared education facilities on the Strule Campus which could help raise educational underachievement while appealing to people with young families locating to/returning to Omagh.
- An absolute necessity to build on the **strong community relations** and maximise Omagh as a shared space, ensure inclusivity and a person-centred approach and ensure “no one is left behind”.

Strategic Conversations

There was a wide but common range of views presented by consultees.

- They highlighted the town’s location, while recognising the need for the A5 to improve this and alleviate congestion.
- The town centre is an attractive heritage town, with a good range of independent shops and a vibrant night-time economy. Omagh’s heritage, the Strule River, its leisure, arts and cultural offerings were highlighted as strengths. Its proximity to the natural countryside and associated assets such as the Gortin Glens were also highlighted as strengths, with a suggestion that Omagh has not yet fully exploited these assets and could develop its tourism offering further. This offering needed to build on bringing tourists/visitors into the town.
- There were concerns expressed over the level of town centre vacancies, criticism of the limitations of the Oasis Plaza, and recognition that shared spaces need to

be both shared and viewed as safe. The quality and usefulness of public signage (wayfaring) could be improved, but some public realm work such as alley-way murals and lighting were praised.

- There were opportunities to build on the sense of physical and mental wellbeing and connection with the outdoors as people emerge from the impact of Covid-19 and working from home (WFH)/hybrid working models offered increased job opportunities for Omagh.
- A place shaping plan for Omagh needs to take account of its demographic profile as well as Omagh's role in the wider rural community, and there was recognition that if a plan took account of the needs of people with disabilities, children and older people then it could be a plan for all.
- The schools and College were highlighted as excellent but correspondingly there was a need to retain young, qualified people in the locality and alleviate a perceived brain drain.
- The range and scale of opportunity sites presented challenges as well as opportunities with a range of suggestions but a risk that sites continue to remain vacant or a long period.

6 Case Studies

Several high-level case studies are outlined below in areas which are relevant for Omagh's new Place Shaping Plan. It outlines specific examples from across the United Kingdom and Ireland in areas related to adaptive reuse, regeneration, pedestrianisation, tourism (greenways) and wayfinding. It also provides information on key aspects of Armagh City's forthcoming Place Plan. Together the case studies provide further inspiration and guidance on the potential direction Omagh can take in the development of the new Place Shaping Plan and the potential enhancement of Omagh's sense of place and community belonging.

Adaptive Reuse of Vacant School Site

Parkhead Public School (Glasgow, Scotland)

Parkhead Public School is a B-listed Victorian building built in 1878 that served as a school until 1963, and then a resource centre for Glasgow City Council up until approximately the 1990s. It then lay vacant for over 15 years.

The regeneration project cost £4.1 million and saw the building refurbished and restored into a community enterprise centre. It had previous damage such as water ingress, rot and structural failure. The project received a significant level of public funding including from Glasgow City Council and the Government Regeneration Capital Grant Fund. Upon completion it was acquired by the Parkhead Housing Association and includes public and office space.⁵⁴ It is a Heritage Angel Awards finalist, indicating the success of the design and adaptation of the formerly vacant school building.

Regeneration of Barracks Sites

Preston Barracks Project (Brighton, England)

Preston Barracks situated in Brighton, was built in 1793, acquired by Brighton and Hove City Council from the Ministry of Defence in 2002 and by 2014, had been lying derelict for over two decades.

In 2014, the Council signed agreements with the University of Brighton and developers U+I Plc for the purchase and redevelopment of the site as part of a public-private partnership. Planning permission for the regeneration scheme was granted in 2017. It is an ambitious regeneration project, projected to create over 1,500 jobs and inject £280 million into the local economy. The regeneration scheme seeks to develop an innovation hub, 369 new residential units, and 534 student rooms on the 5-acre site.⁵⁵ A portion of the residential units will be affordable housing. It should be noted that it was treated as a brownfield site and existing derelict buildings were demolished.

The first building, the Plus X Innovation Hub opened in Summer 2020. It is a 50,000 sq. ft. hub that provides space for start-ups and SMEs. The developer U+I Plc describes it

⁵⁴ See: <https://www.purcelluk.com/projects/parkhead-school-westmuir-street-glasgow>

⁵⁵ See: <https://www.uandiplc.com/our-places/preston-barracks/>

as an industry leading space with sustainability at the heart of its design including in relation to air quality, temperature and humidity.⁵⁶

This is a very ambitious regeneration project through former vacant barracks, but it showcases the potential that 5 acres of land can contain. St. Lucia's Barracks is of similar size so it's important to showcase Preston Barracks Project and what can be done with 5 acres but in accordance with Omagh planning regulations and building regulations.

Columb Barracks Project (Mullingar, Ireland)

Columb Barracks, situated in Mullingar in Westmeath, was constructed between 1810 and 1815. It is a site of historic significance and was operated by the Irish Defence Forces when it closed in September 2012. The site lies 800 metres west of the main street in the town and 500m from the train station.

The ownership of the 9.9-hectare site was transferred to the Land Development Agency (LDA) in September 2018. The Land Development Agency has a remit to manage state owned lands to develop new housing. The transformation of the site is ongoing with a vision to create a sustainable urban neighbourhood with climate resilient low carbon housing and the existing protected structures at its centre.⁵⁷ In doing so it aims to use modern methods of construction including in relation to deep retrofitting and adaptive reuse methodologies which in turn will support innovation in the local construction industry. It is estimated that the Barracks project will bring 100 units of housing to the area of Mullingar.

These examples of the regeneration of previously vacant and derelict barracks should provide ideas both for St Lucia and the numerous large school sites that will become vacant in the next number of years.

Pedestrianisation

Parliament Street & Capel Street (Dublin, Ireland)

Dublin City Council introduced a series of trial pedestrianisation plans for Capel Street and Parliament Street in June 2021 to support the hospitality sector and facilitate outdoor dining. This scheme ran from 18.30 – 23:30 on weekends (Friday – Sunday). The trial was initially intended until July but due to the success of the trial and delays to the reintroduction of indoor dining it was extended twice to September 2021.

The pilot programme was very successful, with a survey carried out over August and September 2021 indicating that both the public and businesses were in favour of the pedestrianisation of these streets in some form.⁵⁸ In relation to Capel Street, 95% of respondents (public, residents and businesses) said that it improved their experience and the same level of support was identified for Parliament Street. For Capel Street 80%

⁵⁶ See: <https://www.uandi plc.com/our-places/preston-barracks/>

⁵⁷ See: <https://columbbarracksproject.ie/>

⁵⁸ Capel Street and Parliament Street Report on Non-Statutory Consultation, Dublin City Council, November 2021

of businesses were in support of developing some form of traffic free arrangements on the street, while Parliament Street also had a majority of businesses in support, albeit at lower levels. In both cases the public were overwhelming in favour of introducing some form of pedestrianisation. Common benefits mentioned included a better atmosphere, cleaner air, felt safer and better sense of community. Some retailers were keen for a balanced approach that limited the pedestrianisation to the evenings when retailers were closed with other issues highlighted including increased litter and traffic congestion elsewhere.

Following further consultation, plans for the pedestrianisation of Capel Street are now progressing. This example provides Omagh with a blueprint for trialling pedestrianisation and gathering feedback on the results to ascertain if it would be suitable for certain areas of the town. Stakeholder engagement and consultation with the public, residents and private sector will be key to its success.

Tourism

Waterford Greenway (Waterford, Ireland)

The Waterford Greenway was constructed along 46km of the former Mallow and Waterford rail line. It opened in March 2017 and is the longest greenway in Ireland connecting Waterford City to Dungarvan. It is used as a walking and cycling routeway for residents and visitors.

The project was developed at a cost of €15 million. The Greenway has been a huge success for Waterford, winning two awards, at the All-Ireland Community and Council Awards 2018, and Chamber Ireland Excellence Award in 2017. It has contributed significantly to the local tourism industry, creating up to 90 new jobs for the local community. In a 2017 survey⁵⁹ of Greenway users, 68% of those surveyed said they had travelled to Waterford mainly to use the Greenway and 80% of people visiting from outside Waterford paid for accommodation. By December 2017, only 9 months after it had opened, the greenway had seen 247,545 users.

Omagh could explore the possible opportunity for greenways to attract further tourism, increase active transport and improve linkages between the town and surrounding attractions and amenities such as the Ulster American Folk Park, Gortin Glen Forest Park and Sperrin mountains. This could be beneficial both for community and businesses located in Omagh town.

Wayfinding

Legible Leeds (Leeds, England)

Legible Leeds is a pedestrian wayfinding system that has been implemented in Leeds City Centre. Before being implemented there were a number of different and conflicting signage systems being used across the city centre which failed to effectively aid navigation. In 2009-2010, to address this issue and prepare the city for increased footfall

⁵⁹ Waterford Greenway Intercept Survey 2017, AECOM, 2017.

in relation to then upcoming retail developments, the Legible Leeds wayfinding system saw its initial development.⁶⁰

The system was developed to assist people to navigate the different districts (business, shopping and cultural) of the city centre on foot, highlight specific destinations and increase awareness of the waterfront and available greens spaces close to the city centre.⁶¹ A number of the street signs used solar power to illuminate the street maps to aid with the ease of navigation in low light. Furthermore, the signs use robust material that allows for easy maintenance and updating.⁶²

This is particularly relevant for Omagh, with shopping areas, conservation areas, green space and a riverfront all in close proximity in the town centre. Linkages between these areas and the amenities like the riverside walk and Arlestone Park, as well as the Strule Arts Centre could be greatly aided by a clearer wayfinding system. Thought could be given to potential categorisation of districts, the unique identity of different areas and distinctive landmarks across the town centre.

Armagh Place Shaping

Armagh Place Plan (Armagh City, Northern Ireland)

Armagh is the smallest designated city in Northern Ireland with a population of 14,780. It has a rich culture and history creating a sense of belonging to the city for its residents in which place shaping is an important component. Armagh City, Banbridge and Craigavon Borough Council is currently finalising its new place plan with public consultation on the draft plan completed in January 2022. The draft plan⁶³ has four pillars:

- **A Connected City** which focuses on physical, digital and social connectivity including active transport, utilising Armagh's rivers, developing shared spaces and the use of digital technology to connect enhance tourism and investment opportunities.
- **A Green City** which focuses on sustainability and climate action including the circular economy, rewilding initiatives and the celebration of food (food security).
- **An Engaging City** which focuses on engaging with those that live, work and visit the city including developing meaningful tourism experiences, adaptive reuse for protected buildings, improved arrival points and greater public participation.
- **A Healthy City** which focuses on inclusion and health including through tackling inequalities, embracing sport, housing provision and active transport.

These four pillars help to realize Armagh's vision as a "vibrant, creative and environmentally responsible" city. As a fellow county town, Omagh can take inspiration from the direction that Armagh has taken in the development of its new place plan.

⁶⁰ See: <https://www.citywayfinding.com/legible-leeds/>

⁶¹ See: <https://www.citywayfinding.com/legible-leeds/>

⁶² See: http://www.lacockgullam.co.uk/walkit_leeds.html

⁶³ See: <https://shapingarmagh.com/downloads/Armagh-Draft-Plan.pdf>

7 SCOT Analysis

This section identifies the key strengths, constraints, opportunities and threats for Omagh as it moves towards 2035. It has been developed from the analysis and consultation completed as part of the development of the new Omagh Place Shaping Plan.

Strengths

Location

- Omagh is in a strategic location along the A5 Western Economic Corridor resulting in it being well connected with Derry, Belfast and Dublin.
- Recognised as a Main Hub within the NI Regional Development Strategy 2035 and as a Main Town within the FODC Corporate Plan 2020-2024.
- Situated on the River Strule, providing the town with an attractive riverscape environment that brings a blue public realm component to the town.
- The town is in close proximity to a beautiful rural landscape including the Sperrin Mountains and Gortin Glenn Forest Park, as well as the Ulster American Folk Park.
- Areas of the town score highly in relation to the living environment, access to services and low levels of crime.
- Appealing built environment with attractive heritage buildings on High Street and Market Street.
- Significant and attractive green space between Old Mountfield Road and the Camowen River

Education & Skills

- Strong education provision with a range of schools at primary and post-primary level, and further and higher education provided through the South West College Omagh campus.
- A high proportion of school leavers entering higher level and further level education in recent years with positive trends in educational achievement identified.
- Strule educational campus will be the largest shared campus in Northern Ireland and one of the largest in Europe.

Community & Services

- Good services provision and investment in public infrastructure.
- Good availability of broadband in the town including through the Project Kelvin fibre-optic cable
- Strong sense of community identity within Omagh, with a historical and cultural sense of place within the town and surrounding landscapes.
- Award winning Strule Arts Centre providing a contemporary arts venue and conference centre in the town centre.
- Good culture of sport and home to Tyrone GAA, which attracts significant levels of visitors on matchday.

Accessibility

- Compact town centre that has great potential for walking and cycling.
- Significant number of off-street parking spaces within 10 minutes' walk of the town centre.

Economy

- Omagh has a clear role as an economic, educational and public services hub for its surrounding region
- There is a strong and supported local business community.
- Town centre has a diverse range of independent shops and bigger brand retailers with little trade leakage
- There is a strong entrepreneurial environment: Almost 1 in 5 people are self-employed and 91% of businesses survive their first year (FODC level)
- The town has a vibrant night-time economy and holds a purple flag award.
- Omagh also has sectoral strengths and clusters around agri-food/business, advanced engineering & construction, and manufacturing
- The commercial vacancy rate of Omagh's town centre is to be below average
- Omagh has been selected as a location for a Northern Ireland Civil Service Connect2 Regional Hub as part of the Civil Service's approach to hybrid working.

Constraints

Accessibility

- No rail access and lack of access to motorways and dual carriageways.
- Infrequent and uncompetitive travel times in relation to public transport.
- Lack of cycling infrastructure and gaps in footpath provision (including narrow footpaths) curtail the uptake of active modes of transport (walking and cycling).
- Traffic congestion which is exacerbated by a complex one-way system in the town centre.
- Perception that there is not enough car parking despite the significant availability of spaces.
- Poor signage and linkages for car parks in the town centre, coupled with the complex one-way system contributes to the potential underutilisation of existing car parks.
- Lack of permeability along the riverside, particularly to connect the town centre to Strule Campus,
- Majority riverside businesses turning their backs to the river.
- Linkages with the town centre and design of signage in parks could be improved.

Community and Population

- High levels of deprivation in certain areas of the town.
- Omagh has slightly lower levels of individuals stating that they are in very good or good health and higher levels stating they are in bad or very bad health when compared to the NI average (2011 census)

- Significant gap in achievement for those from disadvantaged backgrounds in relation to income, employment and education.
- Overall population indicators point to a decline in population since 2001, low levels of population growth since 2011 and an increasingly ageing population.
- There has been a significant decrease in the key working cohort of people aged 16-39 since 2001.

Economy and Employment

- Residents of the Fermanagh and Omagh District fall below the Northern Ireland average for employment and economic activity.
- The majority of businesses in Omagh are micro and small enterprises.
- Decrease in the number of employee jobs and businesses in comparison to 2011
- Lack of a significant evening economy despite vibrant night-life in certain parts of the town.
- Limited FDI attracted to the town and small number of investor visits
- Poor linkage between Omagh and the Ulster American Folk Park means the town economy generally does not benefit from visitors to the park.
- Lack of significant tourism footfall within the town itself.
- Hotel and food offering could be enhanced.
- The town has Omagh has limited, capacity if any to expand retail floorspace through to 2030.
- Perceived lack of career opportunities leads to the migration of younger cohorts.

Education and Skills

- Underachievement is evident with Omagh overall still having a lower level of educational qualification attainment than the Northern Ireland average.
- There is a significant gap in educational achievement in those from the most disadvantaged backgrounds.

Opportunities

Economy

- Enhance innovation across leading sectors to increase large businesses within the town and encourage investment within these sectors
- Build on existing strengths and clusters around advanced engineering & manufacturing, agri-food, and construction.
- Capitalise on opportunities arising from Northern Ireland's unique position in relation to the EU Exit e.g. cross-border opportunities for the agri-food sector in Omagh
- Encourage the economic growth of existing SMEs, encourage SME start-up, and business investment to the town including through the provision of infrastructure such as enterprise working hubs within Omagh.

- Increase serviced industrial land to attract investment and allow for expansion of existing businesses.
- Increase collaboration between industry and academia to increase R&D in Omagh and embrace new technology and approaches.
- Capitalise on enhanced education provision through the Strule Shared Education Campus and continue to invest infrastructure to support skills development.
- Opportunity to capitalise on the accelerated transition to remote and hybrid forms of working.

Community

- Deepen collaboration between partner organisations and key stakeholders to ensure maximised service delivery.

Opportunity Sites

- Significant potential to transform the town through the identification and implementation of appropriate uses for the vacated opportunity sites to shape the town's future for growth and prosperity.
- Opportunities related to the vacated school sites within the town centre in supporting the future development of a wide range of uses, in particular, residential, commercial leisure, tourism and cultural/community facilities.
- Lisnamallard House and Arleston House may represent opportunities to further develop the accommodation and hospitality offering within the town.

Accessibility & Public Realm

- Opportunity to position Omagh as a town with high quality of life based on the natural environment.
- Opportunity to improve the buildings fronting the waterfront and make further use of the river as a natural asset through increased accessibility and permeability.
- Improve the public realm through increased greening and street furniture in the town centre to create an accessible environment that would contribute to increased footfall.
- Potential to improve linkages between the town centre and the green space between Old Mountfield Road and the Camowen River.
- Increase pedestrian and cycling infrastructure to capitalise on the compact nature of the town, encourage active transport and reduce traffic congestion.
- Develop stronger links between existing car parks and the town centre through better signage and adequate provision for walking.
- Opportunity to rationalise and relocate some car parks further from the town centre.
- Review the complex one-way system that has been identified as contributing to traffic congestion and improve public transport.
- Opportunity for pedestrianisation of a portion of the high street to open it for community use.

- Improve the permeability of the streets via public realm implementations which would ‘open’ up unsafe side-streets with street lighting and improve pedestrian pathways.
- Improve the signage of the town, developing a unique design that personifies the character and heritage of Omagh.

Tourism

- Potential for tourism to grow particularly within the town
- Improve the marketing of the tourism amenities that Omagh has to offer, such as the Sperrin Mountains and Ulster American Folk Park.
- Opportunity to improve the accessibility from the town to the surrounding tourism amenities such as the American Folk Museum and Sperrin Mountains via sustainable forms of transport such as greenways, improved cycling infrastructure, and improved pedestrian infrastructure.
- Strengthen and capitalise on the local culture that exists within Omagh, through better promotion of the built heritage and Strule Arts Centre.

Threats:

Community

- Low population growth and decreases in key working age cohorts which may lead to further decline in the town.
- Disadvantaged areas in the town could lead to further deprivation if not adequately addressed.
- Ageing population which may put pressure on healthcare provision and services

EU Exit and COVID-19

- Economic volatility and uncertainty arising from the EU Exit will impact a number of sectors and may detract from investment.
- Staffing shortages resulting from the EU Exit could threaten key sectors such as retail, hospitality, manufacturing and agri-foods.
- Loss of access to EU Funding resulting in funding gap in Northern Ireland including in relation to SME supports and unemployment programmes.
- Long-term impact of COVID-19 on local businesses remains uncertain.

Economy and Employment

- Low levels of investment and associated lack of employment opportunities within Omagh may lead to further migration of graduates and young people.
- Large public sector employment means the local economy could be significantly impacted by public sector budget cuts
- Online shopping continues to threaten the vitality of the high-street with retail a key sector in Omagh

- Lower economic activity and employment rates than the Northern Ireland average coupled with the identified decrease in employee jobs could lead to further economic decline if not addressed.
- Inflation and rising costs will impact a number of sectors and consumer spending
- Automation may lead to job losses in certain sectors

Town Centre

- Several large sites becoming vacant in the town and risk remaining vacant for significant amount of time. If opportunity sites lay vacant for a significant amount of time, it could threaten the vitality and vibrancy of Omagh particularly in the town centre.
- Climate change and the risk of flooding in the Town Centre, which can impact the interest of future development along the waterfront of the river.
- Environmental and health impact resulting from the high rate of car usage and traffic congestion.

Education and Skills

- Lower overall educational attainment than the Northern Ireland average threatens the ability of Omagh to attract investment despite positive trends.
- If not addressed, the significant gap in educational achievement for those that are from the most disadvantaged backgrounds may lead to increased levels of deprivation.
- Failure to embrace new technologies and skills could lead to a more uncompetitive workforce.

8 Strategic Priorities

Several strategic priorities have been identified from the qualitative and quantitative analysis of the town and the consultation with a wide range of stakeholders from across the community. They broadly look to address areas related to the strengths, constraints, opportunities and threats present in Omagh, and will be utilised in the development of the objectives and actions that will form the key components of the Omagh Place-Shaping Plan.

The **high-level strategic priorities** are as follows:

- **Developing and promoting Omagh as an attractive place that people want to live, work and visit.**
- **Increasing employment opportunities and ensuring supports for existing businesses.**
- **Capitalising on the natural environment including in the town itself and the surrounding countryside.**
- **Identifying how to progress the many opportunity sites located in and around the town.**
- **Ensuring that Omagh is an inclusive place that has a community that is prosperous, well educated, vibrant and healthy.**
- **Improving connectivity and accessibility throughout the town**

B Appendix 1: Consultees

Name	Position	Political Party / Organisation
ClIr Errol Thompson	Councillor	Democratic Unionist Party
Alison McCullagh	Chief Executive	Fermanagh & Omagh District Council
Gerard Tracey	Rural Affairs	Department of Agriculture, Environment and Rural Affairs
Liz Loughran	Director of Transport	Department for Infrastructure
Ethna McNamee	Regional Business Manager	Invest Northern Ireland
Sinead Collins	Director of Regional Services	Northern Ireland Housing Executive
Mervyn Seffen	District Commander Fermanagh & Omagh	Police Service of Northern Ireland
Alison Chambers	Director for Area Planning	Department of Education
Allison Forbes	Vice Chair	South West Age Partnership / Community Voluntary Sector Forum
Tony Rafferty	Transport Division	Department for Infrastructure
Lorraine Barry	Transport Division	Department for Infrastructure
Elizabeth Campbell	Pathfinder Lead	Western Health & Social Care Trust
Martin Graham	Regional Manager	Tourism Northern Ireland
Sinead Crossan	Shared Education Campus business change manager	Department of Education
Dr Nicholas O'Shiel	Chief Executive	Omagh Enterprise Agency
Joni Beatty	Inspector	Police Service of Northern Ireland
G Rafferty	Lecturer	Ulster University
Linda McElduff	Lecturer	Ulster University
Celeine McCarten	Director of Corporate Services and Governance	Fermanagh & Omagh District Council
John Boyle	Director of Community, Health and Leisure	Fermanagh & Omagh District Council
John News	Director of Environment and Place	Fermanagh & Omagh District Council
Kim McLaughlin	Director of Regeneration and Planning	Fermanagh & Omagh District Council
Mark Batchelor	Education Authority	Academy
Brian Lenehan	Trustee	Loreto Grammar School
Eddie Fynes	Trustee	Loreto Grammar School
Pat Andrews	Trustee	Sacred Heart College
Padraig McNamee	Head of Faculty	South West College
Conor Keys	CVS Forum Representative	FOCUS (Forum in Omagh for Community Understanding & Support)
Mary T Conway	CVS Forum Representative	Omagh Rural Community Network
Barry McCarron	Senior Business Development Officer	South West College
Alan Strong	Business Development Officer	South West College
Brendan Wilkinson	Rivers Agency	Department of Finance
Thomas McConaghie	Active Travel Officer -SW	Sustrans
Allan Duncan (owner)	Owner	Silverbirch Hotel
Julie Corry	Biodiversity Officer	Fermanagh & Omagh District Council
James McCallan	Director	Ballymore Services NI
Jonathan Moore	Land & Property Advisor	Strategic Investment Board
Bronagh Gormley	Business Development Officer	Omagh Chamber of Commerce



Mairead McCrory	Int Marketing Manager	Telestack
Mary Gormley	Business Owner	Nature Trail
Noel Slane	Business Owner	Software Company