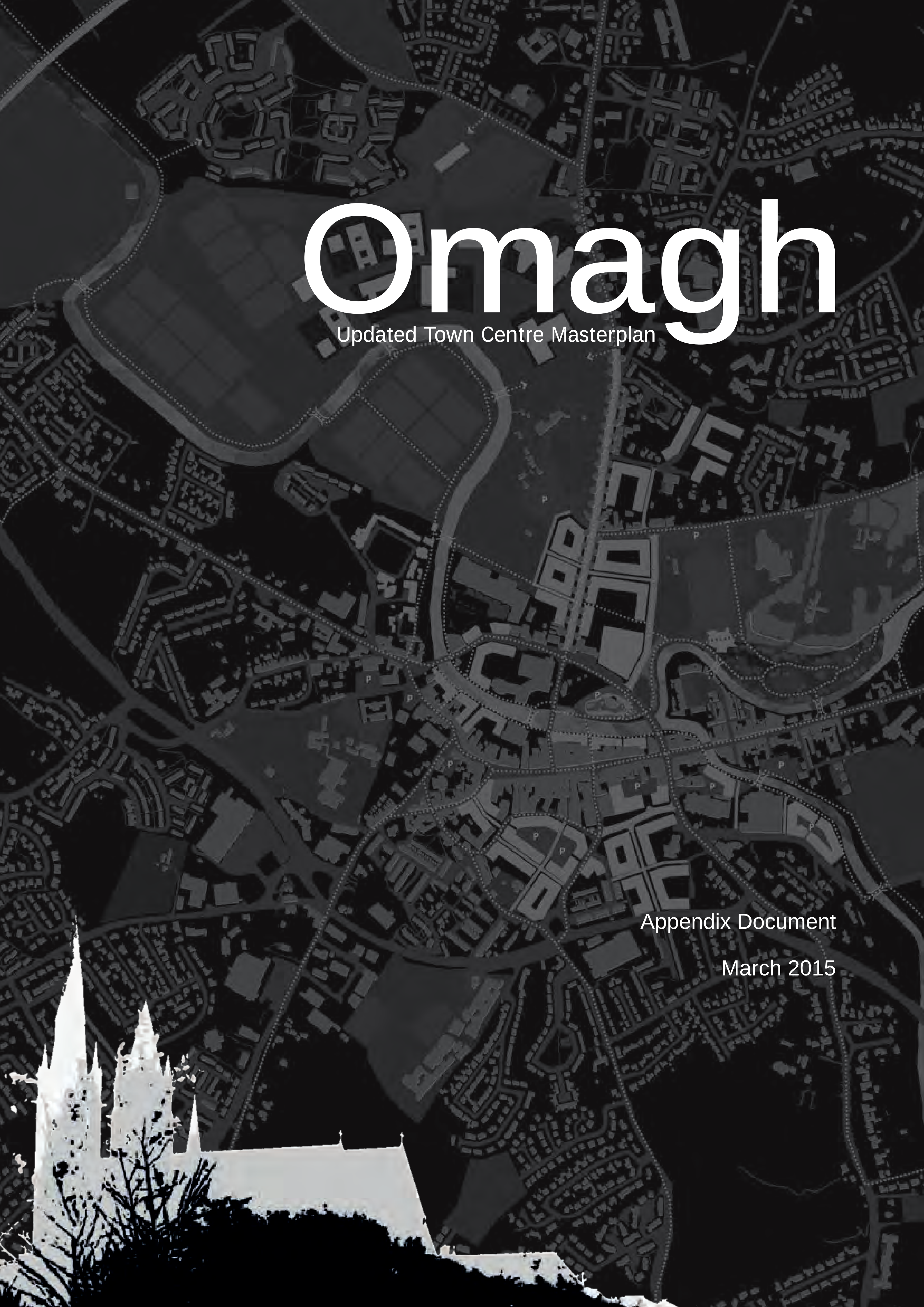
Omagh

Updated Town Centre Masterplan



Appendix Document

March 2015

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Appendix 1

Socio Economic Analysis Report

RSM McClure Watters (Consulting)
Connected for Success

Omagh Town Centre – Updated Masterplan

Socio-Economic Review

March 2015

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1 SOCIO-ECONOMIC OVERVIEW

1.1 Introduction

Omagh is a large town located in the west of Northern Ireland. It is the largest town in County Tyrone with a population of around 19,220 in 2011. For the purposes of this analysis, Omagh Town is considered as covering the following Electoral Ward areas:

- Camowen,
- Coolnagard;
- Dergmoney;
- Drumragh;
- Gortrush;
- Killyclogher;
- Lisanelly; and
- Strule.

This socio-economic profile for Omagh covers the following areas:

- Population;
- Employment and skills;
- Social and economic deprivation;
- The business environment; and
- Summary of key conclusions.

1.2 Population

1.2.1 Current Population

On Census day 2011, there were 19,220 people living in the 8 wards comprising the Omagh urban area. The median age of the population was 31 (younger than the Northern Ireland median age of 37). The table below presents an age structure breakdown comparison between the Omagh urban area, Omagh District and Northern Ireland overall.

Table 1:1: Population Age Structure

Area	Under 16	16-64	Over 65
Omagh Town	21%	65%	14%
Omagh LGD	23%	64%	13%
Northern Ireland	21%	64%	15%

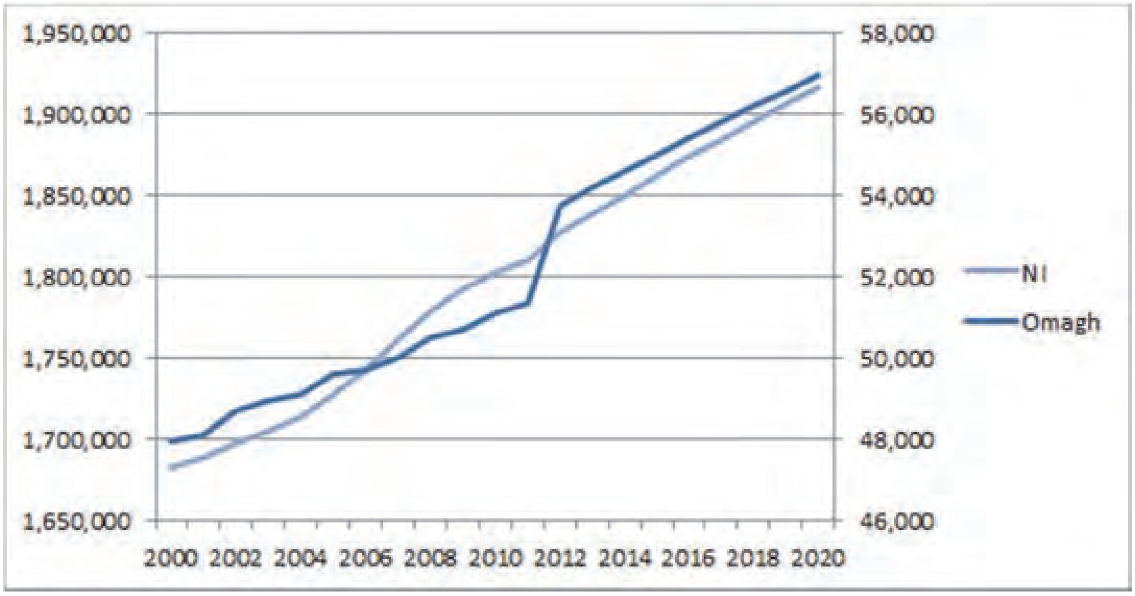
Source: NISRA, Northern Ireland Census of Population Survey 2011

The population structure of Omagh Town roughly correlates with the population structure of Northern Ireland overall. However the Omagh District Council area overall has a proportionally younger population structure.

1.2.2 Projected Population Growth

The Omagh District Council area experienced a rate of population growth which was marginally lower than that of the regional average between 2000 and 2010 (6.5% compared to 7.1%). The graph below demonstrates the anticipated forecast of population growth between 2010 and 2020 for the Omagh District Council area and Northern Ireland as a whole.

Figure 1:1: Past and Forecasted Population Growth



Source: NINIS

The total population for the Omagh District Council area is expected to rise from 51,116 in 2010 to 56,944 (+11.4%) by the end of 2020. This would represent a significantly higher rate of increase than the anticipated rate of increase across Northern Ireland of 6.4%.

1.3 Employment and Skills

1.3.1 Economic Activity

The table below provides an overview of the rates of economic activity within the Omagh Town and District Council areas.

Table 1:2: Percentage of Population Economically Active (16-74)

Area	Economically Active
Omagh Town	61.6%
Omagh LGD	64.5%
Northern Ireland	66.2%

Source: NISRA Census of Population Survey 2011

The wider Omagh District Council area has a higher rate of economically active people compared to the Omagh Town area. Both areas have a lower rate of economically active people in comparison to the overall rate across Northern Ireland, which is already the lowest among the 12 UK regions.

Table 1.3 below details the breakdown of the nature of economic inactivity among the resident population considered economically inactive.

Table 1:3: Analysis of Economic Inactivity (16-74)

Area	Retired	Student	Looking after home / family	Long term sick / disabled	Other
Omagh Town	34.5%	16.0%	13.1%	27.2%	9.2%
Omagh LGD	32.5%	19.6%	13.2%	24.5%	10.2%
Northern Ireland	38.3%	13.3%	13.2%	21.5%	8.7%

Source: NISRA Census of Population Survey 2011

Analysis of the population considered to be economically inactive highlights that Omagh Town has a higher proportion of full time students in comparison to Northern Ireland. Omagh also has a higher rate of population considered to be long term sick or disabled. The rate of people in retirement in the Omagh LGD and in Omagh Town is significantly lower than the overall Northern Ireland rate.

Table 1.4 below compares rates relating to unemployment for the Omagh area, compared to Northern Ireland.

Table 1:4: Analysis of Unemployment Statistics (August 2014)

Area	No. claimants	As % working age	Change over year[1]	Jobs Density[1]
Omagh Town[2]	720	5.3%	-	-
Omagh LGD	1380	4.2%	-21.4%	0.71
Northern Ireland	53,258	4.6%	-15.9%	0.71

Source: DETI, Monthly Labour Market Report & NISRA Census of Population Survey 2011

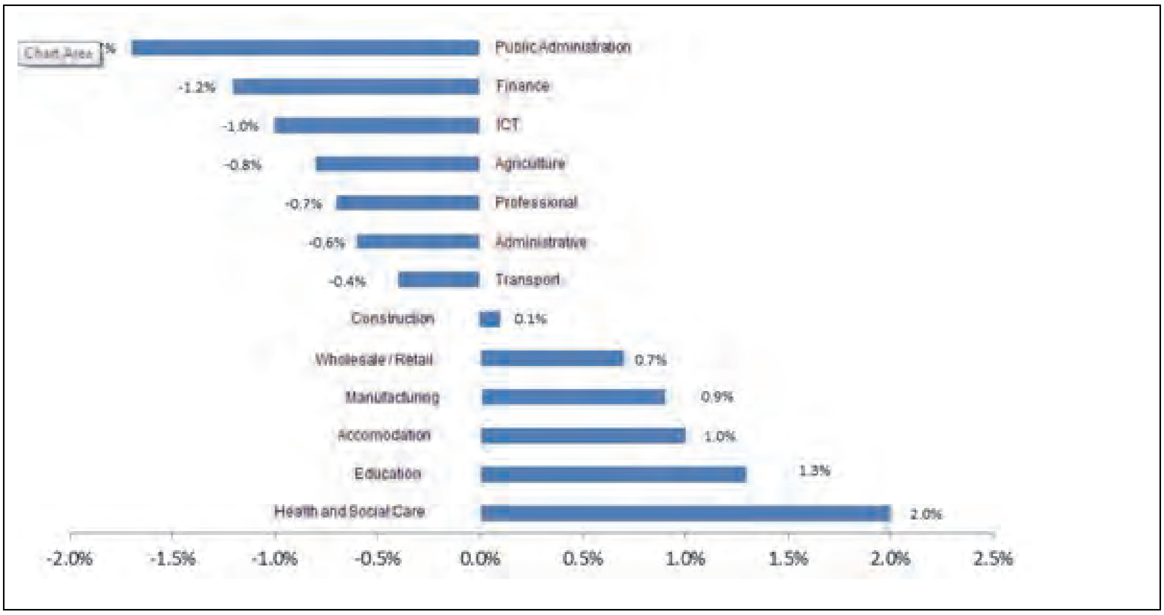
Table 1.4 demonstrates that Omagh Town has a higher rate of the working age population claiming benefits relating to unemployment (5.3%), compared to Northern Ireland (4.6%) and the wider Omagh LGD (4.2%). Within the Omagh District Council area, the rate of unemployment has fallen more significantly than Northern Ireland overall, this is likely a key contributing factor to the Omagh LGD having a lower rate of unemployment than the regional average.

Both the Omagh LGD and Northern Ireland display a jobs density figure of 0.71, demonstrating that the rate to which the Omagh LGD working population commute elsewhere is broadly similar to that of the Northern Ireland population overall.

1.3.2 Employment Sectors

The figure below illustrates the sectoral profile of employment with the Omagh Town area, compared to Northern Ireland as a whole.

Figure 1:2: Sectoral Employment



Source: NISRA Census of Population Survey 2011

[1] Data not available at electoral ward level
[2] As of Census day 2011 *(not available below Local Government District level)*

As can be seen from Figure 1.2 above, Omagh Town currently has an over reliance on employment in health and social care, education, accommodation and manufacturing. Combined with employment in general public administration, the overall level of employment in the public sector is just over 33% of total employment, this is a decrease of almost 10 percentage points from 2001.

Earnings

The table below compares the mean average wage for Omagh compared to the Northern Ireland average and illustrates the impact of the sectoral composition of the local economy.

Table 1:5: Mean Wage Level and Frequency by Population Level

Area	Wage Level per week	Population
Omagh (all)	£352	17,000
Northern Ireland (all)	£429	674,000
Omagh (full time)	£453	10,000
Northern Ireland (full time)	£538	426,000
Omagh (part time)	£185	7,000
Northern Ireland (part time)	£189	212,000

Source: NISRA ASHE (2013)

In terms of mean salary across part time and full time posts, the Omagh District Council area has a significantly lower salary level than the rest of Northern Ireland (i.e. 82% of the Northern Ireland average).

Table 1.5 shows us that the rate to which employment in the Omagh District Council area is constituted of part-time jobs (41%) is significantly higher than the Northern Ireland rate (31%). As previously illustrated, part-time jobs pay significantly less on average than those which are full time, and as such the effect of this will be more acute within the Omagh area,

1.3.3 Skills

Data from the 2012 Labour Force Survey shows us that the Omagh District Council area has the 2nd highest proportion, out of current 26 council areas, of 16-64 year olds with no qualifications (24.7%), significantly higher than the over Northern Ireland rate of 18.6%. The area is also ranked 9th lowest in terms of the proportion of the working age population qualified to at least NVQ Level 4 (25.1%). Once again this does not compare favourably with the overall Northern Ireland rate of 27.9%.

1.3.4 Labour Productivity

In terms of labour productivity, it is not possible to get a specific figure for the Omagh District Council area. However, we have used a regional figure for the South and West of Northern Ireland which illustrates the following.

Table 1:6: Productivity measured by GVA[3] per filled Job

Area	GVA per filled job as % of UK average
UK	100%
South and West of Ireland	75%
Belfast	91%
East of Northern Ireland	87%
North of Northern Ireland	79%

Source: Office for National Statistics (2012)

The table above shows that all sub-regions in Northern Ireland continue to lag in terms of productivity relative to the rest of the UK, and that the South and West of Ireland (including Omagh) has the lowest productivity level of the identified sub-regions. This puts it in the bottom 15% of UK NUTS3 regions in terms of productivity.

1.4 Social and Economic Deprivation

The table below compares the Omagh area in relation to Northern Ireland across a range of indicators relating to social deprivation.

Table 1:7: Comparison of Social Deprivation (2011)

Indicator	Omagh Town	Omagh LGD	Northern Ireland
Median age at death	79	80	80
General Health as Good / V. Good	75.8%	78.6%	79.5%
Cars registered to a disabled person (%)	10.8%	9.2%	8.4%
Owner occupied households	58.3%	70.2%	67.5%
Children in Low Income Families	29.6%	21.2%	21.4%

Source: NINIS

The table above illustrates that the Omagh Town generally compares less favourably to Northern Ireland across various indicators relating to deprivation. This is not an overall trend apparent across the Omagh area which compares favourably to Northern

[3] Gross Value Add

Ireland across a number of indicators. This is further reinforced when considering evidence from the 2010 NI Multiple Deprivation Measure where the Lisanelly_2 SOA ranks within the top 10% most deprived areas in Northern Ireland.

1.5 The Business Environment

Registered Companies

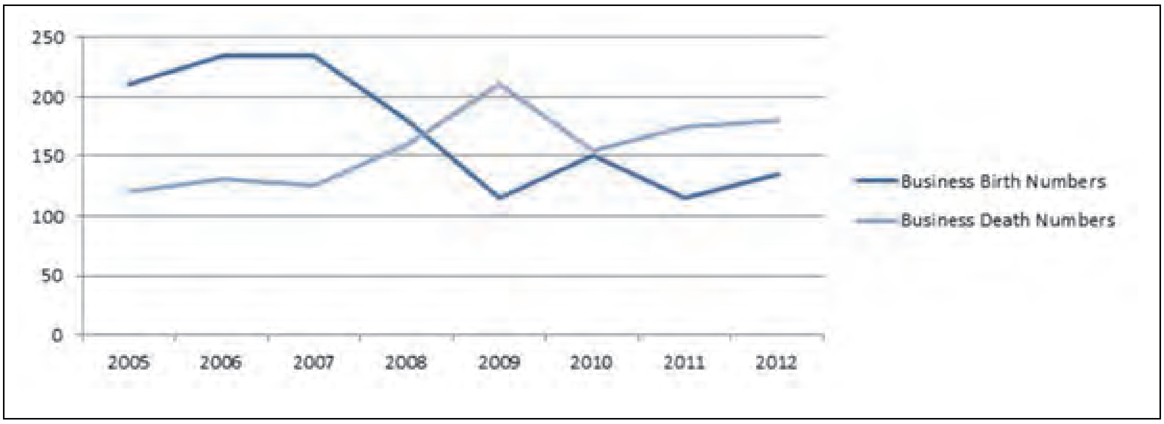
In 2014, according to the Interdepartmental Business Register, the Omagh District Council area has 3,190 VAT registered companies. This amounted to 4.7% of the total registrations for Northern Ireland. This put the Omagh LGD in 6th position out of 26 Local Government Districts behind Belfast (12.9%), Newry & Mourne (6.8%), Fermanagh (6.1%), Lisburn (5.5%) and Dungannon (4.9%).

1,645 of the 3,190 VAT registered businesses in the Omagh area were classified as being micro (i.e. less than 5 employees). There were no 'large' companies (over 250 employees) registered in the Omagh area, however there were 30 medium sized enterprises with between 100-250 employees.

Business Births and Deaths

The figure below demonstrates the number of business births and deaths in the Omagh LGD between 2005 and 2012.

Figure 1:3: Annual Number of Business Births/Deaths in Omagh LGD (2005-2012)



Source: DETI, Business Demography

Figure 1.3 shows us that up until the economic downturn in 2008, there were a relatively stable higher annual number of business births in the Omagh LGD than business deaths. However from 2008 onwards, the number of business deaths in the Omagh area has consistently outstripped the number of births.

The table below demonstrates the level of both business births and deaths in the Omagh LGD, as a rate, in comparison to the rates prevalent across NI and the UK as a whole.

Table 1:8: Annual % Rates of Business Births/Deaths (2005-2012)

		2005	2006	2007	2008	2009	2010	2011	2012
Omagh LGD	Business Birth Rates	11.3	11.8	11.2	8.2	5.4	7.3	5.7	6.8
	Business Death Rates	6.4	6.5	6.0	7.3	9.9	7.5	8.7	9.0
Northern Ireland	Business Birth Rates	10.5	10.1	10.3	9.4	6.6	7.8	6.5	7.0
	Business Death Rates	6.7	6.8	6.5	7.0	8.7	8.8	8.5	9.4
UK	Business Birth Rates	12.6	11.6	12.3	11.5	10.1	10.0	11.2	11.4
	Business Death Rates	10.5	9.4	9.8	9.6	11.8	10.6	9.8	10.7

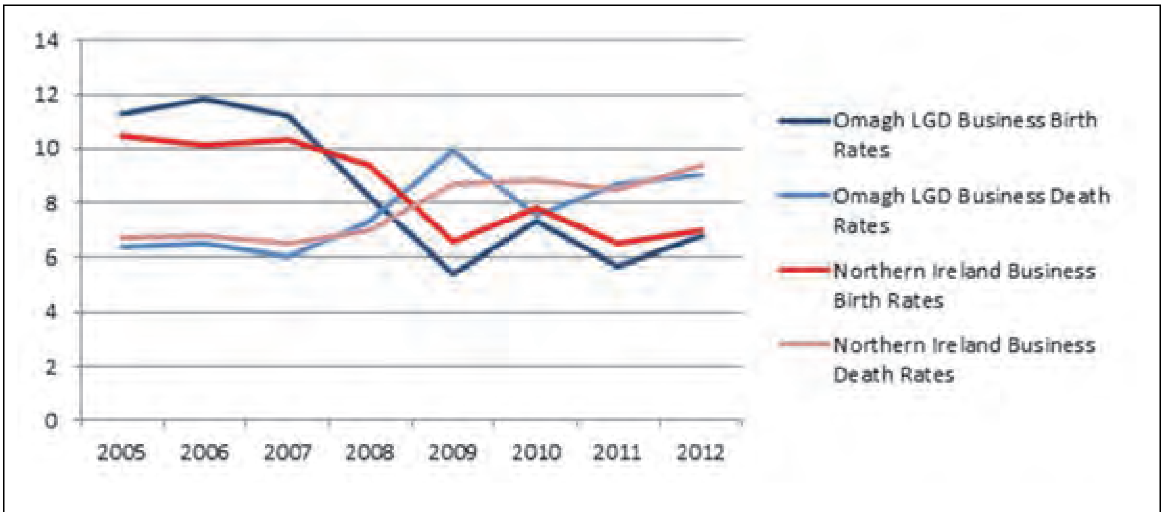
Source: DETI, Business Demography

The table shows that while Northern Ireland displays a consistently lower rate of business births in relation to the UK, there is also lower rate of business deaths in Northern Ireland, even in the years post-economic downturn.

What is also evident from the table is that the Omagh LGD was performing better than Northern Ireland overall pre-2008 with a higher rate of business births and lower rate of business deaths. However the economic downturn appears to have had a more significant impact on the Omagh area where it consistently displays a lower annual rate of business births and higher rate of business deaths from 2008 onwards.

This is further illustrated in figure 1.4 overleaf.

Figure 1:4: Annual % Rate of Business Births/Deaths 2005-2012



Source: DETI, Business Demography

Business Sectors

The table below details the number of registered companies in the Omagh LGD by sector and the percentage make up compared to Northern Ireland as a whole.

Table 1:9: Business Registrations by Sector (2014)

Sector	No of Businesses Registered (Omagh)	% Total Registrations (Omagh)	% Total Registrations (Northern Ireland)
Agriculture	1,425	44.7%	25%
Production	205	6.4%	6.4%
Construction	460	14.4%	13.5%
Motor Trades	95	3.0%	3.5%
Wholesale / Retail	325	10.2%	14.1%
Transport & Storage	75	2.4%	3.2%
Accommodation & Food	90	2.8%	5.4%
ICT	20	0.6%	2.3%
Finance & Insurance	20	0.6%	1.5%
Property	50	1.6%	2.9%
Professional / Scientific / Technical	115	3.6%	7.4%
Business Admin/Support	90	2.8%	3.4%
Education	25	0.8%	0.8%
Health	85	2.7%	4.2%
Entertainment/Recreation	120	3.8%	6.3%

Source: Northern Ireland Inter-Departmental Business Register

Given the rural nature of much of the Omagh District, unsurprisingly the vast majority of VAT registrations relate to the agricultural sector. Beyond this, the major sectoral concentrations of business registrations in the region are in the construction and wholesale & retail sectors.

There is a low incidence of registrations in the tertiary, service sectors such as finance & insurance, and ICT. We can conclude that the primary focus of private sector activity in the Omagh LGD is focussed toward primary and secondary sectors.

1.6 Inward Investment

Northern Ireland has a strong track record of attracting foreign direct investment (FDI). In the five years from 2006/07 to 2010/11 Invest NI assisted over 1200 companies to invest in green-field FDI projects. Software and ICT, business and professional services accounted for 71% of these new jobs.[4]

In software development, Northern Ireland was the most successful region in Europe in attracting green-field FDI.[5] The following are viewed as priority sectors for foreign direct investment into Northern Ireland.

Table 1:10: FDI Priority Sectors

Sector	Competitive Advantage
Financial Services	Northern Ireland's main advantage is its very low labour costs compared to West European financial centres, with labour costs for job junctions in financial services around 50% lower than in Dublin, London and Paris. At the same time there is high skills availability with 2,500 finance related grates and a high number of graduate finance courses.
Software & ICT	NI has a strong advantage in the supply of graduates in computer science. When combined with substantial costs savings, both labour costs and property costs and the availability of financial incentives and support.
Business and Professional Services	This is the major sector for job creation in Northern Ireland accounting for over one third of inward investment jobs created in the last five years. The overall competitive advantage is similar to that for software and ICT, lower competition for graduates compared to other locations and the most competitive operating costs compared to Western Europe locations.
Aerospace	Inward investment in Northern Ireland in the aerospace sector is highly concentrated in the expansion activities of existing investors: Bombardier, Goodrich, Beaufort and Thales.

Source: FDI Intelligence and Invest NI

Globally the number of FDI projects is forecast to increase by 40% from 12,025 projects in 16,806 in 2015. The number of FDI projects attracted to the UK is forecast to increase by 7% over the next five years to over 800 projects in 2015. The average size of projects attracted to the UK is expected to decline and reflects companies locating larger strategic function in emerging markets rather than concentrating activities in Western Europe. For Northern Ireland, this means an increased level of FDI activity.

A response by Omagh District Council on the Independent Review of Economically Policy identified that the Omagh area had been restricted in its ability to attract FDI due

[4] Invest NI FDI Database
[5] FDI Markets Database, FDI Intelligence, Financial Times Ltd.

to delays in securing the appropriate land banks with a knock on effect being that the large micro and small/medium enterprises could not benefit from the supply chains of larger and foreign companies. It was recommended that immediate actions be taken by Invest NI, in areas such as Omagh, to increase the acquisition of industrial land and to prioritise the area as a destination for FDI.

1.7 Potential Growth Sectors

1.7.1 Overview

The South West College has identified the following framework for the Economic Repositioning of the South West region.

Table 1:11: SWC Regional Economic Repositioning Framework

Current regional employment dependencies	Future regional employment opportunities
• Public Service • Construction • Agriculture • Retailing • Tourism	• Advanced Engineering • Business Services • ICT / Creative Industries • Sustainable Engineering Development • E-Retailing • Bio-Dynamic Farming and Food Retailing • Tourism / Hospitality • Sustainable Construction

Source: SWC, College Development Plan 2012-15

The South West College, in its Omagh Campus, has developed the “Idea” facility to support a wide range of organisations, from a range of sectoral backgrounds, in the creative process of generating new ideas. The College seeks to develop ideas from this into prototypes which can be tested for “proof of concept”. Through its InnoTech centre in nearby Cookstown, the SWC also seeks to grow regional innovation and technology, with partnerships with businesses a key aspect. The college is also currently creating partnerships in developing international markets e.g. BRIC and the Gulf.

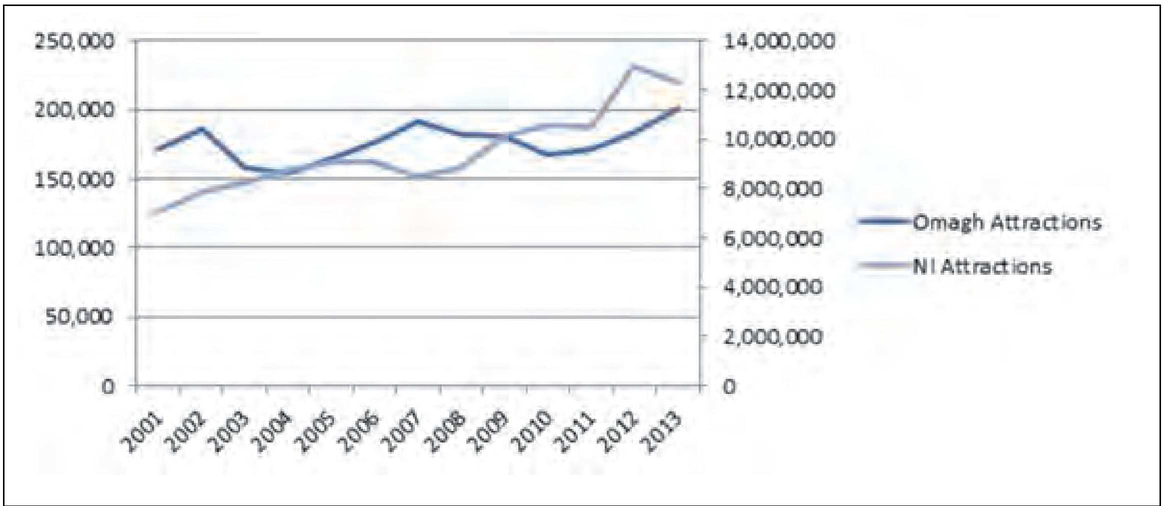
The following sections provide an overview of a number of sectors that could potentially offer Omagh economic growth potential.

1.7.2 Tourism and Hospitality

The Tourism sector in Northern Ireland has grown significantly over the past decade. Between 2003 and 2013, the number of overall visitors to NI visitor attractions increased by almost 50% from circa 8.3m visitors to 12.3m.

Figure 1.5 below demonstrates this trend in growth in relation to trends in visitor numbers to attractions in the Omagh LGD area over the same period.

Figure 1:5: Trends in Visitor Numbers to Attractions in Northern Ireland/Omagh LGD



Source: NISRA Tourism Statistics Branch

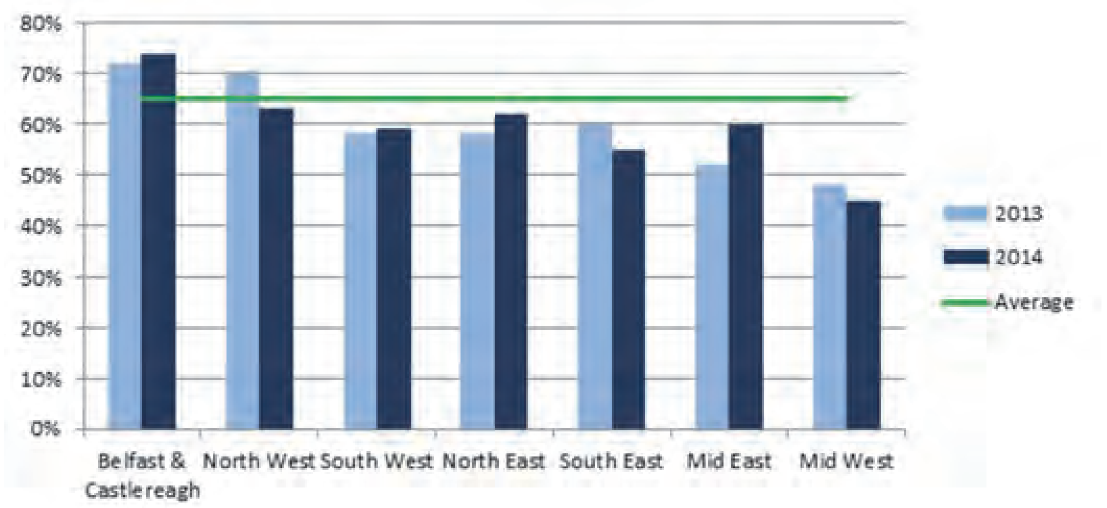
Figure 1.5 demonstrates that Northern Ireland has been able to maintain a sustained period of growth in its visitors numbers. Visitor trends in the Omagh district, however, are characterised by periods of growth and contraction in the number of visitors to attractions in the area.

In 2011/12, the Omagh District Council area accounted for only 1% (41,000) of trips by all visitors in Northern Ireland. This puts the region as 20th out of the 26 council areas, with only Larne, Strabane, Cookstown, Magherafelt, Castlereagh and Ballymoney attracting less visitors. Similarly in the same year, Omagh District benefited from only 0.6% (£4m) of all visitor spend in Northern Ireland putting it 22nd out of the 26 council areas.

Figure 1.6 overleaf demonstrates rates of hotel room occupancy across the Mid-West[6], during the month of August, compared to the rest of Northern Ireland.

[6] Mid-West region includes Cookstown, Magherafelt, Omagh and Strabane

Figure 1:6: Hotel Room Occupancy Rates (%) 2013/14



Source: Tourism Statistics Bulletin, Statistics on Accommodation in August 2014

Figure 1.6 once again demonstrates how the tourism and visitors sector is underperforming in the west of Northern Ireland, with the mid-west region experiencing the lowest rates of hotel occupancy compared to all other regions.

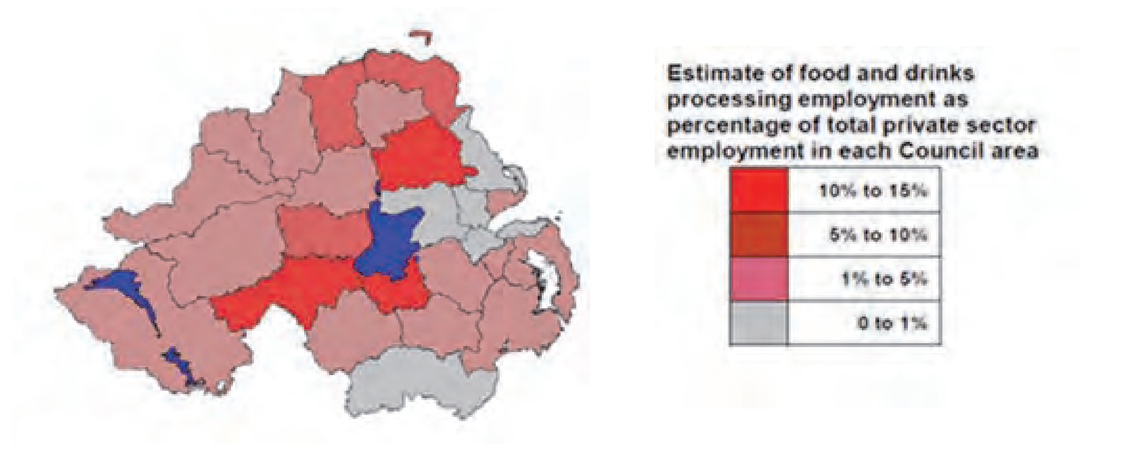
Given the overall growth in regional tourism, Omagh could benefit significantly through improving its tourism offering. A new Masterplan should aim to maximise the town's offering to Tourists, while complementing established tourist attractions (e.g. Ulster American Folk Park) with newer visitor attractions (e.g. Dún Uladh Heritage Centre). This, along with the forecasted population growth, should in turn support the expansion of the accommodation & food and entertainment sectors which combined account for the highest number of businesses past the agriculture, construction and retail sectors.

1.7.3 Agri-Food

The food and drink manufacturing and processing sector accounts for an estimated 21% of Northern Ireland's total manufacturing sector and is worth over £552 million to the local economy. The industry has continued to grow throughout the economic downturn, and now employs over 19,000 people throughout NI.

Figure 1.7 below demonstrates the geographical spread of food and drinks processing employment in Northern Ireland.

Figure 1:7: Geographical Spread of Food/Drink Processing by LGD



Source: Agri-Food Sector: Role in the Economy by NIFDA (2012)

Figure 1.7 shows that the majority of employment in the Food and Drinks Processing sector is concentrated in 6 council areas:

- Craigavon;
- Dungannon;
- Ballymena;
- Cookstown;
- Coleraine; and
- Moyle.

The Going for Growth strategy[7] sees the agri-food sector as looking at a major increase in production over the next 6 years, with the targets for the sector in Northern Ireland being particular ambitious:

- Growth in sales by 60% to £7bn;
- Growth in sales outside Northern Ireland by 75% to £4.5bn – this requires an increase of £3.4bn by 2020; and
- Growth by 60% to £1bn to total added value of products and services from local companies – this requires an increase of £300m by 2020.

Given the previously identified strengths of both the agriculture and manufacturing sectors within the Omagh LGD area there may be long-term potential for the alignment of the two sectors in order to take advantage of the forecasted growth in the agri-food sector.

[7] Agri-Food Strategy Board, 2013, Going for Growth: A strategic action plan in support of the Northern Ireland agri-food sector

1.8 SWOT Analysis and Summary

1.8.1 SWOT Analysis

Figure 1.8 below details the identified strengths, weaknesses, opportunities and threats for the future development of Omagh Town, which the Masterplan should be cognisant of.

Table 1:12: SWOT Analysis for Omagh Town

SWOT ANALYSIS	
Strengths	**Weaknesses**
• The Omagh District area has a comparatively younger population than Northern Ireland. This is forecast to grow further over the coming years. • While the current working age population of 16-65 has a high rate of individuals with no qualifications, the rates of attainment among school leavers in the Omagh District area are improving significantly. • Strong manufacturing sector within the Omagh DC area.	• Employment within the Omagh region is overly dependent on the public services of Health and Education. • The private sector in the region is overly dependent on the agricultural, construction and retail sectors. • Average earnings in the region are low compared to NI, and the UK, as are the rates of GVA productivity per head of population. • There is very limited tradition of FDI within the region and the region is currently not in sync with emerging FDI trends. • The region is experiencing higher levels of unemployment relative to the rest of Northern Ireland.
Opportunities	**Threats**
• Local Government Reform will see the new Fermanagh and Omagh District super-council gain a greater measure of powers relating to planning and economic development. • The development of the A5/N1 cross-border dual carriageway will significantly improve connectivity between Omagh and Dublin & the rest of ROI. • The lower wage costs in Omagh can be utilised to attract firms seeking to reduce labour costs. • Potential for alignment between 2 largest sectors (agriculture and manufacturing)	• Significant levels of deprivation remain in particular pockets of Omagh Town and the wider area. • The overall NI economy is highly dependent on the public sector. UK-wide austerity measures are likely to present a significant constraint on the growth of the NI economy. • While the younger emerging workforce is more skilled, with a higher level of qualifications than previously. To a large extent these skills are not matched by the current and emerging employment sectors in the area. “Brain drain”.

Source: RSM McClure Watters

1.8.2 Summary

In summary, given its high dependence on sectors within limited growth prospects (i.e. public sector, construction, retail and manufacturing), Omagh and the surrounding region is likely to continue to experience challenging growth prospects. Where possible, the Masterplan should develop spaces and infrastructure that facilitate:

- opportunities to develop a more diversified (and value adding) employment profile within the town (e.g. through providing serviced office facilities opportunities for the growth of local service sector firms);
- the maintenance of existing, and the attraction of new jobs, in sectors where the area has developed long standing skills/resource (e.g. public sector);
- further development of the town's tourism and hospitality offerings; and
- development of the areas agriculture, manufacturing and agri-food sectors.

Appendix 2

Retail Capacity Analysis Report

Omagh Town Centre Masterplan

Retail Capacity Study

Strategic Planning
4 Pavilions Office Park
Kinnegar Drive
Holywood
BT18 9JQ

T: 028 9042 5222
F: 028 9042 2888

Ref : C03032

November 2014

CONTENTS

Appendices

1.0 BACKGROUND

1.1 Strategic Planning has been commissioned by The Paul Hogarth Company on behalf of the Department for Social Development to prepare a Retail Capacity Study for Omagh Town Centre. This study informs and is part of the form part of the Omagh Town Centre Masterplan.

1.2 The purpose of the Retail Capacity Study is to assess the need for further retail floorspace in Omagh Town Centre. This assessment is informed by the Household Survey and by assessments of population, retail expenditure per head, existing levels of retail floorspace and turnover and growth in retail expenditure.

1.3 The need for further retail development is assessed over the next 15 years. The assessment takes into account extant retail planning consents where appropriate and assumes that these will be built and trading.

2.0 THE STUDY TOWN - OMAGH

2.1 The town of Omagh is located in County Tyrone and is the principal town in Omagh District Council area. The District of Omagh covers almost 113,000 hectares making it the second largest district council area in Northern Ireland. The District is mainly rural in character and possesses an unspoilt landscape as a well as a rich, historical and cultural heritage.

2.2 Omagh Town is located more or less in the centre of the District and is the main centre of population. The other settlements in the District comprise scattered small town and villages with residents also living in dispersed rural communities. The town has good road links to nearby towns which include Strabane to the north, Cookstown to the east, Ballygawley to the south and Irvinestown and Enniskillen to the south west. Regionally, the town is located approximately 68 miles to the west of Belfast and 34 miles to the south of Northern Ireland's second city Derry/Londonderry.

2.3 Omagh District and Town has seen considerable population growth over recent decades. Since 1971 to the latest Census in 2011, the District population grew by almost 25% to 51,356 persons. In the period 1991 to 2011 alone, the District population grew by 12%. There are currently no population figures provided for towns in the 2011 Census, however in the period from 1971 to 2001, the population of Omagh town grew by 52% and by 15% in the period 1991 to 2001.

2.4 Omagh Town is a major administrative centre for a wide area and within the District, it is the dominant commercial centre, the main source of employment and industry, the principal centre for housing, education, recreation and community facilities. It is expected that Omagh Town will continue to be the dominant centre within the District. There has been extensive upgrading of the public realm in Omagh including, environmental improvements along the Strule riverbank, a new arts centre and a new sub-regional campus for further education.

2.5 The Regional Development Strategy 2035 identifies Omagh as one of a number of Main Hub towns in Northern Ireland. One of the elements of the The RDS's Strategic Framework Guidance is to "*Promote economic development opportunities at Hubs*" [1]

2.6 Omagh Town Centre contains a variety of uses which include shops, offices, civic and institutional buildings, entertainment and housing. Shopping is the most important function of the town centre, attracting people and expenditure, providing jobs and giving the centre its vitality. The Town Centre extends from Old Mountfield Road to the north, to campsite Road to the east, to the Great Northern Road to the south and to Brook Street to the west. The Strule River runs more or less centrally through the town centre with town centre uses located on both sides.

2.7 The retail core of the town centre is located along High Street, Market Street, John Street, Bride Street and George's Street with further retailing located at various locations in the town centre.

2.8 The main food retailer in Omagh Town Centre is Asda on the Dromore Road. Food retailers elsewhere in the town centre there is a Supervalu (which is currently being extended), Lidl, Dunnes (about 40% food), M&S and Iceland.

3.0 THE CATCHMENT AREA

3.1 The starting point in assessing retail capacity is to define the study / catchment area which then forms the basis for the statistical analysis of population, retail spending power and the amount of existing retail floorspace.

3.2 The current development plan for Omagh, the Omagh Area Plan 1987 – 2002 is past its end date, however it remains relevant pending the adoption of a new development plan. The current Plan considers that the catchment area for Omagh Town corresponds approximately with the boundary of the District, and significant change in the catchment area is unlikely, with Omagh at the centre of the District and the District's boundaries being almost equidistant from adjoining District Towns.[2] The sphere of influence and attraction of Omagh Town will therefore be limited by the presence of these other District Towns and consequently the catchment area of Omagh Town would tend to coincide with its district boundaries.

3.3 We consider it is reasonable therefore to use the District of Omagh as the catchment area for our study. This study area is shown on the map in **Appendix 1**. It is considered that this is the area from which Omagh Town Centre draws most of its shoppers.

3.4 From Map 1 it can be seen that the catchment area is inevitably limited mainly by the presence of other competing town centres. The District Town of Strabane is located about 15 miles to the north of Omagh, the District Towns of Cookstown and

[1] Regional Development Strategy, RDS 2035, SFG 11, p.72.
[2] Omagh Area Plan 1987 – 2002, paras. 14.1 and 14.2.

Dungannon are located approximately 20 miles to the east and south-east respectively, the District Town of Enniskillen is located approximately 25 miles to the south-west. The area to the west of Omagh is mainly rural with the next main towns encountered in the Republic of Ireland in the towns of Donegal and Ballyshannon.

3.5 The large District Towns surrounding Omagh contain a variety of shops which likely cater for most of the shopping needs of their resident populations. It is unlikely therefore that significant numbers of people travel from these surrounding towns to shop in Omagh. Equally, it is also unlikely that significant numbers of people travel from Omagh to shop in the surrounding towns given the existing retail offer in Omagh.

3.6 We consider therefore that the study area shown is the area from which Omagh Town Centre draws most of its shoppers

Catchment Population.

3.7 **Table 1** below outlines the population estimates for the catchment area. As stated earlier, the catchment area for the purpose of our study is the District of Omagh. The 2011 Census provided the Northern Ireland Statistics and research Agency (NISRA), gives a population figure for the District of Omagh in 2011 of 51,356 persons. We have projected this to the current year of 2014 and to the end date of the study at 2029, based on an average population growth rate per annum of 0.9%. This has been derived from NISRA's 2008 based population projections for the District of Omagh.

Table 1 - Study Area Population

Year	2,011	2014	2029
	51,356	54,627	60,343

Sources / Notes:

NI Census 2011.

Projection to 2029 based on average growth rate of 0.9% from 2011 - 2023 derived from NISRA 2008 based population projections.

3.8 The current population within the catchment area is estimated to be 54,627 persons. This is estimated to rise by about 5,700 persons (or by approximately 10%) to 60,343 persons in 2029.

OVERVIEW OF RETAIL PROVISION IN THE CATCHMENT AREA.

3.9 Retail provision in the catchment area is located principally in Omagh Town and in the three smaller towns of Carrickmore, Fintona and Dromore. The remaining settlements in the catchment consist of villages and hamlets where retail provision is very limited, catering mainly for the essential everyday needs of its residents in providing goods such as bread, milk newspapers etc.

3.10 In Omagh Town, retailing is concentrated in the town centre at various locations including the retail core streets of High Street, Market Street, John Street, Bridge Street and Georges Street as well as in a number of standalone stores and retail parks in and on the edge of the town centre.

3.11 In terms of convenience goods (mainly food), the main food retailer in Omagh Town centre is Asda, which is located off the Dromore Road to the south of the town centre's main retail core. Elsewhere in the town centre there is a Supervalu (currently being extended), Lidl, Dunnes (about 40% food), M&S Simply Food and an Iceland store. The remaining convenience retail offer in the town centre is generally small scale comprising of mainly independent retailers.

3.12 At present therefore, Omagh Town Centre possesses only one food superstore proper, which is designed to cater primarily for weekly or fortnightly, bulk food shopping. It is a standalone store, located directly off a main traffic route and provides convenient, on-site car parking, all of which makes it attractive as a destination to purchase food items in bulk. On the other hand, the other retailers selling food referred to above are of a smaller scale with a smaller range of goods more suited to top-up grocery shopping. Whilst the Supervalu store is currently being extended, it is located in the heart of the busy retail core with less ease of access and car parking, making it less attractive for bulk grocery purchases than Asda. Lidl is located off James Street and is a discount retailer selling a limited range of grocery items. Comment on Dunnes after site visit...

3.13 M&S Simply Food is located in the Showgrounds Retail Park off Sedan Avenue and sells mainly special occasion foods as opposed to the full range of grocery items. Iceland is a niche retailer selling mainly frozen items and again does not offer the range or scale of goods to cater for one stop, weekly or fortnightly, food shopping trips.

3.14 In terms of comparison goods (non-food), this is located mainly in the town centre streets and in a number of retail parks. The retail core in the town centre is dominated by mainly small scale independent, local retailers. This core area is very compact and most of the uses, including retail, are located at ground floor level in long narrow units which extend along Market Street and High Street. The town centre includes non-food retailers such as Boots, Dorothy Perkins, Carphone Warehouse, Clinton Cards etc.Game etc.

3.15 Elsewhere in the town centre, Showgrounds Retail Park is located to the north of the retail core off Sedan Avenue. Retailers here include Argos, New Look, peacocks, Tempest, Poundworld, M&S Simply Food, Laura Ashley, Next, Heatons, River Island and Yellow Lane.

3.16 On the Dromore Road in the southern reaches of the town centre and opposite the Asda foodstore, there are a number of retailers which include Home Bargains, Gormely Fine Arts along with plumbing/building and car repairs.

3.17 To the north-west of this and on the edge of the town centre is the Great Northern Retail Park which includes Homebase, Harry Corry, Halfords and B&M.

3.18 The three towns of Carrickmore, Fintona and Dromore contain a mix of uses such as retail and retail servies, restaurants, chemists, butchers, library, post office, dentist, professional offices, take away, public houses, credit union, funeral directors and book makers. The food retail offer in each of the towns is generally small scale, catering mainly for the everyday, essential needs of its residents. Such retailers include Nisa, Spar, Centra, Vivo, Coscutters along with some other local shops including butchers, newsagents and grocers. There is a Supervalu store in Fintona. The non – food retail offer in the towns is very limited. The residents in these towns will look to larger towns for a greater range and choice of both food and non-food goods.

Retail Commitments

3.19 There are a number of outstanding retail planning permissions and recently completed retail developments in the catchment area. These are outlined in **Appendix 2** and summarised in **Table 2** below.

Table 2 Retail Commitments

	Convenience Retailing (sqm)	Comparison Retailing (sqm)	Unspecified Retailing (sqm)
Outstanding planning permissions	8,490	4,930	451
Recently started / completed developments	519	0	4,319

3.20 The most significant retail commitments in the catchment area are the retail approvals at Scotts Mill in Omagh Town Centre and at Derry Road which is outside the town centre. The approval at Scotts Mill is for full planning approval for a food superstore of 6,350 sqm gross of which 4,537 sqm is conditioned for the sale of convenience goods. The approval on the Derry Road is an outline planning approval which includes a superstore of 8,164 sqm gross of which 3,138 sqm is for the sale of convenience goods and 1,780 sqm for the sale of comparison goods. The approval also includes three units to sell bulky comparison goods (3,150 sqm gross) and a shop of 250 sqm net, associated with a petrol filling station. A reserved matters planning application has been submitted in relation to this development but is currently undecided.

4.0 SHOPPER SURVEY

4.1 A Shopper Survey was carried out in 2013 on behalf of the Department of Social Development as part of the Omagh Revitalisation Project. The purpose of the survey was to establish perceptions of the area prior to works being carried out as part of the revitilisation programme. The report is included in **Appendix 3.** The Executive Summary of the report highlights the following :

- Overall, the majority (59%) of visits to the area were either passing through or work in the area.
- Of those in the area to shop / use services (41%), almost two thirds (64%) travel to the area by car and almost half (48%) visit the area at least once per week, with 77% of respondents spending less than £20.
- The area was viewed negatively by over two thirds (68%) of shoppers and only 3% viewed the area in a positive light.
- Just over one third (38%) were visiting the town centre for shopping purposes;
- Building Conditions and Shop Fronts were seen as the main areas of concern and also the main areas for improvement. This was further enforced when shoppers were asked if they agreed the physical appearance of John Street could be improved.
- Footfall is busiest at lunchtime (Between 12pm and 1pm) with the busiest point at McGreads Pharmacy. Friday was the busiest day of the three.

5.0 OMAGH CONVENIENCE EXPENDITURE CAPACITY.

5.1 This section assesses the amount of expenditure in the catchment area that is available for spending on convenience retail goods. This will be projected to determine the level of spare expenditure available in the future that could service further retail development in the future in Omagh selling convenience goods. This assessment is carried out by analysing the per capita spend on convenience goods which when combined with the population figures, allows for calculations to be made on the amount of expenditure available to spend on convenience goods. From this, calculations are made on how much convenience retail floorspace this available expenditure can support which is then compared to existing convenience retail floorspace figures to determine if spare expenditure is likely to exist to support further convenience retail development.

Catchment Retail Expenditure

5.2 **Table 3** shows the expenditure per head on convenience goods for the current year and for the projected years of 2029. These figures are derived from the 2005 expenditure per head figures for convenience goods provided in the Retail Study by Colliers in 2007 to inform the preparation of the West Tyrone Area Plan 2019 which has not yet been adopted.

5.3 From this, we have calculated the average spend per head in 2005 to be £1,488.56 on convenience goods. In line with the Colliers study, we have projected this to 2010 by 0.5% per annum. However to take account of the effects of the recession, we have then referred to the latest Retail Planner Briefing Note 11 (October 2013, Colliers also used earlier Retail Planning Briefing Notes) to project spend per head beyond 2010. From this we have calculated that the average rise in spend per head to 2029 is estimated to be 0.2% per annum for convenience goods. On this basis, spend per head on convenience goods in the catchment area is estimated to be currently £1,553.76, rising to an estimated £1,601.03 in 2029.

Table 3 - Expenditure Per Head Per Annum - Convenience Goods

2014 £	2029 £
1553.76	1601.03

Sources / Notes:

Retail Study of West Tyrone Area Plan 2019 - average taken of spend per head across 16 zones to provide base spend per head figure of £1,488.56 for 2005.

Growth 2005 to 2010 based on 0.5% pa - Retail Study of West Tyrone Area Plan 2019, p.37, Table 4.1.

Growth 2010 - 2029 based on Retail Planner Briefing Note 11, p.21, 2010 prices, (adjusted for SFT), using average of 0.2% across annual growth rates.

5.4 **Table 4** below outlines the available expenditure in the catchment area for purchasing convenience goods based on the catchment population and spend per head.

Table 4 - Available Expenditure Estimates in Catchment Area - Convenience Goods

Retail Type	Catchment Population 2014	Per Capita Spend 2014	Total Available Expenditure £m 2014	Catchment Population 2029	Per Capita Spend 2029	Total Available Expenditure £m 2029
Convenience	54,627	1,553.76	84,877,374	60,343	1,601.03	96,610,953

5.5 At present there is an estimated £84.8m of available expenditure in the catchment area for convenience goods. This is estimated to rise by about £12m to £96.6m by 2029.

Convenience Retail Floorspace and Turnover in the Catchment

5.6 **Table 5** below outlines a summary of the existing floorspace in the catchment area selling convenience goods along with turnover estimates. The sales floorspace has been derived from the Colliers Retail Study. In addition to this, we have assessed subsequent approvals for further retail floorspace in the catchment area and these are included as commitments in our calculations. For consistency we have also referred to the Retail Study for sales density figures for retail floorspace turnover which provides a turnover figure of £8,194 psm for convenience goods floorspace in Omagh. In order to project this to the current year and to the end of the study period in 2029 we have referred to Retail Planner Briefing Notes prepared by Experian, again to be consistent with that used in the Retail Study. From the latest Retail Planner Briefing Note 11 (October 2013) we have derived an average growth in sales densities for convenience goods of 0.2% per annum.

5.7 At present the catchment area has an estimated floorspace of 21,126 sqm selling convenience goods with a current estimated turnover of £174m. The turnover is forecast to rise by just over £5m by 2029 to £179.4m.

Table 5 - Catchment Retail Floorspace and Turnover - Convenience Goods

Convenience Goods	Estimated Floorspace (sqm net)	Turnover (£/psm) 2011	Total Estimated Turnover (£) 2011	Total Estimated Turnover (£) 2014	Total Estimated Turnover (£) 2029
Omagh Town Centre	12,167	8,194	99,696,398	100,295,774	103,347,138
List main foodstores					
Other					
Omagh Town Remainder	2,765	8,194	22,656,410	22,792,621	23,486,055
Carrickmore	666	8,194	5,457,204	5,490,013	5,657,039
Dromore	612	8,194	5,014,728	5,044,877	5,198,360
Fintona	1,727	8,194	14,151,038	14,236,114	14,669,229
Omagh District Remainder	3,189	8,194	26,130,666	26,287,764	27,087,534
TOTALS	**21,126**		**173,106,444**	**174,147,161**	**179,445,356**

Sources / Notes :

Retail Study for West Tyrone Area Plan 2019, Colliers, November 2007.

Floorspace : Appendix 8.

Turnover £psm 2011 : Volume 2, Appendix 3, Table 14.

Retail Planner Briefing Note 11 (Oct 2013)
Retail sales density projections - Figure 3a. Average growth rate of 0.2% derived from average of quoted growth rates from 2012 - 2030.

Estimated Current Trading Position

5.8 **Table 6** below outlines the current trading position in the catchment area. The total current estimated turnover from the sale of convenience goods in the catchment area is approximately £174.1m. However the total estimated available expenditure on convenience goods is £84.8m. This indicates that there is a substantial inflow of expenditure into the catchment area of approximately £89m. This would indicate that the convenience retail sector in the catchment area is in a healthy position which attracts a considerable amount of spending from outside.

Table 6 - Estimated Current Trading Position - Convenience Goods - 2014

Retail Type	Total Available Expenditure (£m) 2014	Existing Sales Floorspace (sqm) 2014	Estimated Total Turnover (£m) 2014	Estimated Trade Leakage (-) / Gain (+) (£)
Convenience Goods	84,877,374	21,126	174,147,161	89,269,787

Projected Need for Additional Retail Floorspace

5.9 This section assesses the need for additional retail floorspace selling convenience goods in the catchment area in fifteen years' time. Our assessment has taken into account whether there are commitments for retail developments in the catchment area. Commitments consist of recently completed retail developments and outstanding planning permissions for retail development.

5.10 **Tables 7** below outlines the projected need for additional retail floorspace in 2029 The total available expenditure for convenience goods is estimated to be around £97.8m in 2029.. The amount of floorspace selling convenience goods that can be supported by this level of expenditure is approximately 11,523 sqm. However the existing sales floorspace, including commitments, already exceeds this amount at an estimated 30,135 sqm sqm.

5.11 The result of this analysis demonstrates that there is no requirement for further retail floorspace in the catchment area selling convenience goods, based on the level of available expenditure on these goods in the catchment area.

Table 7 - Projected Need for Additional Retail Floorspace - (Convenience Goods - 2029)

Retail Type	Total Available Expenditure (£m) 2029	Estimated Turnover (£/sqm) 2029	Sales Floorspace Supported by Expenditure (sqm)	Sales Floorspace Existing 2014 (sqm)	Sales Floorspace Commitments 2014 (sqm)	Total Sales Floorspace 2014 (sqm)	Additional Sales Floorspace Needed by 2029 (sqm)
Convenience Goods	97,872,565	8,494	11,523	21,126	9,009	30,135	-18,612

As noted in Table 2, the floorspace from commitments selling convenience goods is 9,009 sqm which has been derived from planning documentation. As also noted in Table 2, there is 4,770 sqm of approved retail floorspace which has the potential to sell both convenience and comparison goods. If any of this floorspace is devoted to the sale of convenience goods then it would further reduce the need for additional convenience floorspace in the catchment area.

Capacity for Further Convenience Retail Floorspace – Omagh Town Centre

5.12 The results of this analysis is that there is no surplus expenditure in the catchment area to support further retail floorspace selling convenience goods in Omagh Town Centre within the next 15 years.

6.0 OMAGH COMPARISON EXPENDITURE CAPACITY.

6.1 This section assesses the amount of expenditure in the catchment area that is available for spending on comparison retail goods. This will be projected to determine the level of spare expenditure available in the future that could service further retail development in the future in Omagh selling comparison goods. This assessment is carried out by analysing the per capita spend on comparison goods which when combined with the population figures, allows for calculations to be made on the amount of expenditure available to spend on comparison goods. From this, calculations are made on how much comparison retail floorspace this available expenditure can support which is then compared to existing comparison retail floorspace figures to determine if spare expenditure is likely to exist to support further comparison retail development.

Catchment Retail Expenditure

6.2 **Table 8** shows the expenditure per head on comparison goods for the current year and for the projected years of 2029. These figures are derived from the 2005 expenditure per head figures for convenience goods provided in the Retail Study by Colliers in 2007 to inform the preparation of the West Tyrone Area Plan 2019 which has not yet been adopted.

6.3 From this, we have calculated the average spend per head in 2005 to be £2,403.94 on comparison goods. In line with the Colliers study, we have projected this to 2010 by 3.8% per annum. However to take account of the effects of the recession, we have then referred to the latest Retail Planner Briefing Note 11 (October 2013, Colliers also used earlier Retail Planning Briefing Notes) to project spend per head beyond 2010. From this we have calculated that the average rise in spend per head to 2029 is estimated to be 2.3% per annum for comparison goods. On this basis, spend per head on comparison goods in the catchment area is estimated to be currently £3,172.58, rising to an estimated £4,462.18 in 2029.

Table 8 - Expenditure Per Head Per Annum - Comparison Goods

2014 £	2029 £
3172.58	4462.18

Sources / Notes:

Retail Study of West Tyrone Area Plan 2019 - average taken of spend per haead across 18 zones to provide base spend per head figure of £2,403.94 for 2005.

Comparison growth 2005 to 2010 based on 3.8% pa - Retail Study of West Tyrone Area Plan 2019, p.37, Table 4.1.

Comparison growth 2010 - 2029 based on Retail Planner Briefing Note 11, p. 21 (adjusted for SFT), using average of

2.3% across annual growth rates.

6.4 **Table 9** below outlines the available expenditure in the catchment area for purchasing comparison goods based on the catchment population and spend per head.

6.5 At present there is an estimated £173.3m of available expenditure in the catchment area for comparison goods. This is estimated to rise by about £96m over the next fifteen years to around £269.2 in 2029.

Table 9 - Available Expenditure Estimates in Catchment Area - Comparison Goods

Retail Type	Catchment Population 2014	Per Capita Spend 2014	Total Available Expenditure £m 2014	Catchment Population 2029	Per Capita Spend 2029	Total Available Expenditure £m 2029
Comparison	54,627	3,172.58	173,308,665	60,343	4462.18	269,261,543

Sources / Notes :
Catchment population at 2029 based on average population growth of 0.9% 2011 - 2023.

Comparison Retail Floorspace and Turnover in the Catchment

6.6 **Table 10** below outlines a summary of the existing floorspace in the catchment area selling comparison goods along with turnover estimates. As with convenience goods, sales floorspace has been derived from the Colliers Retail Study along with our own analysis of subsequent approvals for retail development selling comparison goods. We have also referred to the Retail Study for sales density figures for retail floorspace turnover which provides a turnover figure of £3,818 psm for comparison goods floorspace in Omagh.

6.7 In order to project this to the current year and to the end of the study period in 2029 we have referred to Retail Planner Briefing Notes prepared by Experian, again to be consistent with that used in the Retail Study. From the latest Retail Planner Briefing Note 11 (October 2013) we have derived an average growth in sales densities for comparison goods of 2.8% per annum.

6.8 At present the catchment area has an estimated floorspace of 37,521 sqm selling comparison goods with a current turnover of around £155.6m. The turnover is forecast to rise by almost £80m by 2029 to £235.4m.

Table 10 - Catchment Retail Floorspace and Turnover - Comparison Goods

Comparison Goods	Estimated Sales Floorspace (sqm) 2014	Turnover (£/psm) 2011	Total Estimated Turnover (£) 2011	Total Estimated Turnover (£) 2014	Total Estimated Turnover (£) 2029
Omagh Town Centre	25,378	3,818	96,893,204	105,262,253	159,282,983
Omagh Town Remainder	8,007	3,818	30,570,726	33,211,240	50,255,294
Carrickmore	682	3,818	2,603,876	2,828,783	4,280,518
Dromore	234	3,818	893,412	970,580	1,468,682
Fintona	1,180	3,818	4,505,240	4,894,375	7,406,175
Omagh District Remainder	2,040	3,818	7,788,720	8,461,463	12,803,897
TOTALS	**37,521**		**143,255,178**	**155,628,694**	**235,497,550**

Sources / Notes :

Retail Study for West Tyrone Area Plan 2019, Colliers, November 2007 :-

Floorspace : Appendix 8.
Turnover £psm 2011 : Volume 2, Appendix 2, Table 13.

Retail Planner Briefing Note 11 (Oct 2013) :-
Retail sales density projections - Figure 3b. Average growth rate of 2.8% derived from average of quoted growth rates from 2012 - 2030.

Estimated Current Trading Position

6.9 **Table 11** below outlines the current trading position in the catchment area. The total estimated turnover from the sale of comparison goods in the catchment area is approximately £155.6m. The total estimated available expenditure on comparison goods is about £173.3m. This indicates that there is a surplus / leakage of expenditure on comparison goods from the catchment area of approximately £17.6m.

Table 11 - Estimated Current Trading Position - Comparison Goods 2014)

Retail Type	Total Available Expenditure (£m) 2014	Existing Sales Floorspace (sqm) 2014	Estimated Total Turnover (£m) 2014	Estimated Trade Leakage (-) / Gain (+) (£)
Comparison	173,308,665	37,521	155,628,694	-17,679,971

Projected Need for Additional Retail Floorspace

6.10 This section assesses the need for additional retail floorspace selling comparison goods in the catchment area in fifteen years' time. Our assessment takes into account whether there are commitments for retail developments in the catchment area selling comparison goods.

6.11 **Tables 12** below outlines the projected need for additional retail floorspace selling comparison goods in 2029. The total available expenditure for comparison goods is estimated to be around £272.7m in 2029. The amount of floorspace selling comparison goods that can be supported by this level of expenditure is approximately 43,461 sqm. However the existing amount of comparison retail floorspace in the catchment including committed floorspace selling comparison goods, is less than this, at 42,451 sqm.

Capacity for Further Comparison Retail Floorspace – Omagh Town Centre

6.12 The results of this analysis show that there is a small amount of expenditure capacity in the catchment area to support around 1,000 sq m of further retail floorspace selling comparison goods in the next 15 years. It should be noted that as outlined in Table 2 earlier, there is 4,770 sqm of approved retail floorspace which has the potential to sell both convenience and comparison goods. If any of this floorspace is devoted to the sale of comparison goods then this would more than meet the deficiency of comparison retail floorspace in the catchment area.

Table 12 - Projected Need for Additional Retail Floorspace (Comparison Goods - 2029)

Retail Type	Total Available Expenditure (£M) 2029	Estimated Turnover (£/sqm) 2029	Sales Floorspace Supported by Expenditure (sqm)	Sales Floorspace Existing 2014 (sqm)	Sales Floorspace Commitments 2014 (sqm)	Total Sales Floorspace 2014 (sqm)	Additional Sales Floorspace Needed by 2029 (sqm)
Comparison	272,777,743	6,276	43,461	37,521	4,930	42,451	1,010

Sources / Notes :
T/O psm rojected by 2.8% pa, Retail Planner Briefing Note 11 (Oct 2013).

7.0 RETAIL CAPACITY CONCLUSIONS

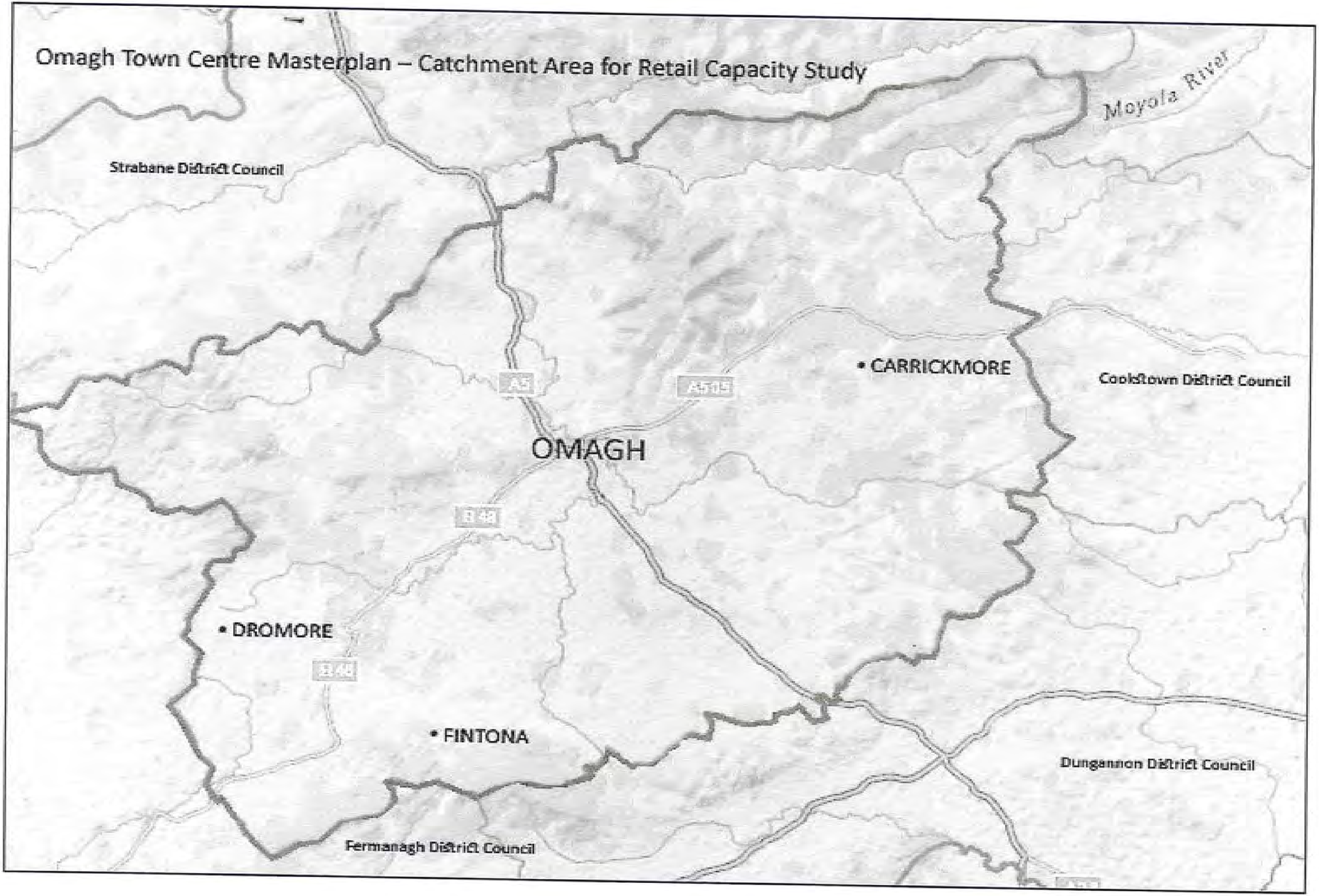
7.1 Our analysis of the retail capacity of Omagh Town Centre has been informed by a assessments of population, retail expenditure per head, existing levels of retail floorspace and turnover, growth in retail expenditure and a Shopper Survey in Omagh Town Centre in 2013.

7.2 In terms of capacity, our analysis shows that there is no surplus expenditure in the catchment to support further retail floorspace selling convenience goods in Omagh Town Centre over the next fifteen years. The available retail expenditure in the catchment area can support a certain amount of convenience retail floorspace, however the existing amount of retail floorspace including commitments, far exceeds what the current level of expenditure can support.

7.3 Our analysis shows that there is a small capacity for additional retail floorspace selling comparison goods in the catchment. However there are some retail commitments that are undefined in terms of the goods they will sell. If these commitments sell comparison goods then this would likely take up the capacity for additional comparison retail floorspace in the catchment.

7.4 Whilst our quantitative analysis shows that there is little or no expenditure capacity to support further retail development in the catchment area, this should not become a reason to prevent further retail development in Omagh, particularly in Omagh Town Centre. The Shopper Survey in 2013 showed that over two thirds of shoppers interviewed in Omagh Town Centre viewed the area negatively and just over one third of those interviewed had travelled to the town centre for shopping purposes. This would seem to suggest that there is a need to improve the quality of retail development in Omagh Town Centre and current planning retail planning policy strongly encourages retail development in town centres.

Appendix 1


Omagh Town Centre Masterplan – Catchment Area for Retail Capacity Study
Moyola River
Strabane District Council
Cookstown District Council
Dungannon District Council
Fermanagh District Council
CARRICKMORE
OMAGH
DROMORE
FINTONA
A5
A505
B48
B46

Appendix 2

Retail Commitments

Ref	Location	Proposal	Retail Floorspace (sqm)			
			Convenience Sales	Comparison Sales	Unspecified Sales	Gross
K/2014/0047/F	Unit 11 Showgrounds Retail Park Omagh	Retention of retail unit as constructed	Unspecified	Unspecified	104	104
K/2013/0497/F	11-13 Market Street Omagh (including lands to rear of site on Dublin Road)	Proposed extension and alteration to existing retail premises to include hot food cafe new service yard car parking and alteration to existing road junction	Unspecified	Unspecified	2274	2664
K/2013/0489/F	North and adjacent to 26 Anderson Gardens	Proposed 2 retail units	Unspecified	Unspecified	160	180
K/2013/0061/F	19 Kelvin Avenue, Omagh	Change of use from a take away to a retail unit	Unspecified	Unspecified	71	71
K/2011/0654/F	17 Dublin Road Omagh	Two storey front extension to retail unit	Unspecified	Unspecified	220	220
K/2011/0263/F	NR 1 Market Street Omagh BT78 1EE	Extension & Internal Alterations to Existing Building Including Change of Use to Ground Floor to Retail Use and Provision of Windows on First Floor Elevation	Unspecified	Unspecified	139	-
K/2011/0272/F	Lands at Mountjoy Road North of Drumragh Avenue and South of Old Mountfield Road Omagh	Demolition of existing buildings and erection of town centre food superstore Petrol filling station along with on-site parking service area access landscaping and general site works	4537	Unspecified	-	6350
K/2009/0703/F	48 & 50 Brookmount Road, Omagh	Proposed demolition of ex store and replacement with 1 no retail unit on ground floor with 1 no apartment over on 1st floor	52 (decision notice)	Unspecified	-	-
K/2008/1148/F	Empty site between nos 5 & 7 Royal Arms Mews, Omagh	New street canopy and retail kiosk, retail kiosk to be used for the baking and selling of bread	30	0	-	37.2
K/2008/1095/F	62 & 64 Market Street, Omagh	Change of use from public house into ground floor retail unit and first floor offices with two storey rear extension plus additional first floor extension to existing retail unit to provide new offices; with elavational improvements including new pitch.	-	-	290	-
K/2008/0810/F	20m west of 33 Coolnagard Rise, Omagh,	Retail development with 6 No apartments over, associated car parking, landscaping works and new access and right turn lane. (Amended drawings received)	565 (decision notice)	Unspecified	-	-
K/2008/0779/O K/2013/0332/RM (Pending)	Lands located between Derry Road and the Strule River (around Number 67 Derry Road) Omagh	Mixed use comprehensive development comprising primary healthcare facility, community park, integrated entertainment unit accommodating cinema, gym and ten pin bowling alley with ancillary retail services, cafes and coffee shops, business and media centre	3388	4930	-	-

K/2008/0762/F	The Village Inn, 116 Old Mountfield Road, Killyclogher, Omagh, Tyrone, BT79 7LT	Change of use from first floor meeting room to two individual commercial units consisting of one class a1 retail unit and one class a2 office unit with associated access.	Unspecified	Unspecified	60	60
K/2008/0072/F	1A Main Street, Carrickmore	Change of use from workshop to extend retail unit.	-	-	149	
K/2007/0245/F	48, 50, 52 &52A Brookmount Road, Omagh	Proposed replacement supermarket (max.retail floor area 3000 sq.ft.), sub-division of ex supermarket into 3no.retail units, associated carparking.	437 (decision notice)			
K/2007/0173/F	Unit 1C Market House, Market Road, Omagh.	Change of use from hot food takeaway to retail unit.	-	-	82	
K/2006/1799/O	1A Main Street, Carrickmore, Omagh.	Site for Business Park including Supermarket, Filling Station, Post Office, Retail Units, Medical Care	-	-	850	
K/2006/1697/F	Lands incorporating 18, 19, 25 & 26 Anderson Gardens, Omagh	Proposed replacement supermarket & provision of 1 No retail unit with associated parking	-	-	371	

Appendix 3

Omagh Revitalisation Project
Shopper Survey Pre-Project Analysis

1. Introduction

As part of the work planned through the Omagh Revitalisation Project, a survey is being conducted on behalf of the Department for Social Development to establish current perceptions of the area. The Revitalisation initiative aims to revitalize commercial districts by providing technical assistance and funding to design and improve storefronts and streets, promote districts and assist in community-driven efforts to improve and retain business.

The project hopes to increase trade, improve appearances, entice tourists and other visitors and shoppers and improve safety.

This report is a review and analysis of surveys completed by on-street shoppers prior to any works being carried out and will provide a baseline for evaluation of the project. The report has been prepared by DSD Analytical Services Unit (ASU) for use by staff in the Regional Development Office (RDO) in evaluating the Omagh Revitalisation Project.

2. Executive summary

- Overall, the majority (59%) of visits to the area were either passing through or work in the area.
- Of those in the area to shop / use services (41%), almost two thirds (64%) travel to the area by car and almost half (48%) visit the area at least once per week, with 77% of respondents spending less than £20.
- The area was viewed negatively by over two thirds (68%) of shoppers and only 3% viewed the area in a positive light.
- Building Conditions and Shop Fronts were seen as the main areas of concern and also the main areas for improvement. This was further enforced when shoppers were asked if they agreed the physical appearance of John Street could be improved.
- Footfall is busiest at lunchtime (Between 12pm and 1pm) with the busiest point at McGreads Pharmacy. Friday was the busiest day of the three.

3. Methodology

3.1. The Shopper Survey (Annex A) was developed by ASU in conjunction with staff in the RDO in order to collect baseline information on the Omagh Revitalisation Project. The survey asked a variety of questions on shoppers' purpose for visiting the project area, frequency of visits, current attitudes towards the project area and the impact the project may be able to create.

3.2. The surveys were conducted by Omagh District Council on 10th May 2013, 11th May 2013 & 14th May 2013 within the boundaries of the scheme area as shown in Figure 1 below. Footfall counts were also conducted on 10th, 11th and 14th May at three locations in the project area identified by ASU as main entrance and exit points. Counts took place for one hour in the morning, at lunchtime and in the afternoon on each day.

3.3. The days and times for footfall counts have been selected to best represent activity in the project area throughout a typical week. Weekday and weekend activity has been monitored while avoiding traditional closing and market days, holiday times and special events.

Figure 1: Map of Omagh Revitalisation Project Area

3.4. These processes will be repeated following the completion of the scheme and comparison will then be made to opinions and feedback received through this survey and the footfall counts to allow a full evaluation of the project. However, this report concentrates solely on the feedback received through the pre-project shopper surveys and footfall counts.

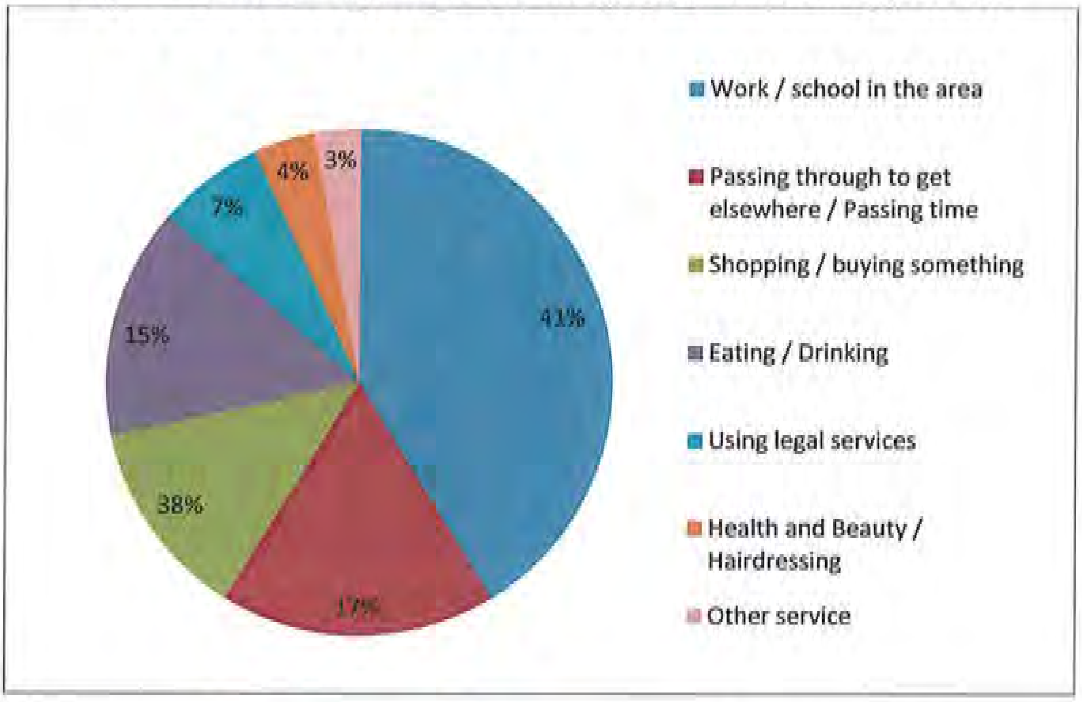
3.5. This analysis is based on a collected sample of 102 shopper surveys. All responses were equally weighted. As some shoppers did not provide an answer to all questions any variance in the sample sizes will be highlighted below. (Where percentages are used these may not total to 100 due to rounding.)

3.6. Any queries on the survey methodology or this analysis should be addressed to:
Stuart Gilmore
DSD Analytical Services Unit
4th Floor James House
Gasworks Business Park, Ormeau Road
Belfast
Stuart.gilmore@dsdni.gov.uk

4. Purpose of visit

4.1. The most common purpose for visiting the area was "Work / School in the area" at 41% (42 responses), followed by "Passing through to get elsewhere" at 18% (18 responses).

Figure 2: Purpose of visits to the Omagh Revitalisation Project Area



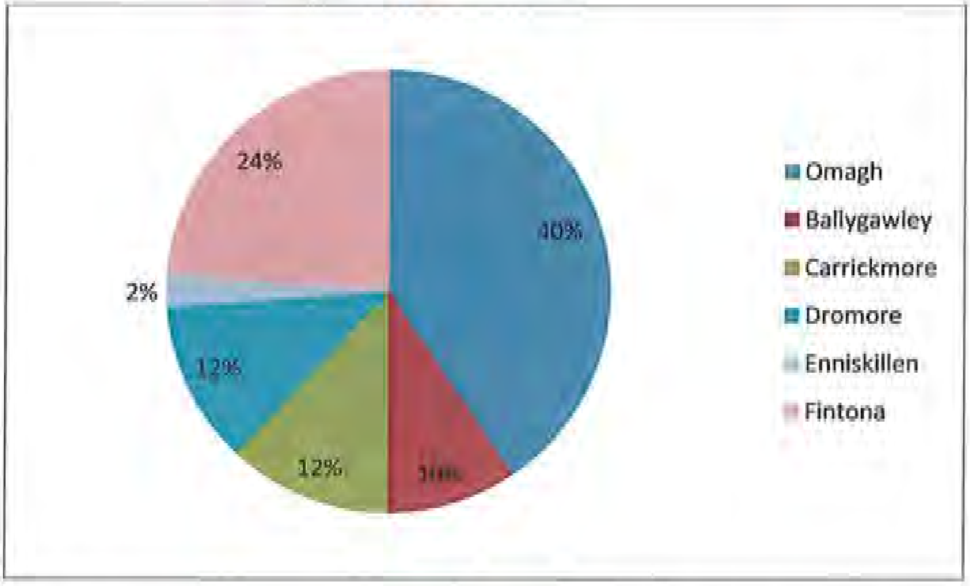
4.2. Figure 2 shows that less than half (41%) of reasons given for visiting the project area were to shop or use services.

5. Travel to the area, frequency and length of visit and expenditure

5.1. This section of the analysis is concerned solely with the survey respondents who were in the area to shop or use services (42 shoppers). All respondents who had indicated their sole purpose as "working / school in the area" or "passing through to get elsewhere" were instructed to leave out these questions in the survey and are excluded from the resultant analysis.

5.2. Less than half (40% - 40 Responses) of the shoppers coming to the Omagh Revitalisation Project area had travelled from Omagh. The remaining visitors travelled from a other areas as shown in the chart below with those travelling from Fintona being the second most common with 24%.

Figure 3: Area Travelled From



5.3. The majority of respondents (64% - 27 responses) travelled to the scheme area by Car, with all other respondents choosing to walk (36% - 15 Responses) to the area.

5.4. The majority of respondents (83%) travelled to the area in 30 minutes or less with the most common option selected being 11-30 minutes (55% - 23 responses) followed by 10 minutes or less (29% - 12 responses). The remaining respondents (17% - 7 respondents) travelled between 31 and 60 minutes.

5.5. Almost half of shoppers (48%) visit the project area at least once per week. Of those, 21% (9 responses) indicated "once a week" while there were also 19% (8 respondents) who indicated "2 – 6 times a week". There were only 7% (3 responses) who visit the area

"Daily". A further 33% (14 responses) visit the area at least once per month with the remaining 19% (8 responses) visiting less than once per month.

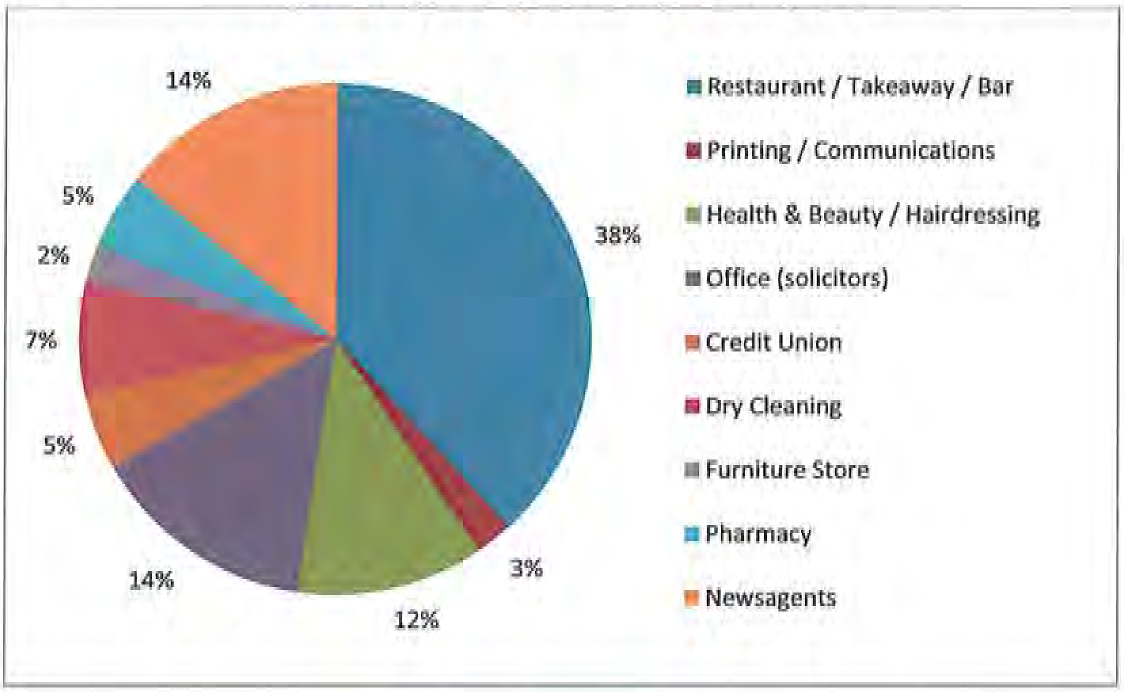
5.6. When asked how long they intended to spend in the area for this visit 38% (16 responses) indicated "Between 31 - 60 minutes". A further 31% (13 responses) would spend 30 minutes or less and 29% (12 responses) would spend between 1 and 2 hours. There were 2% (1 response) who intended on staying over 3 hours. There were no responses indicating spending between 2 and 3 hours.

5.7. When asked how much they had spent or intended to spend, almost two thirds (62% - 16 responses) indicated they would spend £11 - 20, with a further 15% indicating they would spend up to £10. Other spending amounts can be seen below.

- 8% (2 responses) would spend £21 - £30
- 8% (2 responses) would spend £31 - £40
- 4% (1 responses) would spend £41 - £50
- 4% (1 responses) would spend £50+.

5.8. When asked further what type of goods they intended to buy or had bought a range of products and services were indicated. The most popular purchase was Restaurant / Takeaway / Bars with 38% (16 responses).

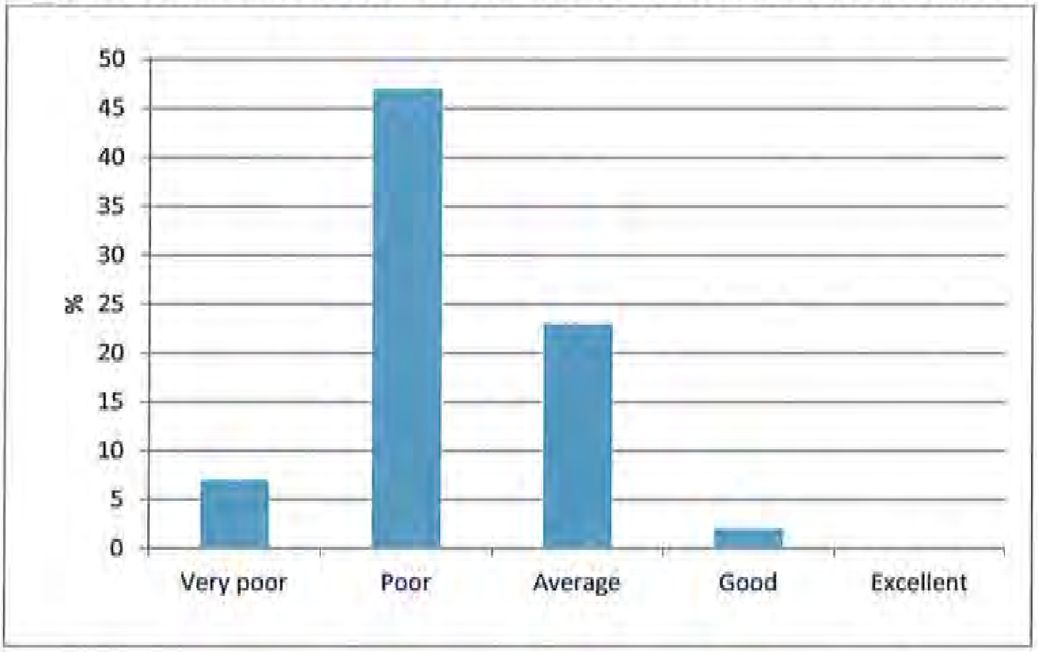
Figure 4: Type of goods bought during visit



6. Current perception of the project area

6.1. Everyone responding to the survey was asked about their perception of the project area as it currently stands. The area was viewed positively by only 3% and negatively by over two thirds (68% - 54 responses). Figure 5 show's that of those viewing the area negatively, 9% (7 respondents) viewed the area as 'Very Poor' with 59% (47 respondents) viewing the area as 'Poor'. There were 3% who viewed the area as 'Good' while there were no respondents viewing the area as 'Excellent'.

Figure 5: Current perception of the Omagh Revitalisation Project Area



6.2. This response shows that perceptions of the area have much room for improvement. Revisiting this question in future surveys could provide a key indicator as to the success of the initiatives undertaken.

7. Opinions and attitudes on the Omagh Revitalisation Project Area

7.1. All respondents were asked their opinion on certain aspects of the Omagh Revitalisation Project area. They were asked to rate each aspect on a scale of 1 to 10, where 1 is poor and 10 is excellent. An average score was then calculated for each aspect.

7.2. Results are shown in Table 1 below, the higher the score the better the aspect is viewed. Not all respondents provided a score for all aspects so the sample for each varies. However this has no effect on the validity of the result as the figure presented is an average of those that did respond.

Table 1: Average scores for aspects of Omagh Revitalisation Project Area

Aspect	Score
Safety	5.2
Street Maintenance	4.9
Accessibility (e.g. parking, transport)[1]	4.9
Street Cleanliness	4.8
Levels of anti-social behaviour	4.7
Street Signage	3.9
Floral Features	3.8
Shop fronts	3.3
Building Conditions	3.0

7.3. Safety was viewed as the best aspect with an average score of 5.2 out of 10. 'Buidling Conditions' was viewed as the worst aspect, scoring 3.0. All of the aspects received relatively low scores on the scale with none achieving a score considered 'good'. Consideration should be given to the scoring when choosing the works to be undertaken by the Scheme.

7.4. Respondents were then asked to consider the aspects and rank the top three issues which should be addressed in the project area.

[1] Figures for Accessibility include figures for an option for Parking which was included as a separate aspect on some but not all surveys.

7.5. Each respondent's three priority issues were taken and an overall score created for each issue based on the number of first, second and third priority rankings received. (For example, if safety was ranked first by eight respondent's, second by eight respondents and third by six respondents, these were weighted 8x3, 8x2 and 6x1 giving safety a score of 24+16+6=46.) The greater the score achieved the greater priority respondents would give to addressing the issue.

7.6. Not all respondents completed this question correctly; as such the results presented are from a sample of 105 responses indicating priorities. The total weighted score for each issue is shown in Table 2 below in order of overall ranking.

Table 2: Rankings of priority issues for Omagh Revitalisation Project Area

Overall Rank	Aspect	Score
1	Building Conditions	166
2	Shop fronts	158
3	Street Signage	71
4	Street Cleanliness	65
5	Floral Features	48
6	Safety	46
7	Accessibility (e.g. parking, transport)[2]	33
8	Street Maintenance	14
9	Levels of anti-social behaviour	11

7.7. 'Building Conditions' were seen as the highest priority and 'Levels of Anti Social Behaviour' the lowest priority. This corresponds to the previous question where 'Building Conditions' were scored as the worst aspect of the area. Again consideration should be given to the scoring when choosing the works to be undertaken by the project

7.8. Shoppers were next asked to respond to a set of statements on the Omagh Revitalisation Project area indicating how much they agreed with each statement on a scale of 1 to 10 (where 1 is strongly disagree and 10 is strongly agree).

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[2] Figures for Accessibility include figures for an option for Parking which was included as a separate aspect on some but not all surveys.

7.9. Average scores are presented in Table 3 below. Not all respondents answered all statements so the sample for each varies. However this has no effect on the validity of the result as the figure presented is an average of those that did respond.

Table 3: Average scores for attitudinal statements for Omagh Revitalisation Project Area

Statement	Score
I would be more likely to use John Street after the proposed changes	7.7
The physical appearance of John Street could be improved	7.5
I feel John Street has a negative image	6.4
There are anti-social behaviour and graffiti problems in the area	6.3
I feel safe in John Street[3]	4.2

7.10. The responses show that 'I would be more likely to use John Street after the proposed changes' scored highest and was closely followed by 'The physical appearance of John Street could be improved'. The responses also show that the statement with the least concern was 'I feel safe in John Street'.

[3] The statement 'I feel safe in John Street' was not asked in all surveys. There were 53 surveys which included this statement with the remaining 49 omitting this statement.

8. Additional comments on the Omagh Revitalisation Project

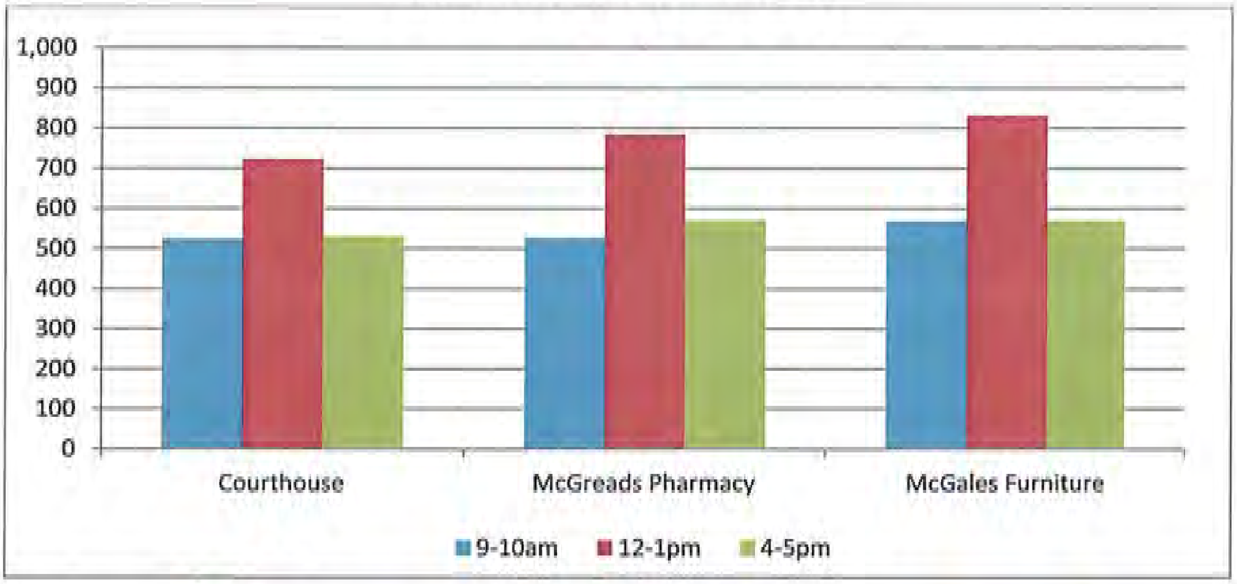
8.1. Shoppers were finally given the opportunity to provide further comments on the Omagh Revitalisation Project. There were no additional comments from any of those surveyed within the project area.

9. Footfall counts

9.1. Footfall counts were taken at three points identified as main entrance and exit points to the project area. Counts took place on three days: Friday 10th May, Saturday 11th May and Tuesday 14th May, and on each day counts were taken between 9.00am and 10.00am, 12.00noon and 1.00pm and 4.00pm and 5.00pm.

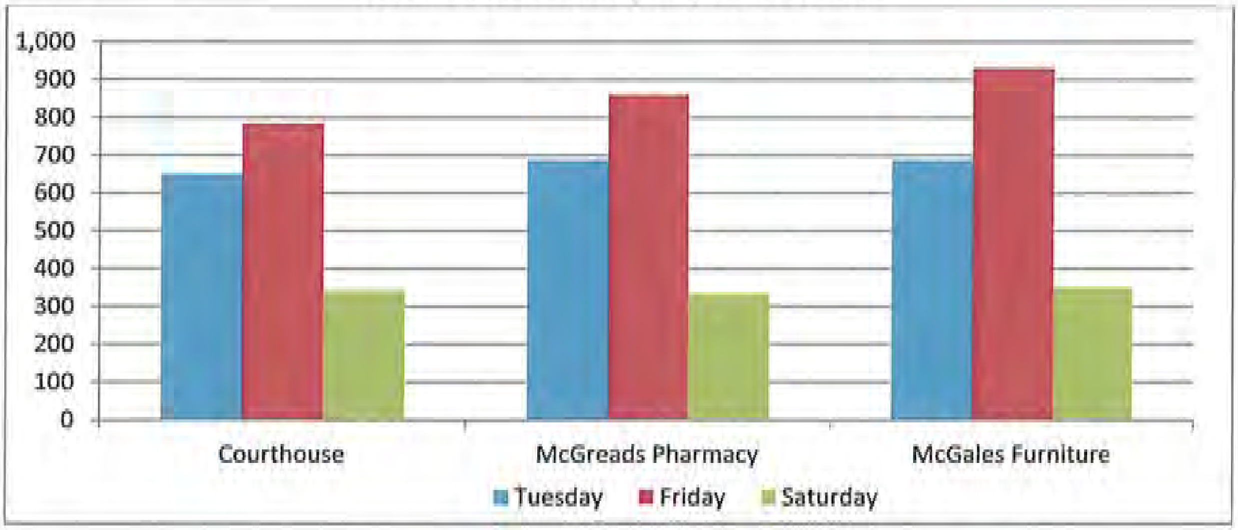
9.2. Figure 6 is a chart of footfall by time of day and shows that the project area was busiest between 12.00pm and 1.00pm on the selected days.

Figure 6: Footfall by time of day



9.3. Figure 7 is a chart of footfall by day of the week and shows that each location is busiest on a Friday with Saturday being the quietest at each location.

Figure 7: Footfall by day of the week



9.4. The breakdown of footfall in Table 4 also shows that the busiest point over the course of the week was Friday between 12pm and 1pm at the 'McGales Furniture' counting point.

Table 4 – Footfall counts

	Tuesday			Friday			Saturday			Total
	9-10am	12-1pm	4-5pm	9-10am	12-1pm	4-5pm	9-10am	12-1pm	4-5pm	
Courthouse	231	266	154	204	312	268	90	144	108	**1777**
McGreads Pharmacy	246	270	172	197	374	289	84	139	110	**1881**
McGales Furniture	251	275	162	231	399	301	87	156	107	**1969**
Total	**728**	**811**	**488**	**632**	**1085**	**858**	**261**	**439**	**325**	

9.5. Footfall counts will be repeated after the project is completed to help evaluate the impact of the public realm scheme.

Omagh (John Street) Revitalisation Proposal

Shopper Survey

As part of the work planned through the Omagh Revitalisation Project, a survey is being conducted on behalf of the Department for Social Development to establish current perceptions of John Street.

The Revitalisation Programme aims to assist commercial districts by providing technical assistance and funding to support initiatives including: the improvement of property fronts and streets; gateway features; enhanced signage, street furniture and planters; and painting schemes (including virtual paint schemes). The purpose of the programme is to help increase trade, improve the appearance of the area, entice tourists, other visitors and shoppers and improve safety of the selected area.

We would be grateful if you could spend a few minutes to complete the following questions. Your answers will enable us to measure the impact of the project and your views on this are greatly appreciated.

All questions relate solely to the red area on the map. Any answers provided will be in confidence and no individual will be identified from the responses provided.

Q1	What is the purpose of your visit today?	*(Circle all that apply)*	
	Work / school in the area	1	Go to Q9
	Passing through to get elsewhere / Passing time	2	Go to Q9
	Shopping / buying something (In John Street)	3	
	Eating / Drinking (In John Street)	4	
	Using legal services (In John Street)	5	
	Health and Beauty / Hairdressing (In John Street)	6	
	Social or leisure (In John Street)	7	
	Other service (specify) ____________________	8	

Q2	Where have you travelled from to get to John Street today?	*(Circle only one)*
	Omagh	1
	Ballygawley	2
	Carrickmore	3
	Cookstown	4
	Dromore	5
	Dungannon	6
	Enniskillen	7
	Fintona	8
	Newtownstewart	9
	Strabane	10
	Other (specify)____________________	11

Q3	How did you travel to John Street?	*(Circle only one)*
	Walk	1
	Car	2
	Bus	3
	Taxi	4
	Other (specify)_______________	5

Q4	How long was your journey to John Street?	*(Circle only one)*
	10 minutes or less	1
	11-30 minutes	2
	31-60 minutes	3
	More than 60 minutes	4

Q5	How often would you visit John Street?	*(Circle only one)*
	Daily	1
	2-6 times a week	2
	Once a week	3
	More than once a month but not weekly	4
	Once a month	5
	Less than once a month	6

Q6	How long do you intend to spend in John Street for this visit?	*(Circle only one)*
	30 minutes or less	1
	31-60 minutes	2
	Between 1 – 2 hours	3
	Between 2 – 3 hours	4
	Over 3 hours	5

Q7	What type of business will you visit in John Street today?	*(Circle all that apply)*
	Restaurant / Takeaway / Bar	1
	Printing / Communications	2
	Health & Beauty / Hairdressing	3
	Office (solicitors)	4
	Estate Agents	5
	Credit Union	6
	Bookmakers	7
	Dry Cleaning	8
	Taxi	9
	Furniture Store	10
	Pharmacy	11
	Newsagents	12
	Other (specify)	13

Q8	My perception of the area as it currently stands is.....?			*(Circle only one)*
	Very poor	Poor	Average	Good	Excellent
	1	2	3	4	5

Q9	Within the area, please score your current opinion of each of the following aspects. (On a scale of 1 to 10, where 1 is poor and 10 is excellent)	*Score (1-10)*
A	Safety	
B	Street Maintenance	
C	Street Cleanliness	
D	Floral Features	
E	Accessibility (e.g. parking, transport)	
F	Street Signage	
G	Shop fronts	
H	Parking	
I	Building Conditions	
J	Levels of Anti-Social Behaviour	

Q10	Please rank in order of priority (where 1 is the most important) the TOP THREE issues that you consider should be addressed by the Omagh Revitalisation Project:	*Rank (1,2 & 3)*
A	Safety (night/day)	Day
B	Street Maintenance	
C	Street Cleanliness	
D	Floral Features	
E	Accessibility (e.g. parking, transport)	
F	Street Signage	
G	Shop fronts	
H	Building Conditions	
I	Levels of Anti-Social Behaviour (night/day)	Day

Q11	Please state to what extent you agree or disagree with the following statements (where 1 is strongly disagree and 10 is strongly agree)	*Score (1-10)*
A	The physical appearance of John Street could be improved	
B	John Street has a negative image	
C	There are anti-social behaviour and graffiti problems in the area	
D	I would be more likely to use John Street after the proposed changes	

Please let us know if you have any other comments regarding this part of John Street

Thank you for your time

Date of interview: ________
Time of interview: ________
Location of interview ________
Interview Initials: ________

Appendix 3

Sectoral Analysis Report

Omagh Town Centre Masterplan

STAGE ONE
SECTORAL REPORTS

FIRST DRAFT
November 2014

Place Solutions
4 Knocktarna Manor
Coleraine
BT52 1HY

T: 07827 3214492
E: info@placesolutions.com

CONTENTS

1. INTRODUCTION

1.1 Background

Place Solutions was commissioned by Department for Social Development and Omagh District Council to undertake analyses of the current position and growth prospects of the two of the town's key economic sectors

- The Recreation, Leisure and Evening Sectors
- The Tourism Sector

These reports build on the current economic profiles of the area and the information gathered from the health check and retail, commercial, tourism and leisure capacity study.

The reports will be used to provide a robust evidence base and inform the preparation of a town centre masterplan which will shape the regeneration of the town centre for the next 15 to 20 years.

2. POLICY AND STRATEGIC CONTEXT

2.1 Wider Policy and Strategic Context

An analysis of the current position and growth prospects of Omagh town centre's key economic sectors must be assessed within the wider policy and strategic context.

The impact of technology and changes in consumer needs, such as internet shopping, has changed the function of town centres and their role in the wider economy forever. The Mary Portas report "Review into the Future of our High Streets" published in December 2011 set out an ambitious vision to "re-imagine" our high streets

"To put the heart back into the centre of our high streets, re-imagined as destinations for socialising, culture, health, wellbeing, creativity and learning. Places that will develop and sustain new and existing markets and businesses. The new high streets won't just be about selling goods. The mix will include shops, but will also include housing, offices, sport, schools or other social, commercial and cultural enterprises or meeting places. They should become places where we go to engage with other people in our communities, where shopping is just one small part of the rich mix of activities…… they need to be spaces and places that people want to be in. High streets of the future must be the hub of the community that people are proud of and want to protect."

It is proposed that the urban regeneration remit, which currently sits within the Department for Social Development, will devolve to the 11 local councils in May 2015, under the Review of Public Administration (RPA). The Department has also introduced Business Improvement District (BIDs) legislation in July 2014, to introduce sustainable funding models for town centres to develop and promote themselves.

The Draft DETI Tourism Strategy for Northern Ireland sets out a number of key growth targets up to 2020, including increasing visitors from 3.2million to 4.5million and increasing earnings from tourism by £520million to £1billion. Delivery is currently co-ordinated through the introduction of 9 Key Tourism Areas or destinations. Omagh falls under the Tyrone and Sperrins destination, administered by representatives of Omagh, Cookstown and Strabane District Councils, the rural hinterland of Derry City Council and Dungannon and South Tyrone Borough Council, who are responsible for the development and delivery of a Tourism Area Plan.

2.2 Regional and Local Context

Following the Reform of Public Administration (RPA), Omagh will amalgamate with Fermanagh Council from 1st April 2015. The new

Councils will have enhanced local economic development and tourism responsibilities.

"Omagh: Towards A City Vision for 2025", is a significant strategic planning and visioning framework document. It sets out five platforms of change:

- Regional Leadership
- Educational Excellence
- Economic Expansion
- Social Prosperity
- Environmental Quality

The framework highlights possible interventions including

- An Energised and Expanded town core
- Maximising the potential of the river Strule
- Developing the spatial opportunities of Lisanelly/ St Lucia and other key land banks
- Ensuring the successful completion of Strategic Road Improvements
- Embedding Enterprise
- Growing Tourism
- Advancing the position of Omagh as the centre of administration in the region.

Destination Tyrone and The Sperrins Tourism Management Plan 2013 - 2018 sets out the vision, objectives and key actions for Cookstown, Omagh and Strabane District Councils, the rural hinterland of Derry City Council and Dungannon and South Tyrone Borough Council.

3. THE RECREATION, LEISURE AND EVENING ECONOMY SECTOR

3.1 Current Leisure and Hospitality Sector

An assessment of the current recreation leisure and evening economy sector offer, in Omagh town centre was carried out as part of the Town Centre Health Check, and is summarised in the table below.

Business Type	No of business types	% of business types
Hospitality	62	90
Fitness & Leisure	1	1.5
Entertainment	5	7
Accommodation	1	1.5
TOTAL	**69**	**100.00**

Table 1: Current Recreation, Leisure and Evening Economy Sector in Omagh Town Centre (Source: Omagh District Council)

Hospitality

There is a diverse hospitality offer in Omagh Town Centre which includes 17 bars, 10 restaurants, 17 cafes and coffee shops and a social club. There is also a 3* hotel – the SilverBirch Hotel located minutes from the town centre.

The bars and restaurants cater for the evening economy offer. There are also 3 night clubs in the town centre – The Vault, Utopia and Sallys. The Terrace Bar situated on John Street in the town centre has been extensively upgraded and extended over the past few years. The Terrace provides live music at the weekends.

Entertainment

There is a multiscreen cinema at Gillygooly Road in Omagh, a few minutes drive from the town centre.

Strule Arts Centre, located in Omagh Town Centre offers an eclectic mix of plays, comedy, music, exhibitions, workshops, talks and films. Used by touring professional companies, musicians, amateur and community groups, Strule Arts Centre has staged international acts, acclaimed drama productions, and yet also provided a space for young people to develop their musical and artistic talents, for adults to learn to draw, write, dance, relax and be entertained.

Leisure Facilities

Omagh Leisure Complex, located at Old Mountfield Road reopened in July 2014 after undergoing major refurbishment and is now offering a wide range of facilities. New facilities include the new 25 metre swimming pool, 14 metre learner pool and free-form toddler pool with new viewing gallery and village style changing facilities as well as the new 25 seater jacuzzi and relaxation area. In addition the sports halls and spinning studio have been refurbished.

Omagh Golf Club is locate 0.5 mile from town centre on Dublin Road.

Clanabogan Stables situated 3 miles from Omagh. The stables is on the same site as Clanabogan Driving Range and Country Club.

Aladdin's Kingdom and Mr Tumble's Fun House are 2 indoor adventure play centre in the town centre area.

History and Culture

Strule Arts Centre first opened its doors to the public on Friday 8th June 2007. The Centre is an integrated, purpose built arts facility, located in the town centre and is continuing the tradition of arts and culture in the town of Omagh and forms part of a wider regeneration project for Omagh Town Centre. Strule Arts Centre runs an extensive and dynamic events calendar year-round, and programmes first-class touring theatre, music, comedy, dance and children's shows. The facility consists of an Auditorium, a Lecture Theatre, and café/bistro overlooking the River Strule.

Ulster American Folk Park is located on Mellon Road, 5 miles from Omagh Town Centre. The indoor exhibition at the Ulster American Folk Park examines life in Ulster in the 18th and 19th centuries. The outdoor museum brings to life people's daily routines and activities in both the Old and New Worlds. Notable buildings include the famous Mellon Homestead, as well as buildings from America which have been relocated to the museum. An Ulster street, complete with original shop fronts, and an American street have been reconstructed alongside a full-scale dockside galley and ship, the Brig Union.

Town Trail

There is a walking town trail around Omagh town centre highlighting buildings of note and a short leaflet covering the historical significance. There is limited signage around the town centre.

Parks and Green Spaces

The Grange Park is a family friendly green space not far from Omagh town centre with parking, toilets and picnic facilities. There is a children's playground, a green gym, an eco-trail - something for all the family to enjoy just a few minutes from the town centre.

Gortin Glen Forest Park is situated 6 miles outside Omagh at the western gateway to the Sperrin Mountains. The Park was first opened in 1967 and embraces some 1534 hectares of ground. A major recreational feature of the forest is the five-mile long drive, which offers some breathtaking views. A number of vista parks have been created where the motorist can pull in and without getting out of the car enjoy the magnificent scenery. A range of trails starts from the finger post in the main car park. They give the visitor the chance to enjoy the Park's natural flora and fauna at its best. All the trails are colour coded and return to the car park. There is a horse riding trail and three mountain bike trails in the forest. The Forest Park is open every day of the year from 10.00am until sunset.

Pigeon Top Forest is a 375 hectare coniferous forest located between Ederney and Omagh.

Organised Events and Festivals

Strule Arts Centre, located in the town centre, offers a wide range of events, covering all genres, throughout the year. The following events will have visitor appeal.

Omagh Midsummer Carnival is an annual event held in June. The colourful carnival includes many community groups, schools and bands and makes its way through the town centre to Grange Park. At the Grange Park a wide range of activities is planned to ensure an afternoon of fun and entertainment for the family.

St Patrick’s Festival runs for two weeks in March. Highlights this year were the open air concert, the colourful St Patrick’s Day Parade featuring local community groups, businesses, sporting organisations, schools and bands and the Tyrone Guild Craft Fair in Strule Arts Centre which combines a unique selection of contemporary and traditional craft products which highlight the creativity and talent of local craftspeople. Other events in the Festival included a celebration of Irish Film at Strule Arts Centre, a Flute workshop, the Pipes of Peace workshop and a lecture discussing aspects of the Gaelic literary heritage of Tyrone.

Benedict Kiely Literary Weekend takes place every year in September. This festival includes lectures, readings and performance, celebrating the verbal arts, and the legacy of Benedict Kiely who was one of the most distinguished figures in twentieth century Irish literature and was born near Dromore, Co.Tyrone. The author died in Dublin in 2007 and is buried in Omagh's Dublin Road cemetery not far from the centre of town

3.2 Opportunities for future growth

Hospitality

The first priority must be to consolidate and enhance the existing hospitality offer as it is fundamental to the future vitality and viability of the town centre. Quality standards and a range of providers appealing to key target markets will be vital. This will be achieved through the provision of sound training and capacity building initiatives, facilitated by the local Council and other stakeholder organisations such as Pubs of Ulster and NITB. The ATCM Purple Flag Initiative which promotes and raises quality standards within a town's evening economy would also be beneficial.

There is considerable merit in promoting a local food initiative within the local hospitality sector. This could range from something as simple as locally sourced menus or special dishes, but could be developed into a comprehensive economic development scheme for the food sector, which would attract external funding and could be a key driver for the visitor market.

This sector will benefit from aggressive branding and collective marketing of the unique retail and hospitality offer to clearly identified key target markets and market segments. Organised events such as themed events, Food festivals and Restaurant weeks will also help to consolidate and build the sector, by providing reasons to visit from a wider catchment area.

Outdoor Activity

There is a tremendous opportunity to develop outdoor activity provision particularly walking related activity in the Omagh area, through sensitive development of the parks and green spaces close to the town centre, such as Gortin Glen Forest Park, Grange Park and Pigeon Top Forest located between Ederney and Omagh.

This will provide additional reasons to visit and attract a new market segment. Activity segments such as walkers and ramblers will also benefit the hospitality and retail sector.

History and Culture

Omagh has not fully exploited its rich, authentic history and culture. The town has the advantage of two main attractions which will provide a hub and focus for the future development of this sector. The Strule Arts Centre in the centre of the town and the Ulster

American Folk Park, located 5 miles from Omagh Town Centre. The role of the town centre vis-à-vis these unique selling points needs to be fully considered within the masterplan.

The arts particularly music and drama are well developed within the town, although our research has shown that these are not accessible to all sections of the community particularly young people. This will be important to rectify if the town is to broaden the appeal to an external visitor market.

Organised Events and Festivals

Organised events and festivals are fundamental to embedding cultural activity within a town or city. There are currently key events in the calendar and opportunities to build and introduce new events and festivals based on key assets such as culture, food and art in the future. The Omagh Midsummer Carnival provides opportunities to attract key tourism markets and a reason to visit. The links to St Patrick and the St Patrick's Festival which runs for two weeks in March, link the town in to tourism on all Ireland context. The established Benedict Kiely Literary Weekend, which takes place every year in September. This festival includes lectures, readings and performance, celebrating the verbal arts, and the legacy of Benedict Kiely who was one of the most distinguished figures in twentieth century Irish literature and was born near Dromore, Co.Tyrone, could be built upon as this is a huge tourism market.

The town's links to Brian Friel have not been exploited and could be another successful literary based event, such as the Beckett Festival in Enniskillen and future proposals to develop an Oscar Wilde theme. This would enhance the arts and literary reputation of the wider region and could become a key visitor draw.

4. THE TOURISM SECTOR

4.1 Existing Level of Tourism Activities/Attractions/Accommodation

Tourism in a town centre context is complex because of the uniqueness of each location and its combination of factors such as size, resources, heritage, environment, people and image of the place. In addition this complexity is compounded by their multifunctional nature, where visitors and residents must share the same resources, facilities, services and space. Urban tourism has grown in recent years because of the demand for short breaks and the desire for flexibility and diversity of experience, to which the urban centres are well positioned to deliver. As well as being a destination in its own right, towns can act as gateways for visitors to the wider region and are increasingly seen as products which complement the surrounding tourist destination. Not only can tourism directly benefit the economy of the town centre but it can also contribute significant to the enhancement of the regional tourism product. This is the context within the role of tourism in the future regeneration of Omagh town centre must be considered.

Through the masterplan, the town must clearly position itself as a key destination within the wider Tyrone and Sperrins destination. Initial consultation indicates a desire from key stakeholders to prioritise tourism as a key economic driver for the town centre. The masterplan presents a strategic opportunity to realise the potential and economic spin-off.

Vision For Tourism

The Tyrone and Sperrins Destination Plan provides an overarching strategic framework for tourism development in Omagh town centre. The vision for the Tyrone and the Sperrins is:

"The natural Irish outdoors – an inspirational, iconic and ancient landscape where adventure is the everyday and every journey unearths our culture."

The Destination Management Plan, highlights the need to utilise the unique natural landscape of the area and key assets such as the Ulster American Folk Park and Gortin Forest Park as a hook from which to build experiential tourism opportunities which target niche markets, increase visitor numbers, dwell time and increased spend in the region. Two key projects being developed under the DMP include the development of a PR/Communications Plan to highlight the range of visitor attractions within the Tyrone and Sperrins, targeted at the Unique Outdoors and Family Fun markets.

Visitor Numbers and Spend

The Tyrone and Sperrins tourism offering currently accounts for 6% of Northern Ireland tourism through overnight stays in the region. This is estimated at generating £32million per annum for the local economy with an additional £37.5m per annum generated through day trips. 77% of visitors to the region were on day trips, with 8% on holidays, short breaks or overnight stays.

Visitor Markets

The Draft Tourism Strategy for Northern Ireland to 2020 identifies the following target market segments for the short term, with particular emphasis on the closer to home markets (ie. NI, GB and ROI):

- City Breaks – especially event led short breaks
- Culture/experience seekers
- Activity/special interest breaks – especially music, golf, angling, walking, gardens, cruising and cycling
- Business visitors – especially National Association conferences, corporate meetings and conferences, trade and consumer exhibitions and incentive travel.

For the longer term, it describes the market segments most relevant to the outcome of the strategy by 2020 as follows:

- Event led short breaks – especially younger audiences UK/ROI
- Mature culture/experience seekers from UK and Europe
- Extended families from domestic market, ROI and GB
- Conference and Exhibition delegates
- "Eco" travellers – especially from Germany seeking untouched landscapes
- "Hobby" visitors – especially music, gardens, angling, golf, cruising, walking, cycling
- Wellness and rejuvenation breaks with a luxury element
- "Foodies" inspired by the quality of raw materials and local chefs

The assessment of the existing activities/attractions/ accommodation is based on the results of the Health Check, background research and consultation process. The criteria for assessment is based on the principles of Destination Management and Place Marketing, which considers the potential of the tourism activities/attractions/accommodation to collectively differentiate the visitor offering of Omagh Town Centre area and contribute significantly to the town's economic performance.

The key elements are

Location/Transport Infrastructure

Omagh is located in the west of Northern Ireland, and is the county town of Tyrone. It is the largest urban centre in County Tyrone. It is situated within the Tyrone and Sperrins Key Destination Area. Omagh is situated 70 miles from Belfast, 34 miles from Derry/ Londonderry, 110 miles from Dublin and is located in the west of Northern Ireland, accessible from all parts. The town benefits from its excellent rail and bus transport links to other parts of Ireland.

In the recent Shopper Survey conducted in John Street in Omagh Town Centre respondents were asked their opinion on certain aspects of the Omagh Revitalisation Project area. Accessibility to the town centre eg. Transport and parking scored an average of 4.9 out of 10.

Environment

The OASIS project, another step forward in the regeneration of Omagh town, will be instrumental in improving the local townscape and environment and will have a key role to play in attracting new visitors to the town. It will improve access to the River Strule and maximise the recreational potential of this natural amenity. The project includes the development of a pedestrian and cycle path along the river bank between Bells Bridge and the Strule Bridge, the installation of a pedestrian/cycle bridge to create a link into the town centre, and the creation of a recreation and meeting space above Drumragh Car Park. The project also includes the creation of a new and exciting Public Space where large numbers of people can socially interact through work and recreation.

Accommodation Base

Omagh's accommodation base includes 2 hotels, 3 Guest Houses, 21 Bed & Breakfasts, 18 self-catering establishments and 2 hostels. An analysis of the accommodation base is enclosed below;

OMAGH	NO OF ROOMS	BED SPACES
Hotels	80	199
Guest Houses	17	46
Bed and Breakfast	55	122
Self Catering	62	137
Hostels	21	106

OMAGH HOTELS		NO OF ROOMS	BED SPACES
Three Star	Silverbirch Hotel	64	154
	Mellon Country Hotel	16	45

OMAGH GUEST HOUSES	NO OF ROOMS	BED SPACES
Goldenhill Guest house	5	12
Greenmount Lodge Guest House	5	13
McGuires Country House	7	21

OMAGH BED & BREAKFASTS	NO OF ROOMS	BED SPACES
Clanabogan Country House	8	20
Mullaslin House	3	5
Mountjoy B&B	3	6
Drom Na Gainne	2	5
Ashview House	2	5
Mullaghmore B&B	6	11
Tattykeel House B&B	3	6
Twenty Three B&B	2	4
Arrandale House B&B	3	6
Pinewood Lodge	4	8
Heron's Burn	2	6
Azure B&B	2	5
Bluebell B&B	2	4
An Teach Ban B&B	2	4
The Laurels B&B	4	9
Rylandhill B&B	1	2
Arleston House B&B	2	6
Ardmore B&B	2	4
Carrick House	2	6
Su Lorr B&B		
The Old School House		

OMAGH SELF CATERING		NO OF ROOMS	BED SPACES
4 Star	Pat Larrys Self Catering Cottage	2	4
Approved	Ashtree Cottage	3	5
	Drumaneir Cottage	4	10
	Hawthorne Cottage	2	4
	Acorn Cottage	3	5
3 star	An Clachan Cottages – 8 cottages	17	47
4 Star	Cobblers Cottage	2	4
	Dervaghroy Cottage	2	4
	Hallow Cottage	2	5
	Joe’s Cottage	2	4
4 Star	Lakeside Cottage	4	8
	Mote Cottage	1	2
3 star	The Foothills Apartment	4	7
3 Star	Shepherd’s Retreat	2	4
	The Bothy	2	6
3 Star	Mr McGregor’s Cottage	1	2
3 Star	Derg View Cottage	5	10
	Pollanroe Cottage	4	6

OMAGH HOSTELS		NO OF ROOMS	BED SPACES
	WELB Residential Centre	11	56
	Owenkillew Gortin Accommodation Suite & Activity Centre	10	50

History and Culture

Omagh is rich in authentic history and culture. This is analysed in detail in Section 3 of this report. From a tourism perspective Omagh has the advantage of two main attractions which will provide a hub focus for the future development of this sector. The Strule Arts Centre in the centre of the town and the Ulster American Folk Park, located on Mellon Road, 5 miles from Omagh Town Centre. The role of the town centre vis-à-vis these unique selling points has not been considered to date.

Parks and Green Spaces

Omagh has a wealth of parks and green spaces. The key assets such as Gortin Glen Forest Park, situated 6 miles outside Omagh at the western gateway to the Sperrin Mountains and the Grange Park , a family friendly green space not far from Omagh town centre with parking, toilets and picnic facilities. Pigeon Top Forest is a 375 hectare coniferous forest located between Ederney and Omagh.

Organised Events and Festivals

The assessment of organised events and festivals in the previous section demonstrate that there are currently key events on the calendar and opportunities to build and introduce new events and festivals based on key assets such as culture, food and art in the future. Strule Arts Centre, located in the town centre, offers a wide range of events, covering all genres, throughout the year and the Omagh Midsummer Carnival provides opportunities to attract key tourism markets and a reason to visit. The links to St Patrick and the St Patrick's Festival which runs for two weeks in March, link the town in to tourism on all Ireland context. The established Benedict Kiely Literary Weekend, which takes place every year in September. This festival includes lectures, readings and performance, celebrating the verbal arts, and the legacy of Benedict Kiely who was one of the most distinguished figures in twentieth century Irish literature and was born near Dromore, Co.Tyrone, could be built upon as this is a huge tourism market.

The town's links to Brian Friel have not been exploited.

Retail offer

There is currently limited tourism related retail in the town centre

Visitor Services and Orientation

Omagh Visitor Information Centre is located at Strule Arts Centre in Townhall Square in the Town Centre. The Centre is open Monday to Saturday from 10am to 5.30pm and visitor services advisors are always available to give professional and informative visitor advice. A wide range of brochures, leaflets, maps, walking routes and books of local interest are in stock alongside a wide range of displays on attractions and activities in the region.

4.2 An Assessment of the Opportunities for Future Growth and Current Weaknesses Inhibiting Growth

The opportunities for tourism growth are underpinned to a certain extent by the extent of tourism growth within Northern Ireland and the wider island of Ireland. The ambitious targets set out in the Draft Tourism Strategy for NI, namely a 50% increase in revenue by 2020 and 29% increase in visitor numbers provide a rough indicator of the potential.

The objective, structured assessment of the existing tourism product provides a framework to identify the key opportunities for growth that will support the development of tourism in the future. The town must be positioned to compete effectively in the global tourism market, which means providing a compelling reason to visit, a strong product offer and a quality visitor experience that is a differentiated from its competitors and encourages more visitors to stay longer and spend more.

From the earlier analysis the key opportunities for growth for Tyrone and Sperrins have been identified below:

- Develop water based activities (rivers)
- Activity tourism – walking, cycling, mountain biking
- Food festivals/trails
- Irish pub food and hospitality
- More collaboration and partnership amongst businesses
- Enhanced broadband coverage
- More use of the web and social media for marketing and promotion
- Landscape and natural heritage product
- Growing demand for safe, relaxed, rural experiences
- Family activities
- Experiential tourism (learn to)
- Range of funding sources, including cross border, EU, rural development and NI Executive agencies and departments
- Stronger industry engagement
- Investment in A5 transport access
- Cross border attractions, trails and markets
- Newly approved Planning Policy Statement (PPS) 16 creating more flexible planning policies related to tourism

Opportunities for Growth

An initial analysis has identified the following key opportunities for growth and challenges which will inhibit growth. The opportunities for growth will contribute significantly to widening of the town's offer and its ability to position itself as a tourism destination. However the opportunities identified will also need to benefit the resident population first and foremost, as tourism development in its own right is difficult to sustain in the current climate and wider tourism growth projections. It is vital that the potential for tourism growth is assessed within the overall regeneration aims and objectives identified in the masterplanning process.

- Proximity to the Sperrins and a potentially compelling offer for visitors- heritage based tourism alongside the wider "Tyrone experience"
- Strule Arts Centre is a unique hub for the development of a vibrant arts scene and interpretation of the area's history and culture. This development has the potential to transform the perception of Omagh as a cultural and historical "hub" and will act as a flagship project to galvanise the future development of tourism in the town. It will clearly position and differentiate Omagh within the wider regional and national tourism offer and link to priority pillars such as Living Legends.

- Ulster American Folk Park. The town centre is only four miles from this key visitor attraction yet, historically, has failed to capitalise on this. The creation of a compelling visitor offer, supported by high quality infrastructure, particularly coach tour and visitor parking provision, visitor services and hospitality offer and driven by branding and marketing would capitalise on this advantage, particularly for the day trip market.

- Position relative to City of Derry and Fermanagh Lakelands. Omagh has a strong geographical advantage as the mid-way point between the city of Derry and the Fermanagh Lakelands. The town needs to improve its infrastructure and service offer and market itself as a stop –off point between these two locations. If the town is able to effectively differentiate its offer from that of the two cities, this role will be further enhanced.

- Riverfront development. The tourism potential afforded by comprehensive and imaginative development of the riverfront would have an immense impact on the town's potential for tourism growth. Current river front development has highlighted the vital importance of harnessing the development in such a way as to link the central core of the town to the river, instead of its current position with its back to the river. The masterplan could galvanise and provide a platform for these plans to develop.

- Outdoor activities. The positioning of the Sperrins as an area for outdoor activity presents an opportunity for the town to accommodate this market and become an active service and retail centre for this high spending market.

Current Weaknesses inhibiting tourism growth

- No significant visitor accommodation i.e. boutique hotel, youth hostel, guest house provision in the town centre itself. The development of a boutique style hotel, either as part of a comprehensive development of the riverfront or conservation area, of at least 3 star standard would have the best opportunity of success in today's market. There is also a lack of quality 5 star self- catering accommodation. This could be aimed at the outdoor activity market and positioned within the town centre to support hospitality and retail.

- No critical mass of night time economy facilities that will appeal to visitor market. The cinema complex is just outside the centre. The Strule Arts Centre has not attracted many additional services i.e. bar and restaurants that would typically co-exist with these attractions. There was no evidence of joint promotions with the cafes/ restaurants that do exist in the area.

- Traffic system is difficult to navigate and confusing to the visitor

- Orientation and signage to town centre car parking is weak

- Lack of cohesive branding and marketing message will continue to inhibit competitiveness in the market place. It is vital that the opportunities for tourism growth are developed within a wider Place Marketing Strategy for the town centre. They will allow the town to re-position itself and develop the key opportunities such as cultural and historical hub and enhance its reputation as the key service and retail centre for the region.

- Poor sense of arrival at key gateways.

- No public/private integrated Delivery Structures. In order to effectively drive forward opportunities for growth, public and private sector need to effectively work together to package and promote the tourism offer and champion tourism development. Tourism must be effectively integrated with the wider economic development and tourism strategies for the town and the wider region. Tourism delivery structures will need to be addressed through the new Council structures and linked to the review of DETI Tourism Development Strategy for NI.

- No clearly identified Visitor Markets. Omagh must concentrate on specific target markets as a framework for effective, robust and viable destination marketing, promotion and branding.

4.3 Prioritising Tourism Development in the Masterplan

The opportunities for growth identified in this report will contribute significantly to widening of the town's offer and its ability to position itself differently within the market place. The opportunities identified will also benefit the resident population, in terms of health, cultural and other quality of life indicators, therefore there is great merit in taking forward the following recommendations and prioritising them within the masterplan.

Positioning and Branding

It is vital that the opportunities for growth are developed within a wider Place Marketing Strategy for the town centre. From the analysis of the strengths and weaknesses of Omagh as a visitor destination and the opportunities that have been identified, Omagh should re-position itself as a cultural and outdoor activity hub within the Sperrins destination, building on its existing reputation as the key service and retail centre for the region. There is tremendous scope to build on the established Sperrins branding and achieve cost efficiencies through partnership working with the various agencies and the private sector involved in wider marketing and promotional activity.

A useful Case Study in this context would be Cumbria in the Lake District. The vision for Cumbria is that ***"in 2018 Cumbria, as well as being known for world class landscapes, will have an unrivalled reputation for outdoor adventure, heritage and culture, with a year round programme of events. Our accommodation, our food, our public realm and our customer service will reinforce our reputation as the number one rural destination in the UK."***

The objectives of the Cumbria Tourism Strategy are to improve the marketing, business performance, quality, skills, infrastructure of the industry:-

- Enhanced communication with visitors
- Higher levels of productivity and performance from businesses operating in the visitor economy
- Improved products and higher quality visitor experiences for all visitors to the region
- For the people who work in the visitor economy to have and to be using an improved level of skill
- Improved infrastructure for the visitor economy

- For all activity related to tourism and the visitor economy to be based on the principles of sustainable development

Cumbria's unique position as a strong brand and its ability to exploit "staycation" trends and promote the area's assets– getting away from it all, rest and relaxation, stunning scenery, pretty villages, free attractions and outdoor activities including walking and cycling attract visitor spend in excess of £1 billion per annum. A major tourism investment programme was undertaken to promote adventure tourism and to position Cumbria as the Adventure Capital of the UK by 2018. Cumbria's priorities for action (underpinned by quality and sustainability) are:-

- **Landscape:** the core – to develop the tourism industry in ways which do not detract from Cumbria's special landscapes.
- **Outdoor adventure, heritage and culture, food and drink and events:** the visitor experience – to develop those experiences that sit well in the landscape and will attract visitors to Cumbria and give them opportunities to spend money.
- **Accommodation, public realm and customer service:** the basics – to invest in those parts of the visitor experience that will, if done well make sure visitors have a great time. And vitally to ensure that people are able to get to and around the county easily by road, rail and air.
- **Marketing:** the means to an end – the need for distinctive marketing to re- establish Cumbria's leading tourism brands as appealing, modern destinations. To focus on the right people with a strong offer and persuade them to come to Cumbria and never forgetting they could so easily choose somewhere else.

The Action Plan includes joint promotion of a package of activities to a worldwide market, coupled with support and development of existing and new products and facilities. It aims to encourage younger and higher spending consumers to Cumbria, achieved by delivering new outdoor/adventure products, for example, adventure and watersports hubs, new cycle routes and indoor outdoor centre.

The priorities for development are:-

- Cumbria outdoor tourism education and retail partnership
- To make it easy to book/sell the product
- To promote and raise awareness of Adventure Capital
- Sustainability
- Increased participation
- Healthier Nation
- Inclusion – county policy/strategy
- Develop a National centre for the outdoors
- Attract national outdoor events

- Supporting emerging events and local activity
- Connectivity and transport
- Marketing programme

Outdoor activity tourism needs to appeal to a broad range of clients to be successful – from day trippers, to those with holiday homes or staying in self-catering accommodation, through short-break activity tourist looking for quality accommodation in a high quality environment. The offer needs to be a unique experience for visitors, providing excellent service and quality assurance with well-equipped accommodation and ancillary services catering specifically for the activity tourism market. Research into international best practice has identified the following key criteria for a viable activity tourism product

- A high quality natural environment which offers access to a wide range of landscapes including coast, mountains and countryside
- Supported by a sound infrastructural base, in terms of accommodation and service provision
- A wide range of well managed activities catering for all sectors of the market ie extreme adventure, the family market and soft adventure activity.
- A recognisable brand with powerful associations with outdoor activity and accessing the natural landscape which provides the framework for active packaging and promotional activity to specific target markets
- An annual calendar of events including sporting events, exhibitions and competitions
- Pro-active business development support programmes and capacity building tailored to the needs of the sector
- State-of-the-art web-based and social media platforms to communicate the sector to the target markets

Activity Tourism can also enhance and develop other tourism market sectors. For example, food is an essential component for developing an activity tourism product. Visitors who come to a destination primarily to undertake activities such as cycling, adventure sports, mountain biking, water sports and sailing will have specific needs in relation to food e.g. healthier food, packed lunches, transportable food. In addition, developing the food offer at activity centres is a useful means of supporting the local food initiative and increasing visitor spend in the local economy. The effective linkage of food and cultural tourism can add value to cycle, walking and holiday routes by allowing the visitor to experience a true sense of place.

Integrated Delivery Structures

In order to effectively drive forward opportunities for growth, it is recommended that a public/private Tourism Development Working group be set up to champion these activities and ensure they are effectively integrated with the wider economic development and tourism strategies for the District and the wider region. The new super-Council will be preparing a new Tourism Development Strategy for the new area. Particular consideration will need to be given to ensure that this relates to the Tourism Destination Plan in its current form and the results of the review of Tourism Delivery Structures, arising from the draft DETI Tourism Development Strategy for NI.

Omagh needs to work in partnership with organisations such as NITB and Outdoor Recreation NI on a future tourism strategy. It is vital that the product offer and branding strategy developed for Omagh demonstrates a good strategic fit with the wider national initiatives and any that may emerge from the Review of Tourism Delivery Structures.

It will take public sector intervention to make this happen, or at least to pump prime the initial phases of growth, particularly in the development of new product, infrastructure and branding. Other issues, such as skills development and business support are also within the public sector remit. However to be commercially sustainable and present a viable business proposition in the longer term it is vital to ensure the involvement, buy-in and commitment of the private sector.

Clearly Identified Visitor Markets

In line with the Tourism Development Strategy for NI, tourism growth within the town centre must be primarily driven by product development, but must also be strongly market focused and provide a strong infrastructural base from which to grow. The review of the wider visitor market opportunities and priorities identified in the Draft Tourism Strategy for Northern Ireland to 2020 has identified the following target market segments for the short term, with particular emphasis on the closer to home markets (ie. NI, GB and ROI) as having the most potential and representing the best "fit"

- Culture/experience seekers
- Activity/special interest breaks – especially music, walking, and cycling

For the longer term, Omagh is well placed to capitalise on the following key market segments identified in the NI Strategy:

- Extended families from domestic market, ROI and GB
- "Hobby" visitors – especially music, walking, cycling

- Mature culture/experience seekers from UK and Europe

Activity Tourists can be divided into 4 categories whose motivation and visibility vary, thus driving potentially separate planning and marketing programmes to attract them:-

- The Dedicated Activity Tourist
- The Regular Amateur
- The Occasional Activity Tourist
- The Family

Understanding the Outdoor Tourism Sector

To date, there was an information gap in terms of understanding what cultural and outdoor activity tourism products are available in the region and the potential for its future development. It is recommended that a mapping exercise is undertaken to provide a baseline for understanding the range of providers, venues and events that are currently available and the gaps in current provision.

Develop Supporting infrastructure

Local infrastructure and basic services need to support a commercially viable product that meets the need of the local and international visitor. This will include signage and visitor orientation, including electronic signage highlighting car parks etc. While the townscape is generally good, it is recommended that this is enhanced by environmental lighting projects i.e. bridges, courthouse and other land mark buildings.

Branding and Marketing

Branding and marketing must effectively promote what the area has to offer activity tourists. This will be achieved through key strap lines, photography, advertorial and web-based activity. The brand needs to be part of a wider brand family, fitting in with the Sperrins Destination Plan, whilst retaining a unique identity which reflects Omagh. A suite of downloadable templates and materials needs to be freely available to businesses in the sector, to encourage widespread adoption of the agreed brand for menu cards, posters, business cards and websites.

Business Support and Capacity Building

Sustained business support for this sector will be vital to success, and should be prioritised within local economic development and capacity building initiatives. Networking and Packaging will need to be addressed to build critical mass in the sector.

Programme of Events

Sporting and Outdoor Activity events have provided a successful mechanism for both attracting outdoor activity tourists to visit places where well-designed events are taking place and also for adding to the overall offer to more general visitors; creating another piece in the attraction jigsaw to complement history and culture, landscape and local food attributes of the area.

5 CONCLUSIONS

The detailed assessment of the current tourism offer, the opportunities for growth that have been identified and the recommendations to realize the potential has resulted in a comprehensive analysis of the future tourism potential for Omagh town centre. It provides a sound evidence base and strategic framework to take forward the detailed action planning stage of the masterplanning process.

Appendix 4

Transportation Analysis Report

Updated Omagh Town Centre Masterplan

Transportation Analysis

Report

Updated Omagh Town Centre Masterplan

Transportation Analysis

Report

JMP Consultants Ltd
250 West George Street
Glasgow
G2 4QY

T 0141 221 4030
F 0800 066 4367
E glasgow@jmp.co.uk

www.jmp.co.uk

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Verified S. Livingstone

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Updated Omagh Town Centre Masterplan

Transportation Analysis

Report

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Draft		1	S. Livingstone	13/11/2014
Draft	Transport NI Update	2	S. Livingstone	18/11/2014
Draft	Minor Amendments	3	S. Livingstone	26/02/2015
Final		1	S. Livingstone	20/03/2015

Contents

Tables and Figures

1 Introduction

1.1 JMP Consultants Ltd (JMP) has been appointed as part of a multi-disciplinary team to prepare an updated masterplan for Omagh Town Centre. JMP's role is to provide transportation advice in relation to the masterplan area and how transportation can help to form, shape and support the emerging masterplan vision.

1.2 The purpose of this report is to identify the key transportation issues which affect the Omagh masterplan area. These transport issues have been identified through consultation with key stakeholders, a review of policy and transport documentation, and by pulling together any available transport data and further informed through site visits and assessment.

Location

1.3 Omagh is a county town of Tyrone, located in the west of Northern Ireland in the foothills of the Sperrin Mountains. The masterplan includes but is not limited to Omagh Town Centre. To assess the Town Centre it is important to consider all of Omagh and its surrounding environs including the residential areas on the outskirts of the town.

1.4 Omagh is situated on the A5 which is designated as the Western Key Transport Corridor in the Regional Development Strategy 2025. The A5 provides key links to Starbane and Derry / Londonderry in the north to Ballygawley and the A4 in the south. Thereafter, the A4 provides a link to Dungannon and Belfast (via the M1) in the east. The town is also served by the A505 which provides a link to Cookstown to the east, the B48 to Gortin in the north and the A32 to Enniskillen to the south-west. The extent of the transport study area is indicated by **Figure 1.1** below.

Figure 1.1 Omagh Masterplan Transport Study

JMP

Masterplan Objectives

Background

1.5 Under the direction of the Project Steering Group, Omagh District Council has appointed a multi-disciplinary team to review and update the existing town centre Masterplan published in 2009. The updated masterplan is intended to provide a valuable document for the new Fermanagh and Omagh Council's Community Plan and to inform the preparation of the new Local Development Plan.

1.6 The previous Town Centre Masterplan from 2009 concluded that:

> *"The vision is for an attractive, distinctive, safe, accessible and above all, sustainable town centre to emerge".*

Updated Masterplan Brief

1.7 The study brief identifies that the purpose of the updated Masterplan is to:

> *"..assist with the ongoing physical and economic regeneration and sustainable development of Omagh. It will provide a framework for the promotion, implementation and phasing of development in Omagh and the required infrastructure".*

1.8 The updated Omagh Town Centre Masterplan will assess all major social, economic and spatial issues faced by the community, identify underlying market conditions, barriers to investment and propose measures to stimulate local economic activity, particularly in the social economy sector. Whilst there will be a strong spatial, environmental and economic influence on the masterplan the brief underlines the overarching nature of the masterplan approach and asks the following to be taken into consideration:

- Recognise the main hub status of Omagh within the wider region;
- The need for an infrastructure led approach to create confidence for private sector investment;
- The need for sustained investment to support infrastructure development;
- The need for specific investment in tourism related infrastructure;
- The need to encourage sustainable development; and
- The potential for the development of public / private sector partnerships.

1.9 The brief recognises that an enhanced transport offer is likely to be an outcome of the masterplan process. While transport only forms a small part of both the opportunities and the solutions which will emerge from the masterplan, it will provide a pivotal role in supporting the masterplan vision and ensuring that accessibility contributes to the regeneration process.

1.10 The contribution which transport can make to a community by encouraging more healthy and active lifestyles and interaction should also be recognised.

Consultation

1.11 To help gain an understanding of the issues facing the masterplan area the team has undertaken a number of consultation meetings / sessions. These have included discussions with the local schools and community groups and key stakeholders and statutory consultees. The transportation input to the masterplan has taken due cognisance of the consultations with various stakeholders including:

- Transport NI;
- Omagh Cycling Initiative;
- Omagh Chamber of Commerce and Trade; and
- Public Drop-In event on 13^{th} October 2014.

2 Policy Framework Review

Introduction

2.1 The process of preparing a masterplan for Omagh will require to take cognisance of the planning and transport policy framework in Northern Ireland. This section of the report identifies the appropriate elements of policy which, with regard to transportation, will influence the masterplanning process.

Regional Development Strategy

2.2 The Regional Development Strategy (RDS) for Northern Ireland 2025 “Shaping Our Future” (September 2001) provides the overarching framework for development plans. Central to the RDS is the principle of ensuring a better quality of life for everyone including future generations by providing a balanced and equitable pattern of sustainable development for the whole of Northern Ireland.

2.3 The RDS identifies that the long term vision for Northern Ireland requires a Spatial Development Strategy (SDS) that will provide a framework to guide future development in Northern Ireland. The plan identifies Omagh as a ‘Main Hub’ which, along with key links and corridors, it considers to form a basis of this framework for future development.

2.4 The aim of this approach is to give a “strategic focus to future development and achieve balanced growth within the Region by developing”:

- **A vibrant Rural Northern Ireland** with balanced development spread across **a polycentric network of hubs/clusters** based on the **main towns** which will have a strategic role as centres of employment and services for urban and rural communities.

2.5 Furthermore, the SDS identifies in relation to rural Northern Ireland the need “To support the network of service centres based on main towns, small towns and villages in Rural Northern Ireland” (SPG-RNI 3).

2.6 To promote the vitality and viability of town centres, such as Omagh, the SDS identifies a need to:

- Create attractive and distinctive central places which are a focus of civic pride and offer a diversity of attractions, and foster clusters of economic activities in and around the heart of towns;
- Encourage residential development;
- Strengthen public transport to offer an alternative to the car in accessing towns and town centres, including improved access for rural dwellers to education and training facilities, and promote internal town bus services.

Regional Transport Strategy

2.7 The Regional Transport Strategy (RTS) sets out the transport investment required to support the RDS as it applies to the Regional Strategic Transport Network. This does have an influence in Omagh, given that the town sits of the Western Corridor and A5, which is a key transport corridor, passes through the town.

Sub-Regional Transport Plan 2015

2.8 With the exception of the Belfast Metropolitan Area, the Sub-Regional Transport Plan (SRTP) seeks to identify the transport needs of Northern Ireland (NI) as a whole by considering each Other Urban Area (OUA), such as Omagh. The SRTP is based upon guidance provided by the Regional Development Strategy (RDS) and the Regional Transport Strategy (RTS).

2.9 By considering the transport needs of each OUA, the SRTP then seeks to identify a package of measures (i.e. Proposed Transport Blueprints) for the period 2002 to 2015 by all modes of transport including walking, cycling, public transport (bus and rail) and by car.

West Tyrone Area Plan 2019 – Issues Paper (October 2005)

2.10 The aim of the 'Issues Paper' is to set out a series of strategic, general and local issues against which comment may be lodged and therefore inform the preparation of the West Tyrone Area Plan 2019 (The Plan) for the Omagh and Strabane Districts. As identified in the 'Issues Paper':

> *"The purpose of the Plan is to inform the general public, statutory authorities, developers and other interested bodies of the policy framework and land use proposals that will implement the strategic objectives of the RDS and guide development decisions within West Tyrone up to 2019"*

2.11 Among the objectives of the Plan is the need to provide:

- promotion of more sustainable and more balanced communities by encouraging choice in, and access to, housing, employment and other services;
- integration of land use and transportation to improve safety, reduce congestion and the need for car journeys, encouraging a shift to more sustainable forms of travel including walking and cycling.

2.12 In the context of future transportation requirements, the 'Issues Paper' identifies the following issues that will require to be addressed as part of the Masterplan process for Omagh Town Centre:

- accessibility and town centre car parking;
- congestion on the Dublin Road and Campsie areas of Omagh; and
- a need for greater traffic calming and additional pedestrian and cycle ways.

Planning Policy Statements (PPS)

2.13 The most relevant Planning Policy Statements to the Omagh Masterplan process in terms of transportation, as published by the Department of the Environment (DOE) and the Department for Regional Development (DRD) respectively are:

- PPS3 (Revised) Access, Movement and Parking (DOE February 2005);
- PPS5 Town Centres and Retailing and
- PPS13 Transportation and Land Use (DRD February 2005).

PPS3 – Access, Movement and Parking

2.14 PPS3 sets out the Department's planning policies for vehicular and pedestrian access, transport assessment, the protection of transport routes and parking. It forms an important element in the integration of transport and land use planning.

2.15 PPS3 identifies its main objectives as:

- promote road safety, in particular, for pedestrians, cyclists and other vulnerable road users;
- restrict the number of new accesses and control the level of use of existing accesses onto Protected Routes;
- make efficient use of road space within the context of promoting modal shift to more sustainable forms of transport;
- ensure that new development offers a realistic choice of access by walking, cycling and public transport, recognising that this may be less achievable in some rural areas;
- ensure the needs of people with disabilities and others whose mobility is impaired, are taken into account in relation to accessibility to buildings and parking provision;
- promote the provision of adequate facilities for cyclists in new development;
- promote parking policies that will assist in reducing reliance on the private car and help tackle growing congestion; and
- protect routes required for new transport schemes including disused transport routes with potential for future reuse.

2.16 The principal routes through Omagh are "protected" routes as defined in PPS3, which controls access to these routes to the benefit of through traffic.

PPS5 (draft): Retailing, Town Centres and Commercial Leisure Developments

2.17 The key objective of PPS5 (draft) is:

> *"to sustain and enhance the vitality and viability of town centres in a manner consistent with achieving the strategic objectives of the Regional Development Strategy for Northern Ireland 2025".*

2.18 PPS5 (draft) identifies that as part of preparing a development plan, it will be necessary to assess the vitality and viability of a town centre, such as Omagh by undertaking a town centre "health check", which includes an assessment of accessibility, "the ease and convenience of means of travel, including the level of public transport services, the availability of car parking, and the provision for disabled people, pedestrians and cyclists".

2.19 It is envisaged that the 'health check' will help to inform the wider town centre strategy aimed at addressing issues such as encouraging greater accessibility, particularly for non-car modes.

2.20 PPS5 (draft) identifies that:

> *"Town centre enhancement should seek where possible, to facilitate improved connections between car parks, transport interchanges and the town centre in the interests of pedestrian movement".*

2.21 This is clearly applicable to the Omagh town centre masterplan.

PPS13 – Transportation and Land Use

2.22 PPS13 is intended to assist in the implementation of the RDS by guiding the integration of transportation and land use particularly in relation to the preparation of development and transport plans for main hubs such as Omagh.

2.23 PPS13 identifies its primary objective as the integration of land use planning and transport by:

- promoting sustainable transport choices;
- promoting accessibility for all; and
- reducing the need to travel, especially by private car.

2.24 The above objectives are further complimented by the following secondary objectives:

- make efficient use of road space within the context of promoting modal shift to more sustainable forms of transport;
- ensure that new development offers a realistic choice of access by walking, cycling and public transport, recognising that this may be less achievable in some rural areas;
- ensure the needs of people with disabilities and others whose mobility is impaired are taken into account in relation to accessibility to buildings and parking provision;
- promote the provision of adequate facilities for cyclists in new development;
- promote parking policies that will assist in reducing reliance on the private car and help tackle growing congestion; and
- protect routes required for new transport schemes including disused transport routes with potential for future reuse.

Omagh 2010 Strategy Document

2.25 The Omagh 2010 Strategy Document is:

> *"an economic and infrastuctural plan for the town of Omagh. It incorporates an inspiring and challenging vision of where Omagh will be in the year 2010, key actions to achieve the vision with benchmarks and targets to measure progress"*

2.26 Omagh 2010 identifies a number of *"Goals and Targets"* for Omagh. One of the 2010 primary goals is the creation of a vibrant town. To create a vibrant town, Omagh 2010 identifies a number of actions such as the following:

- Upgrading of A5 road on each side of Omagh to improve linkages between Omagh town and District and the wider region;
- Traffic calming measures in High Street / Market Street;
- Consideration of a partial pedestrianisation scheme for areas of Market Street, High Street to Bridge Street junction and Scarffes Entry;
- Consideration of a parking / traffic strategy; and
- Consideration of a park and ride scheme.

2.27 Omagh 2010 recognises that Omagh will benefit from improvements to the A5 and the further development of the Omagh through-pass which are considered to be critical to the economic growth and development of the District.

Conclusions

2.28 Regional, local and planning policy objectives are all directed towards an integrated transport strategy which considers, in order of priority, walk, cycle, public transport and finally the car. It will be necessary to ensure that in developing a masterplan for Omagh that these principles are adopted and translated into the masterplan.

3 Omagh Transport Characteristics

3.1 To understand the transport environment of the Omagh area a number of sources including census, traffic and parking information and public transport information from Translink was interrogated. These help to provide a snapshot of the existing transport character of the area.

Census Data

Population

3.2 The population of the Omagh district area is around 51,356 while the population of Omagh Town Centre itself is approximately 16,124 (2011 census). **Table 3.1** below indicates the population of the wards within Omagh Town Centre (wards identified from Omagh District Council website).

Table 3.1 Population of Wards in Omagh Town Centre

Ward	Population
Camowen	2,283
Coolnagard	3,489
Dergmoney	1,675
Drumragh	2,315
Gortrush	2,833
Lisanelly	2,033
Strule	1,496
Total	**16,124**

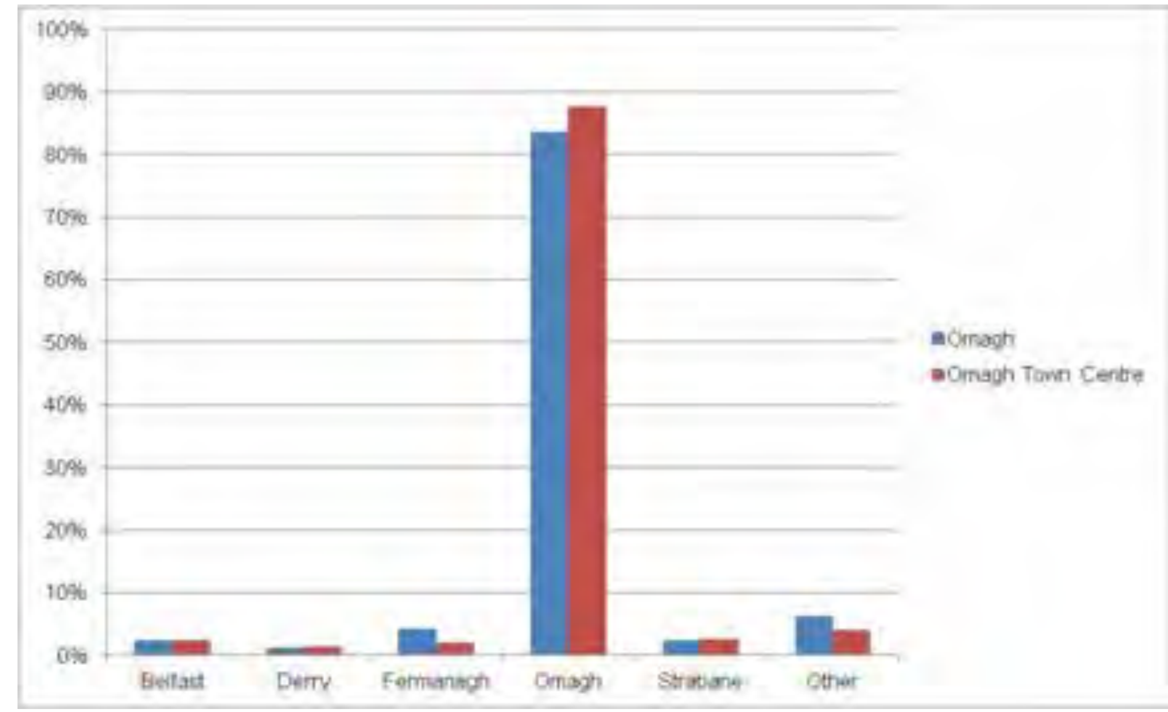
2011 Census

3.3 **Table 3.1** above indicates that while the Coolnagard ward has the highest population, the population of Omagh Town Centre is relatively well-spread throughout the seven identified wards.

Employment

3.4 Analysis of the employment distribution of Omagh district and Omagh Town Centre residents concludes that a very high percentage of people tend not to travel outside of Omagh. **Figure 3.1** below indicates the employment distribution of the economically active population of the Omagh district and Omagh Town Centre.

Figure 3.1 Distribution of Employment of Omagh & Omagh Town Centre Residents



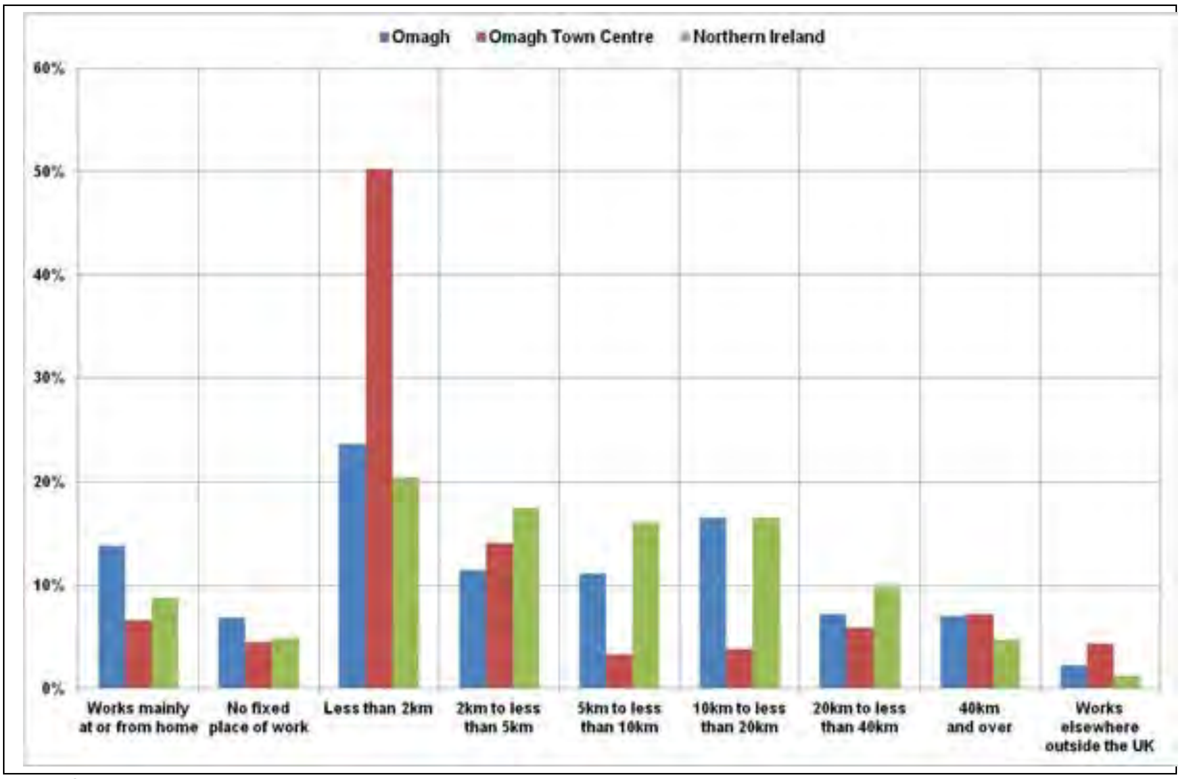
2001 Census

3.5 Given that a very high proportion of people who stay in Omagh and the town centre tend to work within Omagh, there is significant scope to encourage travel to work by sustainable modes including walking, cycling and public transport and ultimately discourage single-occupancy car trips (note: 2011 census data for employment distribution is not yet available. Therefore, there is a risk that the 2001 data does not accurately reflect current travel patterns e.g. the economic downturn may have had an impact.)

Distance Travelled to Work

3.6 **Figure 3.2** below indicates the distance travelled to work by the economically active population of Northern Ireland, the Omagh district and Omagh Town Centre.

Figure 3.2 Distance Travelled to Work



2001 Census

3.7 It is evident from **Figure 3.2** above that approximately 50% of Omagh Town Centre residents travel less than 2km to work which is significantly greater than the percentage of the Omagh district and Northern Ireland. Once more, this provides concrete evidence that there is significant scope to encourage Omagh residents to travel to work by sustainable modes, particularly walking and cycling.

3.8 In addition, the graph above demonstrates that far fewer people travel greater than 10km to work who live in the town centre boundary.

Car Ownership

3.9 **Table 3.2** below indicates the car ownership levels per household in Omagh and Omagh Town Centre and gives a comparison with the average car ownership levels in Northern Ireland.

Table 3.2 Car Ownership (per household)

Area	No cars	1 car	2 Cars	3 Cars	4+ Cars
Northern Ireland[1]	23%	41%	27%	6%	3%
Omagh[2]	21%	45%	26%	6%	2%
Omagh Town Centre[2]	28%	49%	19%	3%	1%

Note [1] : 2011 Census
Note [2] : 2001 Census

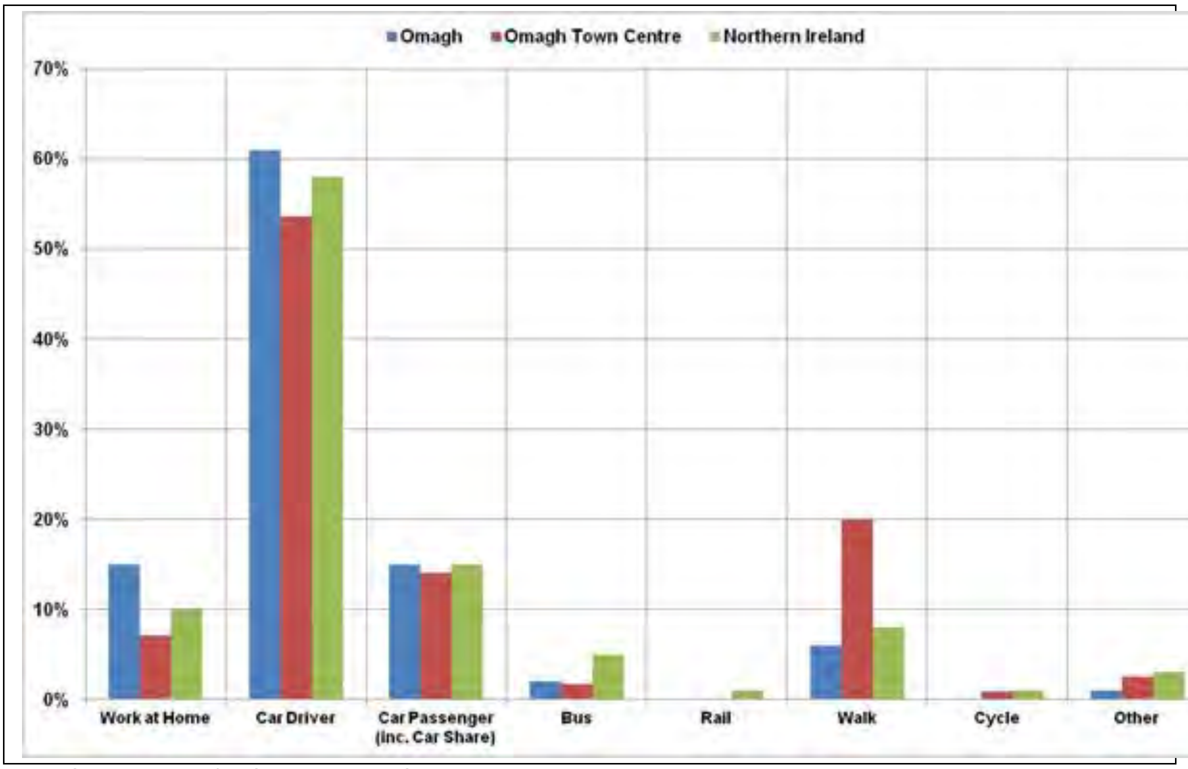
3.10 As expected, given the characteristics of a town centre, there is lower car ownership per household in Omagh Town Centre than both the Omagh district and Northern Ireland. On the other hand, when comparing Omagh with Northern Ireland, it is evident that Omagh generally has similar levels of car ownership as Northern Ireland.

3.11 Further analysis of car ownership in Omagh at ward level indicates that there is generally no significant variance between car ownership levels across the wards in Omagh other than lower car ownership in town centre wards.

Travel to Work

3.12 In terms of the mode share that residents of Omagh and Omagh Town Centre use to travel to work, analysis has been carried out and compared with the statistics for Northern Ireland. **Figure 3.3** below indicates the results of the analysis of the census data.

Figure 3.3 Mode Share - Journey To Work



2001 Census used for Omagh Town Centre
2011 Census used for Omagh and Northern Ireland

3.13 **Figure 3.3** above indicates that the travel characteristics of Omagh are broadly similar to those of Northern Ireland albeit slightly more people from Omagh choose to travel to work by private car than the average for Northern Ireland. Very few of the economically active population travel to work by sustainable modes particularly by rail and by bicycle. It is noted that the public transport utilisation in Omagh is very poor with around 2% of people choosing bus to travel to work. This is slightly less than the Northern Ireland average which is approximately 5%.

3.14 The travel characteristics associated with Omagh Town Centre indicate residents tend to travel more sustainably with around 20% of residents currently walking to work. The number of people who use their private car to travel to work in the town centre is slightly less than both Omagh district and Northern Ireland which is consistent with the car ownership statistics in **Table 3.2** above.

3.15 However, it is noted that public transport usage in the town centre is very poor given the existing level of service within the town and the fact that a high percentage of Omagh residents also work in Omagh.

Other Travel Generators / Attractors

3.16 Omagh is widely recognised as a major administrative and service centre for the region. The district of Omagh provides housing (18443 households in Omagh as of 2011 census), commercial, industrial, shopping, health care, education and recreational services and supports extensive rural hinterland.

3.17 The Strule River generally runs in a north-west to south-east direction through the town centre. The vast majority of retail stores are located to the south of the river while the larger recreational and administrative developments tend to be located to the north of the river. The residential areas are mainly located outside of Omagh Town Centre, however, there is some housing dispersed throughout the core town centre area.

3.18 Omagh Town Centre is recognised for its business and retail activities and has a reasonable compact core retail area with main shopping frontage on High Street, Market Street, John Street, Bridge Street and George’s Street. There are also 2 retail parks within Omagh Town Centre including the Showgrounds Retail Park which is located at Sedan Avenue and the Great Northern Retail Park at Tamlaght Road.

3.19 The A5 runs through Omagh Town Centre and is considered at a key part of the western transport corridor. This road, amongst other through roads, contributes to a significant amount of traffic through the town centre particularly during commuter peak periods.

Existing Transport Provision

Public Transport

Bus

3.20 Given that there is no rail network in Omagh, the bus service is the only public transport provision within the town. As a result, it is essential that there is good accessibility between the surrounding residential settlements, leisure and retail opportunities and the bus network in Omagh.

3.21 It has been demonstrated that just 2% of Omagh district residents use public transport facilities for commuting purposes. Furthermore, it is evident based on the analysis of travel to work census data that a high percentage of people who stay within the Omagh district also work within Omagh. As a result, there is significant scope to encourage commuting trips by bus. Therefore, it is important to ensure the level of bus provision in Omagh is able to accommodate the potential for a significant increase in the number of people using the bus to travel to work.

3.22 The bus services within Omagh are currently operated from the Omagh Bus Centre which is located on Drumragh Road, adjacent to the Drumragh Road / Mountjoy Road traffic signal junction. **Table 3.3** below indicates the buses which operate from Omagh Town Centre along with the frequency of these services from Monday to Friday and Saturday and Sunday. **Appendix A** includes a figure which indicates the location of the bus stops within Omagh Town Centre in relation to Omagh Bus Centre.

Table 3.3 Existing Bus Services Operating from Omagh Bus Centre

Operator	Bus No.	Route	Frequency (Mon –Fri)	Frequency (Sat)	Frequency (Sun)
UlsterBus Town Services (UTS)	384G	Omagh Buscentre – Dergmoney Estate – Coolnagard Estate – Omagh Bus Centre	Every 2 Hours	Every 2 Hours	N/A
UlsterBus Town Services (UTS)	384F	Omagh Buscentre – Mullaghmore – Lisanelly – Omagh Buscentre	Every 60 minutes	Every 60 minutes	N/A
UlsterBus Town Services (UTS)	384E	Omagh Buscentre – Tyrone / Fermanagh Hospital – Omagh Buscentre	Every 60 minutes	Every 60 minutes	N/A
UlsterBus Town Services (UTS)	384D	Omagh Buscentre – Culmore Park – Omagh Buscentre	2 per day at 11:00 and 13:00	2 per day at 11:00 and 13:00	N/A
UlsterBus Town Services (UTS)	384C	Omagh Buscentre – Tamlaght Road – Omagh Buscentre	Every 1 to 2 hours	Every 1 to 2 hours	N/A
UlsterBus Town Services (UTS)	384B	Omagh Buscentre – Kilyclogher – Omagh Buscentre	Every 60 minutes	Every 60 minutes	N/A
Ulsterbus (ULB)	97 / 97H*	Omagh – Newtonstewart - Straban	4 per day at 07:10, 07:55. 15:45 and 17:15	2 per day at 07:25 and 14:25	1 per day at 17:05
Ulsterbus (ULB)	93	Omagh – Beragh – Sixmilecross – Gortfin	Every 2 Hours	2 per day at 10:15 and 18:42	N/A
Ulsterbus (ULB)	83A	Omagh – Lack – Ederney – Kesh	Monday + Thursday – 2 per day at 10:45 and 14:30	N/A	N/A
Ulsterbus (ULB)	83	Omagh – Dromore – Irvinestown	Every 4 hours	N/A	N/A
Ulsterbus (ULB)	94	Omagh – Dromore – Trillick – Ballinamallard – Drumclay – Enniskillen	Every 2 Hours	4 per day at 10:30, 13:30, 15:30 and 17:45	1 per day at 18:25
Ulsterbus (ULB)	94 A	Omagh – Dromore – Irvinestown – Ballinamanard – Enniskillen	Every 2 Hours	4 per day at 08:40, 10:05, 15:15 and 16:45	1 per day at 18:40

Ulsterbus (ULB)	94 H	Omagh – Glenfern – Dromore	2 per day at 07:25 and 07:50	N/A	N/A
Ulsterbus (ULB)	78	Omagh – Garvaghey – Ballygawley	3 per day at 07:25, 15:45 and 17:45	N/A	N/A
Ulsterbus (ULB)	88 H	Omagh – Mountfield – Beaghmore – Cookstown	3 per day at 07:25, 07:55 and 15:45	N/A	N/A
Ulsterbus (ULB)	85 H	Omagh – Fivemiletown – Seskinore – Augher – Clogher	3 per day at 07:00, 07:20 and 15:45	N/A	N/A
Ulsterbus (ULB)	96	Omagh – Drumquin - Castlederg	Every 2 Hours	Every 2 Hours	1 per day at 17:40
Ulsterbus (ULB)	86	Omagh – Carrickmore – Pomeroy – Donaghmore – Dungannon	Every 2 Hours	2 per day at 11:30 and 17:40	N/A
Ulsterbus (ULB)	92C	Omagh – Mountfield – Greencastle – An Creagan Centre	2 per day at 09:15 and 13:30	N/A	N/A

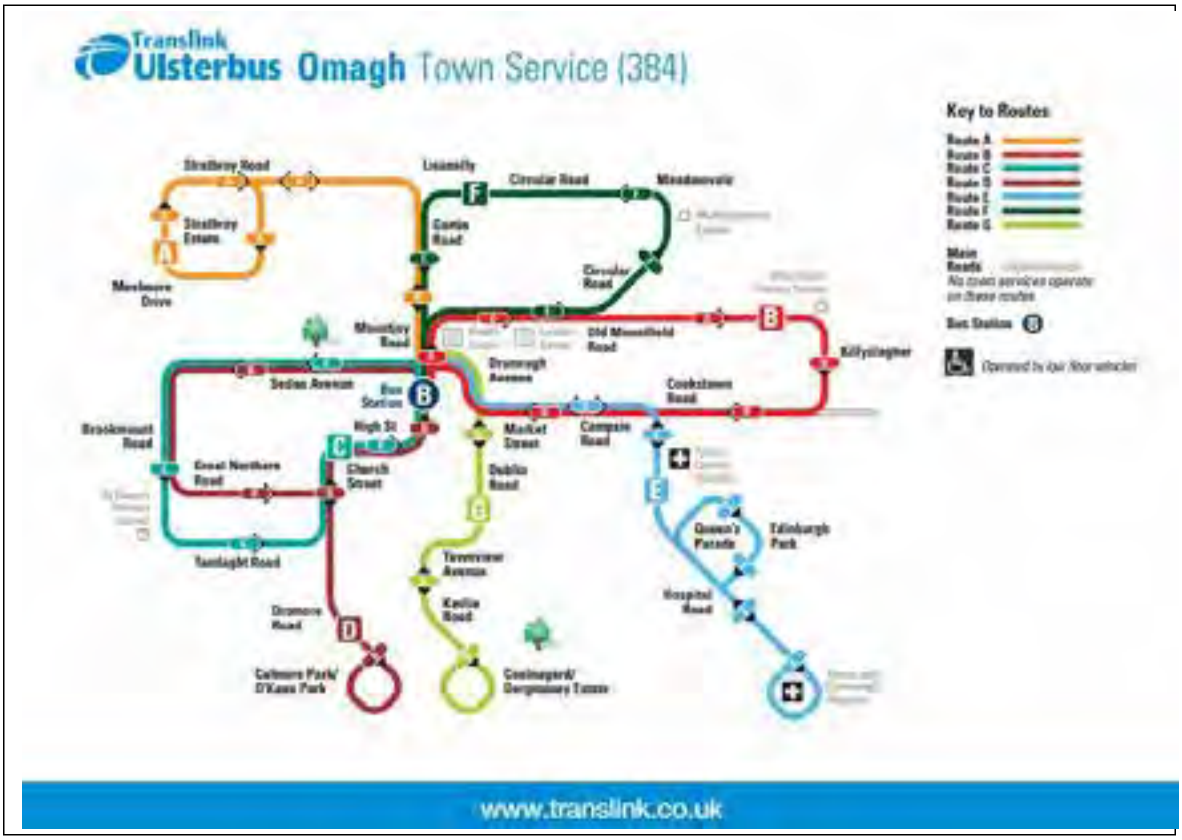
*Note * : 97H only runs to Sion Mills*

3.23 **Table 3.3** indicates that there are a significant number of bus services currently operating from Omagh Bus Centre. These services provide links from Omagh Bus Centre to Dungannon, Cookstown, Enniskillen and Gortin. However, further analysis of the bus service timetables confirms that there is very little bus service provision after 17:30. This will require to be addressed in order to promote future retail and recreational opportunities within Omagh Town Centre.

3.24 The Translink Goldline Service operates throughout the week. This service links Omagh with Belfast Europa Bus Centre, Lurgan, Dungannon, Ballygawley, Strabane and Derry / Londonderry. While it can be concluded that these services aren't particularly frequent, it is important for Omagh that this link is at least maintained throughout the Masterplan process.

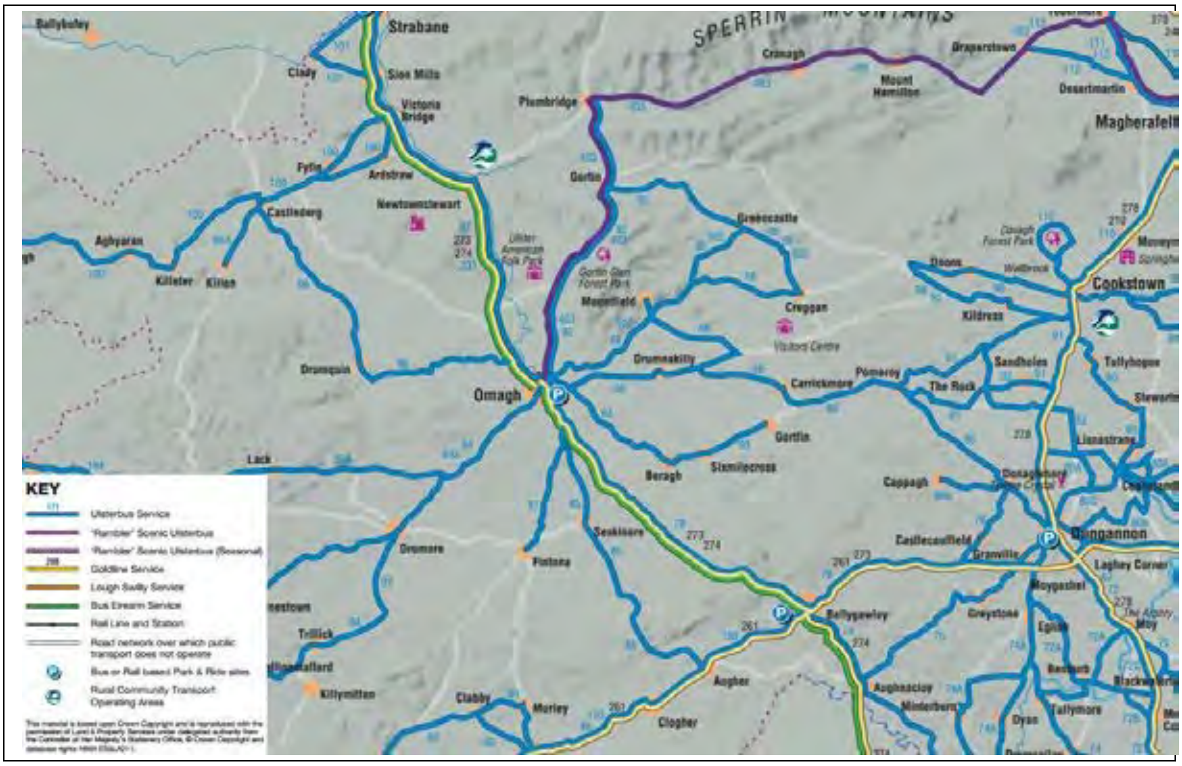
3.25 **Figure 3.4** below provides an indication of the general routes of the Ulsterbus Town Services (UTS) within Omagh while **Figure 3.5** indicates the Ulsterbus Service routes.

Figure 3.4 Ulsterbus Town Services in Omagh



Ulsterbus / Translink

Figure 3.5 Ulsterbus Services Serving Omagh



Ulsterbus / Translink

3.26 The Western Education and Library Board (WELB) operate a school transport network in Omagh. The system includes a fleet of buses which are run by WELB and supplemented by contracted services from other operators including Translink. The school transport system, including those operated by Translink, terminates at Omagh Bus Centre from where pupils currently walk to school. This contributes to a significant amount of pedestrian movements during the school peak periods. However, due to the large proportion of pupils within Omagh to take the bus to school, this has the effect of reducing the number of school-related vehicle trips in Omagh.

Train

3.27 There is currently no rail service within Omagh. The nearest railway station to Omagh is Portadown Railway Station, which is located approximately 70km from the town centre. As indicated in **Table 3.3** above, there are no bus services which run from Omagh to Portadown.

Cycle Routes and Paths

3.28 Omagh is blessed with significant provision of cycling facilities. National Cycle Network (NCN) 92 bisects the town and offers cycle access to Strabane to the north, Enniskillen to the south-west and Cookstown to the east via Old Mountfield Road. Cyclists are provided with a controlled crossing opportunity at the Gortin Road / Lisanelly Avenue / Old Mountfield Road junction.

3.29 Phase 2 of Sustrans' Connect 2 shared walking and cycling path, indicated on the cycling blueprint in **Appendix B**, is currently completed with the third and final phase due for completion in July 2015. Once complete, the riverside route will run adjacent to the Strule River from Clonmore Gardens to the town centre, given the route a total distance of 2.4km.

3.30 Currently, phase 2 includes a link from Clonmore Gardens through lands at Lisanelly onto the St Lucia floodplains in the Hunter Crescent area, including a bridge over the Strule River linking Lisanelly and Hunter Crescent.

3.31 It is recognised from the earlier analysis that the mode share for cycling is very low within Omagh for the main journey to work and also anecdotally for other journeys. This can be partially explained by the high volume of traffic which in Omagh Town Centre particularly during the main commuter periods. As highlighted throughout this chapter, a high volume of people who stay in Omagh currently work in Omagh, giving significant scope to encourage trips by bicycle.

3.32 The construction of the A5 Western Transport Corridor, as described in more detail below, is likely to significantly reduce the volume of traffic through Omagh Town Centre. This, together with the introduction of additional cycle routes in Omagh, will contribute significantly in the promotion of cycling as a viable mode of transport in Omagh.

Omagh Road Network

3.33 Omagh is situated on the A5 which is designated as the Western Key Transport Corridor in the Regional Development Strategy 2025. The A5 provides key links to Starbane and Derry / Londonderry in the north to Ballygawley and the A4 in the south. Thereafter, the A4 provides a link to Dungannon and Belfast (via the M1) in the east. The town is also served by the A505 which provides a link to Cookstown to the east, the B48 to Gortin in the north and the A32 to Enniskillen to the south-west.

3.34 In this Masterplan report this far, it has been recognised that there are significant congestion issues in Omagh Town Centre. There are two potential reasons for this (listed below):

- Through vehicle movements from / to the north and south (A5 Throughpass, Campsie Road, Drumragh Avenue and Mountjoy Road); and
- Town centre activity along Market Street including on-street parking and a high volume of pedestrian crossing movements).

Traffic Flow

3.35 The two-way AADT traffic flow on some key routes within Omagh was collated from the "Traffic and Travel Information 2011" report produced by Transport NI in 2011. These are indicated by **Figure 3.6**.

Figure 3.6 AADT Traffic Flows, Omagh Town Centre

Ref	Route	Location	Two Way AADT (5 Day)
1	A5	Omagh Throughpass	22,070
2	A5	Omagh Throughpass, at footbridge	21,210
3	A5	Omagh Throughpass, at Gortrush	17,090
4	A5	Omagh - Newtonstewart, at Conneywarre	13,320
5	A5	Omagh - Ballygawley, at Doogary	11,880
6	A505	Cookstown Road, Omagh	9,500
7	B83	Omagh - Fintona, Drumragh	4,750
8	B50	Drumquin Road, Omagh	4,490

3.36 Historical peak traffic survey data (traffic survey data collected for the Lisanelly Shared Use Campus development) was interrogated in order to estimate two-way AADT traffic flow data for some of the main roads in Omagh Town Centre. The AADT traffic flow figures listed below have been estimated based on the peak hour flow representing 8% to 10% of the 24-hour flows.

3.37 Furthermore, these figures take into consideration the traffic associated with the major developments within Omagh i.e. Scotsmill, Opportunity Omagh, Lisanelly Shared Education Campus and assumes the Strathroy Link Road is fully constructed and a link is formed between Drumragh Avenue and Old Mountfield Road.

- Drumragh Avenue – 19,000
- Mountjoy Road – 17,000
- Campsie Road – 12,000
- Market Street – 8,000

3.38 The AADT traffic flow figures listed above demonstrate that there is a high volume of traffic flowing through Omagh Town Centre. The construction of the A5 Throughpass has had significant benefits to the level of congestion experienced on roads through the town centre particularly the B48.

Access Roads to Town Centre

A5 Throughpass

3.39 Stage 3 of the A5 Omagh Throughpass was completed in 2006 and brought considerable traffic relief to Omagh by reducing congestion by around 75%. The Throughpass provides an alternative route through Omagh via the Great Northern Road.

3.40 The A5 Throughpass is a distributor road which runs from the Derry Road Roundabout, located to the north-west of the town centre, to Crevenagh Roundabout which is situated to the south-east of the town centre. The Throughpass has the effect of reducing the volume of traffic flowing through the town centre roads, particularly the B48 and the junction at Drumragh Avenue / Market Street / Dublin Road / Campsie Road.

3.41 Based on the Divisional Roads Manager’s Report to Omagh District Council (June 2014), there have been speed amendments to the speed limit on the A5 including an extension to the 30mph speed limit restriction at Doogary Road and to the 40mph restriction at Beltany Road. There are no pedestrian facilities on the A5 Throughpass

3.42 While the A5 Throughpass has significantly improved congestion in Omagh Town Centre, the A5 currently experiences a high level of congestion during commuter peak periods. Even with the Throughpass, there is still a high volume of traffic on town centre roads such as Drumragh Avenue and Mountjoy road (as listed above). This is partially caused by the location of the car parks, which are situated in the centre of Omagh (as indicated by the parking figure in **Appendix E**). It is considered that the introduction of the A5 Western Transport Corridor, described in more detail later in this chapter, will reduce congestion on this route and in the town centre.

A505 / Crevenagh Road

3.43 The A505 is a distributor road links Omagh with Cookstown which is situated approximately 42km to the east of the town centre and provides strategic access to the northern access at Tyrone County Hospital. The road routes south at the Swinging Bars Roundabout and links with the A5 Throughpass at Crevenagh Roundabout.

3.44 The road provides access to numerous residential areas to the east of the town centre and there is no development frontage along the route. There are footways on both sides of the road along its length along with street lighting and strategically placed dropped kerbs.

Hospital Road

3.45 Hospital Road is a distributor road which provides access to the town centre from the south-east and also Tyrone Hospital and the Western Education and Library Board. The road provides access to numerous residential areas at both sides of the road. Like the A505, there are good levels of provision for pedestrians on both sides of the sides of the road with footways and street lighting provided along its length.

B48 Derry Road

3.46 Derry Road is main route into the town centre from the north-west. The road crosses the Strule River near Showgrounds Retail Park and South-West College and provides access to Omagh Police Station at the north side of the road. The road can be classified as a local distributor road and provides access to High Street via Castle Street and George Street. There is no development frontage along the route although there are footways on both sides of the road and crossing opportunities in the form of dropped kerbs and pedestrian islands.

B48 Mountjoy Road

3.47 Mountjoy Road provides a link between the Old Mountfield Road / Gortin Road junction to the north and Bridge Street to the south and has two lanes in both directions. The proposed Scotsmill development is located to the east of Mountjoy Road. As part of the development, a link is to be provided between Drumragh Avenue to the south of the development and Old Mountfield Road to the north.

3.48 There are two lanes in both directions with footways on both sides of the road. Following the completion of the Lisanelly Shared Use Education Campus, it is anticipated that there is likely to be a significant number of pupil movements along Mountjoy Road. However, it is considered that the footways are too narrow to accommodate a large number of pedestrians along the route especially given that there is an approximate two-way AADT flow along the route of 17,000 vehicles per day.

Town Centre Roads

Campsie Road

3.49 Campsie Road is located at the eastern end of the town centre and links the signalised crossroads at Market Street / Drumragh Avenue / Dublin Road with the roundabout at Hospital Road / Crevenagh Road / A505. Along the length of Campsie Road, there are good levels of footway provision and street lighting on both sides of the road which one would expect, given its high street nature. There is on-street parking provision on the south-side of Campsie Road and there is a signalised crossing opportunity near the entrance to the car park on the south side of the road.

3.50 Given that Campsie Road has a high street nature, the road has a very high traffic flow. As listed earlier in this chapter, the road has an estimated two-way AADT traffic flow of 12,000. There are local shops on both sides of the road from the crossroads at Market Street / Drumragh Avenue / Dublin Road and to the entrance to the car park on the south side of the road.

Dublin Road

3.51 Dublin Road generally runs in a north to south direction and links Crevenagh Roundabout at the south to the aforementioned crossroads. There are pedestrian facilities on both sides of the road and provides access to numerous car parks including the Market Street and Market Road car parks.

3.52 There are two lanes on the approach to the signalised crossroads with parking restrictions from the mini-roundabout to the crossroads. There is a signalised crossing opportunity on Dublin Road near the priority controlled junction at Irishtown Road. There is little development frontage on Dublin Road other than a few local amenity store.

Market Street / High Street

3.53 Market Street / High Street runs through the heart of Omagh Town Centre and runs in an east to west direction. Market Street (including a short section of High Street) is one-way westbound between Drumragh Avenue and Bridge Street. There is on-street parking on both sides of the road (although there are restrictions on the north side on High Street) along with traffic calming to reduce vehicle speeds. High Street, to the west of Bridge Street has two-way traffic flow. There are active development frontages on both sides of the road as well as wide footways to accommodate a large volume of visitors to the local shops and amenity stores.

3.54 There are pedestrian crossing opportunities along the length of the road in the form of dropped kerbs, with associated tactile paving, and zebra crossing.

Drumragh Avenue

3.55 Drumragh Avenue generally runs in a north-west to south-east direction and links the signalised crossing roads at Drumragh Avenue / Market Street / Dublin Road with the signalised crossing at Drumragh Avenue / Bridge Street / Mountjoy Road / Sedan Avenue. Omagh Bus Centre can be accessed from the south side of Drumragh Avenue as well as the Drumragh Avenue car park which is operated by Transport NI.

3.56 There are two lanes which operate in each direction and there are footways provided on both sides of the road. As identified in the Divisional Roads Manager's Report to Omagh District Council (June 2014), the existing footways on Drumragh Avenue have recently been upgraded to accommodate cyclists.

Proposed Highway Schemes

A5 Western Transport Corridor

3.57 The proposed A5 Western Transport Corridor (A5 WTC) represents the longest single roads project ever undertaken in Northern Ireland. The new route is one of five key transport corridor upgrades identified in the RTS for Northern Ireland. The highway blueprint included in **Appendix C** indicates the preferred route of the A5 WTC. While the timescales for completion have not yet been confirmed, it is clear that the construction of the A5 WTC will significantly reduce the level of congestion in Omagh and will help maximise development potential in the town centre.

Strathroy Link Road

3.58 The Strathroy Link Road is a proposed road scheme of approximately 1km in length and will link B84 Derry Road to the U1526 Strathroy Road. The scheme will comprise a bridge over the Strule River stretching around 90m. The Lisanelly Shared Use Education Campus is providing funding for the link road and the scheme is required to be constructed by the end of the 2017 / 2018 financial year, prior to the opening of the campus.

3.59 **Appendix C** includes a figure which highlights the proposed A5 WTC, Strathroy Link Road and the Kelvin Avenue Link. In addition, the recently completed highway schemes are also indicated in the figure.

3.60 **Appendix C** also includes a figure indicating the proposed junction improvements within Omagh Town Centre and also indicates the recently completed junction improvement at the entrance to the Asda superstore at Dromore Road.

Parking

3.61 From information recently provided by Transport NI (2014 car park usage to date), we understand that there are 13 off-street car parks in Omagh Town Centre. These are operated and managed by Transport NI and provide 1,088 parking spaces (376 free spaces and 712 pay & display). In addition to the town centre car parking, there is also a Park & Share located on Crevenagh Road. On 15 May 2013, the park and share was officially increased from 85 spaces to 231 spaces.

3.62 **Figure 3.7** indicates the location of the main car parks serving Omagh Town Centre (also include in **Appendix E**).

Figure 3.7 Omagh Town Centre Car Parks

3.63 Transport NI routinely monitors the usage of each of their car parks and the average occupancy 2104 'year to date' is indicated by **Table 3.4** below. It should be noted that the average occupancy for the year to date (provided by Transport NI) included the December survey which has yet to take place. We have therefore adjusted the average occupancy to only include the results of surveys collected to September 2014.

Table 3.4 Transport NI Average Car Park Occupancy

Car Park	Total Spaces	Occupancy
Brook Street	84	89%
Campsie Road	105	95%
Castle Street	31	95%
Church Street North	48	95%
Church Street South	24	99%
Cunninghame Terrace	18	111%
Drumragh Avenue*	8	96%
Foundry Lane	119	60%
Johnston Park	194	70%
Market Place	59	93%
Market Street	80	96%
New Brighton Terrace	93	91%
Old Mountfield Road	66	87%
Town Centre (combined)*	929	84%
Crevenagh Road P&S	231	37%

**Drumragh Ave Car Park has 167 parking spaces. However, it is predominantly closed all year due to Oasis Project*

3.64 The main points to note from the car parking accumulation survey indicated by Table 3.4 are:

- The majority of the town centre car parks predominantly operate with space parking capacity;
- While some car parks (Campsie Road, Market Street, Castle Street) are operating close to capacity, this is with Drumragh Avenue car park currently closed which would normally provide 167 spaces (only 8 are currently available);
- The average occupancy for the combined town centre car parks is only 84%. This is significant given that the Drumragh Avenue car park is currently closed;
- The results suggest that the under utilisation of car parking is due to the predominantly central location and traffic congestion on town centre streets; and
- Until recently, the Crevenagh Road park and share only had 85 parking spaces. This was increased to 231 spaces in May 2013 but it is clear from the results that this additional capacity is not being utilised by the public.

4 Assessment of Transport Characteristics

Introduction

4.1 JMP has undertaken an assessment of the transport network through and around the masterplan area, with a view to identifying any specific strengths and weaknesses of the transport system to support the emerging masterplan objectives. Consideration is given to transport related strengths and weaknesses by travel mode and any conclusion regarding strengthening those transport characteristics.

4.2 Transport has a key role to play in the masterplan vision to develop Omagh into a thriving town. Accessibility to town centre public car parks and access for walkers and cyclists from the surrounding residential areas, are key issues to be addressed.

4.3 Furthermore, the public transport linkage between the town centre and tourist destination zones such as Gortin Forest Park and Ulster American Folk Park are recognised as being a fundamental requirement to the continued vitality of Omagh.

4.4 The following assessment seeks to ensure that these key themes are considered.

Strengths

4.5 The key strengths in relation to transport serving the masterplan area are as follows:

- The future investment strategy for transport in Omagh has been well defined by the SRTP 2015. As a result of the economic downturn, much of this strategy has still to be implemented. The investment is spread across all transport modes and reflects both the strategic needs of the area and the specific needs of Omagh.
- In terms of demographics, a large number of residents appear to live and work in the Omagh area. However, census data also suggests that there are relatively few trips on foot, bicycle and by public transport. There is therefore, significant potential to promote a greater use of the sustainable modes of transport.
- The recent upgrade of the riverside path (Sustrans Connect 2) this has helped to improve walking and cycling facilities. The east to west link will also benefit from the upgrade of footways on Drumragh Avenue to shared use for pedestrians and cyclists (Transport NI scheme).
- The recently consented 'Oasis' development on the north side of the River will provide a high quality civic space area above the Drumragh Car Park (it is understood that there will not be any reduction in car parking spaces). This will improve the pedestrian / cycle links between the north and south of the River Strule and better integrated the town centre.
- While not a committed scheme, we understand Transport NI would be keen to pedestrianise a section of High Street (between Scarffes Entry and Bridge Street).
- The residential areas / street are generally quiet which means there is scope to encourage walking and cycling to the town centre (with suitable infrastructure).
- There are a high number of services operating out of the Omagh Bus Centre.
- There are a number of schools located in the town centre that will be contributing to congestion. The relocation of some of these schools to the Lisanelly Shared Education Campus should help to reduce traffic in the town centre.

- The Transport NI parking surveys indicate that the Crevenagh Road Park and Share is significantly under-utilised. There is clearly scope to promote increase use of this facility.
- The Strathroy Link Road is predominantly being funded by the Department for Education and delivered by Transport NI. It is currently programmed for completion for 2017 / 2018 to coincide with the anticipated opening of the Lisanelly Shared Education Campus. This link will not only support the Campus, it will provide an alternative route to the B48 Gortin Road for trips to /from the west of Omagh and will include cycling facilities.
- The newly opened Cranny Road provides a link between the B158 Donaghanie Road and Drumragh College Roundabout. The road, which includes a cycle path and is associated with the Tyrone and Fermanagh Hospital, should help to provide some relief to the Swinging Bars Roundabout (A505 / B4).
- Transport NI (in conjunction with mitigation measures associated with recent planning approvals) are in the process of implementing a rolling programme of improvement works. These works will include upgrading the control system at a number of signalised junctions to improve operation and efficiency (MOVA) and the upgrade of the B48 Gortin Road / Strathroy Road to traffic signal control.

4.6 The location of the proposed developments in Omagh as discussed above, including the Oasis development and the Lisanelly Shared Use Campus, are included in **Appendix G**.

Weaknesses

4.7 The key weaknesses in relation to transport serving the masterplan area are as follows:

- The limited number of opportunities to cross the River Strule acts as a barrier to pedestrians and cyclists. However, this would be addressed through the provision of the Oasis footbridge.
- Pedestrian and cycle signage is limited within the area and not supporting short distance trips within the town.
- The narrow footway provision on Mountjoy Road, which can expect to see a rise in pupil movements following the relocation of the schools to the Lisanelly Shared Education Campus.
- While cycle parking facilities are provided on Market Street / High Street, the absence of cycle links and the level of traffic and town centre activity, will act as a deterrent to all but the experience cyclist.
- The majority of local bus services do not run in the evenings (most services have terminated by 17:30).
- There are significant traffic congestion issues in Omagh, not only on the strategic routes such as the A5 Throughpass, but also within the town centre core. This is caused by significant through traffic movements and the central location of the car parks.
- The timescale for delivery of the A5 Western Transport Corridor is uncertain.
- The high volume of traffic in the Town Centre is not welcoming for pedestrians. The relatively complicated one-way system is also understood to be a potential deterrent to tourists.
- Coach parking is limited and access is difficult due to the one-way system. Coach operators have difficulty accessing the dedicated coach parking spaces at the Grange Car Park and the drop-off / pick-up bay beside the South West College is often used for informal car parking.

- There is currently no financial support for the Kevlin Avenue link (between Dublin Road and Scarffes Entry) and Transport NI have confirmed that this would be developer lead. This link would provide some much needed relief to Market Street and help to create development opportunities such as cafes and local shops (plus potentially leading to development on the public car parks on Kevlin Avenue).
- There is a significant level of uncertainty regarding a number of potential development sites and therefore, their associated traffic impact and transport interventions are unknown at this time (Opportunity Omagh, Scotts Mill).
- Although town centre car parks are currently under-utilised, this is the result of congestion making access difficult, they are located within the centre of the town and poorly signposted.

4.8 In summary, the development of Omagh means that there is significant potential to improve the transport network and facilities. The improvement to the transport network should be focussed on improving the accessibility to the Town Centre which will involve improved pedestrian and cycle linkage and promoting a greater awareness of bus service provision. The Strathroy Link Road will help to reduce congestion at the junction of Drumragh Avenue / Mountjoy Road. The A5 Western Transport Corridor would help to reduce traffic congestion in the area.

4.9 It is evident from the above assessment that to support the masterplan it will be necessary for the following key transport related matters to be addressed:

- Pedestrians – Significant Improvements will be required with regard to pedestrian linkage to the Town Centre from the surrounding residential areas and off-street car parks;
- Cycling – Again, significant improvements will be required to the cycling facilities in Omagh Town Centre including cycle parking provision and the formalisation of cycle routes.
- “Safe Routes to School” would be an excellent mechanism to identify the areas which require to be improved and to the encouragement to recognise the walkability of the town;
- Public Transport – Consideration of improved buses to links to key tourist attractors should be developed; and
- Parking – Consideration should be given to rationalising off-street parking to provide higher density parking in edge of town centre locations. This would help to reduce traffic volumes that would be more conducive to pedestrians and cyclists. This will require a focus on vehicle access, pedestrian linkage, signing and charging in association with off-street car parks.

5 Transport Network Interventions

5.1 When the assessment of the existing transport network, including the strengths and weaknesses of the system is compared with the vision and themes of the masterplan, a number of high level transport interventions emerge. These are described in detail below.

Improvement to Walk and Cycle Facilities

Walking

5.2 The SRTP 2015 identified a number of improvements that focused on pedestrian infrastructure needs through improved quality and consistency of footway provision on a number of primary walk routes within the town centre. A further investment on facilities along the radial routes was also proposed.

5.3 Within the town centre, there are significant pedestrian flows associated with the college and with the schools, which are located on the south of the town centre. A key issue is the pedestrian demand which this places on Bell's Bridge and Mountjoy Road which are recognised to have sub-standard footways. Notwithstanding the availability of the Riverside walkway, the highest demand levels are when school children are accessing the bus station at the end of the school day and will be using Mountjoy Road, following the opening of the Shared Education Campus.

5.4 The recently consented Oasis project (adjacent to the bus depot) will provide a riverside walk, exercise areas, electronic information hub, artwork panels, games tables and fishing stands. This development will also provide a new pedestrian bridge across the River Strule. This additional link will help to address the 'severance' from the river, providing improved access for pedestrians / cyclists from Drumragh Avenue car park to Old Market Street. This link will also benefit the bus station, the college and future development of the Scotts Mill site.

5.5 There are a number of local issues which also impact on walk opportunities and route standards. These relate in particular to the implications of Great Northern Road (Throughpass), which is located to the south of the town centre. The road is heavily trafficked and in general terms pedestrians are accommodated through grade separated crossings.

Cycling

5.6 The town currently supports an NCN from Gortin Road in the north to Killyclogher Road in the east. This is a combination of off-street and on-street running.

5.7 There is also the recently completed Riverside Walkway (the SUSTRANS Connect2 scheme) which has created an attractive cycle and walking link to the town centre. With priority walking and cycle links to urban and suburban residential areas, many will benefit from this new amenity. Investment should therefore be directed at improving the cycling facilities from the south and south-west.

5.8 It is noted that Omagh Cycling Initiative (OCI) has suggested a considerable number of cycling improvements that they would like to see brought forward. We would also note that the costs associated with some of these improvements are potentially significant (new foot / cycle bridge to cross the River Strule beside Abbey Bridge). This masterplan does not intend to prioritise the area of investment, but recognise where investment is required. A note of the stakeholder engagement with OCI is provided in **Appendix D** at the end of this report.

5.9 The network interventions that should be considered to improve walking and cycling opportunities are set out below.

- Identify clear walk and cycle routes between communities;
- Improve signing for pedestrians and cyclists giving direction and distance to key destinations
- Identify specific walk / cycle routes linking residential areas, car parks, schools and the Town Centre;
- Link Drumragh Integrated College to existing shared path on Crevenagh Road;
- Provide a link from Dublin Road to Scarffes Entry;
- Identify key node points for cycle parking within the Town Centre;
- Improve cycle parking at Crevenagh Park & Share;
- Consider widening the footway on Mountjoy Road to cater for the increase in pedestrian movements to the Shared Education Campus at Lisanelly; and
- Upgrade the Drumragh Avenue footways to shared use for pedestrians and cyclists (Transport NI scheme).

5.10 Consideration could also be given to implementing a town centre public bike share scheme, similar to one that will be launched in Belfast in Spring 2015 (and currently operating at a number of other locations such as Dublin, Glasgow and London). This does not necessarily need to be a large scheme (there is a similar scheme also in operation in the town of Dumfries in Scotland) but the public bikes could be used by:

- Residents: Travel to work, shopping or leisure trips;
- Students: Relatively cheap and easy way to travel;
- Commuters: Cycle to and from the bus station, car parks to their place of work (such as the Park & Share facility on Crevenagh Road).
- Tourists: Register for short term use and visit attractions in and around Omagh (such as the Strule Arts Centre, Ulster American Folk Park, Gortin Glen Forest Park).

5.11 The blueprint for future investment in walking and cycling links is indicated in **Appendix B** (SRTP 2015 and Omagh Cycling Initiative).

Improvement to Public Transport Facilities

5.12 The bus services which pass through and support the town appear to serve the key destinations with regard to employment, shopping and health care. However, the frequency of services and in particular the significant reduction in services at weekends and evenings is a detriment to use for leisure or weekend shopping journeys. Therefore, the public transport interventions that should be considered relate to service provision and suitability to address the needs of the town’s residents and are:

- Consider means of improving the use of the bus, particularly a review of potential services to key tourist destinations such as the Ulster American Folk Park.
- Consider providing town centre facilities for coaches to address the lack of lay-bys and difficult access.
- Operate a number of evening bus services to improve access to the town centre.

Improvements to Car Parking

5.13 As part of the Omagh Transport Study, an assessment of parking was undertaken which concluded that no increase in parking was required at the time. The key focus of the study related to providing short-stay parking in the town centre, with longer stay generally displaced from the core area. The strategy also recommended improved disabled facilities and taxi provision.

5.14 While parking within the town centre is still under utilised (on average the town centre car parks operate at around 84% capacity), we would agree that the previous conclusion of no increase in parking is still valid. It is understood that the main contributors to the under utilisation of these car parks is poor signage, the one-way system and more fundamentally, the volume of town centre traffic.

5.15 Consequently, we would also agree with the previous conclusion that longer stay parking should be displaced from the core area, where higher density car parking may be a possibility. Displacing the off-street parking would have a number of benefits:

- Reduce the volume of vehicles on the town centre roads, thereby easing congestion;
- Provide a more conducive environment for pedestrians and cyclists;
- Potentially provide an opportunity to create a dedicated parking area for coaches in a central location; and
- Create further town centre development opportunities (e.g. Kevlin Avenue and Dublin Road car parks.

5.16 The Transport NI parking surveys have also indicated that the 231 spaces at the Crevenagh Road Park and Share is significantly underused (37% capacity). A public awareness scheme could significantly increase the use of this facility and help to reduce the volume of traffic on the town centre roads.

Improvement to the Road Network

5.17 Prior to the construction of the A5 Western Transport Corridor, measures available to improve the road network are generally limited to the town centre / edge of centre junctions. However, it is important that the severance which traffic congestion causes is reduced. This will principally be through improved traffic signal control operating systems (MOVA) but the creation of the new Strathroy Link Road will bring significant benefits to a number of the town centre junctions.

5.18 It is understood that the outline consent for retail development on the Scotts Mill site included a vehicular link between Old Mount0.0.field Road and Drumragh Avenue. This link would not only help to mitigate the traffic impact from the development, it would provide an alternative north / south route to the B48 and potentially provide some relief to the Drumragh Avenue / Mountjoy Road junction.

5.19 It is noted that a new planning application has recently been submitted for the Scotts Mill site with a reduced floor area, from 6,350sqm to 5,343sqm. More importantly and perhaps critical to helping to reduce congestion at a key junction, we understand that the link between Old Mountfield Road and Drumragh Avenue has been removed, with vehicular access now solely proposed from Drumragh Avenue.

5.20 With a successful masterplan comes the opportunity for increased travel demand, not all of which can be encouraged to be by sustainable travel modes, therefore, monitoring of traffic changes through the town will be required to ensure that further congestion does not arise.

5.21 The key recommendations with regard to vehicular traffic are:

- Improve signing to the town's underutilised off-street car parks and improve pedestrian linkages from the car parks back into the Town Centre;
- Consideration should be given to rationalising car parks outwith the town centre;
- Consideration should be given to providing the Kevlin Avenue Link between Dublin Road and Scarffes Entry. This would provide an alternative route to Market Street, provide an opportunity for coach parking and potentially encourage further development along this new street;
- Consider constructing the Winter's Lane Road (between Winters Lane and Crevenagh Road). While the continued need for this link would need to be determined following the opening of Cranny Road, it is potentially relatively inexpensive given 50% of the road is effectively in place.
- Understand the implications to town centre traffic and key junctions if the Old Mountfield Road / Drumragh Avenue link is not constructed.

5.22 The blueprints for future investment in highways are indicated in **Appendix C**.

5.23 Post construction of the A5 Western Transport Corridor, the key issues will be around harnessing the benefits which the removal of extraneous traffic affords within the town centre and the Throughpass. The key recommendations with regard to vehicular traffic are:

- Identify whether the by-pass changes the dynamics of the key traffic approaches to the town and ensure that any emerging "gateways" are appropriately treated and addressed;
- Review car park location and accessibility on the basis of revised travel patterns;
- Examine key road sections where relief is likely to be at the greatest level and determine whether measures to improve walk and cycle facilities could be provided to recognise the change in balance of movement. This particularly relates to the section of Belfast Road between Assumption Grammar and the Town Centre and Church Street between the South Eastern Regional College and Town Centre.

Personalised Travel Planning

5.24 Personal Travel Planning (PTP) is a well-established method that encourages people to make more sustainable travel choices. It seeks to overcome the habitual use of the car, enabling more journeys to be made on foot, bike, bus, train or in shared cars. This is achieved through the provision of information, incentives and motivation directly to individuals to help them voluntarily make more informed travel choices. PTP forms an important part of UK national and local transport policy, contributing to the suite of tools promoted under the general heading of Smarter Choices.

5.25 The tools and techniques to encourage people to travel sustainably differ from project to project and include:

- One-to-one conversations, either at the doorstep or by telephone, between individuals and trained field officers to encourage and motivate a change in behaviour;
- The provision of information on how to travel sustainably (for example, maps or guides about the local bus network, walking and cycling routes);
- The offer of gifts and incentives to encourage the use of sustainable modes (for example, pedometers, water bottles, free bus tickets).

5.26 Within the UK, PTP has been reported to generally reduce car driver trips by 11% and the distance travelled by car by 12%. A successful PTP can deliver:

- Reduced congestion and reduce car use;
- Individual health improvements through increased walking and cycling;
- Greater use of public transport;
- Better air quality and reduce traffic noise;
- More use of local services by residents;
- Support sustainable economic growth by reducing peak hour congestion;
- Encourage more active lifestyles to address health and well-being issues; and
- Promote environmentally responsible travel choices and carbon reduction by helping reduce individual carbon footprints.

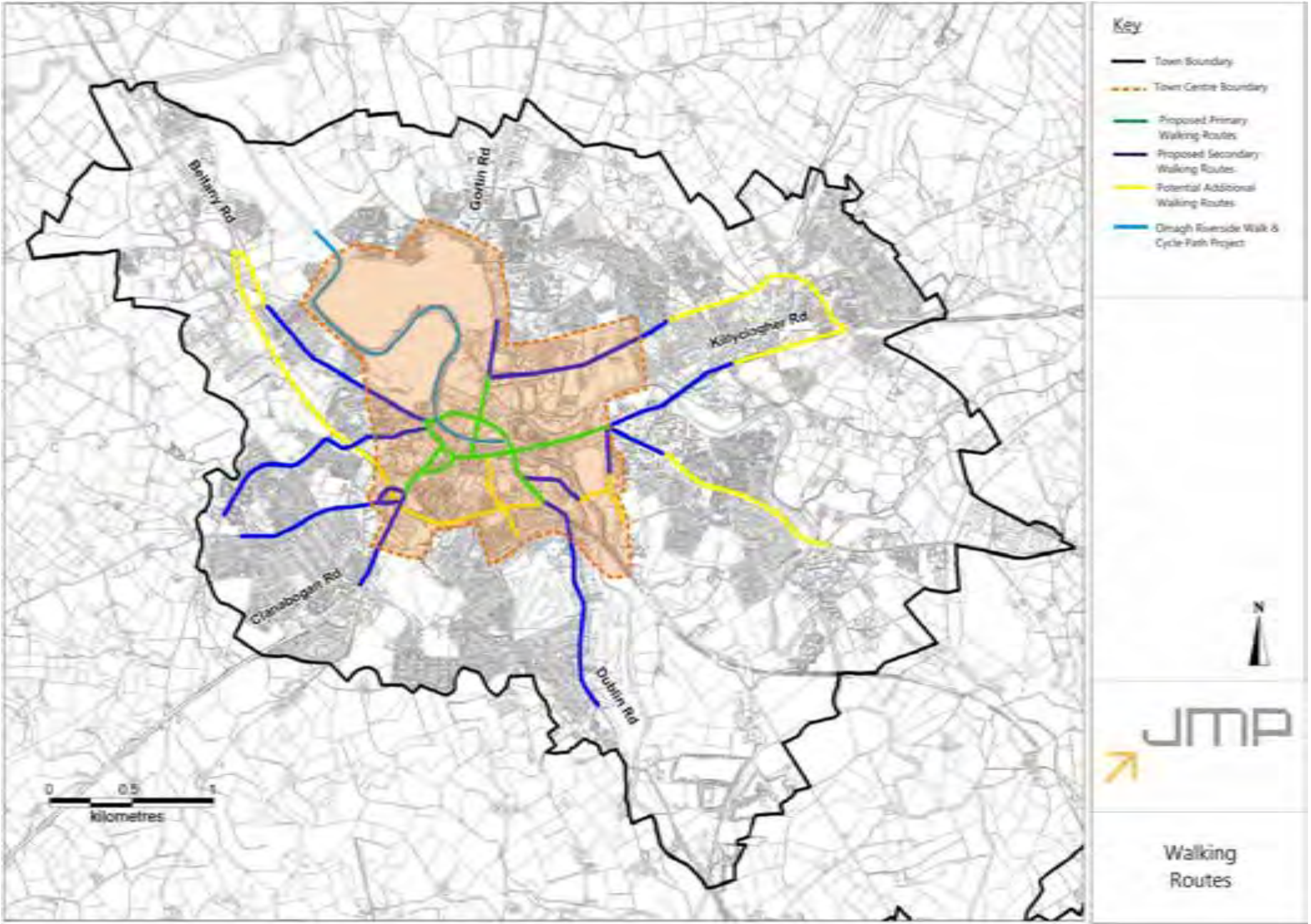
Appendix A

Bus Stops

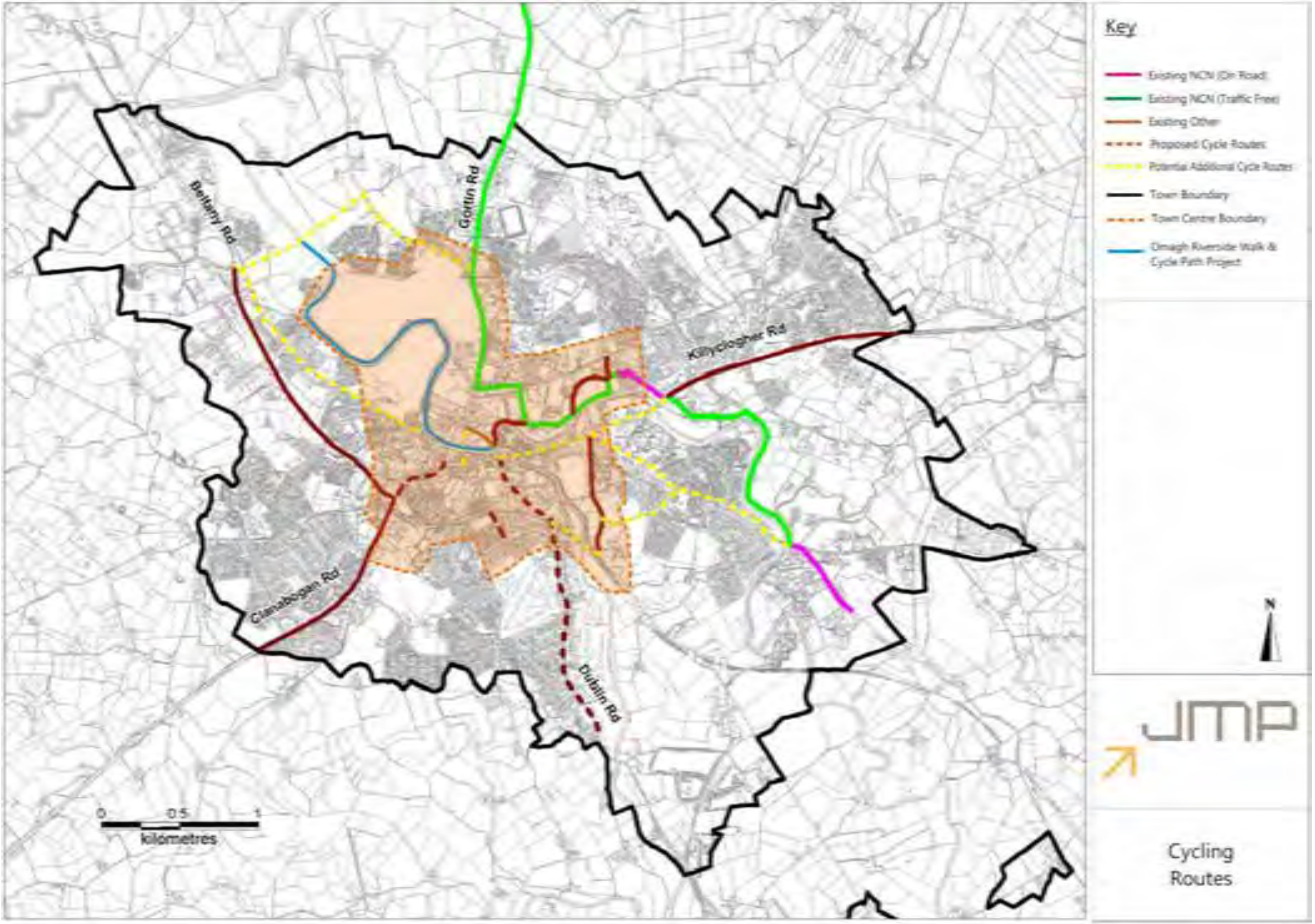

Key
Bus Stop

Appendix B

Walking & Cycling Blueprint



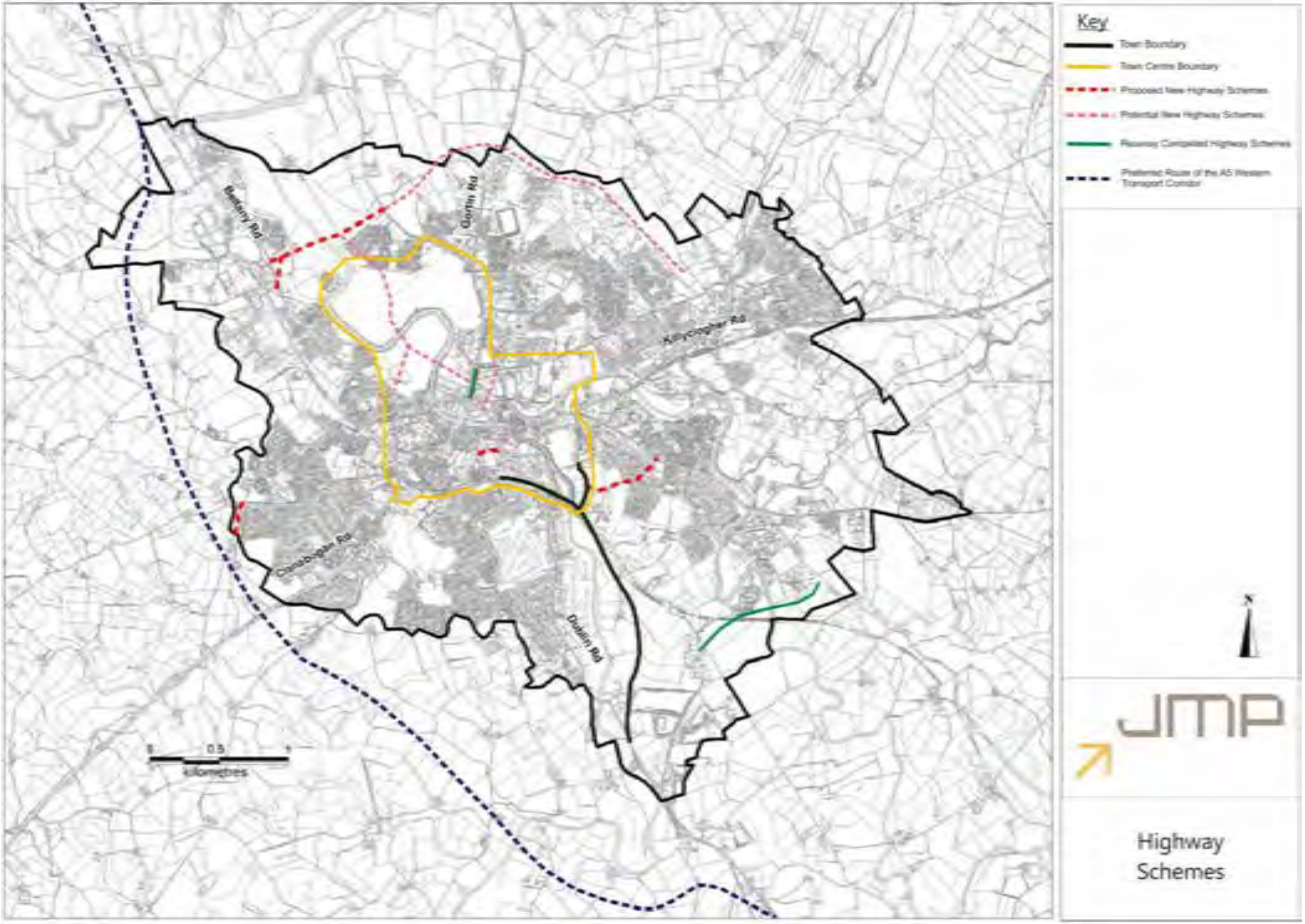
Key
Town Boundary
Town Centre Boundary
Proposed Primary Walking Routes
Proposed Secondary Walking Routes
Potential Additional Walking Routes
Omagh Riverside Walk & Cycle Path Project
Bellany Rd
Gortin Rd
Killyclogher Rd
Clanabogan Rd
Dublin Rd
0
0.5
1
kilometres
N
JMP
Walking Routes



Cycling Routes

Appendix C

Highway Blueprint and Improvement Schemes


Key
Town Boundary
Town Centre Boundary
Proposed New Highway Schemes
Potential New Highway Schemes
Recently Completed Highway Schemes
Preferred Route of the A5 Western Transport Corridor
Gortin Rd
Killyclogher Rd
Dublin Rd
0
0.5
1
kilometres
JMP
Highway
Schemes


Strathroy Link Road
Kelvin Avenue Link
A5 Western Transport Corridor
Key
Proposed New Highway Schemes
Recently Completed Highway Schemes
Town Boundary
Preferred Route of the A5 Western Transport Corridor
JMP


Key
Main Study Area Boundary
Proposed Highway Schemes
Proposed Junction Improvements
Completed Highway Scheme
Completed Junction Improvements
Potential Highway Schemes
JMP

Appendix D

Omagh Cycling Initiative

UPDATE OF OMAGH TOWN CENTRE MASTERPLAN

STAKEHOLDER ENGAGEMENT WITH OMAGH CYCLING INITIATIVE
THURSDAY 13 NOVEMBER 2014

1.0 Present

Patrick Largey (PL)
Secretary, Omagh Cycling Initiative

John Frazer (JF)
TPHC

2.0 Notes

2.1 Create a shared path from roundabout at Donaghanie Road / Hospital Road junction to join National Cycle (NC) route at Cranny Bridge.

2.2 Improve NC route from Cranny Bridge to narrow bridge over small stream at Cranny car park. Widen this narrow bridge to standard width of shared path.

2.3 Improve NC route where Camowen River has eroded banks near toilets at Retreat Avenue / Lover's Retreat.

2.4 Link Drumragh Integrated College to existing shared path on Crevenagh Road with a shared path.

2.5 Link roundabout at Donaghanie Road / Hospital Road junction to Winters Lane via Hospital Road and create a shared path at Winters Lane.

2.6 Provide a shared path from roundabout at Killyclogher Road / Arleston Road junction to roundabout at Old Mountfield Road / Arleston Road junction and continue on left hand side of Old Mountfield Road towards the Health Centre.

2.7 Shared path at Great Northern Road is not standard width (3.5metres) along its length. Widen this where necessary and extend to Derry Road roundabout.

2.8 Create shared paths on both sides of Strathroy Road from Gortin Road to Meelmore Drive.

2.9 Provide links from the end of the Riverside Path to Strathroy Road via Meelmore Drive.

2.10 Improve cycle access from Meelmore Drive to Riverside Path i.e. provide dropped kerbs and continue Riverside Path to Meelmore Drive roadway.

2.11 Provide shared path at proposed new road linking Derry Road roundabout to Strathroy Road and extend path from Derry Road roundabout to Hunter Crescent.

2.12 Extend existing shared path from the new bridge at King James' Bridge past Dunnes' supermarket to Dublin Road.

2.13 Provide link from Dublin Road to Scarffes Entry.

2.14 Provide link from Scarffes Entry to Townview Road via existing subway.

2.15 Link Scarffes Entry across Market Street to Old Market Place and onward to shared path at Strule Arts Centre.

2.16 Link toucan crossing on Drumragh Avenue to Old Mountfield Road via a new shared path on west side of running track at Leisure Centre.

2.17 Link Riverside Path via Lisanelly Avenue to junction at Health Centre.

2.18 Provide new foot / cycle bridge to cross Strule River beside Abbey Bridge.

2.19 Provide shared path from Brookmount Road via rear of Fold Housing to James Street and extend to the end of Railway Terrace at the Coach Inn.

2.20 Link Railway Terrace at the Coach Inn to Ardmore Avenue and continue with shared path from Sperrin Drive to Dromore Road between O'Kane Park and Macdonalds Restaurant. Consider creating a path from the end of the cycle path on Dromore Road near Kentucky Fried Chicken to Tamlaght Road near Coach Inn car park in order to avoid the narrow footpath at the Coach Inn.

2.21 Provide shared path from Coolnagard Road to Dromore Road and towards junction of Coolnagard Lane with Dromore Road.

2.22 Create a shared path from Riverside Path to Castle Place via St. Lucia Barracks site.

2.23 Add a shared path on west side of Great Northern Road from Pat Kirk's garage to Gortrush Industrial Estate and Business Complex.

2.24 Link Health Centre junction to Drumragh Avenue junction at County Hall and continue to bus depot on Mountjoy Road.

2.25 Widen Sedan Avenue footpath to 3.5m for a shared path.

2.26 Improve cycle parking at Crevenagh Park and Ride.

2.27 Provide cycle parking at the Showgrounds.

2.28 A pedestrianisation scheme along High Street should be explored.

2.29 Extend a dedicated cycle lane to Gortin Glen Forest Park

2.30 The Masterplan should incorporate a promotional scheme to encourage cycling in Omagh

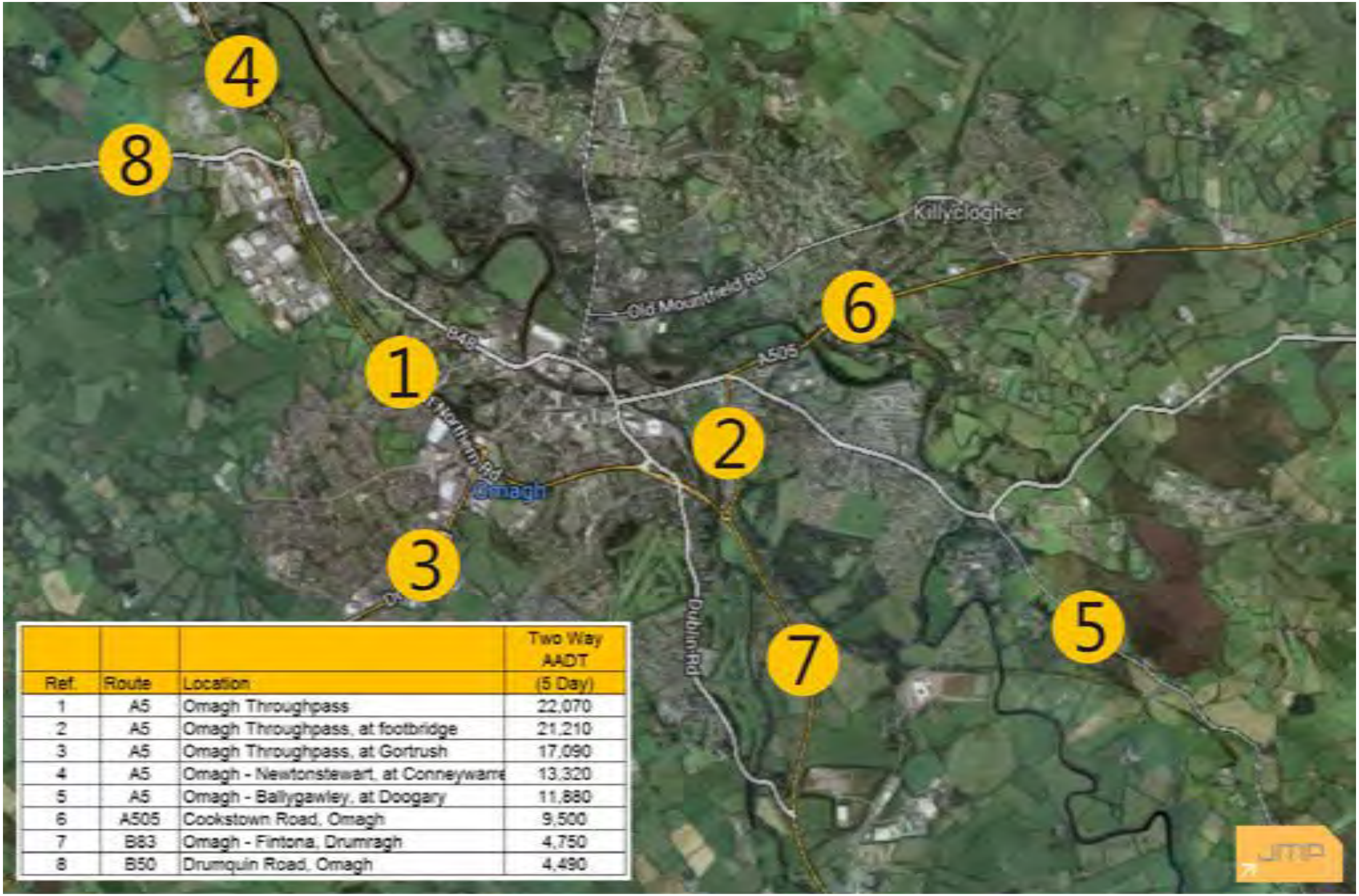
Appendix E

Parking


Key
Main Study Area Boundary
Public Car Parks
Privately Operated Car Parks
Park and Share

Appendix F

Traffic Flows



			Two Way AADT
Ref.	Route	Location	(5 Day)
1	A5	Omagh Throughpass	22,070
2	A5	Omagh Throughpass, at footbridge	21,210
3	A5	Omagh Throughpass, at Gortrush	17,090
4	A5	Omagh - Newtonstewart, at Conneywarre	13,320
5	A5	Omagh - Ballygawley, at Doogary	11,880
6	A505	Cookstown Road, Omagh	9,500
7	B83	Omagh - Fintona, Drumragh	4,750
8	B50	Drumquin Road, Omagh	4,490

Appendix G

Development in Omagh


OPP
OMAGH
LISANELLY
ST LUCIA
SCOTTS
MILL
OASIS
Key

Appendix 5

Town Centre Health Check

Omagh Town Centre Masterplan

Health Check

DRAFT REPORT

November 2014

Place Solutions
4 Knocktarna Manor
Coleraine
BT52 1HY

T: 07827 3214492
E: info@placesolutions.com

CONTENTS

1 INTRODUCTION

1.1 Background

The purpose of this Town Centre Health Check is to provide a comprehensive summary of the vitality and viability of Omagh town centre. The indicators selected for measurement are unique to the particular circumstances facing Omagh town centre, reflect current UK best practice and are capable of being easily updated within a limited budget on an annual basis going forward.

1.2 Purpose of the Health Check

This Health Check has a number of purposes:

- **To inform the preparation of a Master Plan**
- **To provide comprehensive information to prospective investors**
- **To establish whether the town centre is improving or declining over time**
- **To compare Omagh town centre with competitor towns**
- **To assist in prioritising investment and resourcing decisions**
- **To monitor and evaluate the impact/benefit of funding programmes**

This Health Check is based on recommendations set out in the draft NI Planning Policy Statement 5 (PPS5). The Policy Statement defines "vitality" as "a measure of how busy a town centre is, and "viability" as "a measure of its capacity to attract ongoing investment for maintenance, improvement and adaptation to changing retail needs".

The following report is collated from information on various key performance indicators from a wide range of sources including original fieldwork, published data sources and Omagh District Council's own research.

The Key Performance Indicators have been categorised under six main headings. A summary of the Key Performance Indicators and data sources are listed overleaf.

1.3 Summary of Key Performance Indicators and Source

Demographic Profile	**Source**
Overview of Town Centre	Place Solutions
Demographic Profile	NISRA / NINNIS
Catchment Population Profile	Strategic Planning
Town Centre Diversity	
Retail Offer	Omagh District Council
Leisure and Tourism Offer	Omagh District Council
Residential Sector	NISRA / NINNIS
Office Sector	Omagh District Council
Economic Vitality	
Rental Values and Yields	Place Solutions
Pedestrian Footfall	Place Solutions
Vacancy levels	Omagh District Council
Convenience/Comparison Expenditure	Strategic Planning
Accessibility	
Car Parking Capacity	DRD
Public Transport Provision	Translink
Disabled Access	DRD
Congestion Issues	DRD
Cycle Provision	DRD
Town Centre Environment	
Extent and Quality of Public space	Place Solutions
Litter and general cleanliness	Place Solutions
Condition of buildings/shop fronts	Place Solutions
General Ambience and Friendliness	Place Solutions
Safety	
Crime Statistics	PCSP

2 DEMOGRAPHIC PROFILE

2.1 Overview of Town Centre

The town of Omagh is classified as a large sized town. Omagh is located in the west of Northern Ireland, and is the county town of Tyrone. It is the largest urban centre in County Tyrone.

It is situated within the Tyrone and Sperrins Key Destination Area and the Omagh District council area.

Omagh is situated 70 miles from Belfast, 34 miles from Derry/ Londonderry, 110 miles from Dublin and is located in the west of Northern Ireland, accessible from all parts.

A long, steep main street is dominated by a classical-styled courthouse and, behind it, rise the gothic-styled twin spires of the Sacred Heart Church and the single spire of the St Columba's Church. The Drumragh and Camowen rivers merge in the centre of town to form the river Strule.

Omagh's Town Centre is the focal point for shopping with a number of independent retailers and national stores. The many adjoining streets have a range of independent and specialist shops unique to Omagh town. The town centre boasts a large selection of coffee shops and restaurants.

The Showgrounds Retail Park is accessed from the High Street via Bridge Street and hosts a range of national retailers just a stroll from the town centre. The farmers market, located on the grounds of the South West College takes place on the first and third Saturday of every month and the 'Monday market' located at Main Street carpark remains one of the traditions of the town. Every Friday morning, a fishmonger from Killybegs sells fresh seafood at Prospect Court.

The OASIS project marks another step forward in the regeneration of Omagh town, improving access to the River Strule and maximising the recreational potential of this natural amenity. It includes the development of a pedestrian and cycle path along the river bank between Bells Bridge and the Strule Bridge, the installation of a pedestrian/cycle bridge to create a link into the town centre, and the creation of a recreation and meeting space above Drumragh Car Park. The project also includes the creation of a new and exciting Public Space where large numbers of people can socially interact through work and recreation.

2.2 Demographic Profile

Information for the demographic profile is sourced from the NINIS Area Profile based on 2011 Census. Included in the figures are the wards of Lisanelly, Camowen, Drumragh, Dergmoney, Coolnagard, Gortrush and Strule).

The resident population of the Omagh study area is estimated to be 16124 which is a decrease of 1035 people (6.03%) from 2003.

- 19.2% were aged under 16 years;
- 16.2% were aged 65 and over, which is above NI average;
- the average age was 39 years;
- 49.1% of the population were male and 50.9% were female;
- 66.48% were from a Catholic Community Background;
- 29.92% were from a 'Protestant and Other Christian (including Christian related)' Community Background;
- 6.72% didn't have English as their first language and 1.46% were from an ethnic group other than white.

Employment statistics show that 60.16% of the population (6266 people) aged 16-74 who lived in Omagh was economically active. This is slightly below the NI average. Of these, 52.35% are in paid employment and 5.43% were unemployed, which is slightly above the NI average of 4.96%. This overall figure masks areas of relatively high unemployment i.e. The unemployment rate in Lisanelly is 7.99% and Gortrush, 5.32%. (Source: NINIS Area Profile based on 2011 Census). Average weekly earnings for Omagh are £455.00 per week compared with a N.I. average of £446.70 (DETI, 2013). 21.78% of the population of the Omagh study area has a degree or higher qualification, which is slightly lower than the NI average of 23.65%. 43.27% had no or level 1 qualification, which is slightly higher than the NI average of 40.63%. Only the Coolnagard ward falls below the NI average.

The Northern Ireland Multiple Deprivation Measure (NIMDM May 2010) illustrates that the Omagh area performs quite well across all seven types of deprivation (income, employment, health and disability, education, training and skills, proximity to services, crime and disorder, living environment) with the following exceptions – for health and disability deprivation Lisanelly is in the top 35, Camowen is in the top 90 and Gortrush is in the top 70.

2.3 Catchment Population Profile

A detailed study of the catchment population is contained in a separate Retail Capacity Study for Omagh. A summary of the main findings of the Retail Capacity Study, as they relate to Catchment Population Profile, have been included within this report.

The current catchment population is around 51,356 persons and this is estimated to rise to 54,627 by 2014 and 60,343 by 2029 (based on Omagh District Council area, NISRA 2011 Census ward population information). Retail provision in the catchment area is located principally in Omagh town.

3 TOWN CENTRE DIVERSITY

3.1 Types of Business

There are around 307 businesses currently operating within Omagh town centre. Specialist independent retail is complemented by pubs, restaurants and cafes. There are also a large percentage of service retail. The table below gives a breakdown of the categories of business in Omagh's commercial core.

Table 1: Number of Business Outlets in Omagh Town Centre (Source: Omagh District Council)

	Number of business outlets	% of business outlets
Business	11	4%
Comparison Retail	114	37%
Convenience Retail	15	5%
Financial	17	5%
Hospitality	65	21%
Service Retail	85	28%
Vacant	Not known	N/A
TOTAL	**307**	**100**

3.2 The Retail Offer

The retail offer is made up of independent boutiques, interior / furniture shops and jewellery shops. The following table illustrates the breakdown of the town's retail offer.

Business Type	No of business types	% of retail overall
Fashion	44	23
Gift & Homeware	36	19
Health & Beauty	60	31
Convenience	15	8
Miscellaneous	29	15
Charity Shops	7	4
TOTAL	**191**	**100.00**

Table 2: Breakdown of Retail Offer (Source: Omagh District Council)

3.3 Leisure and Tourism Offer

A breakdown of the current leisure and hospitality sector including the evening economy is summarised in the table below.

Business Type	No of business types	% of business types
Food & Drink	62	93
Fitness & Leisure	1	1
Entertainment	3	5
Accommodation	1	1
TOTAL	**67**	**100.00**

Table 3: Leisure Offer in Holywood Town Centre (Source: Omagh District Council)

Hospitality

There is a diverse hospitality offer which includes 17 bars, 10 restaurants, 17 cafes and coffee shops and a social club.

Evening Economy

The bars and restaurants are the main evening economy offer. There are 3 night clubs in the town centre – The Vault, Utopia and Sallys. The Terrace Bar also provides live music at the weekends.

There is a multiscreen cinema at Gillygooly Road in Omagh, a few minutes drive from the town centre.

Leisure Facilities

Omagh Leisure Complex, located at Old Mountfield Road reopened in July 2014 after undergoing major refurbishment and is now offering a wide range of facilities. New facilities include the new 25 metre swimming pool, 14 metre learner pool and free-form toddler pool with new viewing gallery and village style changing facilities as well as the new 25 seater jacuzzi and relaxation area. In addition the sports halls and spinning studio have been refurbished.

Omagh Golf Club is located 0.5 mile from town centre on Dublin Road.

Clanabogan Stables situated 3 miles from Omagh in the tranquil countryside at the foot of the Sperrins offers pony/horse riding to both beginners and confident riders. The stables are on the same site as Clanabogan Driving Range and Country Club.

Aladdin's Kingdom and Mr Tumble's Fun House are 2 indoor adventure play centres providing fun for children in the town centre area.

3.4 Residential Sector

In the 2011 Census, housing statistics for Omagh study area show:

- there were 6,626 households in Omagh;
- 56.41% of households were owner occupied (10.49% below NI average) and 39.74% were rented
- 13% of households were comprised of a single person aged 65+ years
- 9.39% were lone parent households with dependent children
- 27.3% of households did not have access to car or van, which is above the NI average of 22.7% (except for the Camowen and Coolnagard wards which are below the NI average)

Rental market is buoyant. Detached properties are currently achieving rents of around £400 - £500 per month and terraced houses £100 per week.

3.5 Commercial Sector

There are 47 businesses in the commercial/business services or professional sector, which represented 37% of the total amount of businesses operating within the town. There are a relatively high percentage of small businesses and professional services operating within the town centre boundary. They represent a diverse range of small locally owned businesses operating out of converted residential properties or purpose built office space.

Omagh also has a good level of local service provision such as banks, insurance and community services.

A full analysis of the commercial sector is set out in the table below:

Type of Business	Number
Amusement Arcade	1
Art Centre	1
Auctioneers	1
Banks	8
Bookmakers	1
Builders Merchant	1
Chamber of Commerce	1
Dry Cleaners / Sewing Company	7
DSD	1
Estate Agents	5
Insurance Companies	5

Photo Processors	2
Post Office	2
Publishers	3
Radio Station	1
Sign Business	1
Taxi Company	2
Travel Agents	3
Telecommunications Company	1
Total	47

Table 4: Breakdown of Commercial sector (Source: Omagh District Council)

4 ECONOMIC VITALITY

4.1 Retail Rents and Yields

The recognised comparison for town centre rental values is the Zone A rental value commanded in the prime retail area. In Omagh this is defined as High Street.

In October 2014, various letting agents for the town stated that Zone A prime retail rents were in the region of £25 -40 per sq. ft. However, like other provincial towns, it is difficult to predict an average figure as the rental value achieved will depend on market demand at the time, size and configuration of the unit and flexibility of the property owner to strike a deal.

The retail yield is the market rental value of the property as a percentage of the capital value, so the lower the yield, the more commercially attractive the area. The retail yield in Omagh is currently around 10% - 12%. This is mainly because it is extremely difficult to borrow money from banks on any form of commercial property, thus the market is largely restricted to cash buyers. Hence the high yield. This is largely untested in terms of open market sales as at these levels of return very few landlords are prepared to sell in this present poor market.

There are very few vacant retail units in Omagh compared to other places which is a reflection on landlords being realistic with their rental requirements and offering incentives such as rent free periods. It is fair to say, that demand has remained buoyant over the last 2 years. Omagh is an attractive proposition for start-up businesses.

Rents generally start to decrease moving away from the prime retail area High Street, with rents on the secondary locations of the town being very difficult to predict, and largely dictated by market demand and characterised by soft deals and short break clauses.

4.2 Pedestrian Footfall

A key indicator of town centre vitality is pedestrian footfall which is defined in draft PPS5 as a survey of the numbers and movement of people on the streets. The figures give an indication of the number of potential customers using the town centre and which areas they are concentrated in. When compared over time they clearly indicate to potential investors whether a location is economically viable.

The Foot-Fall 'Week-Day' Counts were carried out on Friday 10th May and Tuesday 14th May, with the Foot-Fall 'Week-End' Count having been completed on Saturday 11th May 2014. On each day the counts were taken between 9:00am and 10:00am, 12:00noon and 1:00pm and 4:00pm and 5:00pm.

The Foot-Fall Counts were conducted at three strategically agreed locations within Omagh Town Centre. The days and times for footfall counts have been selected to best represent activity in the project area throughout a typical week.

Table 5 provides a comprehensive breakdown of the dates, time slots, locations and number of shoppers counted during each specific day time interval.

Location	Footfall Count - Morning		Footfall Count – Midday		Footfall Count- Afternoon	
Courthouse, High Street	09:00 – 10:00	231	12:00 – 13:00	266	16:00 – 17:00	154
McGreads Pharmacy, John Street	09:00 – 10:00	246	12:00 – 13:00	270	16:00 – 17:00	172
McGales Furniture, John Street	09:00 – 10:00	251	12:00 – 13:00	275	16:00 – 17:00	162

TABLE 5: Shoppers Survey - Footfall Counts Omagh
Weekday – Tuesday 14th May 2014

Location	Footfall Count - Morning		Footfall Count – Midday		Footfall Count- Afternoon	
Courthouse, High Street	09:00 – 10:00	204	12:00 – 13:00	312	16:00 – 17:00	268
McGreads Pharmacy, John Street	09:00 – 10:00	197	12:00 – 13:00	374	16:00 – 17:00	289
McGales Furniture, John Street	09:00 – 10:00	231	12:00 – 13:00	399	16:00 – 17:00	301

TABLE 5: Shoppers Survey - Footfall Counts Omagh
Weekday – Friday 10th May 2014

Location	Footfall Count - Morning		Footfall Count – Midday		Footfall Count- Afternoon	
Courthouse, High Street	09:00 – 10:00	90	12:00 – 13:00	144	16:00 – 17:00	108
McGreads Pharmacy, John Street	09:00 – 10:00	84	12:00 – 13:00	139	16:00 – 17:00	110
McGales Furniture, John Street	09:00 – 10:00	87	12:00 – 13:00	156	16:00 – 17:00	107

TABLE 5: Shoppers Survey - Footfall Counts Omagh
Weekday – Saturday 11th May 2014

Pedestrian footfall peaked at all 3 locations at Lunchtime on the Friday, Pedestrian footfall was lowest at all 3 locations on the Saturday morning.

4.3 Vacancy Levels

The current vacancy rate for Omagh town centre is tbc. This is extremely low in relation to the current Northern Ireland average (17%) and other provincial towns, such as Coleraine (16.9%) Ballymena (27%) and Bangor (26.2%), according to the most recent Northern Ireland Commercial Property Report carried out by Lisney in 2013.

There are only about 4 retail units vacant in the prime retail area.

4.4 Convenience and Comparison Expenditure / Market Share

The full details of convenience and comparison expenditure and market share for Omagh are contained in the Retail Capacity Study report and are summarised below.

Convenience shopping

At present the catchment area has an estimated floorspace of 21,126 sq.m selling convenience goods with a current estimated turnover of £173m. The turnover is forecast to rise by just over £6m by 2029 to £179.4m. However the total estimated available expenditure on convenience goods is £84.8m. This is estimated to rise by about £12m to £96.6m by 2029. This indicates that there is a substantial inflow of expenditure into the catchment area of approximately £89m. This would indicate that the convenience retail sector in the catchment area is in a healthy position which attracts a considerable amount of spending from outside.

Omagh does not have sufficient retail expenditure capacity to support further retail floor space in the Town Centre within the assessment period up to 2029.

Comparison shopping

The catchment area has an estimated floorspace of 31,521 sq.m selling comparison goods with a current estimated turnover of £155.6m. The turnover is forecast to rise by almost £80m by 2029. However the total estimated available expenditure on comparison goods is £173.3m. This is estimated to rise by about £96m to £269.2m by 2029. This indicates that there is a surplus/leakage of expenditure from the catchment area of approximately £17.6m.

In terms of future capacity, the analysis shows that the catchment area has a small capacity for additional retail floorspace selling comparison goods ofapproximately 1,000 sq.m. Whilst there is limited capacity, in expenditure terms, to support further retail development, the results of the Shopper Survey clearly show that there is a significant element of shoppers, who are choosing to shop outside of the town, which could support the case for additional retailing in Omagh Town Centre.

It is recommended, that additional retailing should take the form of specialist, independent and niche retailing, and build on the current retail offer (a detailed analysis of the retail offer is contained in Section 3.1). Future retail development should complement and build on Omagh's existing strong reputation in this area of the market. This would differentiate and provide a unique selling point on which to competitively position and market the town.

See separate Retail Capacity Study report for further details

5 Accessibility

5.1 Car Parking Capacity

Location	No. of Spaces (2014)	No. of Disabled Spaces	Free / Pay	Normal Weekday Occupancy (March 2014)		Market / Busy day Occupancy (June 14)		Normal weekday Occupancy (Sept 14)		2014 average (%)	2014 disabled average (%)
				% occupancy	% disabled	% occupancy	% disabled	% occupancy	% disabled		
Brooke Street	84	2	Free	96	100	101	100	70	100	89	100
Campsie Road	105	4	Free	101	100	96	25	88	0	95	42
Castle Street	31	1	Free	100	100	103	100	81	0	95	67
Church Street North	48	2	Free	100	100	100	100	83	50	94	83
Church Street South	24	1	Free	100	100	104	100	92	0	99	67
Cunningham Terrace	18	5	Free	111	100	111	100	111	0	111	67
Drumragh Avenue	8	0	Pay	100	-	88	-	100	-	96	-
Foundary Lane	119	2	Pay	57	0	61	0	62	100	60	33
Johnston Park	194	5	Pay	74	40	61	20	76	40	70	33
Market Place	59	4	Pay	95	75	88	50	95	50	93	58
Market Street	80	4	Pay	100	100	100	100	88	25	96	75
New Brighton Terrace	93	0	Pay	95	-	86	-	92	-	91	-
Old Mountfield Road	66	0	Free	89	-	98	-	74	-	87	-
Crevenagh Road	231	11	Free	102	18	116	18	29	0	82	12
Totals	**1160**	**41**								**90**	**58**

Table 8: Total number of car parking spaces and usage by location 2014 (Source DRD Roads Service)

There are 6 DRD owned pay and display car parks with a total of 553 car parking spaces (and 15 disabled spaces) and 6 council owned free car parks with 607 car parking spaces (and 26 disabled spaces) in Omagh Town Centre.

There are an additional 167 spaces and 5 disabled spaces at Drumragh Avenue beside Omagh Bus depot but this car has been closed since March 2014 to allow the start of major construction work on the Oasis project to transform the Strule river bank area of the town centre.

Location	No. of Spaces (2009)	No. of Disabled Spaces	Free / Pay	Normal Weekday Occupancy (March 2009) % Occupancy	Market / Busy day Occupancy (June 2009) % Occupancy	Normal weekday Occupancy (Sept 2009) % Occupancy	Christmas Rush period (Dec 2009) % Occupancy	2009 Year Average Occupancy (%)
Brooke Street	65	2	Free	105	92	97	85	95
Campsie Road	105	4	Free	107	102	99	98	101
Castle Street	31	1	Free	97	100	100	94	98
Church Street North	48	2	Free	102	96	102	100	100
Church Street South	24	1	Free	100	96	108	100	101
Cunningham Terrace	18	5	Free	117	106	100	122	111
Drumragh Avenue	167	5	Pay	96	67	92	72	82
Foundary Lane	119	2	Pay	100	91	84	73	87
Johnston Park	194	5	Pay	89	79	93	91	88
Market Place	59	4	Pay	98	90	97	102	97
Market Street	80	4	Pay	104	78	93	100	93
New Brighton Terrace	94	0	Free	100	106	100	94	100
Old Mountfield Road	66	0	Free	100	97	95	58	88
Crevenagh Road	85	5	Free	76	42	65	48	58
Totals	**1155**	**40**						

Table 8: Total number of car parking spaces and usage by location 2009 (Source DRD Roads Service)

5.2 Public Transport Provision

Omagh has a bus station on Mountjoy Road in the town centre and there are regular bus services from Omagh to other towns in Northern Ireland.

Ulsterbus service 273 operates between Belfast and Derry / Londonderry stopping in Omagh. There are also regular services to and from Dublin and Dublin Airport.

5.3 Disabled Access

There are 41 disabled car parking spaces in the town centre car parks.

5.4 Congestion Issues

First Impressions report highlighted traffic congestion particularly at peak times such as school hours being a problem on the town centre, and an issue which affected both the quality of life and commercial growth of the town.

See Traffic Study for further detail on traffic congestion issues.

5.5 Cycle Provision

There is a growing network of cycling routes in the town and district, with over 100km of routes. The network of traffic free greenways enable you to get around the area by bicycle, taking in the relaxed parkland, riverside and a host of history along the way.

National Cycle Network Route 92 is an 80 mile route which mostly follows quiet country roads connecting Enniskillen and Derry via Omagh, Newtownstewart, Sion Mills and Strabane. In Omagh, the route comes into the town from the south via the Donaghane Road (B158) and thenalong a greenway following the Camowen River through the town before heading north via a segregated path along the Gortin Road (B48).

The OASIS project includes the development of a pedestrian and cycle path along the river bank between Bells Bridge and the Strule Bridge and the installation of a pedestrian/cycle bridge to create a link into the town centre. The pathway will link in to the Riverside Walk and Cycle Path at Bridge Street, improving pedestrian and cycle access around the town, while the bridge across the river from the Drumragh Avenue car park into Old Market Place will provide a quick and easy access into the Omagh town centre.

6 TOWN CENTRE ENVIRONMENT

6.1 Extent and quality of public space

The quality of the town centre environment is a key indicator of the overall attractiveness of an area to residents, visitors and investors. Draft PPS5 states that **"A good quality town centre can increase business confidence, foster public pride and enhance local identity**"

The main shopping streets in Omagh are non-pedestrianized. Many of them have benefitted from a Public Realm refurbishment.

Modern public space provision is currently limited but will be addressed through the Oasis Project.

6.2 Litter and General Cleanliness

The First Impressions report noted that Omagh Town Centre was extremely litter and graffiti free.

6.3 Condition of Buildings/Shop Fronts

A First Impressions Survey of buildings and shop fronts in town centre identified that in the main shopping area there were few empty buildings and general good frontage condition with evidence of shop front improvements.

6.4 General Ambience and Friendliness

Omagh town centre must continue to strive for customer service excellence if it is to achieve its tourism potential. It is difficult to achieve and even harder to quantify, as it can be as simple as good buskers in the public area, to well run events and street entertainment, to an exceptionally high standard of customer service in the local shops. Public Perception is also key to assessing performance in this area.

7 SAFETY

7.1 Crime Statistics

Crime statistics by ward for 2013 are set out in the table below.

Ward	Recorded Crime - Offences	Violence against the person, sexual offences and robbery	Burglary	Theft	Criminal Damage	Drug Offences	All other offences
Camowen	94	36	6	16	24	3	9
Coolnagard	127	37	3	55	17	4	11
Dergmoney	346	174	9	82	47	19	15
Drumragh	153	63	7	27	39	4	13
Gortrush	100	46	5	19	21	3	6
Lisanelly	237	95	9	75	30	15	13
Strule	145	62	5	21	29	19	9
Total	**1202**	**513**	**44**	**295**	**207**	**67**	**76**

Crime statistics for the period May 2013 to end August 2014 for Omagh Urban Area are set out in the table below.

CRIME CATEGORY	TOTAL	PERCENTAGE (%)
Anti Social Behaviour	1507	43.91
Bicycle Theft	11	0.32
Burglary	102	2.97
Criminal Damage & Arson	356	10.37
Drugs	84	2.45
Other Crime	103	3
Other Theft	254	7.4
Possession of Weapons	10	0.29
Public Order	22	0.64
Robbery	8	0.23
Shoplifting	110	3.21
Theft from the Person	6	0.17
Vehicle Crime	79	2.3
Violence & Sexual Offences	780	22.73
TOTAL	3432	100

Crime Levels in the Omagh Urban area between May 2013 and August 2014 are set out in the table below.

Month	Total
May 2013	248
June 2013	194
July 2013	274
August 2013	230
September 2013	195
October 2013	231
November 2013	221
December 2013	179
January 2014	143
February 2014	164
March 2014	203
April 2014	206
May 2014	227
June 2014	211
July 2014	256
August 2014	250

Table 9: Crime Statistics for Omagh Town Centre

(Source: www.police.uk/northern-ireland/Omagh

8 CONSUMER PERCEPTIONS OF TOWN CENTRE

8.2 Town Centre User Survey

A total of 102 shoppers were surveyed in John Street in Omagh Town Centre in May 2013.

The Shopper Survey was developed by ASU in conjunction with staff in the RDO and carried out on behalf of DSD in order to collect baseline information on the Omagh Revitalisation Project.

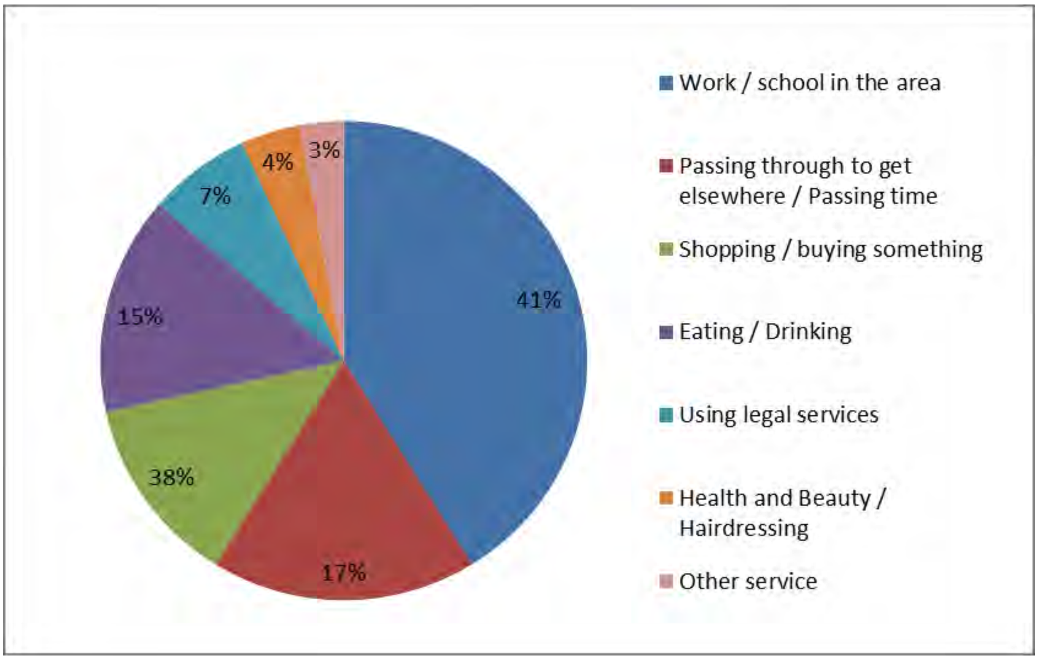
A copy of the questionnaire is contained in Appendix B.

Survey Demographic Representation

No specific demographic criteria were set in selecting survey respondents.

Survey Findings

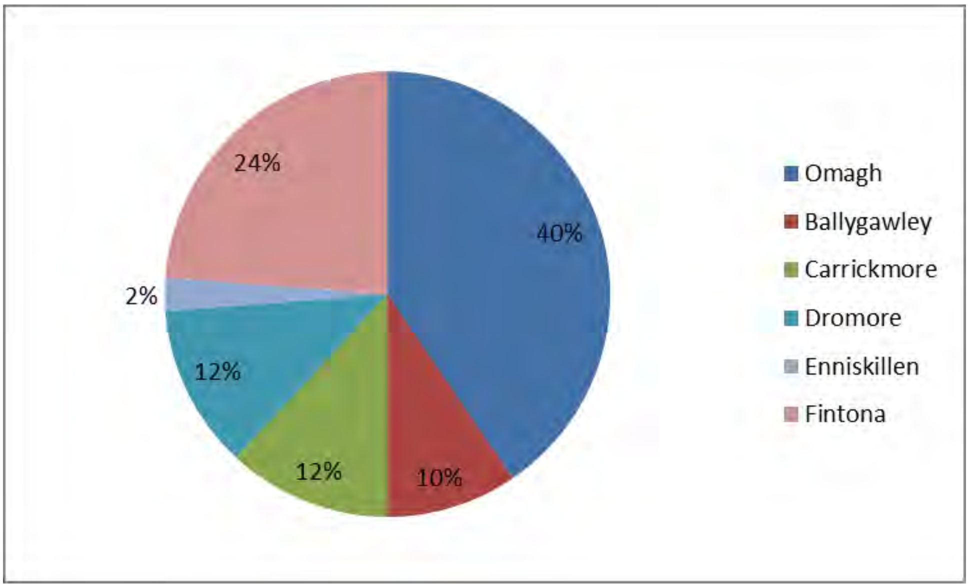
Q1 What is the purpose of your visit here today?



The most common purpose for visiting the area was “work / school in the area” (41%), followed by “shopping/buying something” (38%), “passing through to get elsewhere”, (18%), eating /drinking (15%), using legal services (7%) and health and beauty/hairdressing (4%).

This section of the analysis is concerned solely with the survey respondents who were in the area to shop or use services (42 shoppers). All respondents who had indicated their sole purpose as "working / school in the area" or "passing through to get elsewhere" were instructed to leave out these questions in the survey and are excluded from the resultant analysis.

Q2 Where have you travelled from to get to John Street today?



Just under half (40%) of the shoppers coming to the Omagh Revitalisation Project area had travelled from Omagh. The remaining visitors travelled from Fintona (24%), Dromore (12%), Carrickmore (12%), Ballygawley (10%) and Enniskillen (2%).

Q3 How did you travel to John Street?

Method of travel	Percentage
Walk	36
Car	64
Taxi	0
Bus	0
Other	0

The majority of respondents (64%) travelled to the scheme area by Car, with all other respondents choosing to walk (36%) to the area.

Q4 How long was your journey to John Street?

Journey Time	Percentage
10 minutes or less	28.5
11-30 minutes	54.5
31-60 minutes	17
More than 60 minutes	0

The majority of respondents (83%) travelled to the area in 30 minutes or less with the most common option selected being 11-30 minutes (54.5%) followed by 10 minutes or less (28.5%). The remaining respondents (17%) travelled between 31 and 60 minutes.

Q5 How often would you visit John Street?

Frequency of visits	Percentage
Daily	7
2-6 times a week	19.5
Once a week	21.5
More than once a month but not weekly	0
Once a month	33
Less than once a month	19

Almost half of shoppers (48%) visit the project area at least once per week. Of those, 21.5% indicated "once a week", 19.5% indicated "2 – 6 times a week" and 7% visit the area "Daily". A further 33% visit the area at least once per month with the remaining 19% visiting less than once per month.

Q6 How long do you intend to spend in John Street for this visit?

Length of visit	Percentage
30 minutes or less	31
31-60 minutes	38
Between 1 – 2 hours	29
Between 2 – 3 hours	0
Over 3 hours	2

When asked how long they intended to spend in the area for this visit 38% indicated "Between 31 - 60 minutes". A further 31% would spend 30 minutes or less and 29% would spend between 1 and 2 hours. There were 2% who intended on staying over 3 hours.

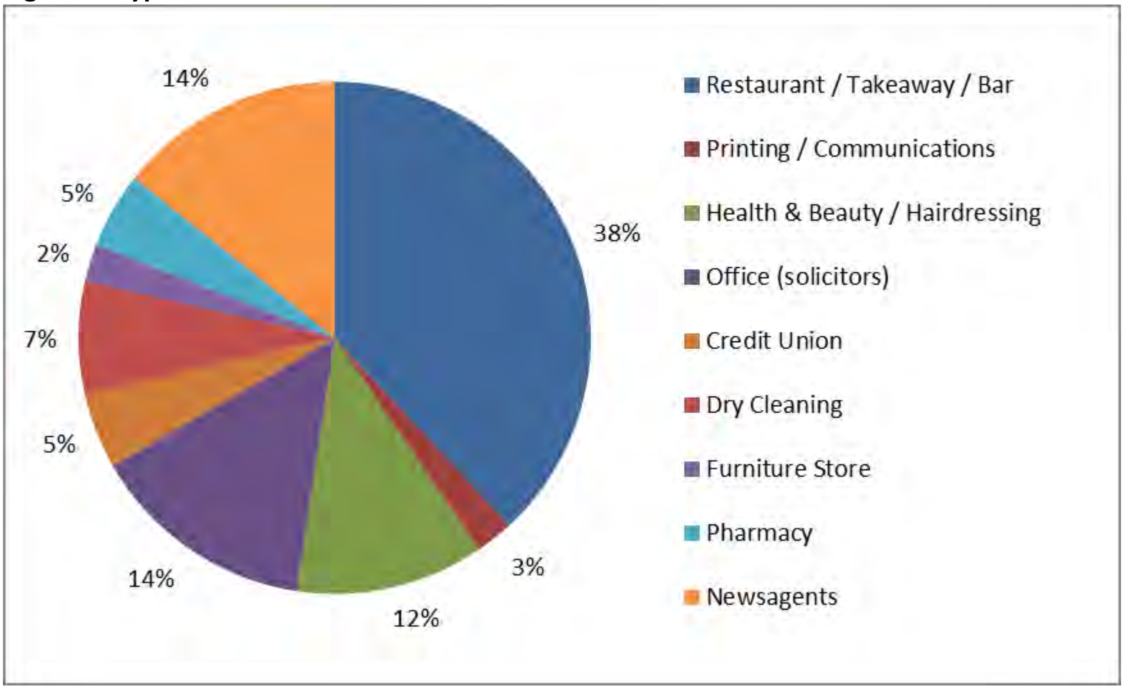
Q7 How much have you spent or do you intend to spend on this visit?

Total Spend	Percentage
Less than £10	15
£11 - £20	62
£21 - £30	8
£31 - £40	8
£41 - £50	4
£50+	4

When asked how much they had spent or intended to spend, almost two thirds (62%) indicated they would spend £11 - 20, with a further 15% indicating they would spend up to £10.

Q8 What type of business will you visit in John Street today?

Figure 4: Type of business visited

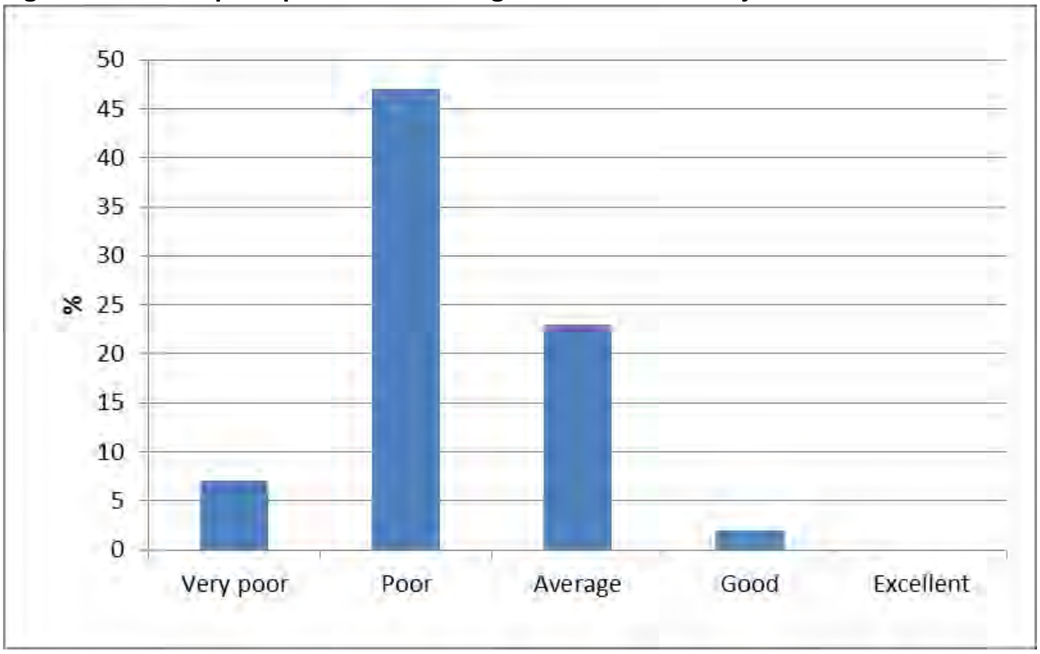


When asked what type of business they intended to visit the most popular Restaurant / Takeaway / Bars with 38%, followed by newsagents (14%), office (solicitors) (14%) and health and beauty / hairdressing (12%).

Q9 My perception of the project area as it currently stands is…?

Perception of the area as it currently stands	Percentage
Very Poor	9
Poor	59
Average	29
Good	3
Excellent	0

Figure 5: Current perception of the Omagh Revitalisation Project Area



The area was viewed negatively by over two thirds of respondents (68%) with only 3% viewing the area positively. Over one quarter (29%) of respondents viewed the area as average.

Q10 Within the area, please score your current opinion of each of the following aspects. (On a scale of 1 to 10, where 1 is poor and 10 is excellent)

All respondents were asked their opinion on certain aspects of the Omagh Revitalisation Project area. They were asked to rate each aspect on a scale of 1 to 10, where 1 is poor and 10 is excellent. An average score was then calculated for each aspect. Results are shown in Table 1 below, the higher the score the better the aspect is viewed.

Table 1: Average scores for aspects of Omagh Revitalisation Project Area

Aspect	Score
Safety	5.2
Street Maintenance	4.9
Accessibility eg transport, parking	4.9
Street Cleanliness	4.8
Levels of anti-social behaviour	4.7
Street signage	3.9
Floral Features	3.8
Shop Fronts	3.3
Building Conditions	3.0

Safety was viewed as the best aspect with an average score of 5.2 out of 10. Building Conditions was viewed as the worst aspect, scoring 3.0.

Q11 Please rank in order of priority (where 1 is the most important) the TOP THREE issues that you consider should be addressed by the Omagh Revitalisation Project:

Each respondent's three priority issues were taken and an overall score created for each issue based on the number of first, second and third priority rankings received. The greater the score achieved the greater priority respondents would give to addressing the issue.

The total weighted score for each issue is shown in Table 2 below in order of overall ranking.

Table 2: Rankings of priority issues for Omagh Revitalisation Project Area

Aspect	Score
Building Conditions	166
Shop fronts	158
Street Signage	71
Street Cleanliness	65
Floral Features	48
Safety	46
Accessibility (e.g. parking, transport)	33
Street Maintenance	14
Levels of anti-social behaviour	11

'Building Conditions' were seen as the highest priority, followed by 'shop fronts', 'street signage' and 'street cleanliness'. 'Levels of Anti Social Behaviour' the lowest priority.

Q12 Please state to what extent you agree or disagree with the following statements (where 1 is strongly disagree and 10 is strongly agree)

Shoppers were next asked to respond to a set of statements on the Omagh Revitalisation Project area indicating how much they agreed with each statement on a scale of 1 to 10 (where 1 is strongly disagree and 10 is strongly agree).

Average scores are presented in Table 3 below.

Table 3: Average scores for attitudinal statements for Omagh Revitalisation Project Area

Statement	Score
I would be more likely to use John Street after the proposed changes	7.7
The physical appearance of John Street could be improved	7.5
I feel John Street has a negative image	6.4
There are anti-social behaviour and graffiti problems in the area	6.3
I feel safe in John Street	4.2

The responses show that 'I would be more likely to use John Street after the proposed changes' scored highest and was closely followed by 'The physical appearance of John Street could be improved'. The responses also show that the statement with the least concern was 'I feel safe in John Street'.

Additional comments
Shoppers were finally given the opportunity to provide further comments on the Omagh Revitalisation Project. There were no additional comments from any of those surveyed within the project area.

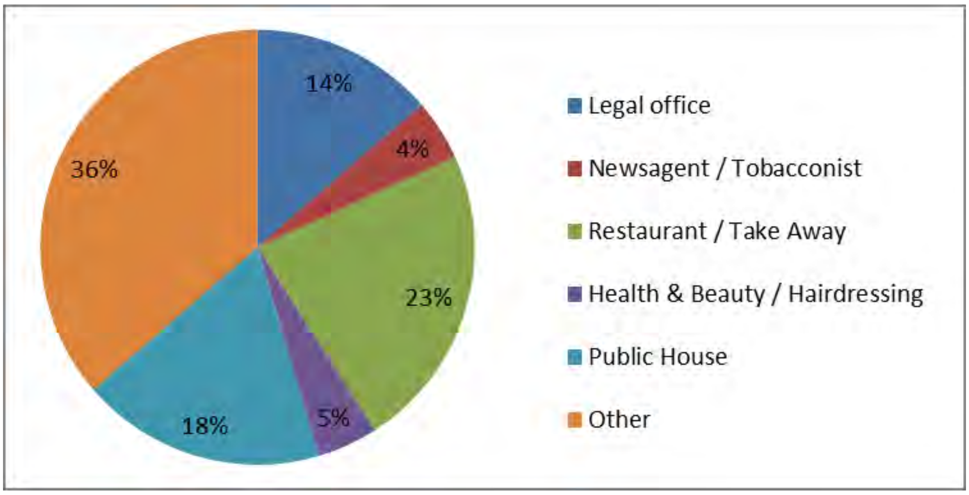
8.3 Business Survey

The Business Survey was developed by ASU in conjunction with staff in the RDO in order to collect baseline information on the Omagh Revitalisation Project. The survey was intended to take in all businesses that are within the boundaries of the Omagh Revitalisation Project.

The survey was administered by Omagh District Council who reported that a total of 37 surveys were issued, 22 of which were returned, achieving a response rate of 59%.

Q1 Please indicate your main business type?

Figure 1: Businesses within the Omagh Revitalisation Project Area



Of the 22 businesses which responded to this question, the majority were Restaurant / Take Away (23%). There were 36% choosing the 'Other' option which included bookmakers, Taxi, Newspaper publisher, Furniture retailer, Phone shop, Estate Agent, Pharmacy, Dry Cleaners.

Q2 What is the ownership status of your current premises?

Type of ownership	Percentage
Owner Occupied	**52%**
Leasehold / Rented	**45%**

Just above half (55%) of respondents said their premises were Owner Occupied. The remaining (45%) of premises were Leasehold / Rented.

Q3 How long have you been in your current premises?

Length of time in current premises	Percentage
Less than 6 months	0
More than 6 months but less than 1 year	0

Between 1 and 3 years	14%
More than 3 years	86%

The majority of respondents (86%) said they had been in their current premises for "More than three years". The remaining 14% had been in their premises between 1 and 3 years. There were no respondents in their premises for less than 1 year.

Q4 How was your business performing in the year prior to November 2012 (November 2011 – October 2012)?

Business Performance	Percentage
Below Average	62
Average (Normal)	38
Above Average	0
Not Applicable	0

Respondents were also asked how their business had been performing in the year prior to November 2012. The most common response given was 'Below Average' (62%). The remaining 38% stated that their business performance was 'Average (Normal)'. No businesses stated that their performance was 'Above Average'.

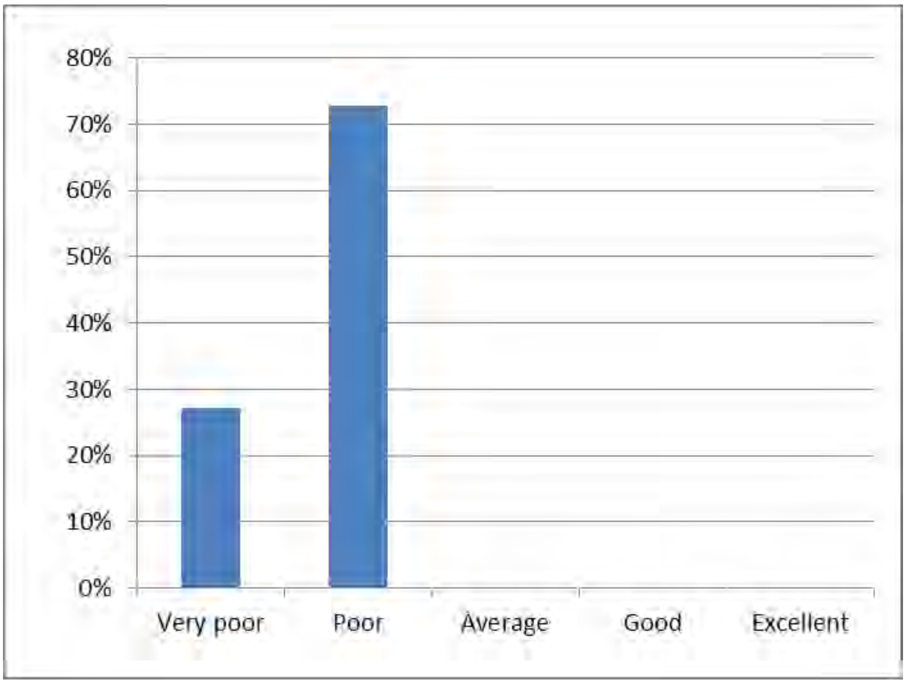
Q5 In the past year (December 2011– November 2012), in comparison to the previous year (December 2010 – November 2011) has your turnover…..

Turnover comparison to previous year	Percentage
Decreased	67
Stayed the same	33
Increased	0

When asked how their turnover compared to the previous year two thirds (67%) of respondents indicated that their turnover had 'Decreased in comparison to the previous year with the remaining one third (33%) indicating the turnover had 'Stayed the Same'. No businesses indicated that their turnover had increased.

Q6 My perception of John Street as it currently stands is…..?

Figure 2: Current perception of the Omagh Revitalisation Project Area



When asked about their perception of the project area as it currently stands, 100% of respondents view the area negatively with 73% viewing the area as 'Poor' and the remaining 27% viewing the area as 'Very Poor'.

Q7 Within John Street, please score your current opinion of each of the following aspects. (On a scale of 1 to 10, where 1 is poor and 10 is excellent)

Table 1: Average scores for aspects of scheme area

Aspect	Score
Lighting	5.7
Street Maintenance	5.1
Accessibility	5.0
Safety	5.0
Street Cleanliness	5.0
Vandalism	4.6
Business / Shop Frontage	4.0
Amount of Dereliction	3.0
Building Conditions	2.9
Promotional banners	2.6
Floral Features	2.4

Respondents were asked their opinion on certain aspects of the scheme area. They were asked to rate each aspect on a scale of 1 to 10, where 1 is poor and 10 is excellent. An average score was then calculated for each aspect. The highest scoring aspect was lighting with a score of 5.7

followed by street maintenance with a score of 5.2. The worst aspect based on the scores was 'Floral Features' with 2.4.

Q8 Please rank in order of priority (where 1 is the most important) the TOP THREE issues that you consider should be addressed in the John Street Revitalisation Area:

Table 2: Rankings of priority issues

Aspect	Score
Amount of Dereliction	27
Building Conditions	24
Business / Shop Frontage	13
Promotional banners	8
Street Cleanliness	8
Floral Features	7
Safety	3
Lighting	2
Street Maintenance	1
Accessibility	0
Vandalism	0

Respondents were then asked to consider the same 11 aspects and rank the top three issues which should be addressed by the project. Of the total businesses responding 16 provided rankings in this question. Each respondent's three priority issues were taken and an overall score created for each issue based on the number of first, second and third priority rankings received. The greater the score achieved the greater priority respondents would give to addressing the issue.

"Amount of Dereliction" was viewed overall as the highest priority with a score of 27. "Building Conditions" followed with a score of 24 and "Business / Shop Frontage" scoring 13, rounded off the top three issues of priority for businesses.

Q9 Please state to what extent you agree or disagree with the following statements (where 1 is strongly disagree and 10 is strongly agree)

Table 3: Average scores for attitudinal statements

Statement	Score
There are underused areas in John Street which could be developed	9.05
The physical appearance of John Street could be improved	9.00
This initiative could give me more confidence in my business	8.81
The area is currently poorly marketed	8.67
The provision of free Wi-Fi could make a positive difference to my business	8.57
New businesses will not open in John Street in its current state.	8.48
The initiative may encourage me to diversify my business	7.62
The initiative may encourage me to expand my business	7.33

Businesses agreed with all of the above statements but agreed most that "There are underused areas in John Street which could be developed" and with "The physical appearance of John Street could be improved".

Q10 Do you feel revitalisation could help your business?

Could revitalisation help the business	Percentage
Yes	100
No	0

Businesses were also asked to indicate if they felt that this project could help respond to their needs and wishes as a business – 100% said it could. Additional comments were:-
All vacant sites should be updated, even painted
If the street was more presentable it would attract more footfall thus more business
Bring footfall to street
Older buildings being replaced with new ones
John St has got old and dilapidated over the years, revitalisation can only attract new business & customers
Help the whole area

Q11 Have you invested any of your own capital in improvements to your business in the last year?
A few businesses have made improvements to their interior and exterior in the last year.

Q12 Would you consider investing your own capital in further improvements to your business as a result of the work proposed?

Consider investing own capital in improvements as a result of the work proposed	Percentage
Yes	91
No	9

When asked if they would consider investing their own capital in further improvements to their business as a result of the work proposed, a vast majority 91% said they would consider further investment.

Q13 How may staff currently work in your business?
Businesses were also asked about the number of staff employed and volunteers. There was a wide range of staffing levels, with businesses indicating between 1 and 80 members of staff. The average staff numbers for the area was 7.5 (7 Full Time on average and 8 Part Time on average).

Have you any comments on the potential proposals/works the project might take or any other comments relating to the Revitalisation Project?

Respondents were finally asked if the proposals could be improved in any way and given the opportunity to add any other comments relating to the Omagh Revitalisation Project area. A number of respondents drew attention to the need to address dereliction. The comments provided were:

- Old derelict buildings which are unoccupied should be re-vamped at least painted
- The focus should be on dereliction and improving the streetscape
- The old empty buildings that are run down and falling apart it does not encourage anyone to do anything in the street to do much with their own
- "Tarmacking the alley - safety hazard
- Painting shop fronts & buildings
- Redeveloping the derelict buildings"
- For a number of years now there have been a number of businesses/premises lying derelict particularly the one which defines John St/James St. Also the lane connecting John St/Church Hill would make a great market location if it were cobbled and the current buildings refurbished and decorated.
- The Ulster Herald owns significant property in John Street and would be willing to discuss options for new initiating with ODC etc
- Can't happen quick enough
- John Street needs done up and tidied - need bins

9 CONCLUSIONS

This Health Check has, for the first time, started to pull together into a single report, all the information required to make an informed and accurate commentary on the vitality and viability of Omagh town centre.

The town performs well against the majority of the recognised performance indicators particularly vacancy levels. The town performs well as a regional service centre with strong independent retail offer and a varied hospitality offer. Further development of this retail and hospitality sector into speciality and local food would differentiate and provide a unique selling point on which to competitively position and market the town and would further enhance the vitality and viability of Omagh town centre.

9.1 Recommendations for the future

This report provides an excellent basis from which to build and improve on the benchmarking and monitoring process in the future. Place Solutions has made a number of recommendations to improve the quality of information available to decision makers in Omagh.

- Omagh needs to be more effectively bench-marked with other comparator towns in Northern Ireland. There is merit for everyone in the closer alignment of data collection techniques, particularly across the economic vitality indicators. This should be addressed through the Association of Town and City Management and DSD.
- Place Solutions recommends bi-annual perception surveys be carried out to fully understand and react to changing consumer needs with regard to their town centre.
- Place Solutions recommends quarterly footfall counts be carried out to give comprehensive data on pedestrian movements over time. Consideration should be given to the installation of one electronic footfall counter in the commercial core.
- Place Solutions recognises that the collection of data is carried out with the minimum amount of resources and strongly recommends that this process be given meaningful resources going forward to improve and develop the information.
- Place Solutions recommends that a Town Centre Health check be carried out every two years going forward and be presented in the form of a published report.

Appendix 6

Public Exhibition Boards

THE PROJECT

Welcome to the public exhibition of the draft proposals for the updated Masterplan for Omagh Town Centre.

The aim of this project is to review and update the existing Masterplan for Omagh Town Centre, produced back in 2009.

With the imminent transfer of planning powers to the new Councils in April 2015, this updated Masterplan will inform and provide a central resource for the new Fermanagh and Omagh District Council's Community Plan and Local Development Plan. It will also provide an integrated development strategy which will help inform future decision making on the promotion, implementation and timing of urban regeneration initiatives in Omagh over the next fifteen to twenty years.

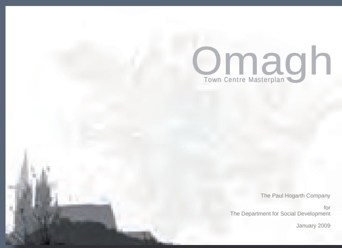
MASTERPLAN DELIVERY

Once the Masterplan is finalised, the agreed proposals will be subject to a process of costing, prioritisation and phasing. Stakeholders will then be identified to take forward key projects, subject to the availability of funding and more detailed development and consultation with landowners and statutory agencies.

Given the current economic climate, resulting in spending cutbacks in both the public and private sectors, funding for projects will be limited. Therefore, it is vitally important for Omagh to plan for the future, so as to ensure its own sustainability.

MASTERPLAN - 2009

Back in 2008, with increased developer interest in the town cent
commissioned a Masterplan for Omagh Town Centre. This Mas
site specific proposals which seek to achieve these objectives.



VISION

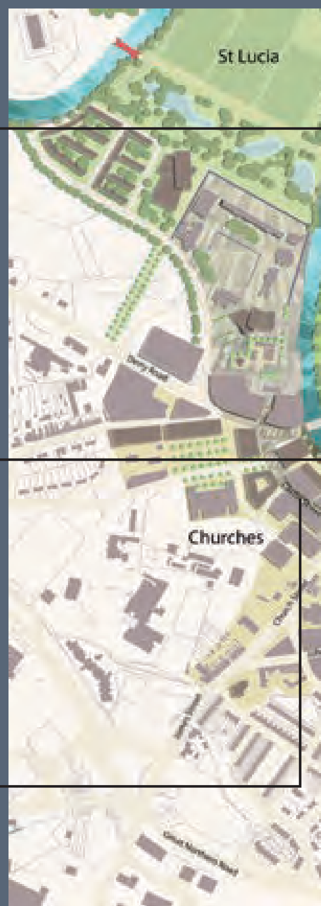
'An attractive and d
sa

PROPOSALS

1 KEVLIN AVENUE

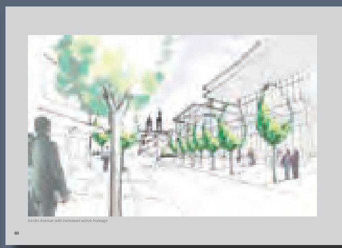
2 CAMPSIE

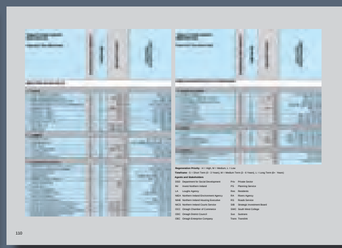
3 CHURCHES & ST LUCIA



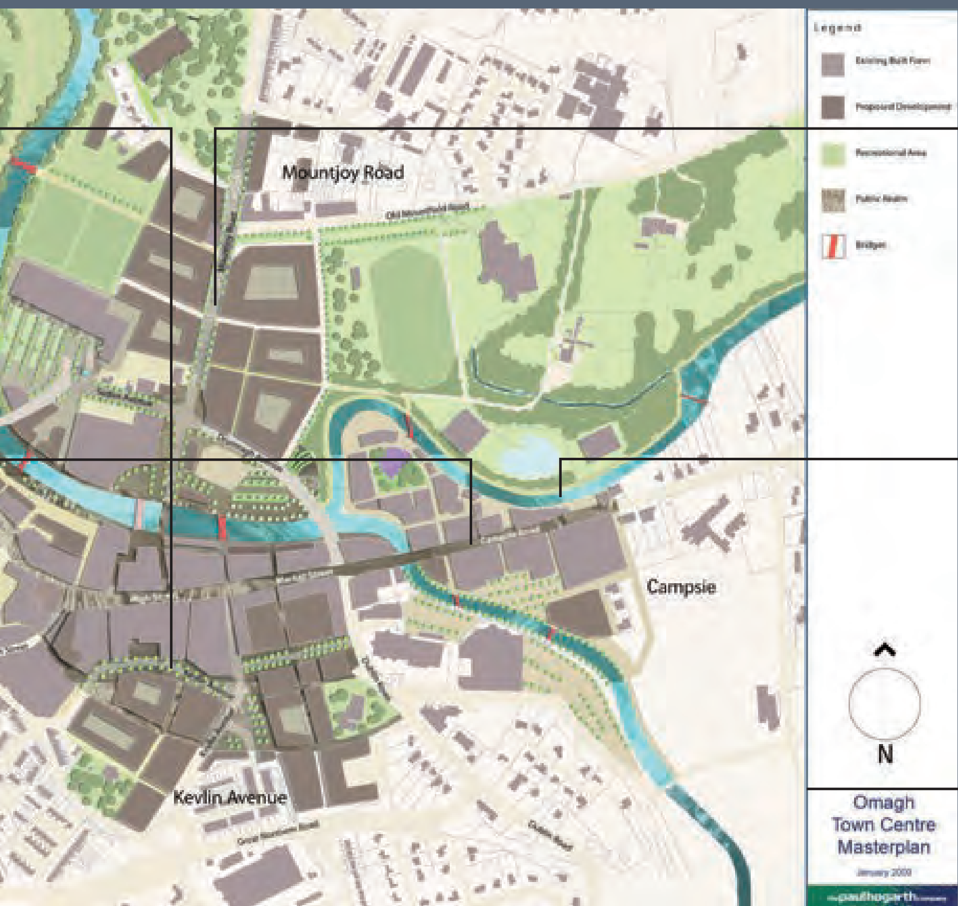
Update of **Omagh Town Centre Masterplan**

tre and the anticipated release of substantial areas of former army lands, the Department for Social Development (DSD)
terplan was published in January 2009 and set out key objectives for the regeneration of Omagh as well as a series of





istinctive town centre that is sustainable, fe and accessible to all.'



4 **MOUNTJOY ROAD**

5 **RIVER**

6 **OVERALL**

thepaulhogarthcompany

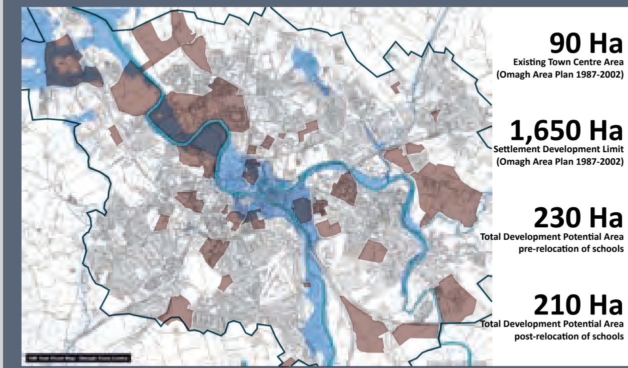
Omagh DISTRICT COUNCIL

ANALYSIS 2014

Regional Context

- Consideration must be given to Omagh’s position within the new Fermanagh and Omagh District Couincil area.
- Omagh is strategically positioned on the Western Economic / A5 Transport Corridor providing links with the North-West and West of Ireland.
- Situated in close proximity to Sperrins, Gortin & Ulster American Folk Park.

Urban Form



- The town has evolved around a central spine from Campsie to the Court House with the surrounding narrow streets contributing to the distinctive character.
- Landmark buildings include the Court House, the Churches and the Strule Arts Centre
- Significant development lands available
- There is a heightened flood risk, particularly in town centre

Sectoral Overview

OFFICE, INDUSTRY, HOUSING :

- 47 Commercial / Business services
- Greater demand for office use than retail in town centre
- 53 Ha zoned for industry
- 6,626 households
- 202 Ha zoned for housing

RECREATION, LEISURE, CULTURE& EVENING ECONOMY

- 67 businesses in Leisure and Hospitality
- Historical/ cultural identity not clearly visible/interpreted within town centre
- Potential to develop cultural quarter around Court House and Churches
- No critical mass of night time economy facilities

Tourism

WEAKNESSES INHIBITING TOURISM GROWTH

- Insufficient visitor accommodation
- Lack of cohesive branding and marketing
- No public/private integrated delivery structures
- No clearly identified visitor markets

OPPORTUNITIES FOR GROWTH

- Myths and legends (NITB Pillar) presents a viable hook to present the unique Omagh story
- Proximity to major tourism assets
- Strule Arts Centre
- Position relative to City of Derry and Fermanagh Lakelands
- Riverfront development
- Outdoor activities

Socio-Economic Profile

Strengths	Weaknesses
• While the elderly population is growing, the overall population of Omagh is still relatively young and is forecast to grow significantly; • Increasingly skilled, and better qualified school leavers; and • Strong agricultural and manufacturing sectors.	• Employment is overly dependent on public services of Health and Education; • Private sector is overly dependent on agriculture, construction and wholesale/retail; • Low wages/low level of GVA per head; • Little tradition of FDI and not in sync with emerging trends; and • Higher levels of unemployment.
Opportunities	**Threats**
• Increased planning and economic development powers (e.g. land acquisition); • Connectivity: A5 Dual Carriageway; • Lower wage costs; • Highly qualified younger workforce with a high rate of full-time students; and • Diversification of strong agriculture sector into the emerging agri-foods sector.	• Pockets of severe deprivation within the Omagh Town area; • Austerity measures nationwide; • Potential skills mismatch between younger, qualified workforce, and employment sectors available; and • Preponderance of lifestyle start ups, agriculture and tourism.

- **Stable population, however 'brain drain' of most qualified**
- **High dependence on public sector for jobs although under represented in Public Administration sector**
- **Possible areas of indigenous growth**
  - **Agri food**
  - **Renewable energy**
  - **Retail**
  - **Public Sector 'back office functions'**
  - **Higher paid graduate jobs**

Retail Capacity

- **Population of Omagh District Council (catchment area) set to increase by 10.4% by 2019**
- **There are currently 354 businesses throughout the town. The retail sector is dominated by Health, Beauty & Pharmacies - 66 and Retail Fashion - 52**
- **Strong mix of both independant retailers and multinational chains**
- **No expenditure capacity for further food retailing and only small capacity for non-food retailing.**
- **The town centre faces considerable competition from out of town centre retail sites**
- **Town centre retail vacancy rates are extremely low and sit well below the NI Average of 19%**

Town Centre Health Check

KEY FINDINGS

- **65 + age group above NI average**
- **Economic Vitality**
  - Zone A rents £25-40 per sq.ft
  - Footfall strong during week/term-time due to college
  - 4 retail units vacant in prime retail area
- **Environment**
  - Recent public realm refurbishment
  - Public space provision limited addressed by OASIS
  - Litter/graffiti free
  - Frontages generally in good condition
- **Safety**
  - Total recorded crimes - 2,486 (Sep 2013 – Aug 2014)
    Down 11% (2782) for the same period last year
  - Anti-Social Behaviour is 44% of total recorded crime figures
    Down 7% from the same period last year.

Movement & Transportation

- **New footbridges and paths will enhance walking and cycling network**
- **SRTP identifies routes that would greatly improve access throughout the town centre**
- **Promote public transport connections to and from outlying tourist destinations.**
- **Car Parking is underutilised due to challenging access**
- **Higher density parking should be introduced on edge of town centre locations**
- **Proposed Highway Improvements**
  - Strathroy Link Road
  - Mountjoy Road Widening
  - Old Mountfield Road / Drumragh Avenue Link.
  - Kevlin Avenue Link
  - Winter's Lane Link
  - Cranny Road Link
- **The proposed A5 would reduce congestion levels on town centre streets and bypass**

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Omagh District Council

AIMS AND OBJECTIVES

SHARED VISION

AS A STEP TOWARDS CITY STATUS, TO POSITION AND CREATE AN IDENTITY FOR OMAGH WHICH TAKES ADVANTAGE OF ITS NATURAL ASSETS, LANDSCAPE AND NEW REGIONAL CONTEXT. *'OUTDOOR OMAGH'* WILL REFLECT A QUALITY OF LIFE FOR THE LOCAL COMMUNITY AND VISITORS AND WILL PROVIDE A FRAMEWORK FOR SUSTAINABLE ECONOMIC GROWTH OF A VIBRANT, ATTRACTIVE AND DISTINCTIVE CENTRAL CORE.

UNDERPINNING A STRONG AND POSITIVE IDENTITY

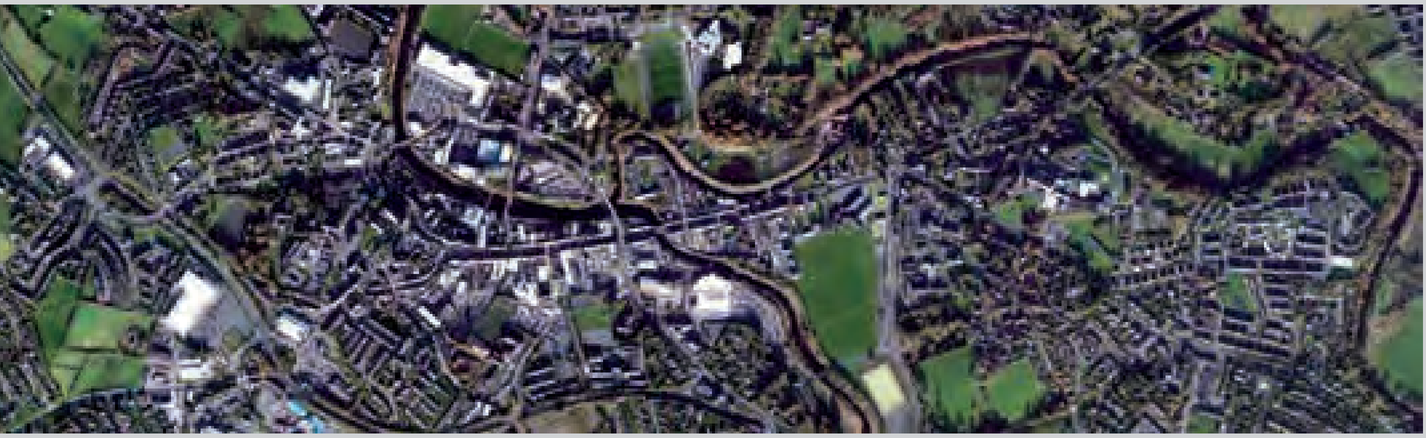
- Define a regional and sub-regional role for Omagh
- Strengthen the physical quality of the town centre
- Nurture the distinctive character and role of the various town centre areas
- Reinforce the role of the town centre to its people
- Pursue the Shared Future agenda of safety & accessibility for all
- Reinforce the urban and rural synergy of Omagh

RECONNECTION WITH THE LANDSCAPE

- Maximise the economic benefits of Omagh's natural features
- Take a proactive approach to dealing with the considerable flood threat
- Strengthen physical connections between the urban and rural environment
- Ensure new development does not negatively impact on future generations
- Engender a healthy town and healthy lifestyle

SUSTAINABLE

- Enhance link education ar
- Take advanta quality digita
- Develop a su transport mo reliance on c
- Ensure ease through clea signage



E LINKAGES

- kages between nd enterprise
- age of high al connectivity
- ustainable odel reducing cars
- of movement ar wayfinding

PROTECTION AND ENHANCEMENT OF EXISTING QUALITIES

- Respect, conserve and enhance the existing built fabric
- Identify sustainable new uses for old buildings and spaces
- Support and strengthen town centre retail
- Build upon and develop Omagh's cultural role
- Ensure new developments complement existing features and views
- Support the local business and enterprise base

SUSTAINABLE COORDINATION OF CHANGE

- Use Masterplan to inform the new Local Area Plan and Community Planning
- Prepare development guidelines for opportunity sites
- Phase implementation of development opportunities
- Encourage temporary uses for sites, in the short term
- Positive social and economic rationale for new development

the paulhogarth company

Omagh District Council

DRAFT PROPOSALS

A total of 19 proposals are contained in the draft Omagh Town Centre Masterplan. The proposals vary in nature and scale and the timefran realised in the medium to longer term (5-10 and 10-20 years). Furthermore, the proposals have differing cost implications and while no all statutory bodies can use as a tool to plan for the future and seek funding.

01 Town Brand and Interpretation Strategy

The Masterplan will confidently position the 'Outdoor Omagh' brand, differentiating Omagh from other town and city centres around Northern Ireland. It will reflect the importance of the town's relationships, whether ancient or recent, with its landscape setting, with the nearby Sperrins, the farming traditions, rivers and emerging renewable energy sector.

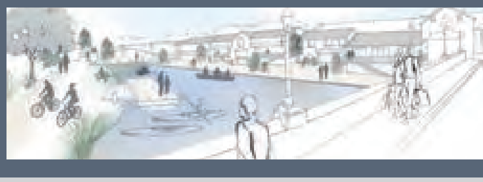
This will define Omagh's distinctive tourism, retail and hospitality provision adding value to existing and potential developments/initiatives and having an increasing resonance with other sectors including education, enterprise and healthcare.

03 Flood Alleviation

Given the updated understanding of the level of flood risk facing Omagh, an examination of options to improve flood alleviation has commenced. Proposals arising from this study will be subject to viability and competing priorities for funding. In considering options, opportunities to better integrate the town with the river environment will also be explored. One such opportunity involves reconnecting the Camowen River with a part of the floodplain at the area of low-lying land around Omagh Boating Lake. This proposal will create a new wetland habitat, enhancing the river environment and benefitting local people and attracting visitors to the town centre

04 Riverfront Development

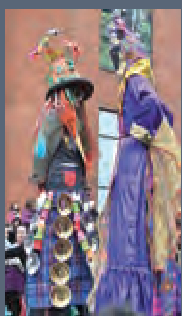
- New and existing buildings encouraged to front onto the river
- Establishment of greenways linking the town centre with the wider town and rural hinterland
- Amenity for both locals and visitors



05 Events Strategy

Utilising Omagh's fine buildings and spaces including the rivers, a series of historical, cultural and sporting events and activities should be coordinated.

This strategy should tie in with related events and activities taking place throughout the Sperrins and the Folk Park and should involve all members of the community including young people.



06 Public Realm and Town Centre Frontages

Building upon the recent public realm works, opportunity exists to extend this into other town centre streets and spaces in the future, such as Mountjoy Road, Campsie and St. Lucia.

Shop frontages, in poor condition, will be also targeted through a frontage improvement scheme to enhance the town centre image.

07 Lisanelly Shared Educational Campus

The Lisanelly Shared Educational Campus involves the relocation of five post-primary schools and one special needs school, located throughout Omagh, to the mature parkland setting of the Lisanelly site.

This scheme, which would see this former military barracks site fully reutilised, also presents a unique opportunity for collaboration between schools and the sharing of facilities and school transport which would not be not deliverable on an individual basis.

08 Development Briefs

With the proposed relocation of the schools to the Lisanelly site, significant regeneration opportunities will open up for the town.

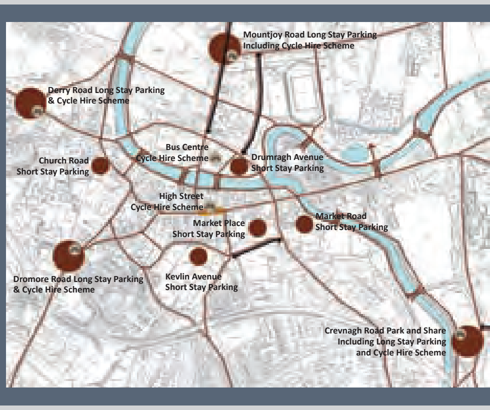
The Masterplan recommends the preparation of detailed development briefs for these sites to inform future development and ensure they complement and benefit both the wider town and the town centre and contribute to a high quality environment.

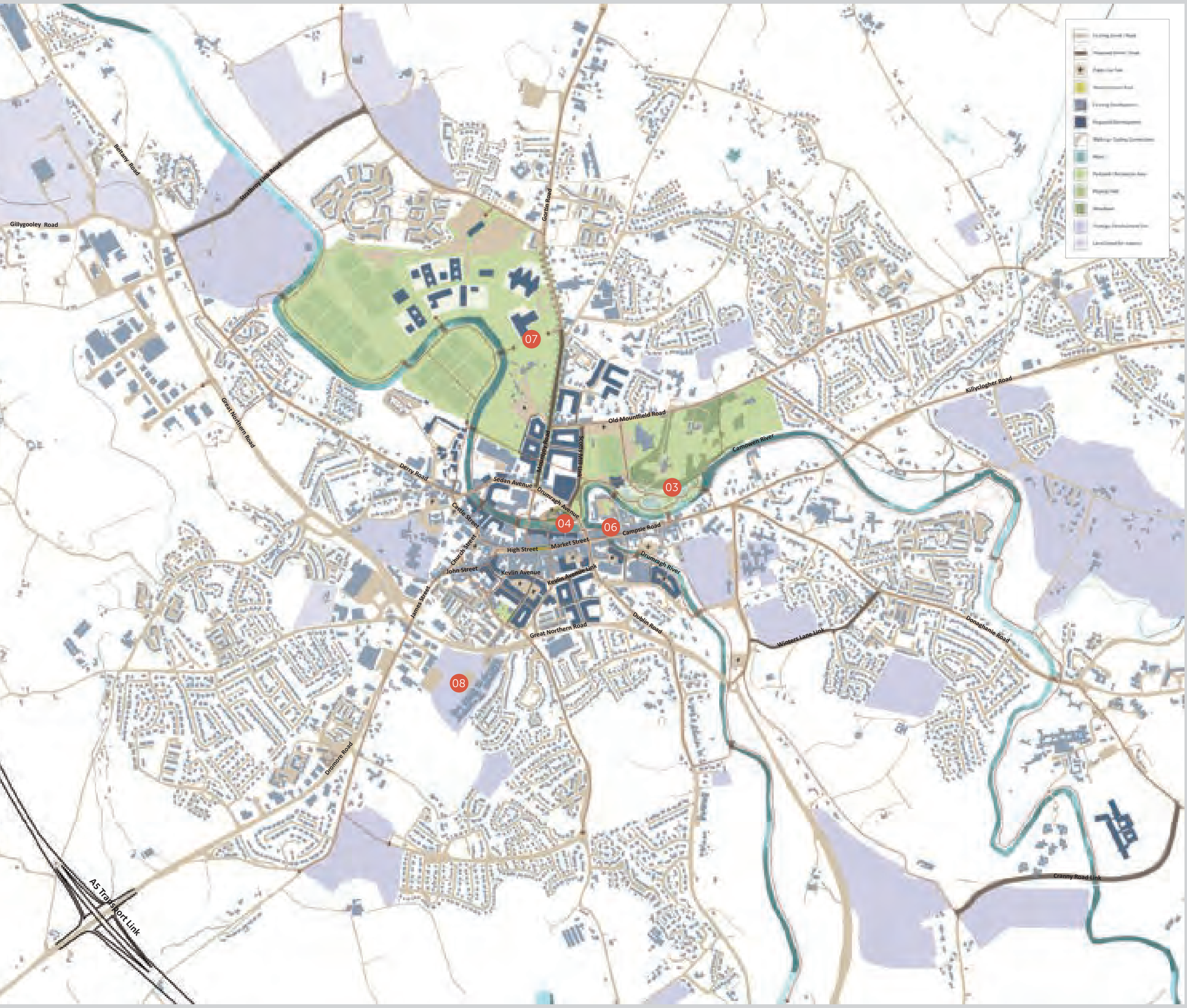
ne for their delivery varies from those that can be delivered in the short term (0-5 years) to those more aspirational proposals that could be ocated funding is presently available, the Masterplan will provide a shared vision that key stakeholders including the Council and other

02 Sustainable Transport Planning

The following proposals seek to identify ways in which reliance on the private car in Omagh can be reduced and walking, cycling and the use of public transport can be encouraged:

- Enhanced network of foot and cycle paths throughout the town centre, between communities and extending to outlying destinations
- Improved crossings on Great Northern Road
- Additional cycle parking locations
- Town centre public bike hire scheme
- Improved bus services to key visitor destinations
- Improved town centre coach parking
- Additional evening bus services
- Strategically located free-parking on the edge of town centre
- Improved signage and vehicular connections to town centre parking
- Improvements to the existing road/street network





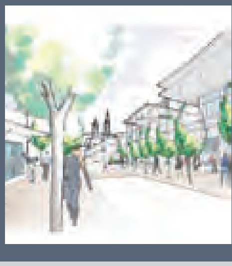
DRAFT PROPOSALS

09 High Street Pedestrianisation

The Masterplan proposes the pedestrianisation of an area of High Street, extending from Scarffes Entry to Bridge Street.

The timing and coordination of the delivery of the Kevlin Avenue to Dublin Road link will be key to the successful delivery of this proposal.

10 Kevlin Avenue Development Sites



A key element of the development of this area will be the creation of safe and active streetscapes which allow vehicular access and the servicing of buildings whilst incorporating a high quality pedestrian environment and facilitating direct pedestrian linkages to High Street.

11 Establishment Quarter

The Churches and St L
ground in the town ce
to its distinctive skylin
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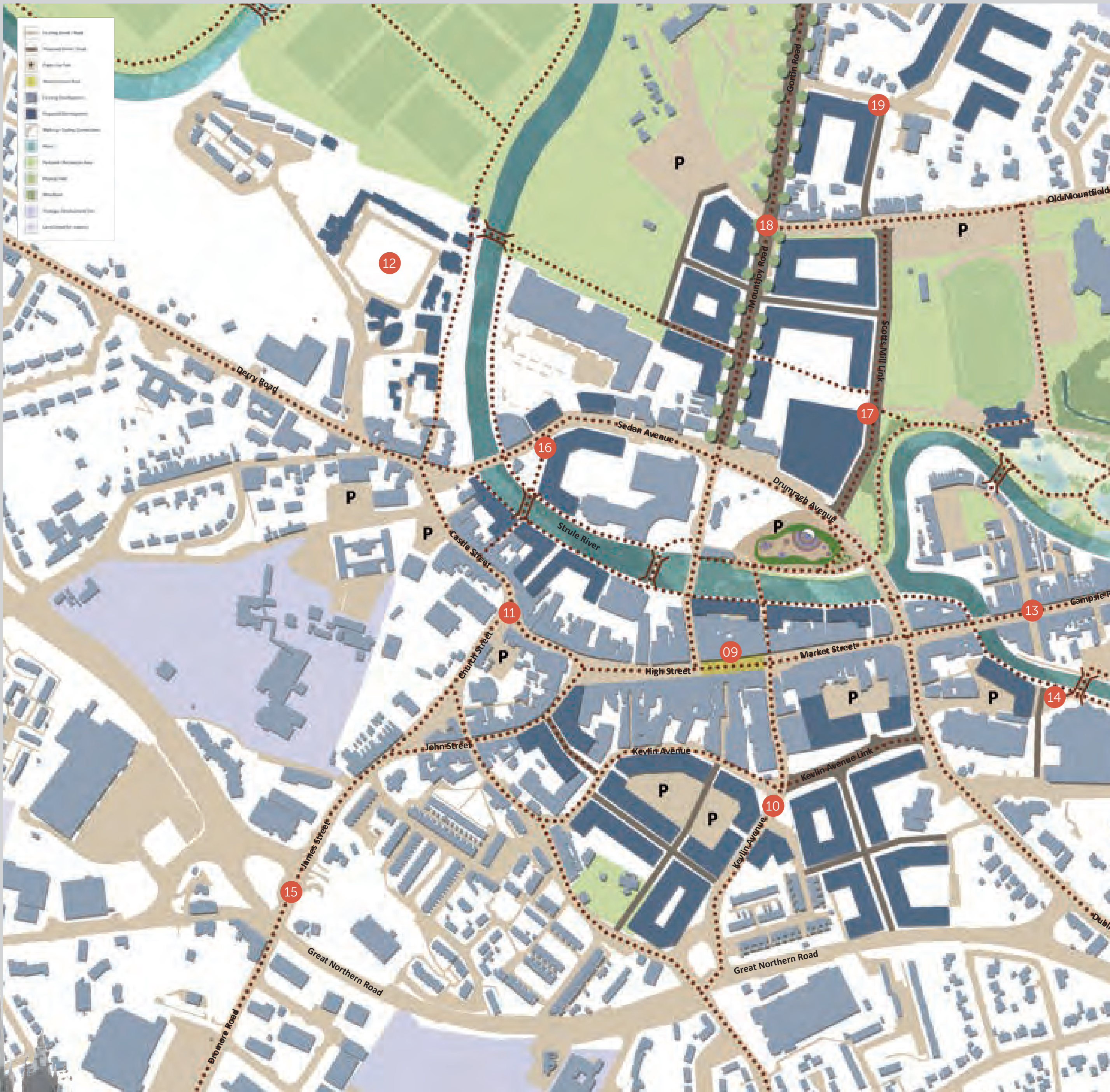
proposed that a cultur
become an ideal locati
retail, visitor attraction



Update of **Omagh Town Centre Masterplan**

of a Cultural

ucia dominate the high
ntre, and contribute
e. Building upon this
e Strule Arts Centre, it is
al area is created. This would
ion for restaurants, specialist
s and accommodation.

12 St Lucia Barracks Development

Set within the proposed Cultural Quarter and with its many historic buildings and attractive public spaces, St Lucia will play an important role as a leisure, commercial and employment base.

Given the size and flexibility of the site, scope exists to accommodate a base for public administration, a museum and arts and cultural provision to complement the Strule Arts Centre and accommodation provision.

13 Campsie Road Improvements

The Masterplan proposes that Campsie is developed as a distinctive area within the town centre, with specialist retail and enhanced connections with the rest of the town.

Improved traffic control and parking arrangements in Campsie would benefit traders, pedestrians and commuters and would ensure further efficient and safe use of this area.

14 Irish Town Development

The Masterplan proposes improved linkages between this area of the town centre and both Campsie and Market Street.

Furthermore, new development wrapping the existing surface level car parks will provide high active frontage on Market Road and will help achieve greater interaction with the River in this area.

15 Dromore Rd. & James St.

Following construction of the proposed A5 Western Transport Corridor, Dromore Rd. and James St. will become a main approach route into the town. This changing dynamic will therefore increase the demand for parking along this route. With Loreto Grammar relocating to Lisanelly, scope may exist to utilise part of the remaining site for parking. However, given the landscape quality of this site, including the listed Convent Building, historic graveyard and fine mature trees, further detailed studies to determine the feasibility of this proposal will be required.

16 Sedan Avenue Development

While situated in close proximity to High Street and containing the College and Showgrounds, the lack of active frontage along this street, discourages pedestrian movement and connectivity with High Street.

The Masterplan proposes enhanced pedestrian connections as well as new development providing active, street frontage and accommodating expansion of the adjacent commercial and educational facilities.

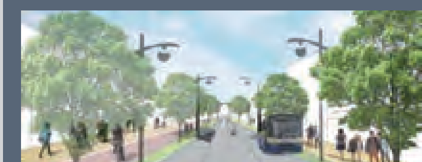
17 Scotts Mill Development

Development of this strategically important site should provide active frontage onto Drumragh Avenue, Mountjoy Road and onto the proposed link road, which extends between Drumragh Avenue and Old Mountfield Road.

Whilst, opening up access to these development lands, the proposed link road will also help to alleviate vehicular congestion on Mountjoy Road.

18 Mountjoy Road Development

It is proposed that the Mountjoy Road is established as a tree lined street, with generous pedestrian footpaths, cyclelanes, and active development frontage on both sides.



19 Woodside Avenue Development

Given the extent of development land available, following the relocation of the PSNI station and College Training centre as well as the imminent relocation of Rivers Agency, the Masterplan proposes comprehensive redevelopment of Woodside Avenue.

Design guidance should be adhered to in order to ensure that a high quality environment is established.

the paulhogarth company

Omagh District Council

LET US KNOW WHAT YO

Now it's over to you. All of the proposals presented on these panels are in draft. The feedback of the general public, local residents and businesses is now sought on the existing area and the draft Masterplan. New ideas for regeneration are also greatly welcomed. It is recognised that only through the combined ideas and efforts of the area's many stakeholders, can the most appropriate actions for its improvement be identified. Once complete, the findings of the consultation process will be used to finalise the Masterplan, which will then be used to inform future investment and policy making for the area.

V

fa

What does Omagh mean to you?

What other ideas do you have to regenerate the town?

HOW TO GET INVOLVE

The consultation period extends for eight
Boards are available to view at the Strule A

Alternatively the Information Boards can b
- www.facebook.com/omaghmasterplar
- www.omagh.gov.uk

Please take time to study the Information
All of the proposals outlined are draft and
the outcome of the consultation period.

Following your review of the Boards we w
provide us with your opinions and comme

The questionnaire is available online at wv
questionnaire are available at the Strule A
Completed questionnaires can also be em
- omaghmasterplan@paulhogarth.com

or posted to;
- Omagh Masterplan, The Paul Hogarth

U THINK

isit:

acebook.com/omaghmasterplan

D

weeks from Friday 5th December 2014 to Friday 30th January 2015 and Information
Arts Centre, Townhall Square, Omagh

be viewed online at the following websites:
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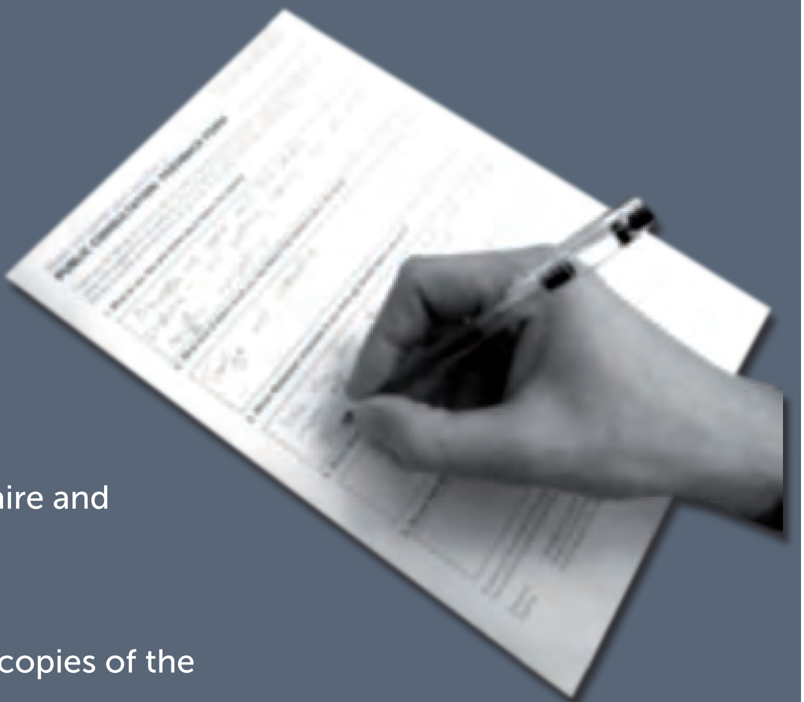


Boards and review the emerging proposals.
therefore will be subject to change, pending

velcome you to complete a feedback questionnaire and
ents on any of the elements presented.

ww.surveymonkey.com/s/Y5RT7WZ, while hard copies of the
rts Centre along with a feedback returns box.
nailed to;

Company, Potters Quay, 5 Ravenhill Road, Belfast, BT6 8DN

Appendix 7

Public Consultation Feedback

- Eight-Week Consultation Period (5th Dec - 30 Jan)
- Consultation Boards and Poster on Public Display at the Strule Arts Centre and various community facilities
- Consultation Boards available online at Facebook and Omagh District Council websites
- Feedback Questionnaire available online and at Strule Arts Centre
- Public consultation drop in event and workshop

Testing the Draft Masterplan

Public Event

Facebook Page

419

281 Facebook 'Likes'

5 Comments on Facebook Page

126 Completed Questionnaires (87 online and 39 hard copies)

7 Written Submissions

Feedback Received

Facebook Responses

281 Facebook 'Likes'

5 Comments

I would like to see the town having a town centre cinema and bowling alley like Derry has - this would bring more people into the town from the surrounding districts and stop people having to travel further afield.

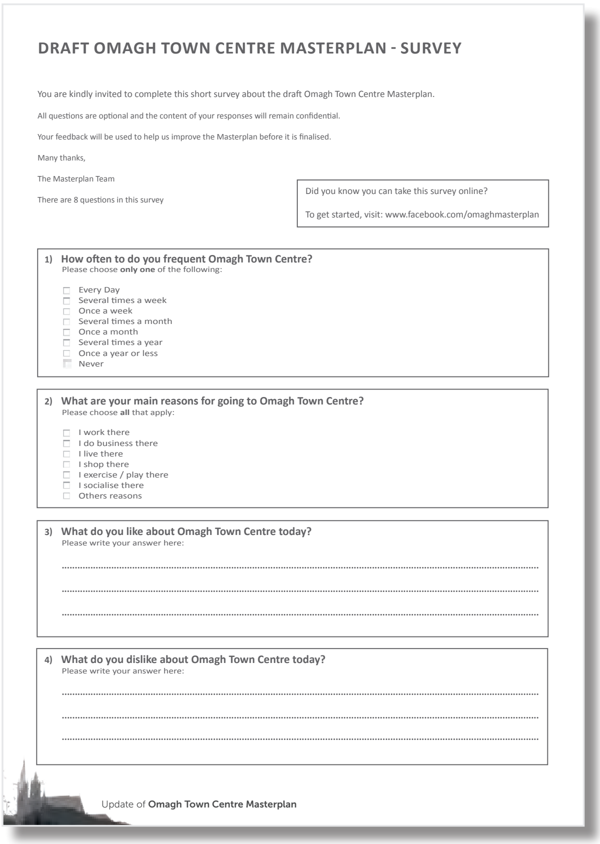
Looks extremely exciting and love the brand... Outdoor Omagh!

I think the existing houses [in Lisanelly] should be kept.

Impressive plan but bridge still isn't nice

I would like to have a park in Lisanelly Camp that would be nice for a walk in good weather and be able to hold music festivals with bands.

Questionnaire Responses



DRAFT OMAGH TOWN CENTRE MASTERPLAN - SURVEY

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All questions are optional and the content of your responses will remain confidential.

Your feedback will be used to help us improve the Masterplan before it is finalised.

Many thanks,

The Masterplan Team

There are 8 questions in this survey

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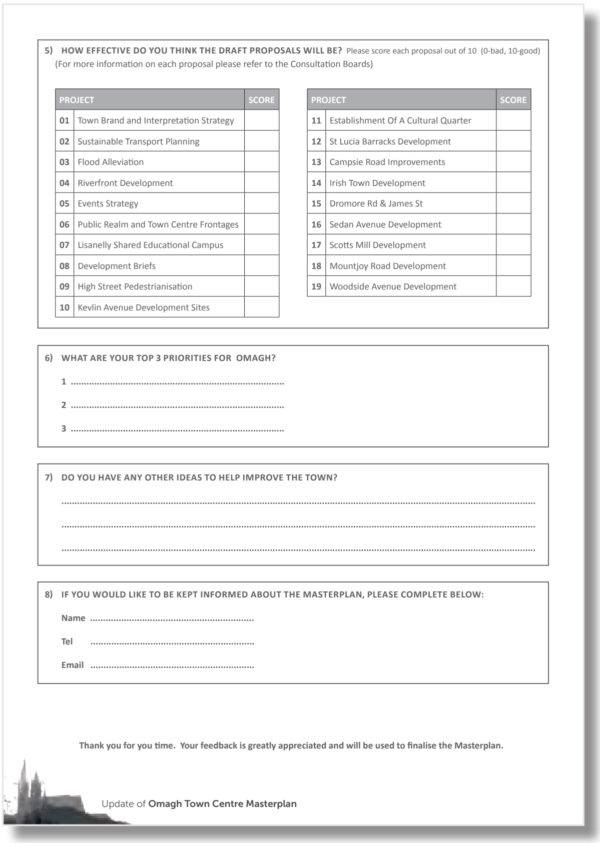

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6) WHAT ARE YOUR TOP 3 PRIORITIES FOR OMAGH?

1 ……

2 ……

3 ……

7) DO YOU HAVE ANY OTHER IDEAS TO HELP IMPROVE THE TOWN?

8) IF YOU WOULD LIKE TO BE KEPT INFORMED ABOUT THE MASTERPLAN, PLEASE COMPLETE BELOW:

Name ……

Tel ……

Email ……

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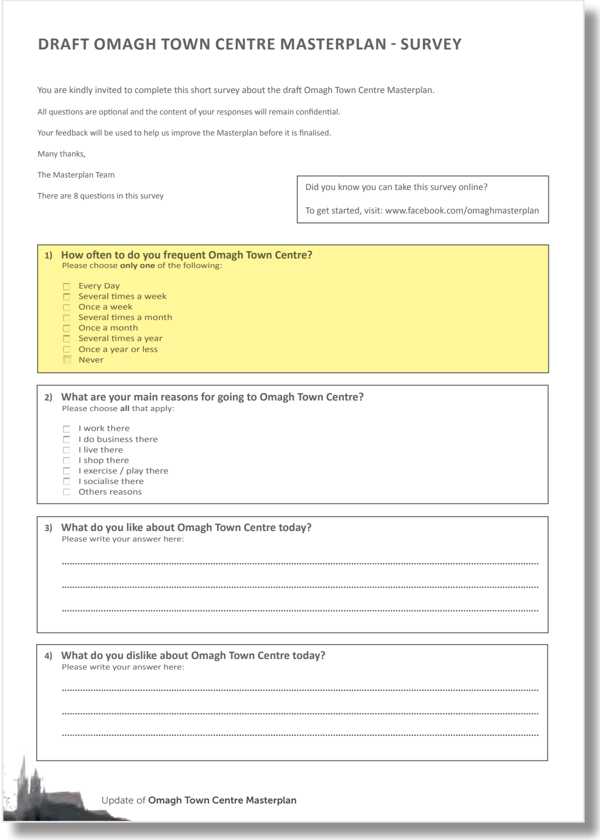
Update of **Omagh Town Centre Masterplan**

126 Completed Questionnaires



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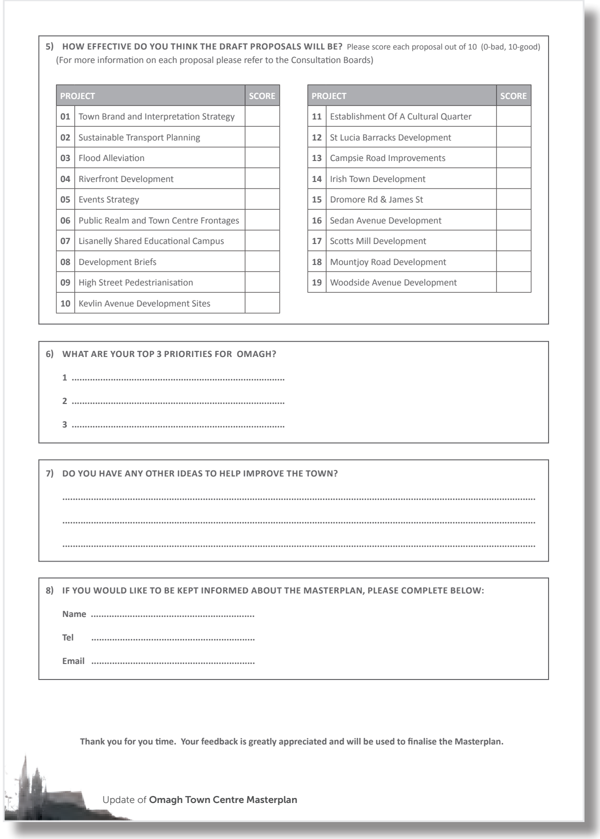

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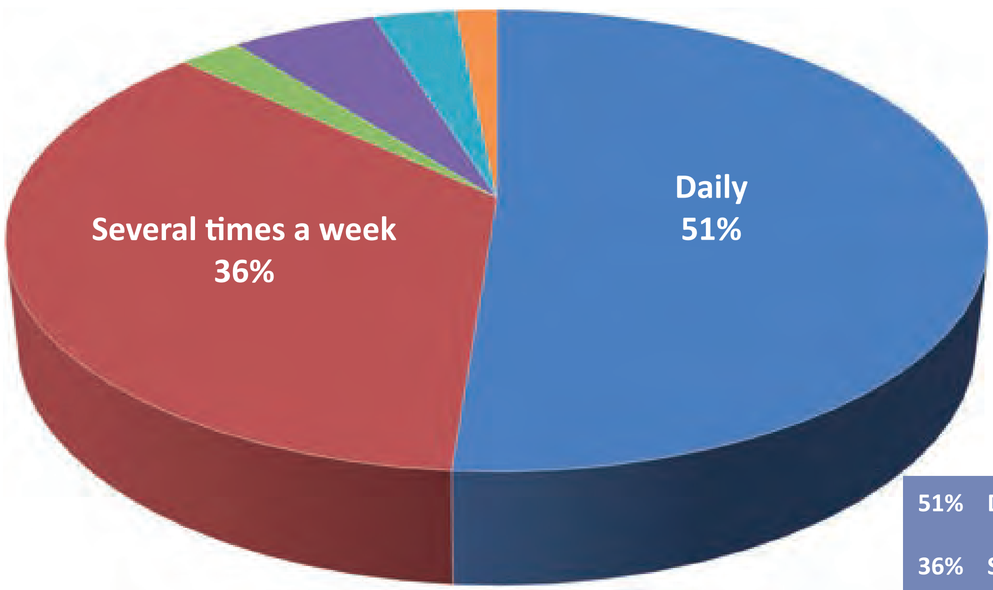

51%	Daily
36%	Several times a week
2%	Once a week
6%	Several times a month
3%	Once a month
2%	Several times a year

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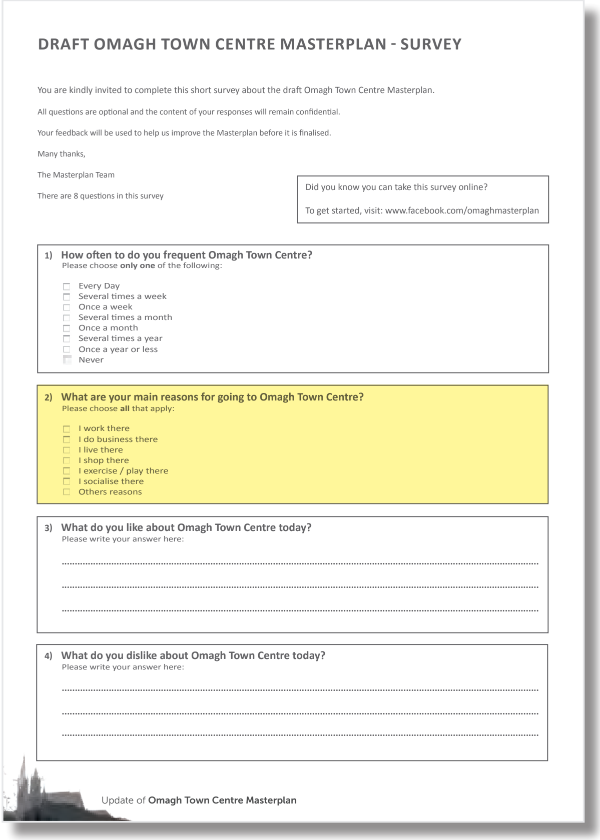
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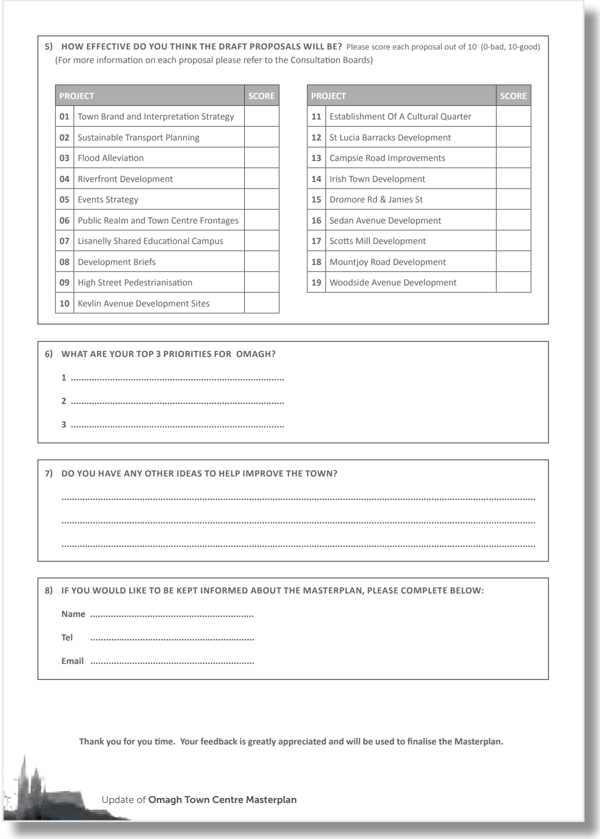
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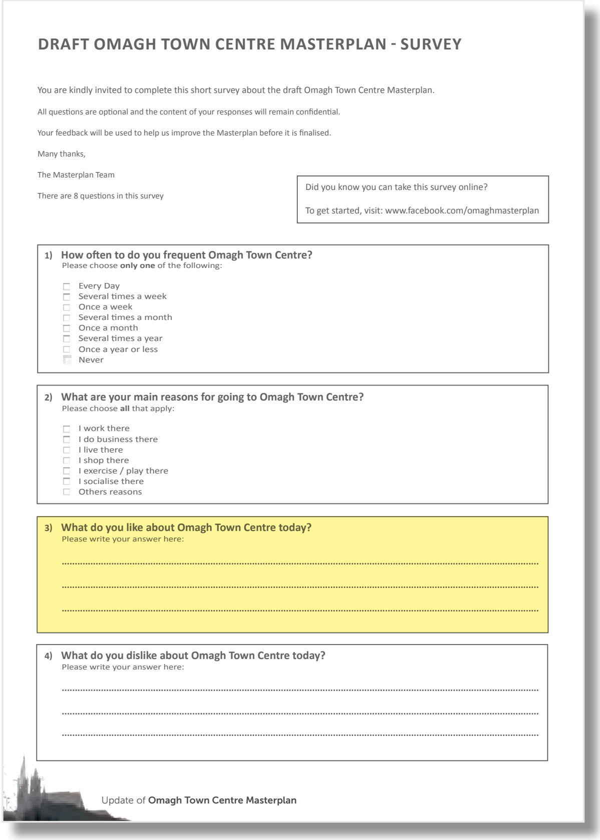

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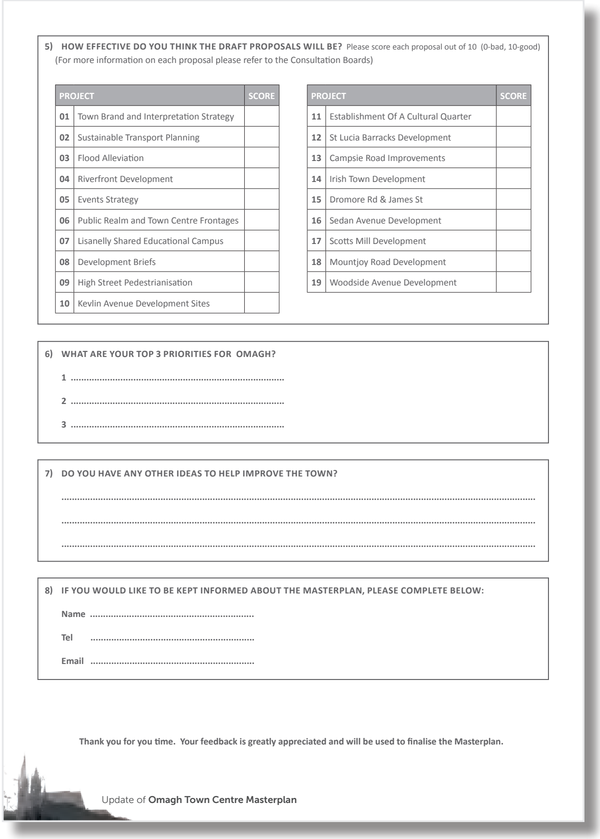

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Update of **Omagh Town Centre Masterplan**

Q.3 WHAT DO YOU LIKE ABOUT OMAGH TOWN CENTRE TODAY?

TOP TEN LIKES

22 Good variety of shops

21 Attractive, clean and safe

11 Quality street lighting

11 Footpaths are easy to navigate

10 Quality built environment (particularly the Courthouse)

7 Strong community spirit and friendly people

5 Strong arts scene in the town

4 River

4 Good daytime eating and places to go out at night

3 Busy Atmosphere

Q.3 WHAT DO YOU LIKE ABOUT OMAGH TOWN CENTRE TODAY?

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Update of **Omagh Town Centre Masterplan**

Q.4 WHAT DO YOU DISLIKE ABOUT OMAGH TOWN CENTRE TODAY?

TOP TEN DISLIKES

42 Lack of parking

24 Vehicular congestion

14 Poor retail choice - too many service type outlets

14 Uneven, broken footpaths

11 The new footbridge

9 Unattractive buildings

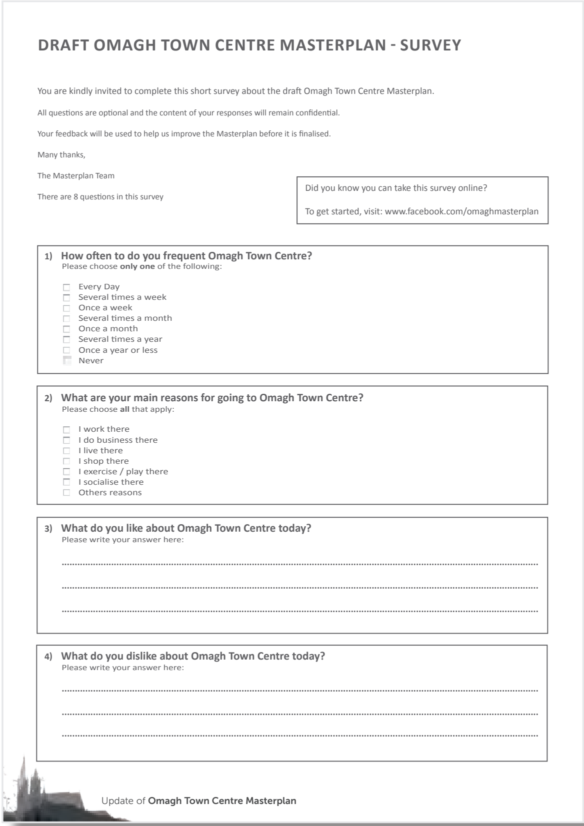
5 River frontage is underutilised

4 Litter on the streets at weekends

4 Poor evening / night-time economy

4 John Street is particularly run-down

Q.4 WHAT DO YOU DISLIKE ABOUT OMAGH TOWN CENTRE TODAY?



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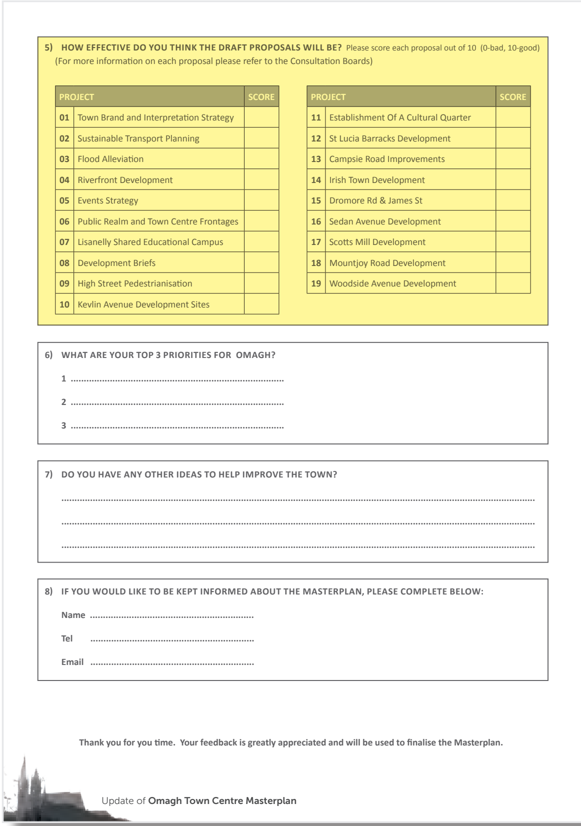

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Q.5 HOW EFFECTIVE DO YOU THINK THE DRAFT PROPOSALS WILL BE?

4/10 Town Brand and Interpretation Strategy

5/10 Sustainable Transport Planning

4/10 Flood Alleviation

5/10 Riverfront Development

5/10 Events Strategy

5/10 Public Realm and Town Centre Frontages

5/10 Lisanelly Shared Educational Campus

4/10 Development Briefs

4/10 High Street Pedestrianisation

4/10 Kevlin Avenue Development Sites

4/10 Establishment Of A Cultural Quarter

4/10 St Lucia Barracks Development

4/10 Campsie Road Improvements

4/10 Irish Town Development

4/10 Dromore Rd & James St

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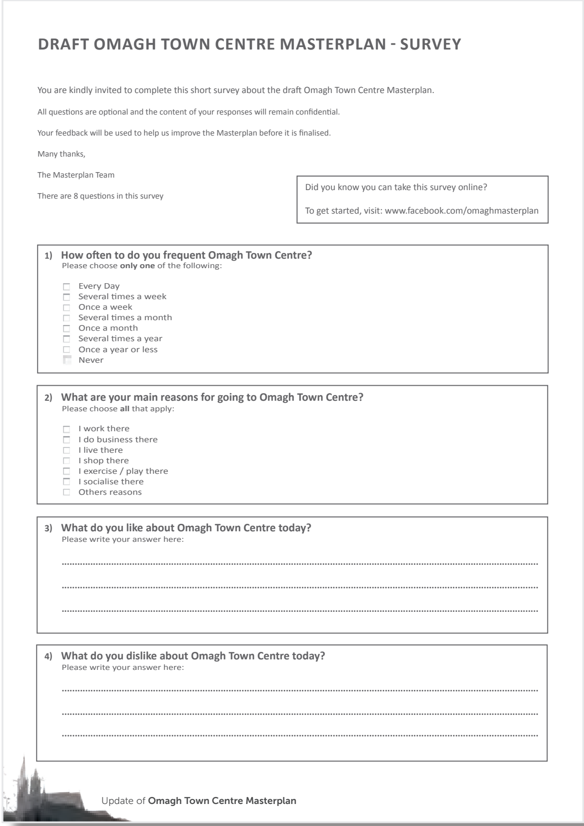

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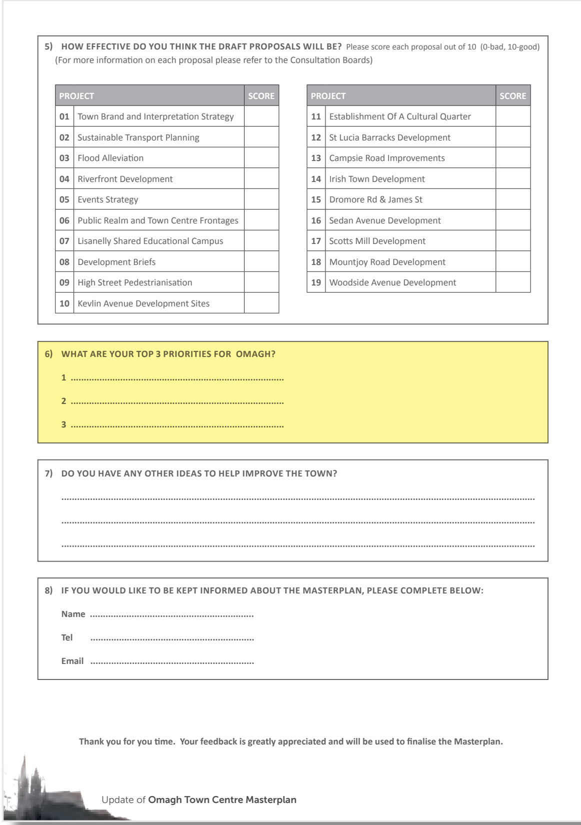

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Q.6 WHAT ARE YOUR TOP 3 PRIORITIES FOR OMAGH ?

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2 Sustainable Transport Planning 42

3 Riverfront Development 25

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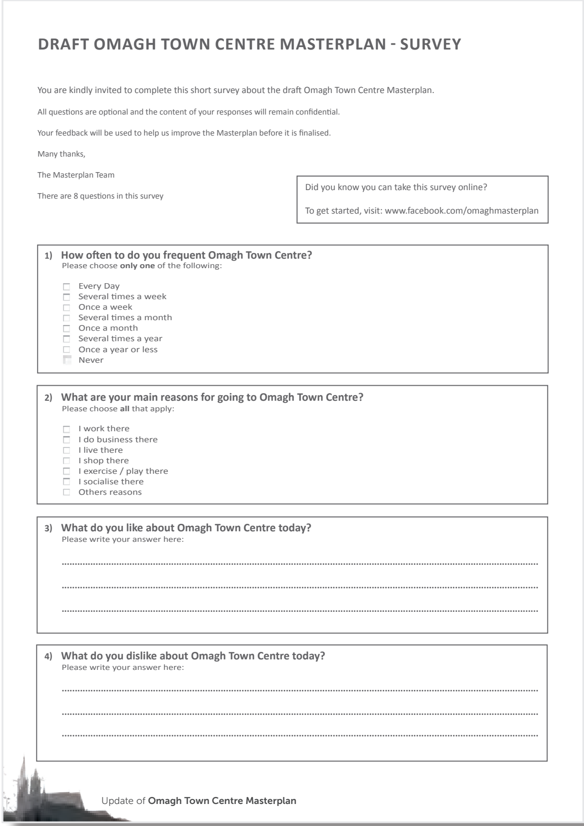

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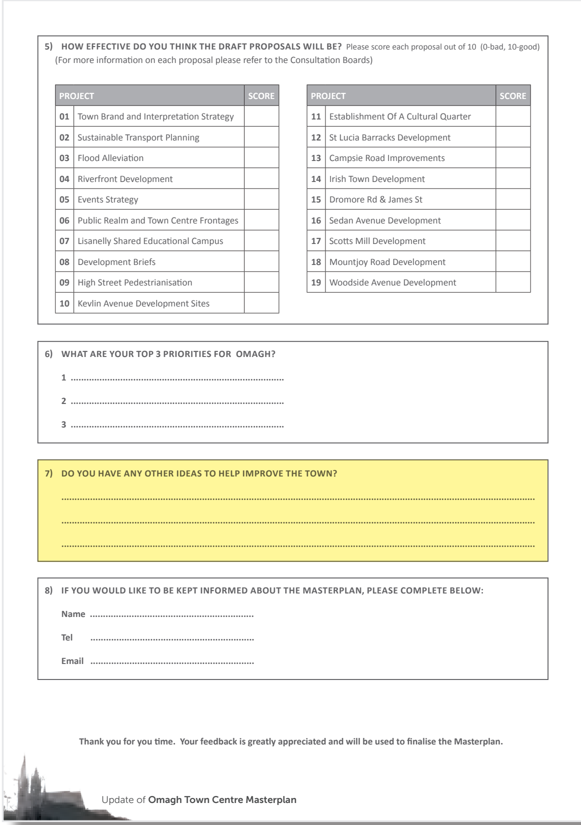

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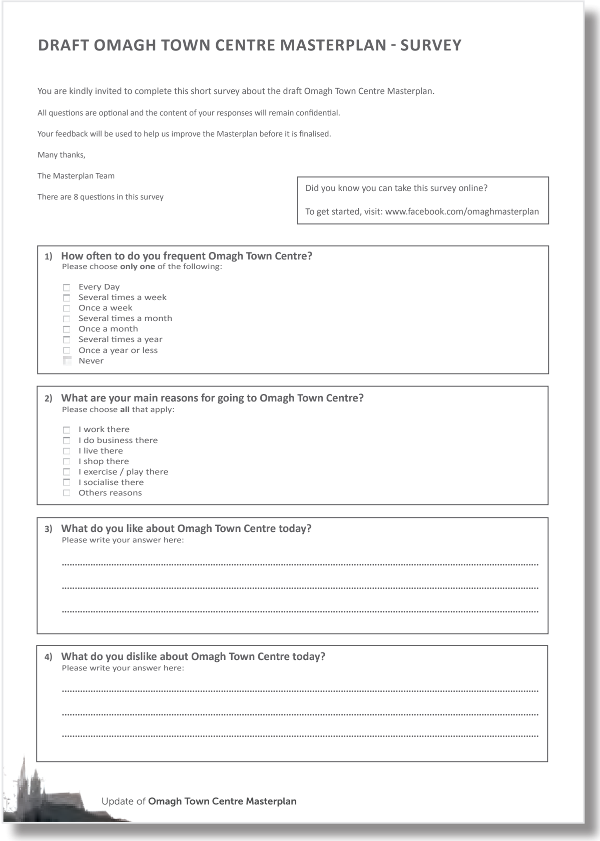
Q.7 DO YOU HAVE ANY OTHER IDEAS TO HELP IMPROVE THE TOWN?

- Enhance evening/night-time economy (restaurants, entertainment, events, festivals)
- Attract additional visitors and enhance accommodation provision (coach parking, motorhome provision, additional hotel provision - Loreto Convent)
- Develop more activities/facilities for young people (football, bowling, skating)
- Investigate opportunities to extend the proposed pedestrianised area from Dublin Road to Bridge Street
- Enhance approach roads and arrival points into Omagh. Replicate the tree-lined approach along Mountjoy Road
- Restrict vehicular access on John Street on weekend nights
- Reintroduce LOTS scheme in the town centre
- Conduct a lighting strategy to promote key buildings and spaces
- Improve vehicular directional signage throughout the town
- Reintroduce street markets and fairs
- Reduce rates to help existing and attract new traders
- Provide public toilets that are accessible at night time
- Create a new footbridge to link Showgrounds with High Street
- Enter the Tidy Town competition to motivate environmental improvement works
- Develop a second official taxi rank on Kevlin Avenue

Q.7 DO YOU HAVE ANY OTHER IDEAS TO HELP IMPROVE THE TOWN?



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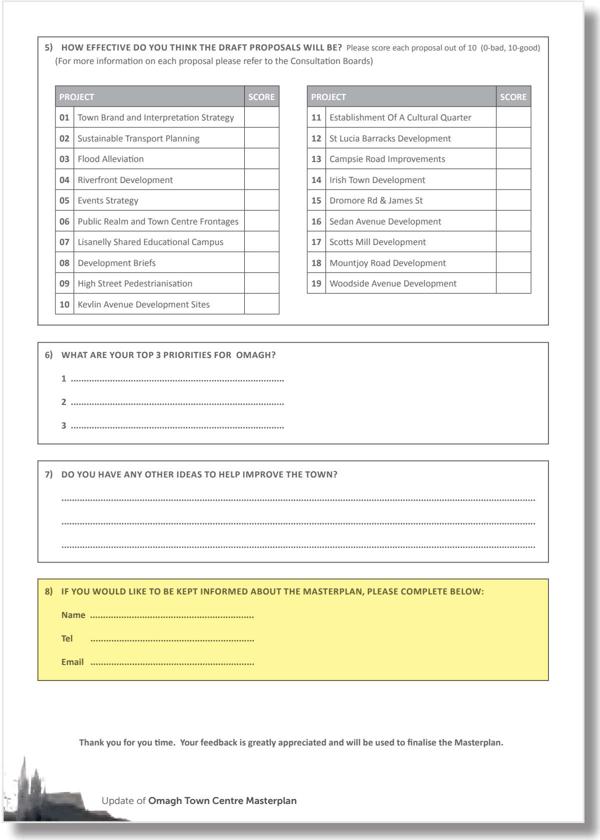

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Q.8 WOULD YOU LIKE TO BE KEPT INFORMED ABOUT THE MASTERPLAN?

62

Q.8 WOULD YOU LIKE TO BE KEPT INFORMED ABOUT THE MASTERPLAN?

Written Submissions

No objections in principle to any of the proposals

TNI believe that the road proposals are not driven by current transportation needs and as such they would not lead project delivery.

Further Traffic Impact Assessments would be required before any proposals are taken forward.

Retain and promote the architectural and historical character of Lisanelly and St. Lucia

Implement pedestrianisation on Market Street and ensure appropriate disabled access is provided

Investigate opportunities to establish a Civic Centre and Museum at St. Lucia

Promote the Council's aspirations for City Status

7 Written Submissions

Provide disabled access across all streets and pathways with dropped kerbs at all crossing points.

Develop wheelchair access points at Gortin Lakes

Increase disabled parking bays in the town centre and better police existing disabled bays

Provide a shuttle bus to encourage town centre workers to park outside of town

Improve signage throughout the town for people with visual difficulties

Introduce disabled toilet facilities as part of riverfront development

Provide disabled accessible spaces at events

7 Written Submissions

The Masterplan should highlight the contribution entrepreneurs and small businesses make to local economies

Develop an Enterprise Hub in the town centre complementing existing town centre facilities and contributing to commercial activity

7 Written Submissions

Create a walking/cycling route from the town centre to Gortin Forest, the Ulster American Folk Park, Gortin Lakes and Gortin village utilising existing rights of ways were possible.

Extend the existing cycle path on the Gortin Road from Gortnagarn to Gortin village.

7 Written Submissions

It is unclear what is meant by “Outdoor Omagh”

If walking and cycling routes are to be improved there will have to be less space for motor vehicles. The “recreational” type footpaths on their own are not enough.

The Masterplan will make a constructive contribution to the debate regarding the strategic vision for the future of the town.

The Masterplan has been the subject of only very limited consultation and lacks buy-in from the local community.

In the absence of a clear strategic vision, it would be premature to proceed with the Masterplan.

7 Written Submissions

2. SUSTAINABLE TRANSPORT PLANNING

- Review wayfinding and vehicular directional signage
- Investigate merits associated with:
  - restricting vehicular access on John Street on weekend nights
  - developing a second official taxi rank on Kevlin Avenue

4. RIVERFRONT DEVELOPMENT

- Investigate opportunities to provide enhanced activities/facilities for young people

5. EVENTS STRATEGY

- Rename ‘Tourism and Events Strategy’
- Augment strategy with targeted actions to:
  - increase visitor numbers through enhanced infrastructure and accommodation provision
  - enhance the evening/night-time economy
  - reintroduce street market and fairs
  - enter ‘Tidy-Town’ award schemes to animate local communities

6. PUBLIC REALM AND TOWN CENTRE FRONTAGES

- Undertake a review to ensure appropriate disabled access provision throughout the town
- Incorporate a lighting strategy within this proposal to promote key buildings and spaces

Supplements

ARRIVAL POINTS AND APPROACH ROADS

LOTS (LIVING OVER THE SHOPS) STRATEGY

TOWN CENTRE BUSINESS STRATEGY

- Investigate opportunities to provide incentives for new retailers and start-up businesses
- Establish a town centre enterprise hub

Additional Proposals

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Priority Proposals

Appendix 8

Masterplan Estimate Costs

MASTERPLAN ESTIMATE COSTS

Town Brand and Place Marketing Strategy

- £61.5k

Sustainable Transport Planning

Measure	Details	Costs	Comment
Enhanced foot / cycle paths	Majority of SRTP 2015 blueprint still to be implemented. We also note that Transport NI 2015 – 2017 Draft Programme (20th Nov 2014) proposes 2 paths that appear to be additional to the SRTP: 370m path linking Dublin Road with Crevenagh Road and 115m path to link Riverview Road with Donaghanie Road.	Walking - £1,000,000 Cycling - £275,000	Cycling consists of £165,000 from SRTP and £110,000 from the Transport NI draft programme. Does not include OAYSIS bridge as this is development funded.
Crossing on Great Northern Road	The GNR impacts on walking opportunities (severance) but there is little scope to provide an at grade crossing due to the difference in ground level to north and south of the road. Any crossing would need to be a grade separated and likely in the form of a footbridge.	£1,000,000	Location of a footbridge is challenging. Possibly the only location would be from Townview Ave (north) to Omagh Academy when it moves to Lisanelly.
Cycle Parking	1 stand – Approx £100	6 x 4 sets of stands around town centre - £2,400	Each stand provides parking for 2 bikes. This is an assumed requirement, providing parking for 48 bikes in total (in addition to parking for a hire scheme).
Town Bike Hire Scheme	£150,000 start up cost	£150,000	This should allow the scheme to run for up to 3 years. Thereafter, it would need to rely on revenue from membership and advertising / sponsorship.
Improved Bus Service to Key Destinations	Assuming this could be covered by a new shuttle service from town centre. Services typically need to be subsidised for a minimum of 3 years.	£225,000 (£75,000 per annum)	After 3 years, the service would need to be self reliant or without further subsidies, could be dropped.
Evening Bus Services	£75,000 per annum per service Assume 2 services to ensure good connectivity to town centre Subsidised for a minimum of 3 years	£450,000	After 3 years, the service would need to be self reliant or without further subsidies, could be dropped.
Coach Parking	Assume lay-by(s) for 2 coaches	£35,000	
Strategic Parking (edge of Omagh)	Assume surface parking. 6 locations £2,500 per space and 100 spaces at each car park.	£1,800,000	This cost does not include the acquisition of any third party land or future maintenance costs.
Improved Signage	Variable Message Signs (VMS) on key gateway routes (assume 6 signs) Static signs to complement VMS (8 directional) Set up fee for VMS system	£84,000	£10,000 per VMS sign, £500 for static sign (includes labour) and £20,000 set up cost.
Improvements to existing roads and streets	SRTP 2015 blueprint indicted highway cost of £4,456,000. We understand the majority of the blue print has still to be implemented. The Strathroy Link Road was also included in the blue print, but this is now being funded predominantly by the Education Board (£6million plus £1million from Transport NI). Blue print also included Park and Share which is now constructed.	£2,500,000	This is difficult to estimate but includes Winter's Lane link, Kevlin Avenue Link and improvements to a number of town centre junctions. We would note that the original SRTP blueprint appears to have been vastly under estimated as we understood it included the Strathroy Link Road. This does not include a new link adjacent to Scotts Mill site as this would be development funded.

Flood Alleviation

- £2.7-2.8M
- An allowance of £1.1M has been included for floodplain works.
- We have assumed a timber deck boardwalk 1000m long, piled at 5m intervals.

Riverfront Development

- £32-32.5M
- An allowance of £500k is included for each pedestrian footbridge.
- The riverside and cantilevered pathways have been assumed 2m width. Costs are for surfacing only and excluded all drainage alterations.
- We note we have included an indicative allowance of circa £500/m for cantilevered riverside path. Costs associated with this path will be largely dependent on the type of cantilevered structure proposed and the structure which it is being cantilevered against.
- Lighting to one side of all riverside paths has been included (1nr every 20m).
- A handrail has been included to one side of riverside pathways.

Events Strategy

- £28k

Town Centre Business Strategy

- £25k

Public Realm and Town Centre Frontages

- £7M-7.2M
- We assume a footpath width of 2m. We assume a road width of 7m.
- We have assumed high quality paving. We have assumed asphalt resurfacing works only to the road.
- An allowance of £50/m2 for fascade improvement works has been included.
- Lighting to one side of the road has been included (1nr every 20m).

Living over the Shops (LOT'S) Strategy

- £10k

Lisanelly Shared Educational Campus

- £120M (approximately)

Development Briefs

N/A

High Street Pedestrianisation

- £650-750k
- We have assumed high specification paving to an area of 1,400m2.

Kevlin Avenue Development Sites

(To be confirmed following complretion of ongoing piece of work)

Establishment of a Cultural Quarter

- £10k

St Lucia Barracks Development

(To be confirmed - based on detailed Masterplan for this site).

Campsie Road Improvements

- £810k-820k
- We have assumed high quality paving enhancement.
- We have assumed 2m wide footpath on each side of the road.
- We have assumed the roadway is 7m wide. We have assumed resurfacing works only to the road.
- Lighting to one side of the road has been included (1nr every 20m).

Irishtown Development

- £30.5M-31M
- We assume no demolition works are required.
- We have assumed 2m wide resin bound footpath each side of the road.
- We have assumed the roadway is 7m wide.
- Lighting to one side of the road has been included (1nr every 20m).
- No allowance is included for any external works to new build properties.

Dromore Road and James Street

- £250k
- Upgrade to SCOOT control (£150,000 - £200,000)
- Localised widening of James Street (£50,000 excluding any third party land and utility costs)

Sedan Avenue Development

- £32M-32.5M
- A nominal allowance of £50k has been included for demolition works.
- Assumed new 3 storey college.

Scotts Mill Development

- £14.4M-14.5M
- We have assumed 2m wide resin bound footpath each side of the road.
- We have assumed the roadway is 7m wide.
- Lighting to one side of the road has been included (1nr every 20m).

Mountjoy Road Development

- £77.8M-78M
- We note all costs associated with acquiring addition land, removal of existing structures, and all facilitation works necessary to enable the construction of the new road and cycle path are excluded.
- Assumed medium specification pavements (2m wide to both sides of the road) to enhanced area of paving as requested. We have assumed road resurfacing (asphalt) only in this area. We have assumed the road is 7m wide.
- We have assumed road widening of 2.5m wide to one side of the road only. Of this 2.5m, we have assumed 2m wide cycle lane and 0.5m footpath (medium specification paving).
- We have assumed trees 1nr every 10m.
- Lighting to one side of the road has been included (1nr every 20m).

Woodside Avenue Development

- £37.3M-37.5M

Arrival Points

- £870k-900k
- Primary Arrival Points;
  - An allowance has been included for the following works at each Primary arrival point;
  - £20,000 Signage
  - £20,000 Soft landscaping improvements- allowance only
  - £5,000 Planter
  - £50,000 Art work
  - £5,000 Say 5nr uplighters
- Secondary Arrival Points
  - An allowance has been included for the following works at each Secondary arrival point;
  - 20,000 Signage
  - 10,000 Soft landscaping improvements- allowance only
  - 5,000 Planter
  - 2,500 Art work
  - 5,000 Say 5nr uplighters
- All environmental improvement works along approach routes to arrival points are excluded.

Generally;

- Costs are for budgetary purposes only and prepared on an estimated basis only. All information upon which this estimate has been prepared is presently indicative.
- Costs have been developed from TPHC drawings received 11th February 2015 and discussions with TPHC at our meeting 11th February 2015 and subsequent query sheets.
- Costs exclude VAT, professional and statutory fees.
- Estimate is considered current at February 2015. There is no allowance for future inflation.
- This estimate does not attempt to cover all items that may be required on site.
- Costs exclude litter bins/street furniture etc.
- All retail costs included within any of the above cost allowances, are shell only costs.
- All office costs included within any of the above cost allowances are shell only costs.
- All costs associated with asbestos removal/contamination etc are excluded.
- All costs associated with land acquisition are excluded.
- Costs associated with planning permission, statutory charges, CEEQUAL Registration and all site surveys are excluded.
- Drainage, infrastructure upgrades and service diversions are excluded.

Appendix 9

Place Marketing Strategy

OMAGH TOWN CENTRE MASTERPLAN

Place Marketing Strategy

FIRST DRAFT

February 2015

Prepared By

Place Solutions
Regeneration and Tourism Consultants

DSD
Department for Social Development
www.dsdni.gov.uk

Omagh
DISTRICT COUNCIL

CONTENTS

1. Place Marketing – a collaborative approach

Successful Place Marketing is not just about designing a brand logo or strap line, but is about reaching a consensus among all stakeholders from the public, private and community sectors on the specific issues of identity, image, product development and competitive position of Omagh town centre as a destination. It should create a culture of innovation and collaboration across all stakeholders and provide the overarching strategic and delivery framework for future development projects, firmly positioning Place Marketing as an integral part of the regeneration agenda and must exploit the potential for tourism and drive economic growth through the creation of a sustainable competitive advantage. It will deliver the regeneration aims and objectives, particularly in retaining the unique identity, increasing customer dwell time and creating a sustainable competitive advantage and real potential for economic growth through increased footfall and consumer spend.

The Place Marketing Strategy for Omagh town centre effectively combines its personality, values, assets and experiences. It will reflect the importance of the town's relationships, whether ancient or recent, with its landscape setting, with the nearby Sperrins and American Folk Park, the farming traditions, rivers and emerging renewable energy sector. This will define Omagh's distinctive tourism, retail and hospitality provision, adding value to existing and potential developments/initiatives and having an increasing resonance with other sectors including education, enterprise and healthcare.

While the Department for Social Development (DSD) and Omagh District Council have had a crucial leadership role in driving the masterplanning process so far, the responsibility for the long term success and sustainability of the Place Marketing Strategy lies with everyone in the town, including local businesses, hospitality providers, young people and local community groups. This Place Marketing Strategy sets out how all stakeholders can work together to launch and develop a strong brand proposition, and sets out exactly who will do it, how they will do it, what resources they will need and when it needs to be done by. It is collaborative, yet ambitious in its approach. It will take place during a period of great change, as radical reform of local government will give local communities more ownership, with the ability to shape decisions through the Community Planning process and work closely with the local Council on planning, economic and tourism development issues. The Place Marketing strategy will also have a crucial role in galvanising civic pride, ownership and passion for the place.

2. Wider Strategic Context

It was vital for the credibility and future sustainability of the Place Marketing Strategy, to carefully consider the town centre within the wider strategic context for the regeneration, tourism and economic development. This will be particularly important under the Review of Public Administration (RPA). Omagh District Council will amalgamate with Fermanagh District Council from 1st April 2015. The new Council will take on new urban regeneration, economic development, tourism and community planning, which will impact considerably on the future development of our towns and cities. The Place Marketing Strategy for Omagh will carefully position Omagh within the wider offer for the new Council area, which includes Enniskillen and the smaller towns and villages. Careful consideration will need to be given to Omagh and its role within the Sperrins destination, as designated in the Draft DETI Tourism Strategy for Northern Ireland. The current Review of NITB and Existing Tourism Structures, commissioned by DETI will have a considerable impact on how we market at a regional and local level. The focus on creating a unique visitor experience to create a competitive advantage, known in the tourism industry as "Experiential Tourism", will be an important consideration for the stakeholders in Omagh town centre and will be key to shaping the new brand identity. The Tyrone and Sperrins Destination Plan provides an overarching strategic framework for tourism development in Omagh town centre. The vision for the Tyrone and the Sperrins is:

"The natural Irish outdoors – an inspirational, iconic and ancient landscape where adventure is the everyday and every journey unearths our culture."

The Destination Management Plan, highlights the need to utilise the unique natural landscape of the area and key assets such as the Ulster American Folk Park and Gortin Forest Park as a hook from which to build experiential tourism opportunities which target niche markets, increase visitor numbers, dwell time and increased spend in the region. Two key projects being developed under the DMP include the development of a PR/Communications Plan to highlight the range of visitor attractions within the Tyrone and Sperrins, targeted at the Unique Outdoors and Family Fun markets.

3. Developing a Brand Proposition

Through the Masterplan Town Centre Health Check and Sectoral Reports on tourism, leisure, and the evening economy the stakeholders will have a clear perspective of the strengths and weaknesses of the town centre as well as the key opportunities for growth and barriers inhibiting growth. These will form the basis of the Unique Selling proposition. The opportunities for growth will contribute significantly to widening of the town's offer and its ability to position itself as a tourism destination. However the opportunities identified will also need to benefit the resident population first and foremost, as tourism development in its own right is difficult to sustain in the current climate and wider tourism growth projections.

Opportunities for growth

- Proximity to the Sperrins and a potentially compelling offer for visitors- heritage based tourism alongside the wider "Tyrone experience"

- Strule Arts Centre is a unique hub for the development of a vibrant arts scene and interpretation of the area's history and culture. This development has the potential to transform the perception of Omagh as a cultural and historical "hub" and will act as a flagship project to galvanise the future development of tourism in the town. It will clearly position and differentiate Omagh within the wider regional and national tourism offer and link to priority pillars such as Living Legends.

- Ulster American Folk Park. The town centre is only four miles from this key visitor attraction yet, historically, has failed to capitalise on this. The creation of a compelling visitor offer, supported by high quality infrastructure, particularly coach tour and visitor parking provision, visitor services and hospitality offer and driven by branding and marketing would capitalise on this advantage, particularly for the day trip market.

- Position relative to City of Derry and Fermanagh Lakelands. Omagh has a strong geographical advantage as the mid-way point between the city of Derry and the Fermanagh Lakelands. The town needs to improve its infrastructure and service offer and market itself as a stop –off point between these two locations. If the town is able to effectively differentiate its offer from that of the two cities, this role will be further enhanced.

- Riverfront development. The tourism potential afforded by comprehensive and imaginative development of the riverfront would have an immense impact on the town's potential for tourism growth. Current river front development has highlighted the vital importance of harnessing the development in such a way as to link the central core of the town to the river, instead of its current position with its back to the river. The masterplan could galvanise and provide a platform for these plans to develop.

- Outdoor activities. The positioning of the Sperrins as an area for outdoor activity presents an opportunity for the town to accommodate this market and become an active service and retail centre for this high spending market.

- The achievement of Purple Flag accreditation will enhance the reputation of the Evening Economy and overcome issues around perception of safety.

Current Weaknesses inhibiting growth

- No significant visitor accommodation i.e. boutique hotel, youth hostel, guest house provision in the town centre itself. The development of a boutique style hotel, either as part of a comprehensive development of the riverfront or conservation area, of at least 3 star standard would have the best opportunity of success in today's market. There is also a lack of quality 5 star self- catering accommodation. This could be aimed at the outdoor activity market and positioned within the town centre to support hospitality and retail.

- No critical mass of night time economy facilities that will appeal to visitor market. The cinema complex is just outside the centre. The Strule Arts Centre has not attracted many additional services i.e. bar and restaurants that would typically co-exist with these attractions. There was no evidence of joint promotions with the cafes/ restaurants that do exist in the area.

- Traffic system is difficult to navigate and confusing to the visitor

- Orientation and signage to town centre car parking is weak

- Lack of cohesive branding and marketing message will continue to inhibit competitiveness in the market place. It is vital that the opportunities for tourism growth are developed within a wider Place Marketing Strategy for the town centre. They will allow the town to re-position itself and develop the key opportunities such as cultural and historical hub and enhance its reputation as the key service and retail centre for the region.

- Poor sense of arrival at key gateways.

- No public/private integrated Delivery Structures. In order to effectively drive forward opportunities for growth, public and private sector need to effectively work together to package and promote the tourism offer and champion tourism development. Tourism must be effectively integrated with the wider economic development and tourism strategies for the town and the wider region. Tourism delivery structures will need to be addressed through the new Council structures and linked to the review of DETI Tourism Development Strategy for NI.

- No clearly identified Visitor Markets. Omagh must concentrate on specific target markets as a framework for effective, robust and viable destination marketing, promotion and branding.

It is vital that the opportunities for growth are developed within a wider Place Marketing Strategy for the town centre. From the analysis of the strengths and weaknesses of Omagh as a visitor destination and the opportunities that have been identified, Omagh should re-position itself as a cultural and outdoor activity hub within the Sperrins destination, building on its existing reputation as the key service and retail centre for the region. There is tremendous scope to build on the established Sperrins branding and achieve cost efficiencies through partnership working with the various agencies and the private sector involved in wider marketing and promotional activity.

In the Tourism Sectoral Report we highlighted Cumbria, in the Lake District, as a useful Case Study in this context. The vision for Cumbria is that "in 2018 Cumbria, as well as being known for world class landscapes, will have an unrivalled reputation for outdoor adventure, heritage and culture, with a year round programme of events. Our accommodation, our food, our public realm and our customer service will reinforce our reputation as the number one rural destination in the UK."

Cumbria's unique position as a strong brand and its ability to exploit "staycation" trends and promote the area's assets– getting away from it all, rest and relaxation, stunning scenery, pretty villages, free attractions and outdoor activities including walking and cycling attract visitor spend in excess of £1 billion per annum. A major tourism investment programme was undertaken to promote adventure tourism and to position Cumbria as the Adventure Capital of the UK by 2018.

This brief summary of the town's strengths and opportunities, realised through the masterplanning process, will start the process of reaching a consensus amongst the key stakeholders on the town's Unique Selling Points, which will form the basis of the Brand Proposition and the creation of a unique Brand Identity. Once consumers see this identity (in advertising, websites, printed material, etc.) they instantly get a sense of the place and what it has to offer.

4. Target Markets

The Place Marketing Strategy is targeted at two specific groups. First and foremost the brand must be understood, adopted and championed by **local people**. The local community not only epitomise the core brand values, but will act as brand ambassadors, selling it much more effectively than any media campaign or marketing strategy ever will. The brand values will help to engender a sense of civic pride, ambition, optimism and ownership of the place we all come home. It is much more than an economic or marketing tool. This will give the place Marketing Strategy authenticity and sustainability over the longer term.

NITB NI Tourism Priorities for Growth published in 2012 identifies **Experience Pillars** and **specific market segments.** The key pillar for Omagh town centre, which is closely aligned with those of the wider Sperrins destination, falls under the **Unique Outdoors**. The key prospects in terms of market segments are set out in the table below.

Category	Visitor Focus	Key Words	Markets
FAMILY FUN	Value for money offers Family Accommodation Cafes, Activities	Fun, quality time, safe, child orientated attractions and entertainment, memories	NI ROI
CULTURALLY CURIOUS	Curiosity Authenticity Insight Independence Immersion in culture Off the Beaten Track	Broadening the mind Active sightseeing Historic buildings and attractions World heritage sites Artisan food Events	GB
GREAT ESCAPERS	Breath taking landscapes, Ancient sites, Remote places, Landmarks, Restaurants offering fresh, local food, Authentic pubs	Slow travel, relaxation, rebalancing, getting away from it all, connecting with family	GB

5. Place Marketing Strategy

The Omagh Place Marketing Strategy will encompass all stakeholder marketing activity. The aim of the strategy is

"To work in partnership to develop a unique identity and agreed brand proposition, based on the "Outdoor Omagh" theme of the masterplan, which will competitively position and differentiate Omagh town centre.

The **objectives** of the Place Marketing Strategy are

- To build an agreed brand proposition for Omagh Town Centre.
- To increase the profile of Omagh Town Centre as a visitor destination.
- To co-ordinate the marketing and promotion of Omagh Town Centre.
- Develop this branding into a co-ordinated programme of marketing and promotional activities / events.
- Ensure the marketing of Omagh Town Centre is sustainable.

The key **outputs** of the Place Marketing Strategy are

- To increase footfall into Omagh Town Centre.
- To increase consumer spend in Omagh Town Centre.
- To reduce retail leakage and strengthen the local economy.

The Place Marketing Strategy sets out a phased approach to be delivered over a two year period. The key stages are

1. Delivery and Resourcing
2. Developing the Brand Proposition
3. Communication and Ownership
4. Marketing Collateral
5. Annual Integrated Marketing Strategy

The specific actions and indicative budgets associated with each phase are set out overleaf:

1. Delivery and Resourcing

The Place Marketing Strategy will be a collaborative process involving all sectors of the community. This will be achieved through the appointment of a representative Omagh Marketing Working Group**,** who will become the delivery body for all future Place Marketing activity. The role of the group is that of a coordinating authority, overseeing the development of the brand and taking ownership of the brand launch and roll-out. This should be set up as part of existing local town centre management function, but must take cognisance of the wider marketing activity being delivered by the new Council in a post RPA environment. The Marketing Group also needs to be an integral part of the wider masterplan implementation group. Effective communication between the public and private sector will be a crucial success factor and will ensure that local marketing activity reinforces and benefits from the overarching marketing activity for the destination. The key actions are;

No.	Action	Timescale	Responsibility	Cost	Funding Source
1a	**Establish a Working Group (working title Omagh Marketing Group OMG)** identify a working group of individuals and key stakeholder groups representing a broad cross section of community, commercial, educational, cultural and political interests within the town centre.	May 2015	FODC	Staff resource	
1b	**Establish protocol and procedures for working with the Council's development team,** particularly marketing and tourism functions to ensure integration with wider marketing activity.	May 2015	FODC	Staff resource	
1c	**Develop a Terms of Reference for Branding Exercise** which articulated the rationale and the wider place marketing strategy and positions the town within wider Tyrone and Sperrins and NI tourism branding and marketing framework.	June 2015	FODC	Staff Resource	
1d	**Secure budget for branding and marketing** (see funding section) and integrate the branding concept into the town centre masterplanning process to ensure future development activity reflects and builds on the brand values.	June 2015	OMG/FODC	Staff Resource	
1e	**Instigate Procurement Process** through discussion with Council and representative bodies	June 2015	OMG/FODC	Staff Resource	

2. Developing the Brand Proposition

It is highly recommended that this process is delivered professionally and is sufficiently resourced to ensure credibility and future sustainability and to ensure it is effectively positioned within the wider strategic context and relevant policy and strategies for Omagh and the wider tourism destination. The brand position will articulate the vision set out in the Omagh Masterplan and deliver the regeneration objectives. Future development plans arising out of the masterplan should articulate the brand values and Unique Selling Proposition for the town. Omagh needs to take advantage of the emerging opportunities to grow tourism revenue and position itself within the wider Tyrone and Sperrins offer.

Key Actions

No.	Action	Timescale	Responsibility	Cost	Funding Source
1a	**Marketing Audit** to examine how the town had been promoted in the past, what worked and what didn't and lessons learnt from the past.	Sept 2015	OMG	£1k	FODC
1b	**Omagh Experience** make a realistic and honest assessment of the "Omagh Experience". This exercise was vital to ensure that the emerging brand was set against realistic expectations about what the town can effectively deliver to future visitors. Even the most effective promotion will be unsustainable, if it results in poor visitor expectations when they actually get here.	Sept 2015	OMG	£1k	FODC
1c	**Stakeholder Engagement** will be a crucial to the on-going success and sustainability of the branding process. This will include all stakeholder groups including Council, Tourism bodies, Town Centre Traders, Tourism Providers and local community groups	Sept 2015	OMG	£3k	FODC
1d	**USP and Brand Hierarchy** reach consensus through a facilitated workshop on the USP and Brand Hierarchy for the town centre	Sept 2015		£4k	FODC
1e	**Brand Tool kit** design and produce an educational and inspirational presentational toolkit to be disseminated via projection, Ipad, hard-copy, branded USB and emailable PDF.	Sept 2015		£3k	FODC

3. Communication and Ownership

The people of Omagh will be providing authenticity to the brand proposition and Place Marketing Strategy. Our aim is that the brand will raise civic pride and create a common voice for the community in Omagh. First and foremost, the brand must be understood, adopted and championed by local people. The local community not only epitomise the core brand values, but will act as brand ambassadors, selling it much more effectively than any media campaign or marketing strategy ever will. The brand values will help to engender a sense of civic pride, ambition, optimism and ownership of the place.

Key actions

No.	Action	Timescale	Responsibility	Cost	Funding Source
1a	**Brand Ambassadors** identify inspirational individuals who represent Omagh's brand proposition and recruit them as Brand Ambassadors. Record their personal thoughts and discoveries on the area.	Oct 2015	OMG	Staff Resource	
1b	**Stakeholder Educational programme** To deliver a 3 month programme of education/ awareness building about the brand, what its stands for and the strategic process to identified audiences.	Dec 2015	OMG	Staff Resource	
1c	**PR Plan** planned PR activity will help disseminate the story of the brand and what it is trying to achieve in Omagh. This is a newsworthy story and should be picked up by daily, business and magazine media. Employ a professional PR company to prepare a proactive PR plan.	On-going	OMG	£5k	FODC
1d	**Launch** of brand to funders and key stakeholders and media. Incorporate with PR activity to tell the story of the Omagh brand as a good news story	Oct 2015	OMG	£1k	FODC

4. Marketing Collateral

To be effective, particularly in the early stages of introduction, the brand must be highly visible. Resources have been allocated to provide brand collateral to introduce and raise the brand profile within the town centre and wider NI market. It will also set firm foundations for the Integrated Marketing Plan. Other opportunities will arise over the year which should be capitalised and included in the plan.

No.	Action	Timescale	Responsibility	Cost	Potential Funding Source
1a	**Pop-up and rollups** design and produce a suite of 1 branded Pop-up and 2 rollups for use at events, workshops etc. a new suite of generic branded lamppost banners (x40)	Oct 2015	OMG	£4.5k	TBC
1b	**E marketing provision.** Develop an emarketing platform consisting of **website provision (smart phone, tablet and pc) and** rollout of free wi-fi with provision of landing page to act as key information portal for the town. Provision must include full spectrum of interactive visitor information and service provision. Fully integrated with links to other visitor information sites.	Dec 2015	OMG	£10k	TBC
1c	**Branded materials** design, production and print of branded window stickers, shopping bags, promotional leaflets and giveaways	Oct 2015	OMG	£2k	TBC
1d	**Photography** commission new photography to depict the buildings, environment, culture, history and personality of Omagh.	On-going	OMG	£3k	TBC
1e	**Events, animation and promotional support** identify opportunities to brand existing events in conjunction with Council and other partners including the private sector. Deliver animation/street entertainment on new oasis development an throughout the town centre	Annual	OMG	£10k	TBC

5. Annual Integrated Marketing Plan

An effective, targeted and imaginative Integrated Marketing Strategy will promote the brand proposition to the key target audiences and differentiate Omagh as a unique destination within the wider Tyrone and Sperrins and Northern Ireland offer. A draft costed annual Action Plan has been produced as a working document, which contains a full breakdown of each activity, with lead partner, timescale, costs and funding mechanism. Funding will come from public sources such as Council, DSD, NITB, etc. and also from joint promotions with the private sector.

No.	Action	Timescale	Responsibility	Cost	Potential Funding Source
1a	**Promotional and events calendar** prepare an online Promotional and events calendar which co-ordinates all events and activities in the District and highlights gaps on the calendar which need to be filled. Integration of Omagh into wider Tyrone and Sperrins and NI events such as restaurant week, cultural events and sporting events should be maximised.	Jan 2016	OMG	Staff resource	
1b	**Promotional Literature** design and print a Town Centre Guide (10k copies). This should have a quirky and informal feel with innovative design and presentation.	Jan 2016	OMG	£1k	FODC
1c	**Media campaign** integrated media campaign to include advertorial campaigns in press/ radio, billboard and bus advertising, media, online advertising campaign reaching identified target markets. This will be linked to events and key trading periods identified through the events calendar.	Annual	OMG	£13k	TBC
1d	**Social media** audience profiling and establishment of appropriate social media platforms. Development of social media strategy and communication protocols.	On-going	OMG	Staff Resource	
1e	**Customer service training** integrate brand into existing customer service and business support activity i.e. World Host	On-going	OMG	Staff Resource	

6. **Future funding**

Throughout the delivery plan and identified actions we have attempted to identify potential funding sources, as they exist at this stage. Given the period of change identified within the plan, it is vital to stress that funding avenues will undoubtedly change and evolve over the course of the plan. New opportunities will certainly emerge as a result of the changes in local government. The emergence of community planning and the transfer of regeneration and economic development responsibilities to local councils will present new opportunities. The ongoing review of the role of NITB, and how this will affect the destinations within NI will affect the existing funding regimes. The local economy is becoming more conducive to new business starts and supportive of small independent business, particularly in the creative industries sector. We would hope to see reflected in future economic development strategies from Invest NI, DCAL and local enterprise agencies. Funding avenues through the new Council budgets and structures will provide opportunities in the short term. Training and capacity building for small businesses supported by DEL and delivered by People First have a number of new programmes to be launched over the next few months such as World Host for retailers and Digital High Street programme, which can be adapted to contain a brand awareness element.

The policy context within Northern Ireland is also recognising the role of the private sector in supporting local economic development. The introduction of Business Improvement District (BIDs) legislation in Northern Ireland in June 2014 will include 7 pilot programmes across towns across NI. A BID is a business led funding mechanism, whereby local businesses vote on an agreed business plan to develop and promote their area (BID). If there is a majority voting on favour of the plan, then the legislation will require all businesses within the designated BID area to pay the levy, which is derived from the existing rateable value. This provides a sustainable funding scheme for various town centre initiatives including marketing. A BID will typically run for a 5 year period and has proven to be a highly effective sustainable funding mechanism for promoting private sector involvement. It is highly recommended that Omagh pursue this avenue of funding in the future.

The Omagh Marketing Group should be responsible for keeping abreast of changes and assessing how Omagh could maximise the opportunities which will undoubtedly arise.

7. Monitoring and Evaluation

The long term success of the Place Marketing Strategy will ultimately depend on the ability to demonstrate that sustained marketing activity has delivered measurable improvement to the economic performance and competitive position of the town centre. Marketing is also inextricably linked to wider regeneration initiatives delivered as part of the wider masterplan.

It is recommended that a series of key performance indicators, based on the town centre performance indicators recommended in the Draft Planning Policy Statement PPS5 should be designed as part of the wide evaluation process to monitor and evaluate the effectiveness of the masterplan. The masterplan implementation group should liaise closely with the marketing group to benchmark and set SMART targets, which can be reviewed going forward.

An example of recommended Key Performance Indictors is set out below:

Key Performance Indicator KPI	Measurement	Target Year One
Footfall	Pedestrian footfall counts on 2 key streets	+6%
Vacancy levels	Number of ground floor vacant properties expressed as a percentage of the total number	Maintained at current low rate
Customer perception	Positive customer perceptions of the town centre measured by annual on-street surveys	Measurable positive increase
Safety	Reduction in crime levels across main town centre categories, measured by PCSP	Measurable decrease
Website	Number of hits as measured through Google Analytics or similar	TBC
Media Monitoring	OTS supplied by media buying company	TBC

Appendix 10

Benefits and Realisation Plan

RSM McClure Watters (Consulting)
Connected for Success

Omagh District Council

Omagh Town Centre Master Plan

Benefits Realisation Plan

March 2015

Table of Contents

1 BENEFITS REALISATION PLAN

Objective	Project Title	Owner	Output	Method & Timing of Measurement	Responsibility for Measurement	Potential Barriers to delivery	Resource Implication
One of six working objectives.	*Working title of project.*	*Person accountable for delivery of this benefit.*	*Description of output*	*Measurement of*	*The person/role responsible for measuring achievement of the benefit. Unlikely to be the Owner.*	*Identification of potential barriers and mitigating factors.*	*The resources, financial and otherwise that would be required to manage and deliver the proposals.*
1. Underpinning a strong and positive identity	Town Brand and Place Marketing Strategy	Appointed consultant. **Project Management:** Council	**Target:** Preparation of report.	**Method:** Development of Action Plan **Timing:** 1-5 years	Senior Responsible Officer, Council	**Barrier:** Engagement with retail sector. **Mitigating Factor:** Involvement of Chamber of Commerce & development of engagement strategy	**Financial:** £61.5k **Non: Financial:** Project Management Role for Councils
2. Underpinning a strong and positive identity	Improved Signage	Appointed consultant **Project Management:** Transport NI/Roads Service	**Target** Provision of 6 variable signs and 6 static signs	**Method:** Design, Procurement and Installation of signage. **Timing:** 1-5 years	Senior Responsible Officer, Council	**Barrier (s)** Quality of delivery partners Planning **Mitigating Factor:** Procurement exercise, highlighting quality of provision and price. Coordination of planning	**Financial:£84k** **Non: Financial:** Coordinating role for Council staff

Objective	Project Title	Owner	Output	Method & Timing of Measurement	Responsibility for Measurement	Potential Barriers to delivery	Resource Implication
One of six working objectives.	*Working title of project.*	*Person accountable for delivery of this benefit.*	*Description of output*	*Measurement of*	*The person/role responsible for measuring achievement of the benefit. Unlikely to be the Owner.*	*Identification of potential barriers and mitigating factors.*	*The resources, financial and otherwise that would be required to manage and deliver the proposals.*
3. Underpinning a strong and positive identity	Events Strategy	Appointed Consultant: **Project Management**: Council	**Target:** Provision of Report.	**Method:** Development of events strategy to be co-developed with community and private sectors as well as Tourism NI. **Timing:**1-5 years	Senior Responsible Officer, Council	**Barrier:** Engagement with local stakeholders **Mitigating Factor:** Development of engagement strategy as part of terms of reference	**Financial:** £28k **Non-Financial:** Project/Contract Management role for Council
4. Underpinning a strong and positive identity	Public Realm and Town Centre Frontages	Appointed Consultant: **Project Management**: Council	**Target** Provision of streetscaping for James Street, Kevlin Avenue, Mountjoy Road and St Lucia.	**Method:** Planning, procurement and construction of public realm and town centre frontages **Timing:** 1-5 years	Senior Responsible Officer, Council	**Barrier:** Planning Application and funding issues **Mitigating Factor(s):** Prioritise planning applications Seek funding from private sector and NIEA	**Financial** £7m-£7.2m **Non-Financial:** Project /Contract Management role for Council

Objective	Project Title	Owner	Output	Method & Timing of Measurement	Responsibility for Measurement	Potential Barriers to delivery	Resource Implication
One of six working objectives.	*Working title of project.*	*Person accountable for delivery of this benefit.*	*Description of output*	*Measurement of*	*The person/role responsible for measuring achievement of the benefit. Unlikely to be the Owner.*	*Identification of potential barriers and mitigating factors.*	*The resources, financial and otherwise that would be required to manage and deliver the proposals.*
5. Reconnection with the landscape	Enhanced foot/cycle paths	Appointed consultant **Project Management:** Transport NI/Roads Service	**Target:** 485m of cycle path	**Method:** Planning and construction of new cycle paths **Timing:** 1-5 years	Senior Responsible Officer, Council	**Barrier(s)** Planning application and funding Issues **Mitigating Factor(s):** Prioritise planning application Seek ring fencing of funding.	**Financial:** £1,275,000 (Walking: £1,000,000) (Cycling: £275,000) **Non: Financial:** Coordinating role for Council staff
6. Reconnection with the landscape	Crossing on Great Northern Road	Appointed consultant **Project Management:** Transport NI/Roads Service	**Target** Development of a footbridge on Great Northern Road	**Method:** Planning and construction of a footbridge **Timing:** 5-10 years	Senior Responsible Officer, Council	**Barrier(s)** Planning application and funding Issues **Mitigating Factor(s):** Prioritise planning application Seek ring fencing of funding.	**Financial:** £1,000,000. **Non: Financial:** Coordinating role for Council staff

Objective	Project Title	Owner	Output	Method & Timing of Measurement	Responsibility for Measurement	Potential Barriers to delivery	Resource Implication
One of six working objectives.	*Working title of project.*	*Person accountable for delivery of this benefit.*	*Description of output*	*Measurement of*	*The person/role responsible for measuring achievement of the benefit. Unlikely to be the Owner.*	*Identification of potential barriers and mitigating factors.*	*The resources, financial and otherwise that would be required to manage and deliver the proposals.*
7. Reconnection with the landscape	Cycle Parking	Appointed consultant **Project Management:** Transport NI/Roads Service	**Target:** Provision of parking for 24 bicycles	**Method:** Planning and subsequent construction of cycle Parking **Timing:** 1-5 years.	Senior Responsible Officer, Council	**Barrier(s)** Planning application and funding Issues **Mitigating Factor(s):** Prioritise planning application Seek ring fencing of funding.	**Financial:** 6x4 sets of stands around town centre= £2,400 **Non: Financial:** Coordinating role for Council staff
8. Reconnection with the landscape	Town Bike Hire Scheme	Delivery partner to manage the scheme **Project Management:** Council	**Target** Provision of town bike hire scheme to run 3 years.	**Method:** Procurement exercise to identify delivery partner to deliver scheme. **Timing:** 1-5 years.	Senior Responsible Officer, Council	**Barrier (s)** Quality of delivery partners **Mitigating Factor:** Procurement exercise, highlighting quality of provision and price.	**Financial:** £150,000 **Non Financial:** Council to project management procurement and subsequent contract.

Objective	Project Title	Owner	Output	Method & Timing of Measurement	Responsibility for Measurement	Potential Barriers to delivery	Resource Implication
One of six working objectives.	*Working title of project.*	*Person accountable for delivery of this benefit.*	*Description of output*	*Measurement of*	*The person/role responsible for measuring achievement of the benefit. Unlikely to be the Owner.*	*Identification of potential barriers and mitigating factors.*	*The resources, financial and otherwise that would be required to manage and deliver the proposals.*
9. Reconnection with the landscape	Coach parking	Appointed consultant **Project Management:** Transport NI/Roads Service	**Target** Provision of 2 laybys for coaches.	**Method:** Planning and subsequent construction of 2 laybys **Timing:** 1-5 years	Senior Responsible Officer, Council	**Barrier(s)** Planning application and funding Issues **Mitigating Factor(s):** Prioritise planning application Seek ring fencing of funding.	**Financial:** (£35,000) **Non: Financial:** Coordinating role for Council staff
10. Reconnection with the landscape	Strategic Parking (edge of Omagh)	Appointed consultant **Project Management:** Transport NI/Roads Service	**Target** Provision of 6 new car park spaces (total 600 additional spaces)	**Method:** Planning, purchase/leasing and construction of 6 car parks (of up to 100 spaces) **Timing:** 1-5 years.	Senior Responsible Officer, Council	**Barrier(s)** Planning application and Cost does not include acquisition of any lan **Mitigating Factor(s):** Prioritise planning application Seek additional funding	**Financial:** (£1,800,000) **Non: Financial:** Coordinating role for Council staff

Objective	Project Title	Owner	Output	Method & Timing of Measurement	Responsibility for Measurement	Potential Barriers to delivery	Resource Implication
One of six working objectives.	*Working title of project.*	*Person accountable for delivery of this benefit.*	*Description of output*	*Measurement of*	*The person/role responsible for measuring achievement of the benefit. Unlikely to be the Owner.*	*Identification of potential barriers and mitigating factors.*	*The resources, financial and otherwise that would be required to manage and deliver the proposals.*
11. Sustainable Linkages	Improved Bus Service to Key Destinations	Delivery partner to manage the scheme **Project Management:** Transport NI	**Target** Provision of bus shuttle service	**Method:** Confirmation of key routes, Procurement exercise to identify service deliverer for 3 years **Timing:** 1-5 years	Senior Responsible Officer, Council	**Barrier (s)** Quality of delivery partners **Mitigating Factor:** Procurement exercise, highlighting quality of provision and price.	**Financial:** (£225,000) (£75,000 per annum) **Non Financial:** Council to project management procurement and subsequent contract.
12. Sustainable Linkages	Evening bus services	Delivery partner to manage the scheme **Project Management:** Transport NI	**Target** Provision of evening bus service	**Method:** Confirmation of key routes, Procurement exercise to identify service deliverer for 3 years **Timing:** 1-5 years	Senior Responsible Officer, Council	**Barrier (s)** Quality of delivery partners **Mitigating Factor:** Procurement exercise, highlighting quality of provision and price.	**Financial:** (£450,0000) **Non Financial:** Council to project management procurement and subsequent contract.

Objective	Project Title	Owner	Output	Method & Timing of Measurement	Responsibility for Measurement	Potential Barriers to delivery	Resource Implication
One of six working objectives.	*Working title of project.*	*Person accountable for delivery of this benefit.*	*Description of output*	*Measurement of*	*The person/role responsible for measuring achievement of the benefit. Unlikely to be the Owner.*	*Identification of potential barriers and mitigating factors.*	*The resources, financial and otherwise that would be required to manage and deliver the proposals.*
13. Sustainable Coordination of Change	Lisanelly Shared Education Campus	Appointed Consultant: **Project Management:** Department of Education	**Target:** Development of masterplan for Lisanelly.	**Method:** Planning, procurement and construction of Lisanelly Shared Education Campus **Timing:** 5-10 years	Senior Responsible Officer, Council	**Barrier:** Planning Application and funding issues **Mitigating Factor(s):** Prioritise planning applications Seek ring fencing of funding	**Financial** £120m **Non-Financial:** Coordinating role for Council
14. Sustainable Coordination of Change	Kevlin Avenue Development Sites	Appointed Consultant: **Project Management:** Council	**Target** Provision of development brief	**Method:** Procurement of consultants. Preparation of development brief **Timing:** 5-10 years	Senior Responsible Officer, Council	**Barrier:** Planning and funding **Mitigating Factor(s):** Prioritise planning applications Identify funding	**Financial:** TBC **Non-Financial** Project /Contract Management role for Council

Objective	Project Title	Owner	Output	Method & Timing of Measurement	Responsibility for Measurement	Potential Barriers to delivery	Resource Implication
One of six working objectives.	*Working title of project.*	*Person accountable for delivery of this benefit.*	*Description of output*	*Measurement of*	*The person/role responsible for measuring achievement of the benefit. Unlikely to be the Owner.*	*Identification of potential barriers and mitigating factors.*	*The resources, financial and otherwise that would be required to manage and deliver the proposals.*
15. Sustainable Coordination of Change	St Lucia Barracks Development	Appointed Consultant: **Project Management:** Council	**<u>Target:</u>** Provision of development brief	**Method:** Procurement of consultants. Preparation of development brief **Timing:** 5-10 years.	Senior Responsible Officer, Council	**Barrier:** Planning and funding **Mitigating Factor(s):** Prioritise planning applications Identify funding	**Financial:**TBC **Non-Financial:** Project /Contract Management role for Council
16. Sustainable Coordination of Change	Campsie Road and James Street	Appointed consultant **Project Management:** Transport NI/Roads Service	**<u>Target</u>** Upgrade of traffic control Provision of additional car parking	**Method:** Procurement of delivery partners Address planning issues and Undertake construction work **Timing:** 1-5 years	Senior Responsible Officer, Council	**Barrier(s)** Quality of delivery partners; and Planning **Mitigating Factor:** Procurement exercise highlighting quality of provision and price; and Coordination of planning	**Financial:** £810-820k **Non Financial:** Coordinating role for Council staff

Objective	Project Title	Owner	Output	Method & Timing of Measurement	Responsibility for Measurement	Potential Barriers to delivery	Resource Implication
One of six working objectives.	*Working title of project.*	*Person accountable for delivery of this benefit.*	*Description of output*	*Measurement of*	*The person/role responsible for measuring achievement of the benefit. Unlikely to be the Owner.*	*Identification of potential barriers and mitigating factors.*	*The resources, financial and otherwise that would be required to manage and deliver the proposals.*
17. Sustainable Coordination of Change	Irishtown Development	Appointed consultant **Project Management:** Transport NI/Roads Service	**Target** Streetscaping to obscure carpark	**Method:** Procurement of delivery partners Address planning issues and Undertake construction work **Timing:** 10-15 years	Senior Responsible Officer, Council	**Barrier(s)** Quality of delivery partners; and Planning **Mitigating Factor:**Procurement exercise highlighting quality of provision and price; and Coordination of planning	**Financial:** £30.5-31m **Non Financial:** Coordinating role for Council staff
18. Sustainable Coordination of Change	Dromore Road and James	Appointed consultant **Project Management** Transport NI/Roads Service	**Target** Road widening Junction upgrade Provision of pedestrian/cycle crossing	**Method:** Procurement of delivery partners Address planning issues and Undertake construction work **Timing:** 5-10 years	Senior Responsible Officer, Council	**Barrier(s)** Quality of delivery partners; and Planning **Mitigating Factor:** Procurement exercise highlighting quality of provision and price; and Coordination of planning	**Financial:** £250k **Non Financial:** Coordinating role for Council staff

Objective	Project Title	Owner	Output	Method & Timing of Measurement	Responsibility for Measurement	Potential Barriers to delivery	Resource Implication
One of six working objectives.	*Working title of project.*	*Person accountable for delivery of this benefit.*	*Description of output*	*Measurement of*	*The person/role responsible for measuring achievement of the benefit. Unlikely to be the Owner.*	*Identification of potential barriers and mitigating factors.*	*The resources, financial and otherwise that would be required to manage and deliver the proposals.*
19. Sustainable Coordination of Change	Sedan Avenue Development	Appointed Consultant: **Project Management:** Council	**Target** New development fronting	**Method:** Procurement of delivery partners Address planning issues and Undertake construction work **Timing:** 5-10 years	Senior Responsible Officer, Council	**Barrier(s)** Quality of delivery partners; and Planning **Mitigating Factor:** Procurement exercise highlighting quality of provision and price; and Coordination of planning	Financial: £32-32.5m **Non Financial:** Coordinating role for Council staff
20. Sustainable Coordination of Change	Scotts Mill Development	Appointed Consultant: **Project Management:** Council	**Target** Address vacant sites	**Method:** Procurement of delivery partners Address planning issues and Undertake construction work **Timing:** 1-5 years	Senior Responsible Officer, Council	**Barrier(s)** Quality of delivery partners; and Planning **Mitigating Factor:** Procurement exercise highlighting quality of provision and price; and Coordination of planning	Financial: £14.4m- £14.5m **Non Financial:** Coordinating role for Council staff
21. Sustainable Coordination of Change	Mountjoy Road Development	Appointed Consultant: **Project Management:** Transport NI	**Target** Development of Mountjoy Road	**Method:** Procurement of delivery partners Address planning issues and Undertake construction work	Senior Responsible Officer, Council	**Barrier(s)** Quality of delivery partners; and Planning **Mitigating Factor:** Procurement exercise highlighting quality of provision and price; and	Financial: £77.8m - £78m **Non Financial:** Coordinating role for Council staff

Objective	Project Title	Owner	Output	Method & Timing of Measurement	Responsibility for Measurement	Potential Barriers to delivery	Resource Implication
One of six working objectives.	*Working title of project.*	*Person accountable for delivery of this benefit.*	*Description of output*	*Measurement of*	*The person/role responsible for measuring achievement of the benefit. Unlikely to be the Owner.*	*Identification of potential barriers and mitigating factors.*	*The resources, financial and otherwise that would be required to manage and deliver the proposals.*
				Timing: 5-10 years		Coordination of planning	
22. Sustainable Coordination of Change	Woodside Avenue Development	Appointed Consultant: **Project Management:** Private sector	**<u>Target</u>** Development of design briefs.	**Method:** Procurement of delivery partners Address planning issues and Undertake construction work **Timing:** 5-10 years	Senior Responsible Officer, Council	**Barrier(s)** Quality of delivery partners; and Planning **Mitigating Factor:** Procurement exercise highlighting quality of provision and price; and Coordination of planning	Financial: £37.3m- £37.5m **Non Financial:** Coordinating role for Council staff
23. Protection and Enhancement of Existing Qualities	Improvements to existing roads and streets	Appointed consultant **Project Management:** Transport NI/Roads Service	**<u>Target</u>** Improvements to Winter's Lane, Link, Kevlin Avenue Link	**Method:** Procurement of delivery partners. Address planning issues and Undertake construction work **Timing:** 5-10 years	Senior Responsible Officer, Council	**Barrier (s)** Quality of delivery partners Planning **Mitigating Factor:** Procurement exercise, highlighting quality of provision and price. Coordination of planning	**Financial:** (£2,500,000) **Non: Financial:** Coordinating role for Council staff

Objective	Project Title	Owner	Output	Method & Timing of Measurement	Responsibility for Measurement	Potential Barriers to delivery	Resource Implication
One of six working objectives.	*Working title of project.*	*Person accountable for delivery of this benefit.*	*Description of output*	*Measurement of*	*The person/role responsible for measuring achievement of the benefit. Unlikely to be the Owner.*	*Identification of potential barriers and mitigating factors.*	*The resources, financial and otherwise that would be required to manage and deliver the proposals.*
24. Protection and Enhancement of Existing Qualities	Flood Alleviation	Appointed consultant **Project Management:** Rivers Agency/ NIEA	**<u>Target:</u>** Provision of a 1,000 m timber boardwalk	**Method:** Planning, procurement and construction of timber boardwalk **Timing: 1-5 years**	Senior Responsible Officer, Council	**Barrier:** Planning Application and funding issues **Mitigating Factor(s):** Prioritise planning applications Seek ring fencing of funding.	**Financial** (£2.7-£2.8 million) **Non-Financial:** Project Management role for Council
25. Protection and Enhancement of Existing Qualities	Riverfront Development	Appointed consultant **Project Management:** Rivers Agency/ NIEA	**<u>Target:</u>** Development of Masterplan Development of 3 pedestrian bridges Development of walkway	**Method:** Planning, procurement and construction of riverfront development **Timing: 5-10 years**	Senior Responsible Officer, Council	**Barrier:** Planning Application and funding issues **Mitigating Factor(s):** Prioritise planning applications Seek ring fencing of funding.	Financial (£32-32.5million) **Non-Financial:** Project /Contract Management role for Council

Objective	Project Title	Owner	Output	Method & Timing of Measurement	Responsibility for Measurement	Potential Barriers to delivery	Resource Implication
One of six working objectives.	*Working title of project.*	*Person accountable for delivery of this benefit.*	*Description of output*	*Measurement of*	*The person/role responsible for measuring achievement of the benefit. Unlikely to be the Owner.*	*Identification of potential barriers and mitigating factors.*	*The resources, financial and otherwise that would be required to manage and deliver the proposals.*
26. Protection and Enhancement of Existing Qualities	Living over the shop (Strategy)	Appointed Consultant: **Project Management:** Council	**Target:** Provision of Report.	**Method:** Development of Living over the shops strategy **Timing:**5-10 years	Senior Responsible Officer, Council	**Barrier:** Engagement with local stakeholders **Mitigating Factor:** Development of engagement strategy as part of terms of reference	**Financial:** £10k **Non-Financial:** Project/Contract Management role for Council
27. Protection and Enhancement of Existing Qualities	High Street Pedestrianisation	Appointed Consultant: **Project Management:** Transport NI	**Target** Provision of 1,400m2 of paving	**Method** Planning, procurement and construction of paving **Timing:** 5-10 Years	Senior Responsible Officer, Council	**Barrier:** Planning Application and funding issues **Mitigating Factor(s):** Prioritise planning applications Seek ring fencing of funding.	**Financial:** £650-750k **Non-Financial** Project /Contract Management role for Council
28. Protection and Enhancement of Existing Qualities	Establishment of a Cultural Quarter	Appointed Consultant: **Project Management**: Council	**Target** Establishment of a Cultural Quarter	**Method:** Procurement of consultants; Development of Action Plan **Timing:** Within 1st Year	Senior Responsible Officer, Council	**Barrier:** Engagement with local stakeholders: **Mitigating Factor:** Involvement of Chamber of Commerce and Development of Engagement strategy	**Financial:** £10k **Non Financial** Project/Contract Management by Council

Objective	Project Title	Owner	Output	Method & Timing of Measurement	Responsibility for Measurement	Potential Barriers to delivery	Resource Implication
One of six working objectives.	*Working title of project.*	*Person accountable for delivery of this benefit.*	*Description of output*	*Measurement of*	*The person/role responsible for measuring achievement of the benefit. Unlikely to be the Owner.*	*Identification of potential barriers and mitigating factors.*	*The resources, financial and otherwise that would be required to manage and deliver the proposals.*
						and Action Plan	
29. Protection and Enhancement of Existing Qualities	Arrival Points	Appointed Consultant: **Project Management:** Council	**Target** Primary Arrival Points Provision of signage, soft landscaping improvement. Secondary Arrival Points Provision of signage, soft landscaping improvement.	**Method:** Procurement of delivery partners Address planning issues and Undertake construction work **Timing:** 5-10 years	Senior Responsible Officer, Council	**Barrier(s)** Quality of delivery partners; and Planning **Mitigating Factor:** Procurement exercise highlighting quality of provision and price; and Coordination of planning	Financial: £870k-£900k Non-financial: Project Management role for Council

Updated Omagh Town Centre Masterplan

the paul hogarth company