

Enniskillen Place Shaping Plan 2035

BASELINE ANALYSIS REPORT - DRAFT

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Fermanagh & Omagh
District Council

Comhairle Ceantair
Fhear Manach agus na hÓmaí



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Executive Summary

Purpose and Approach

The objective of this plan is to establish the strategic direction for the development of Enniskillen town centre and associated opportunity sites to create a more sustainable, resilient and vibrant place that fully realises its socio-economic potential and meets the needs of all residents. The plan will assist with the ongoing regeneration of the town centre both physically and economically and contribute to the wellbeing of the town and the community in relation to their economic, environmental and social wellbeing. This will include examining through thorough consideration of evidence and targeted engagement how connectivity can be increased and how the community and private sector can be enhanced and supported in the post COVID and EU Exit environment, including in relation to key sectors such as tourism and retail. An inspirational vision for Enniskillen in 2035 will also be developed reflecting the views and shared aspirations of the community and aligned with the Island Town's Naturally Welcoming ethos and strategic outcomes.

Situation Analysis

To assist in understanding the local economic, community and spatial context, a baseline analysis has been undertaken for Enniskillen and, where relevant, across the Fermanagh and Omagh District and Northern Ireland. This review provides a comprehensive understanding of the current situation in Enniskillen town, its natural assets and information on emerging trends and developments which are relevant to the overall place shaping approach to enhance and build a more sustainable and vibrant town in line with the UN Sustainable Development Goals and existing Community Plan. This has been facilitated primarily through desktop-based research which has been supplemented by consultation activities along with field surveys that were undertaken in mid-2022.

Demographic Profile

The overall analysis of key demographic data for Enniskillen, points to a stagnating population that has gone through a number of cycles since 2001, including strong growth from 2005-2013, a sharp decline between 2013-2015, and a small recovery from 2015-2020 (if estimates are correct). Furthermore, analysis of historic data and projections suggests an increasingly ageing population with a declining level of young people which is reflective of many similar sized towns across Northern Ireland. The town, however, has a beautiful natural setting for its residents and visitors alike, with a number of areas scoring highly in relation to the physical environment. However, despite the very positive attributes of the town, deprivation is also evident in certain areas. Therefore, as the town moves towards 2035, consideration should be given to enhancing services and supports to those that need it while also promoting and enhancing the towns positive attributes. In doing so, Enniskillen can look to support and grow its current population while creating a more sustainable and resilient town. Key findings include:

- Since 2010, the population of Enniskillen has **decreased by approximately 1%**. However, over the longer-term (2001-2020) the population has **grown by approximately 2.1%**. This includes approximately 1.6% growth between 2015-2020.

- Enniskillen’s (former Fermanagh LGD) projected population growth from 2020-2040 is **1.33%**. This is **significantly below** the projected Northern Ireland growth rate of 4.26% for the same period, although **slightly higher** than the growth projections for Fermanagh and Omagh (1.25%).
- In comparison to other comparator towns, Enniskillen experienced the **lowest rate of growth** from 2011 (**0.11% growth since 2011**). In comparison, Antrim (4.39%), Armagh (8.14%) and Dungannon (10.43%) experienced significantly higher growth rates than Enniskillen.
- From 2001 to 2020, the proportion of the population of Enniskillen under 15 years **decreased by 2.6%**, while those aged 16-39 years **decreased by 5.9%**. Those aged over 65 years **increased by 5.4%** during this period, followed by the 40 – 64 years cohort **increasing by 3.2%** during that time. In relation to the comparator towns¹, Enniskillen had the highest proportion of those aged 65+ and the 2nd lowest proportion of those aged 0-15 years. However, this is not unique to Enniskillen, with the general trend in Northern Ireland pointing towards an ageing population and all of the comparator towns experiencing increases in those aged 65+.
- Deprivation levels vary within Enniskillen, with areas to the north and central part of the town identified as being more deprived than those within to the east and west. However, Devenish is one of the most deprived areas in Northern Ireland (ranked 44th) and the most deprived area in the Fermanagh and Omagh District.
- However, in relation to deprivation and the living environment the town also has a number of positive attributes with Castlecoole_1, Erne and Rossorry all scoring highly with regards to their outdoor physical environment.
- In relation to health, in the 2011 census **78.2% of the population** within Enniskillen town identified their health status as ‘very good’ or ‘good’ (**slightly below** the NI average of 79.4%) with just **5.2%** overall identifying as ‘bad’ or ‘very bad’ (**lower than** the NI average of 5.6%). However, **significant variances** are evident in this metric across the town, with **80.2% of Portora** identified as having ‘very good’ or ‘good’ health compared to just **68.1% of Devenish**.
- More up-to-date health information is also available from the findings from the Fermanagh and Omagh District Council 2021 Resident Survey. In Enniskillen, 79% of respondents identified their health status as “very good or good” which made it joint 5th out of 7 District Electoral Areas (DEAs). However, the Enniskillen had the highest proportion of individuals identifying as being in bad or very bad health (5%) of the 7 DEAs in Fermanagh and Omagh. As the Resident Survey represents a sample of the population, if these findings were reflected in the wider population, it **may indicate a slight improvement in health outcomes in Enniskillen since the 2011 census**.

Spatial Analysis

Enniskillen, the second largest settlement in the Fermanagh and Omagh District, is **strategically placed** between the Upper and Lower Loughs of Lough Erne. The town is identified as a main hub and inter-regional gateway to Ireland’s Northwest in the Regional

¹ Selected comparator towns of Antrim, Armagh, Dungannon, and Omagh.

Development Strategy 2035. It plays an important role as an educational, economic and public services hub for its residents as well as its surrounding catchment areas and benefits from its proximity to the border in relation to cross-border trade. Despite being serviced by the A4 route towards Portadown and Belfast to the east and Sligo to the west, the A32 towards Omagh and the A509; its location does not lend itself to enhanced accessibility with a **lack of access to rail and motorways evident**. Furthermore, like many towns it experiences issues with the movement of people and traffic around the settlement and has clusters of commercial vacancy in the town centre with a number of opportunity sites also identified. Key findings include:

- **Residential land uses were most dominant within Enniskillen**, followed by industrial uses at the northern and southern fringes of the town. Significant recreational/open space and landscaped areas were also identified including along the river corridors and lakes.

Similarly, a review of planning applications for Enniskillen for the last 5 years identified residential applications as the most dominant (comprising 78% of all grants), with more limited commercial developments also noted at 22% of all grants. However, the *Fermanagh and Omagh Retail Needs Assessment 2020* update determined that there was **no capacity for additional comparison goods floorspace** and very little capacity for additional convenience floorspace in Enniskillen through to 2030, with a specific recommendation to avoid allocating non-central floorspace across the district. Planning policy will continue to promote retail developments within town centres

- A commercial vacancy survey of Enniskillen town centre was conducted in May 2022 by the on the ground project team. From this survey **554 non-domestic properties** were identified, of which **50 were identified as vacant and derelict (i.e., 9.0%)**.
- The commercial vacancy rate for April 2022 provided by the Department for Communities varies from the vacancy survey conducted by the project team in May 2022 due to differences in methodology. However, while both rates would suggest that **Enniskillen town centre has a below average commercial vacancy rate**, according to data from the Department for Communities vacancy has increased in recent years and has remained above its pre-pandemic levels in contrast to other settlements such as Omagh and Armagh.
- There are **17 identified opportunity sites in Enniskillen** with 9 of the 17 opportunity sites being located within the town centre. With over 70% of the most recent planning applications associated with the sites being granted planning permission outright, there is an immense opportunity to reimagine and enhance areas of the town through repurposing and perhaps in some cases redeveloping the sites. Conversely, should these sites remain or become vacant for the longer term, they have the **potential to have a negative impact on the vibrancy of the town**.

Permeability, accessibility and transport analysis

Enniskillen, while serviced by a number of A-class roads, lacks access to rail and motorways and has a **limited provision of infrequent public transport**. However, analysis of the permeability and accessibility of the town indicates that it is **conductive to walking and cycling due to its relatively compact nature**. Yet the potential for this type of mobility is curtailed due to a **lack of sufficient walking and cycling infrastructure**. Furthermore, the town suffers from **traffic congestion** due to the

significant volume of through traffic it experiences which is exacerbated by the limited network capacity caused by bottlenecks in the town centre. It is expected that the planned A4 Enniskillen Southern Bypass should result in traffic being rerouted away from the town centre, reducing traffic congestion and freeing up road space for potential reallocation. As such, there is an **opportunity for the town to increase the provision of cycling and walking infrastructure** and promote active mobility which in turn should further reduce traffic congestion and contribute to a more appealing and healthier town centre. Key findings include:

- The town centre can be accessed on foot from a significant proportion of the Enniskillen built-up area, with the exception of some suburbs including the areas north of Cherrymount Link Road, Carrigan in the south, and Silverhill in the northwest.
- Similarly, analysis suggests that the town centre could be reached by cycling from most points across the town in no more than approximately 15 minutes, while the entire town could be traversed in approximately 30 minutes.
- However, the lack of dedicated cycling infrastructure and narrow footpaths may discourage residents and visitors from using more active modes of transport (i.e. cycling and walking).
- River Erne forms a permeability barrier, with the Castle Bridge and Erne Bridge providing the only connections between the eastern and western parts of town, though does also offer other permeability opportunities with water taxi services.
- The accessibility of the town centre by walking from the southern suburbs could be improved by the provision of foot bridges.
- A good provision of parking is evident with 13 public car parks within 10 minutes' walk from the town centre.
- There is also a total of 374 free of charge car parking spaces and 466 paid car parking spaces within a 5-minute walk from the notional town centre point (in addition to 240 spaces available to the Fermanagh Lakeland Forum visitors only). Overall, there is a total of 1,583 off-street car parking spaces, including 799 free of charge spaces, 544 paid spaces, and 240 customer only spaces within 10 minutes' walk from the town centre, excluding private car parks.
- In relation to public transport the Fermanagh and Omagh Local Transport Study indicated that the available bus services for Enniskillen have limited appeal and use due to uncompetitive travel times and low running frequencies.²
- The town centre has 3 bus routes that operate circular routes at 2-hourly intervals on weekdays and on Saturdays with a focus on the morning interpeak period, with few services between 15.00 and 16.00. The 3 routes are the Ulsterbus service 397a running from 9.00-17.00 serving the South West Acute Hospital and areas to the north of the town, the Ulsterbus Service 397b from 10.00-16.00 serving Cleenish Park and the southwest of the town, and Ulsterbus service 397c from 10.30-17.30 serving Cavanleck and the northeast of the town.³

² Fermanagh and Omagh Local Transport Study, Department for Infrastructure, 2021.

³ Fermanagh and Omagh Local Transport Study, Department for Infrastructure, 2021.

Economy and Employment

Enniskillen has a multifunctional role including as an economic, educational and public services centre and as already noted, is formally identified as a main hub and inter-regional gateway in the FODC area. As such, the town is an important driver of the economy and employment across the wider District and beyond. The town has a number of significant employers and sectoral clusters, with tourism an important contributing element to the local economy. However, when compared to 2011 data, there appears to have been a decline in the number of employee jobs (-5.3%). Similarly, at a district level, **economic activity rates are also below the NI Average**, although this may be partly attributed to early retirees and a culture towards one parent staying in the home. As such, to enhance the economy and employment opportunities, Enniskillen needs to build upon its identified strengths and clusters, attract investment, support local businesses and SMEs, and fully capitalise on its immense tourism potential. Furthermore, Enniskillen's beautiful setting and amenities, along with lower than NI average house prices ~~than other districts~~, mean that the town could be an attractive place for people to locate, should employment opportunities exist. Key findings include:

- **Enniskillen has a strong tradition of independent retail** with an entrepreneurial spirit reflective of the district in that the majority of companies are small or micro businesses.
- However, there also a **number of significant employers in Enniskillen** with clusters around manufacturing, retail, and leisure and tourism identified as well as the presence of large companies in the telecommunications and insurance sectors.
- The top three industries for employment in 2021 in Enniskillen were Retail (31%), Hospitality (14%), and Public Administration (10%).
- Combined, Wholesale and Retail trade and Accommodation and Food Services accounted for approximately 35% of employment in 2021 and 54% of business turnover in 2019, highlighting the dominance and importance of these two sectors in Enniskillen.
- Similarly, the town's function as a public service hub is also evident with significant employment through the FODC, Waterways Ireland, South West Acute Hospital and the Department of Agriculture, Environment and Rural Affairs (DAERA).
- However, employment by industry has recorded a decrease of 5.2% from 4,485 in 2011 to 4,246 in 2021. During the same period, the number of businesses recorded actually increased by 3.6%. Yet, given the decrease in employee jobs, this would appear to be more representative of the establishment of micro companies, sole traders and other small companies. The business birth rate⁴ in Fermanagh and Omagh District was recorded at 8.1% in 2020 which was below the NI Average of 9.9% and the 2nd lowest of all the NI districts.

Community Infrastructure

⁴ IDBR Business Demography defines a business birth as a business that was not present in the previous 2 years, while the birth rate is expressed as a percentage of total active businesses in the stated year.

Enniskillen is home to a range of community services and supports as well as amenities and infrastructure that contribute to the overall wellbeing of residents and communities in its wider catchment area. Findings from the Fermanagh and Omagh District Council 2021 Resident Survey highlight that 22% of residents in Enniskillen identified themselves as regularly taking part in local groups or community activities and 15% of those surveyed in Enniskillen identified as having volunteered in the last 12 months. A Social Infrastructure Audit (SIA) of Enniskillen Town was also undertaken to record the social infrastructure contained within the town centre boundary. Seven categories were used which are outlined in the table below. The results from this SIA recorded a total of 379 social infrastructure facilities and amenities within Enniskillen. A breakdown and categorisation of these facilities and amenities produced the following key findings:

Category	Number
Arts, Cultural and Tourism	25
Community and Civic Services	30
Education and Training	20
Healthcare Services	42
Open Space, Sport and Recreation	65
Religious Institutions and Burial Sites	18
Retail Centres and Services	179
TOTAL	379

- The most prominent category recorded in Enniskillen was Retail Centres and Services, with 179 facilities and amenities located within the town. The study found that this category was particularly focused around the Darling Street, Church Street and Townhall Street area, which comprises the main commercial core of the town.
- The second most prominent category identified within Enniskillen was Open Space, Sport and Recreation. Of the 65 recorded facilities and amenities under this category, facilities which have a significant function within the town include the Fermanagh Lakeland Forum, Inis Ceithleann Park and the Erneside Marina.
- The category with the lowest provision in Enniskillen was Religious Institutions and Burial Sites, with a total of 18 facilities located within the town.

Education

In Enniskillen, a **strong education provision is evident with a significant level of educational infrastructure present in the town.** This includes primary, post-primary, and further and higher educational facilities, with the town acting as an educational hub for the surrounding area. Notable facilities include the South West College's Erne Campus which was the world's first and largest educational building to achieve Passive House Premium Status and the BREEAM Outstanding certification for sustainable design and the CAFRE Enniskillen Campus which hosts the widest range of equine courses in Ireland. In relation to education outcomes, a particularly strong performance was recorded in 2019/2020 school leaver year in relation to achievement and the **town is consistently above average for school leavers entering higher education.**

However, when achievement and qualification attainment is considered over the longer-term a **degree of underachievement is evident with levels significantly and**

consistently below the NI Average. Given the high level of school leavers entering higher education, the relatively lower levels of qualification attainment outlined below may be reflective of a significant level of educated young people leaving the town to access higher education and related employment opportunities. Overall, Enniskillen education outcomes have been improving, but there is work to be done to bring achievement in line with NI Averages and ensure the workforce and town remain competitive to 2035. Key findings include:

- In 2019/2020, 58.0% of school leavers went on to higher education (HE) and 21.8% went onto further education (FE), higher than the NI average of 47.9% (HE) but lower than the 29.2% recorded for further education.
- In the same period, 2.7% of school leavers were recorded in the unemployed/unknown category, which is lower than the NI recorded average of 4.7%.
- In 2019/2020, those achieving at least 5 GCSEs (A*-C) was recorded at 93.6% in 2019/2020 which is higher than the NI average (91.3%) and a significant improvement from 78.5% in 2014/2015. Similarly, 80.9% of school leavers in the 2019/2020 academic year achieved at least 5 GCSE's grades A*- C or equivalent, including English and Maths which again is above the NI average of 76.2%.
- However, while 2019/2020 saw particularly strong education attainment, it was the only period between 2014/2015 – 2019/2020 that Enniskillen was above the NI average for those achieving at least 5 GCSEs (A*-C). Similarly, in 2014/2015, 2015/2016 and 2018/2019 Enniskillen was also below the NI Average for those attaining 5 GCSE's grades A*- C or equivalent, including English and Maths.
- In 2019/2020, 85.4% of non-FSME school leavers achieved at least 5 GCSE grades A*-C (or equivalent) including English and GCSE maths, while 70.7% of FSME school leavers achieved the same. However, as noted above 2019/2020 was a particularly strong period for educational achievement, with the gap in achievement much larger in previous years. For instance, examined over a 5-year period from 2015/16 to 2019/20, the same achievement for non-FSME school leavers stands at 77.9%, while for FSME school leavers it is 56.1%. As such there is a clear and continued need to support those from disadvantaged backgrounds to achieved enhanced educational outcomes.
- In relation to qualifications, in 2019 only 26.0% of the working age population were recorded as having obtained a qualification classed at NVQ Level 4 or Above (NI Average 36.7%), with 24.5% of the working age population holding no Qualifications (which was above the NI Average of 13.8%).
- Despite this there is a positive trend over the longer term. Since 2015 FSME achievement has been above the NI Average except for the 2018/2019 period, those obtaining NVQ Level 4 or above has increased from 18.5% in 2011 to 26.0% in 2019 and those with no qualifications have fallen from 29.1% in 2011 to 24.5% in 2019.

Natural, Built and Cultural Heritage

Given Enniskillen's location on an island at a strategic crossing point along the River Erne, **much of the town's open space and natural amenities are located in close**

proximity to the town's commercial core. Several parks, playgrounds, walkways, recreational facilities and sports clubs can be found along the watercourses which run through the town. Many of these amenities are located within a 10-minute walking distance of the town's centre.

The expansive heritage of Enniskillen has lent itself to the **number of high-quality architectural styles being found throughout the town.** Buildings along the main thoroughfare of the town are predominantly belonging to Edwardian and Victorian architectural styles. Enniskillen Castle, built in the 15th Century, is typical of Medieval architecture, with the original building comprising an additional two storeys, standard of traditional Irish tower houses of the 15th, 16th and 17th Centuries. Due to the pedigree of the town's architectural merit and built heritage, many of the buildings found along its main thoroughfare and town centre are listed buildings of 'special architectural or historic interest'.

In addition to Enniskillen Castle and the built heritage of the Main Street, some key heritage features of the town include the Buttermarket which now hosts a thriving craft retail hub, the Victorian gem Forthill Park and Cole's Tower, and the historic Caithleen's Island. Near to the town are several key heritage attractions including Castle Coole, Devenish Island, Florence Court, Necarne Castle, Marble Arch Caves and Cuilcagh Boardwalk Trail.

As a result of Enniskillen's rich cultural heritage and history, both natural and built, the town itself has several significant designations. Part of Enniskillen town centre is designated as a Conservation Area, an 'Area of Townscape Character' as well as an 'Area of Archaeological Potential'. These designations ensure that the character, history and urban fabric of Enniskillen is retained or enhanced where an opportunity arises

Tourism, Leisure and Marketing

The wider Fermanagh and Omagh District Council area attracted £79 million spend in 2019 and attracted 0.4 million trips. The District and Enniskillen town has potential for further development of tourism activities and attractions, and for growing the international market. The importance of tourism to the local economy was highlighted by residents in a survey undertaken on behalf of Fermanagh and Omagh District Council in 021, where 85% said tourists / visitors are important for the economy in their local area.⁵

Tourism in Enniskillen is based primarily around water activities on the River Erne and cultural heritage displayed through archaeological and historic monuments, and architecture and storytelling in several castles and historic houses. Enniskillen has a unique status as Ireland's only island town. The most popular visitor attractions in or near Enniskillen include Castle Archdale Country Park (319,000 visitors in 2019), Belleek Pottery (182,296), Cuilcagh Boardwalk (99,000), Marble Arch Caves (64,093), Enniskillen Castle Museums (85,722), Florence Court House (43,593), Castle Coole (31,134), and Devenish Island (12,704).

While popular primarily as a destination for the domestic ROI and NI visitor market, the town currently has perhaps not capitalised upon the nearby tourism assets to the degree to which it undoubtedly could. This includes the proximity to the River Erne and Lough Erne for water-based activities, the proximity of heritage attractions such as Castle Coole, Devenish Island, Florencecourt and Necarne Castle; as well as natural attractions such as Marble Arch Caves and Cuilcagh Boardwalk Trail. In addition, the town itself can

⁵ FODC Residents Survey 2021

capitalise on attractions such as Enniskillen Castle and will benefit from the planned re-development of Ardhowen Theatre and Fermanagh Lakeland Forum which will contribute to a re-imagining of the town's relationship with the water.

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

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

Tourism in Enniskillen is supported by good quality infrastructure, reflected in various forms of accommodation that vary in price and level of luxury. Enniskillen is also recognised as an ideal starting point to explore the rest of the Fermanagh and Omagh District.

Growing the tourism opportunity in Enniskillen is one element of this plan, with regenerative and sustainable approaches to tourism leading to increased number of visitors in turn bringing vibrancy and vitality to the town centre. Enhancing the town, making it a more appealing place to be, and thus for visitors to want to stay, is fundamentally important to enable the town to sustainably grow overnight stays in the town centre. It is also important to increase revenue from tourism throughout the year, rather than in peak season, and encourage visitors to explore more of the district, by communicating the range of things to see and do. It should be noted that tourism jobs do not tend to be well paid, in many cases are part-time and seasonal. While there are efforts to try to enhance the quality of employment in the tourism sector, growing this sector of Enniskillen's economy may not result in raising the average wage or to attract skilled graduates directly. However, bringing more visitors to Enniskillen creates an opportunity for spin-off employment based on increasing footfall and indirect economic growth.

The *Fermanagh Lakelands & Omagh and The Sperrins Visitor Experience Development Plan 2022-2032* indicates that while domestic visitors are important, the best prospects for growth for the region "*are in generating sustainable increases in Out of State Visitors and associated spend*".⁶ It is important to communicate itineraries to the ROI market, while itinerary development is important to encourage the ROI.

Economic Outlook and Growth Scenarios

The impacts of the EU Exit and the COVID-19 pandemic along with the more recent inflation and cost of living pressures will continue to impact Enniskillen's economy and growth into the future. The pandemic created significant challenges for many sectors, particularly in relation to hospitality, tourism and retail. However, it also

⁶ Fermanagh Lakelands & Omagh and The Sperrins Omagh Visitor Experience Development Plan 2022-2032, page 32

resulted in significant opportunities for certain sectors such as online retail and professional services, as well as an accelerated transition to remote working.

On the other hand, the EU Exit has resulted in staffing shortages, particularly for retail, hospitality, manufacturing and agri-businesses. It has also resulted in a funding gap, with Northern Ireland no longer able to benefit from EU-funded SME and unemployment supports, both of which are important to Enniskillen (e.g. the European Social Fund (ESF) and European Regional Development Fund (ERDF)). Yet, Northern Ireland (NI) is also in an advantageous position, with companies in NI facing fewer trade restrictions with the EU than those based in Great Britain (GB). **Cross-border trade is at an all-time high and further growth opportunities may exist**, particularly for agribusinesses that have a presence in Enniskillen.

However, while the Northern Ireland economy saw signs of significant recovery and high growth towards the end of 2021, the outlook for the region is now uncertain with the war in Ukraine and increased inflationary pressure impacting the economy. Taking this into account, an analysis of the region’s historic growth, population, sales, employment, and sectors has been undertaken to **develop 4 different scenarios to inform Enniskillen potential growth rate between 2022 to 2030**. Given the uncertainty in the economy and external influences over the next 20 years, the scenarios reflect a range of outcomes which may arise.

Scenario	Narrative and rationale	Annual average economic growth rate, 2022-2030 ⁷	Related total estimated jobs growth 2022-2030	Scenario probability (KPMG viewpoint)
S1 Central A	<ul style="list-style-type: none"> The Town’s economy grows in line with the 3-year average growth rate pre-COVID (2017-2019) for NI overall Assumes recent trends pre-COVID extend into future; allows for headwinds such as the 2022 cost of living crisis continuing over a number of years; allows for other headwinds (e.g. trade friction) 	0.5% p.a.	0.2%	30%
S2 Central B	<ul style="list-style-type: none"> The Town’s economy grows in line with the 5-year average growth rate pre-COVID (2015-2019) for NI overall Captures recent growth per Central A as well as higher growth in years pre-EU Exit referendum, assumes cost-of-living crisis abates in the short-term; assumes no friction to NI-EU trade 	1.5% p.a.	0.6%	45%
S3 Upside	<ul style="list-style-type: none"> The Town’s economy grows at a faster rate than it has grown at in recent years, and at a faster pace than the NI economy is expected to grow at overall Assumes the Town can achieve a step change in growth relative to NI; requires strong UK based growth 	2.5% p.a.	1%	20%
S4 Downside	<ul style="list-style-type: none"> The Town’s economy does not grow materially over the entire period 	0.1% p.a.	0%	5%

⁷ ONS, KPMG Analysis

	<ul style="list-style-type: none"> Scenario would arise only in context of an economic downturn that reduces annual average growth 			
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Policy Analysis

This section sets out the policy framework and principles to underpin the Enniskillen Place Shaping Plan 2035. This includes international, Northern Ireland level, regional, and local frameworks that set policy and best practice for social, economic and community development. This sets a strong foundation for shaping a vision and objectives for an attractive and vibrant Enniskillen in 2035. A total of **18 policy documents were outlined for review** and were included within this policy analysis. Some of the key policy documents reviewed included:

Scale	Policy Document
International	The 2030 Agenda – UN Sustainable Development Goals
United Kingdom	Levelling Up the United Kingdom UK Net Zero Strategy: Build Back Greener
Northern Ireland	Northern Ireland Economic Recovery Action Plan Northern Ireland Domestic Tourism Strategy 2020
Regional	Regional Development Strategy 2035 MSW Regional Economic Strategy DfI Strategic Planning Policy Statement High Street Task Force – Delivering a 21 st Century High Street Regional Strategic Transportation Strategy 2002-2012 Regional Transportation Network Plan 2015
District	FODC 2030 Community Plan FODC 2030 Community Plan – 2020 Update FODC Climate Change and Sustainable Development Strategy 2020-2030 FODC Corporate Plan 2020 – 2024 Local Development Plan 2030
Local	Enniskillen Town Centre Masterplan 2012 Experience Enniskillen: BID Business Plan 2022-2027

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

- Promoting the **island town identity** of Enniskillen, both within its communities and to tourists and visitors alike.
- Promoting and maintaining a **healthy and connected built and natural environment** which improves the well-being of Enniskillen’s communities.
- Developing a **strong, inclusive local economy** to boost business and create attractive experiences for customers and consumers across all sectors.

- **Conserve and promote** Enniskillen’s strong cultural assets - both built and natural.
- Creating **sustainable, connected communities** to ensure prosperity and quality of life for generations of the future.

Consultation and Engagement

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

Public Survey – 400 responses

- Almost two-thirds (**61.3%**) of respondents considered Enniskillen’s greatest asset to be its local and natural environment (i.e., the lakes)
- **The most frequently cited challenges** were employment opportunities, town centre vacancy rates and recreation and leisure opportunities
- **The top priorities to generate growth in Enniskillen** were attracting more business to the area, attracting more visitors/tourists to the area and enhancing local services and facilities (such as health, education and transport)
- **The top priorities to improve the town centre** were improving access to the waterfront and lakes walks, enhancing the waterfrontages (i.e., the lakes) and accessible, affordable car parking.

Business Survey – 36 responses

- While many respondents described Enniskillen’s business environment as being good, solid or vibrant, almost half (**44.8%**) of respondents felt **Enniskillen’s business environment could be improved significantly** to enable enterprise growth
- **The most frequently cited priorities** to help drive economic development in Enniskillen were providing the necessary infrastructure for business to succeed, promoting a pro-business culture and providing enterprise support services to SMEs and micro companies
- **Enniskillen’s main strength as a place to do business** as outlined by respondents was the quality-of-life which Enniskillen offers.

CVS Survey – 34 responses

- Almost two-thirds (**60.7%**) of respondents felt that Enniskillen offered *some services/opportunities* for their organisation/membership base, while **21.4%** of respondents felt that Enniskillen offered *poor services and opportunities* for their organisation and membership base.

Student Survey – 116 responses

- The youth and students of Enniskillen considered that the three biggest challenges, issues or concerns for the future development of Enniskillen for their cohort were employment opportunities, retail and shopping opportunities and housing/accommodation availability. While employment opportunities were outlined as the town’s greatest challenge, **almost two-thirds (62.9%)** of

respondents described Enniskillen as offering some or significant employment opportunities for young people.

Primary School Children – 4 responses

- Despite **75%** of respondents travelling to school by private car, **all respondents (100%)** felt that a new footpath or cycle path would be the most effective change that would make them want to cycle or walk to school. In addition to this, **all respondents (100%)** felt that the lakes/water was Enniskillen’s greatest asset.
- Respondents saw their ‘*Perfect Enniskillen*’ as being busy, clean and vibrant; and relaxing, friendly and welcoming.

Steering Group Consultation

Key themes included the following:

- There was a desire to **capitalise on Enniskillen’s unique selling point** as an island town, which was further enhanced by a **range of historic and heritage assets**, and a desire to maximise these assets including increased use of, for example, Forthill Park, Enniskillen Castle, Inis Ceithleann (Island of Kathleen) and the Buttermarket. This included a desire to further promote and develop the tourism offering including increased but sustainable development of the waterways/water frontages as well as building on the concept of Enniskillen as the market town of Fermanagh and to promote independent shops and a vibrant night-time economy.
- There was a need to encourage more and well-paid jobs to the town, and this could be done in part by **developing tourism potential** and events as well as making the town centre more vibrant. **The A4 Enniskillen Southern By-pass** was seen to be essential to help with businesses expanding or moving to Enniskillen and there were opportunities to market and promote the town, both to businesses but also to encourage people to return/relocate given the opportunities afforded by **working from home** models. There was also potential to explore opportunities arising from the acute hospital in Enniskillen as well as linkages with the SW College and schools and job opportunities.
- Consideration of opportunity sites needed to look at both **the business and housing needs in Enniskillen as well as reflect demographic needs**. Therefore, opportunity sites offered potential for office accommodation or an innovation hub, stepdown or respite care facilities, social housing, recreational/tourism potential (e.g. for facilities and/or events).
- A need to be fully inclusive, and to ensure place shaping and the development of public spaces and facilities went beyond considering physical accessibility but took account of a **broader range of disability and demographic considerations** as well as social issues such as **poverty**.

Strategic Conversations

Consultation with a varied range of stakeholders indicated a desire to:

- Maximise and develop its current position (an island town), its current natural assets and its current heritage assets and bring more vibrancy and footfall to the town centre as well as consider people friendly spaces in some parts.
- Address challenges associated with town centre vacancy rates / derelict premises.

- Have greater links with the SW College to ensure training and skills opportunities matched available jobs and future jobs in the locality, help retain young people in the area and help with workforce availability challenges.
- Look at development opportunities at key sites including the vacant SW College site and also the current PSNI site, described as a “prime site” which was ideal for tourism and housing redevelopment.

Conclusion

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

Case Studies

Several case studies were examined and analysed in areas of relevance to Enniskillen and the new Place Shaping Plan. It includes areas such as **adaptive reuse, regeneration, people friendly spaces, tourism and wayfinding**. The case studies are outlined in more detail in Section 6 of this report with a summary provided below.

Regeneration: Parkhead Public School is a B-listed Victorian building built in 1878 that served as a school until 1963, and then a resource centre for Glasgow City Council up until approximately the 1990s. It then lay vacant for over 15 years. The regeneration project cost £4.1 million and saw the building refurbished and restored into a community enterprise centre. The Tramyard is a historic site located in the centre of the Dalkey Architectural Conservation Area, in Dún Laoghaire-Rathdown. The site was sold in 2018 for €3 million to FL Partners, an investment consortium based in Dublin, Ireland. The regeneration of the historic site aims to re-integrate the Tramyard back into the Dalkey public realm through the diverse and mix of uses proposed for the vacant site. These uses include a main piazza at the centre of the yard and the re-use of the Tramyard depots as a health centre, retail and café space, rooftop pavilion and garden, along with a cinema and enterprise/workspace.

People Friendly Spaces and Mobility: Dublin City Council introduced a series of trial pedestrianisation plans for Capel Street and Parliament Street in June 2021 to support the hospitality sector and facilitate outdoor dining. The pilot programme was very successful, with a survey carried out over August and September 2021 indicating that both the public and businesses were in favour of the pedestrianisation of these streets in some form. In relation to Capel Street, 95% of respondents (public, residents and businesses) said that it improved their experience, and the same level of support was identified for Parliament Street. For Capel Street 80% of businesses were in support of developing some form of traffic free arrangements on the street. Several other examples provide evidence based positive impacts of pedestrianisation, particularly for communities and local businesses.

A perceived negative impact on local businesses is often used as a rationale to stop people friendly space proposals. The evidence suggests the opposite is the case and **people friendly spaces can have a positive impact for communities and business**. These examples further illustrate the importance of listening to all sectors of a community rather than one particular interest group when considering place-making proposals.

Strabane Pedestrian Bridge (Strabane Footbridge) was installed in mid-2015 to provide a key pedestrian crossing point along the River Mourne. Connecting the residential areas of Melvin Park and Ballycolman to the town centre, the bridge has provided a much-

needed link between these two distinct areas within Strabane's built-up footprint. The project illustrates a successful integration of wildlife and natural habitat concerns with the provision of key infrastructure, enabling greater mobility within Strabane; between its suburban, residential communities and its town centre and commercial core. It is understood that a footbridge is proposed to connect the new SW College site with Enniskillen town centre. The Strabane Footbridge example illustrates the potential of such investment.

Tourism:

Waterford Greenway was constructed along 46km of the former Mallow and Waterford rail line. It opened in March 2017 and is the longest greenway in Ireland connecting Waterford City to Dungarvan. It is used as a walking and cycling routeway for residents and visitors. The project was developed at a cost of €15 million. It has contributed significantly to the local tourism industry, creating up to 90 new jobs for the local community, with an average visitor spend of €28.50 and 80% in paid accommodation. The **Royal Canal Greenway** returned a dividend of €17.2 million in its first full year of operation and saw a return on the initial investment of €12 million within the first eight months of full operation. The Greenway comprises walkways, cycleways and water-based navigations spanning from Maynooth in County Meath out to Cloondara in County Longford. It showcases how a waterway that was previously used as a network for trade and commerce can be repurposed as an amenity for walkers, runners, cyclists, anglers and water sport enthusiasts in a sustainable manner that supports its natural ecosystems. Enniskillen could explore the possible opportunity for further greenways, in addition to the planned Enniskillen-Sligo Greenway, to attract further tourism, increase active transport and improve linkages between the town and surrounding attractions and amenities. This could be beneficial both for community and businesses located in Enniskillen town.

Inis Cealtra is a 20-hectare (50-acre) island located in Scariff Bay in the south-west part of Lough Derg between County Clare and County Galway. Having taken 41 acres on the island into public ownership in 2015, Clare County Council commissioned The Inis Cealtra Visitor Management and Sustainable Tourism Development Plan in 2017. The remit was to seek to ensure the long-term conservation of this significant historical and cultural site, while expanding its attractiveness as a sustainable tourist destination for an increased number of visitors. The development of the Inis Cealtra Visitor Experience has, in 2022, now taken a significant step forward with the announcement of plans for a proposed new Inis Cealtra (Holy Island) visitor centre in the heart of Mountshannon village. The Inis Cealtra Visitor Experience is a collaborative project involving Clare County Council, Fáilte Ireland, Waterways Ireland, the OPW and National Monuments Service and National Parks and Wildlife Service. The Old Rectory building will be repurposed and extended to provide an impressive Visitor Centre scheduled to open in the second half of 2023. There is a clear similarity between this project and Devenish Island. Development of a visitor centre for Devenish Island on Enniskillen Island, linked by ferry, would provide a significant visitor attraction for the town.

Hodson Bay Watersports, Lough Ree: Baysports Water Sports Centre is located on the shores of Lough Ree in Hodson Bay and is the home of the world's tallest floating slide. This water adventure centre covers almost an acre of interlinking walkways, slides, towers and obstacles. Baysports is a playground for children and adults alike.

Marine recreation structures, Denmark: In Denmark, as in many other countries there is a growing trend for natural swimming pools. Towns have commissioned lake or harbour side recreation areas which are of architectural interest such as the Hasle Harbour Bath, commissioned to cater for a growing number of seasonal visitors.

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

Strategic Priorities

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

- Developing and promoting Enniskillen as an attractive and vibrant place.
- Increasing employment opportunities and ensuring supports for existing businesses.
- Enhance the Enniskillen visitor experience offer with a focus on regenerative tourism and an integrated people-centred and placed-based approach.
- Improving connectivity and accessibility throughout the town including in relation to walking and cycling.
- Identifying how to progress the many opportunity sites located in and around the town.
- Ensuring that Enniskillen is an inclusive place that has a community that is prosperous, well educated, vibrant and healthy.

Next Steps

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



1 Introduction

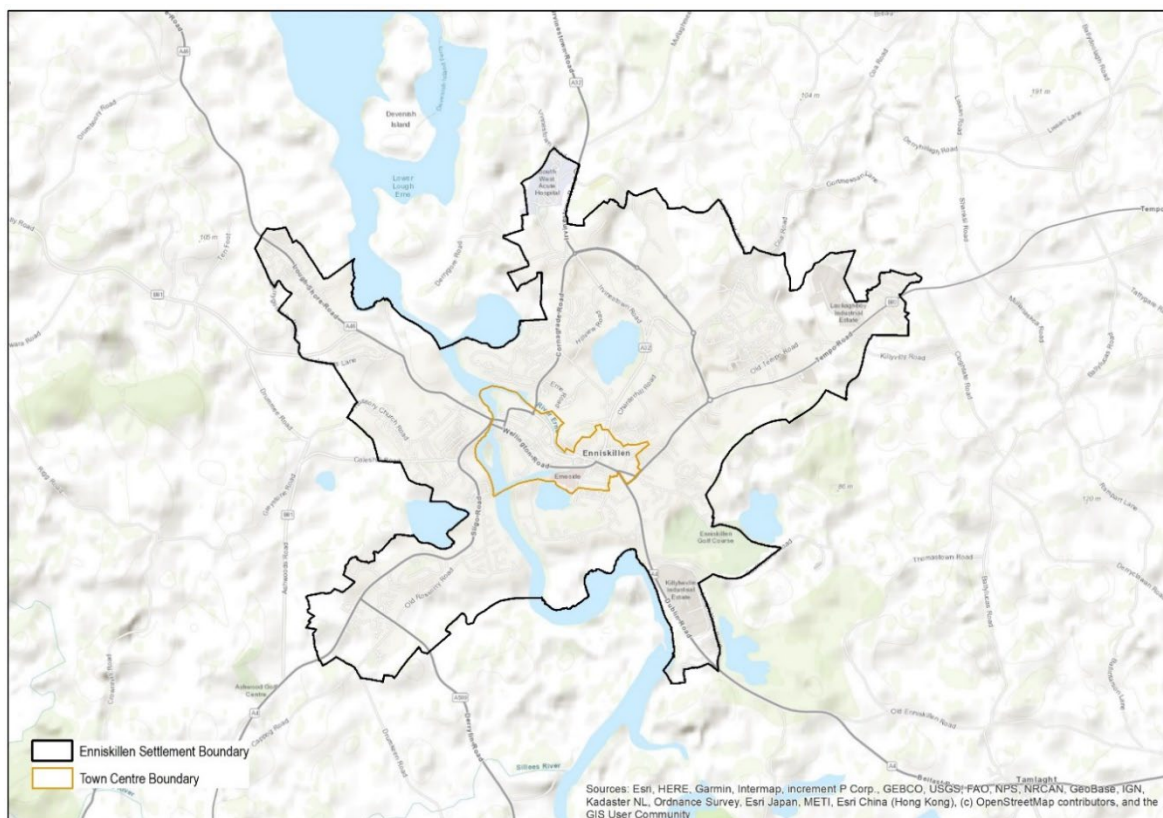
1.1 Approach

The objective of this plan is to establish the strategic direction for the development of Enniskillen town centre and associated opportunity sites to create a more sustainable, resilient and vibrant place that fully realises its socio-economic potential. It will be in line with the UN Sustainable Development Goals and the existing community plan. As such, the plan will assist with the ongoing regeneration of the town centre both physically and economically and contribute to the wellbeing of the town and the community in relation to their economic, environmental and social wellbeing. This will include examining how connectivity can be increased and how the community and private sectors can be enhanced and supported in the post COVID and EU Exit environment, including in relation to key sectors such as tourism and retail. An inspirational vision for Enniskillen in 2035 will also be developed reflecting the views and shared aspirations of the community and aligned with the Island Town’s Naturally Welcoming ethos.

To assist in understanding the local economic, community and spatial context, a baseline analysis has been undertaken for Enniskillen and where relevant across the Fermanagh and Omagh District and Northern Ireland. This review provides a comprehensive understanding of the current situation in Enniskillen town and information on emerging trends and developments which are relevant to the overall place shaping approach to building a more sustainable and vibrant town. This has been facilitated primarily through desktop-based research which has been supplemented by consultation activities along with field surveys that were undertaken in mid-2022.

While the focus of this project is on Enniskillen town centre, as outlined below in Figure 1-1, it is acknowledged that the town centre is part of the wider settlement of Enniskillen which in turn is a key settlement of the Fermanagh and Omagh District. This has been considered during the research for the baseline assessment which follows.

Figure 1-1 Enniskillen town centre and settlement boundaries



The new Enniskillen Place Shaping plan has the potential to influence the town at different spatial extents and a positive impact on the people who live, visit and work in Enniskillen. Data from the Northern Ireland Statistics and Research Agency and other government agencies has been examined and supplemented with local insights from consultation as part of an evidence-based approach to understand the current context of the town from which the new plan will build. As such, UK and Northern Ireland data has been considered for comparative analysis where relevant, however the assessment has focused on the following areas:

- Enniskillen town has been defined as the 6 Super Output Areas (SOAs)⁸ of Castlecoole_1, Castlecoole_2, Devenish, Erne, Portora and Rossory;
- The Local Government District of Fermanagh and Omagh has been considered on the basis of its administrative boundary that was established in 2015;
- Four towns were selected for comparative analysis to highlight Enniskillen’s position in Northern Ireland and to broaden the context and understanding of the existing data. The towns are Antrim, Armagh, Dungannon and Omagh. Specifically, this relates to the District Electoral Area and/or the town boundaries that were analysed as part of the development of the Town Centre Database that was undertaken by the Department for Communities with the relevant boundaries identified for individual datasets herein throughout this report.
- The towns were selected considering their location, and similarities to Enniskillen in relation to size, growth and strategic role (e.g., county town). Antrim was included to highlight the effect of proximity to Belfast in the Northern Ireland context and the different roles that settlements can fulfil for their respective communities/
- Statistics presented for other former, and in some cases superseded administrative or statistical boundaries (such as the former Fermanagh district, wards and/or small areas) have also been noted as appropriate throughout this report to provide as much detail as possible at the smallest available geographic scale where feasible.

⁸ Super Output Areas (SOAs) were a new geography that were developed by the Northern Ireland Statistics and Research Agency to improve the reporting of small area statistics. A set of slightly revised Super Output Areas (SOAs) were created for the 2011 Census outputs.

2 Enniskillen Situation Analysis

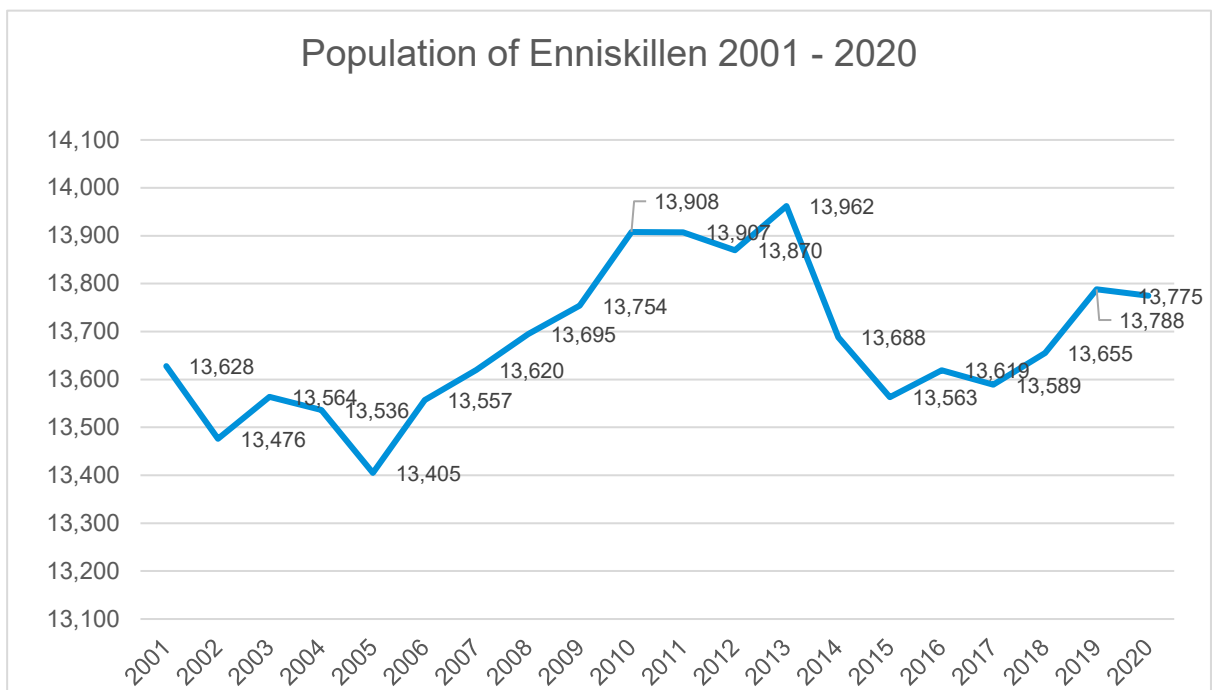
2.1 Demographic Profile

To provide further understanding of the current and future population of the town, an overview of the demographic characteristics of Enniskillen as well as comparisons to the district, NI average and selected comparator towns are presented below. A particular focus has been given to those of working age given their influence on the economic potential of the town.

2.1.1 Population Change

The mid-year population estimate provided for 2020 by the Northern Ireland Statistics and Research Agency (NISRA) for Fermanagh and Omagh was 117,337 people, comprising 6% of the total population of Northern Ireland. Of this cohort, some 13,775 people lived in Enniskillen⁹. If the population estimates are correct, the population of Enniskillen climbed steadily from 2005 – 2011, followed by a significant decline between 2011-2016 and a period of population recovery between 2016-2020. Yet since 2010, the population has decreased by approximately 1%. However, over the longer term (2001-2020) the population has grown by approximately 2.1%. These population cycles of growth and decline are potentially reflective of a stagnating population.

Figure 2-1: Historic population change - Enniskillen



Detailed comparison of population change over the last decade is provided for Enniskillen and other comparable towns¹⁰ in Table 2.1, as per the available NISRA data for District Electoral Areas (DEAs). Enniskillen is the second smallest of the 5 DEAs (comprising 18,310 people in 2020) followed by Omagh (18,220 people in 2020) and

⁹ Mid-year projection for 2020.

experienced the lowest rate of growth from 2011 (0.11% growth since 2011). In comparison, the larger DEAs of Antrim, Armagh and Dungannon grew by 4.39%, 8.14% and 10.43% respectively. We note that Enniskillen and Omagh, the smallest DEAs, declined year-on-year on four occasions during this period, with Enniskillen demonstrating the highest proportional decline of any area (0.82% decline in 2013-14).

Table 2.1: Historic rates of population change across DEAs¹⁰

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

With respect to the changing age profile within Enniskillen, we note that the proportional share of the younger population (aged 39 or younger) has generally decreased year-on-year from 2001 to 2020, while the older population (aged 65+ years), has increased, as demonstrated in Table 2.2. Specifically, the proportion of the population under 15 years has decreased by 2.6%, while the 16 – 39 years cohort decreased by 5.9%.

The proportion of the population aged over 65 years has increased by +5.4% during this period, followed by the 40 – 64 years cohort at +3.2% during that time. These changes were observed across Fermanagh and Omagh, where the median age increased from 34.1 years in 2001 to 40.1 years in 2020. However, this follows the general trend for Northern Ireland level (which increased from an average age of 34.7 years to 39.2 years during the period).

Table 2.2: Proportional share population by age group, 2001-2020.

Year	Under 15 years	16-39 years	40-64 years	Over 65 years
2001	23.0%	34.2%	29.2%	13.5%
2002	22.6%	33.6%	30.0%	13.9%
2003	21.9%	33.6%	30.4%	14.1%
2004	21.5%	33.0%	31.3%	14.2%
2005	20.8%	32.7%	32.1%	14.3%
2006	20.4%	33.1%	32.2%	14.3%
2007	20.3%	32.9%	32.5%	14.3%
2008	20.4%	32.5%	32.4%	14.6%
2009	20.4%	32.0%	32.6%	15.0%
2010	20.2%	31.9%	32.6%	15.3%
2011	19.9%	31.6%	32.9%	15.6%
2012	20.2%	31.2%	32.7%	15.9%
2013	20.2%	30.5%	32.9%	16.4%
2014	20.1%	30.3%	32.6%	16.9%
2015	20.0%	30.0%	32.8%	17.2%
2016	20.2%	29.6%	32.6%	17.6%
2017	20.2%	29.2%	32.6%	18.0%

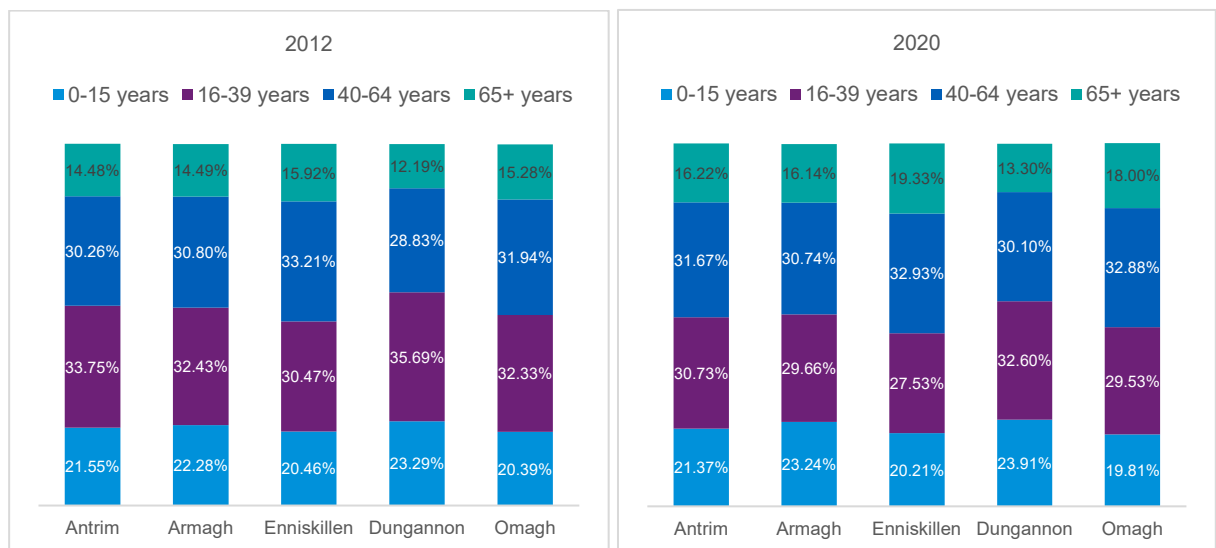
¹⁰ This relates to the DEAs of Antrim, Armagh, Enniskillen, Dungannon and Omagh.

2018	20.2%	29.2%	32.3%	18.3%
2019	20.4%	28.8%	32.2%	18.6%
2020	20.3%	28.3%	32.4%	19.0%

Similar trends were also observed within the comparable towns, which are becoming older over time. All 5 of the DEAs experienced a decline in the proportion of the population aged 16-39 years and an increase in the proportion of the population aged over 65 years from 2012 - 2020.

Within the Enniskillen DEA, the proportion of the population under 15 years was the second lowest of all the comparable towns by 2020 (comprising 20.21%) and declined by 0.2% during the period. The proportion of the population aged 40-64 years increased by 0.3% to 32.9% in 2020, while the over 65 years cohort grew by a significant 3.4% to 19.3%, the highest change reported of any DEA.

Figure 2-2: Historic population share by age group - DEAs¹⁰



2.1.2 Population Projections

The NISRA projections indicate that the population of the former LGD of Fermanagh¹¹ will grow 1.33% from 2020 (64,496 people) to 2040 (65,356 people). The larger Local Government District of Fermanagh and Omagh is projected to grow 1.25% from 2020 (117,962 people) to 2040 (119,440 people). The 1.33% growth identified for Enniskillen is significantly below the projected Northern Ireland growth rate of 4.26% while being slightly higher than the rate for Fermanagh and Omagh (1.25%) for the same period.

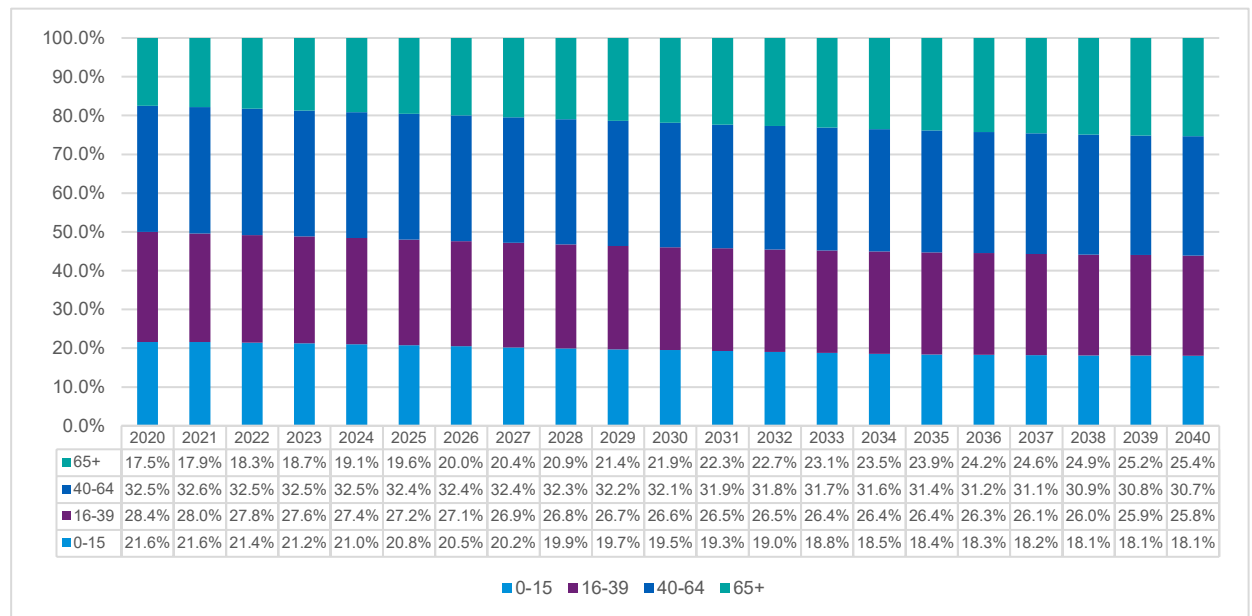
Within Fermanagh and Omagh, the proportion of the population over 65 years is expected to increase from 17.5% in 2020 to 25.4% in 2040, while all other groups are expected to decline across the period as presented in Figure 2-3. The most significant

¹¹ Note that population projections were not available at the SOA level, and hence the Former Local Government District is the smallest geographic area available, however for alignment with current administrative boundaries, this entire section generally presents information on the current Local Government District of Fermanagh and Omagh.

changes are anticipated at the extreme ends of the age profile, with some increases of 101.3% projected for those over 90 years of 87.2% for those 85-89 years and of 78.5% from those 80-84 years. In the younger categories, a relative decline of 17.4% is projected for the 5-9 years cohort, and c. 15% for both the 10-14 years and 0-4 years cohorts. An additional 18.4% is projected for the 35-39 years cohort. By 2041, NISRA projects¹² that the youth dependency ratio within Fermanagh and Omagh will decrease from 34.6 to 31.6 (NI rate projected to be 30.7), while its elderly dependency ratio will increase from 27.3 to 41.2 (NI rate projected to be 37.7) per 100 members of the working age population.

The elderly cohorts are vulnerable and growth in these groups will potentially increase demand for health and community services as well as accessible age-appropriate housing. Similarly, the projected decreases in the younger cohorts may result in a reduced demand for education and childcare services throughout the area and consequently a reduction in workforce size owing to the lower proportion of 35-39 age group.

Figure 2-3: Projected share of population by age group - Fermanagh and Omagh



2.1.3 Household Composition

NISRA projections suggest that the composition of households across Fermanagh and Omagh are also likely to change during the 2020 – 2040 period, as smaller households become more dominant over time (illustrated in Figure 2.4). This may be attributable to the rising number of elderly residents (as outlined in Section 2.1.2) with the related potential for more adult households without children and a general decrease in the number of households with children. Overall, this change aligns with the projected changes in household size as described above and reinforces the need for age-appropriate, accessible housing for the elderly and those living alone.

¹² NISRA, 2016 Dependency Projections for Fermanagh and Omagh District.

Figure 2-4: Projected share of households by size - Fermanagh and Omagh

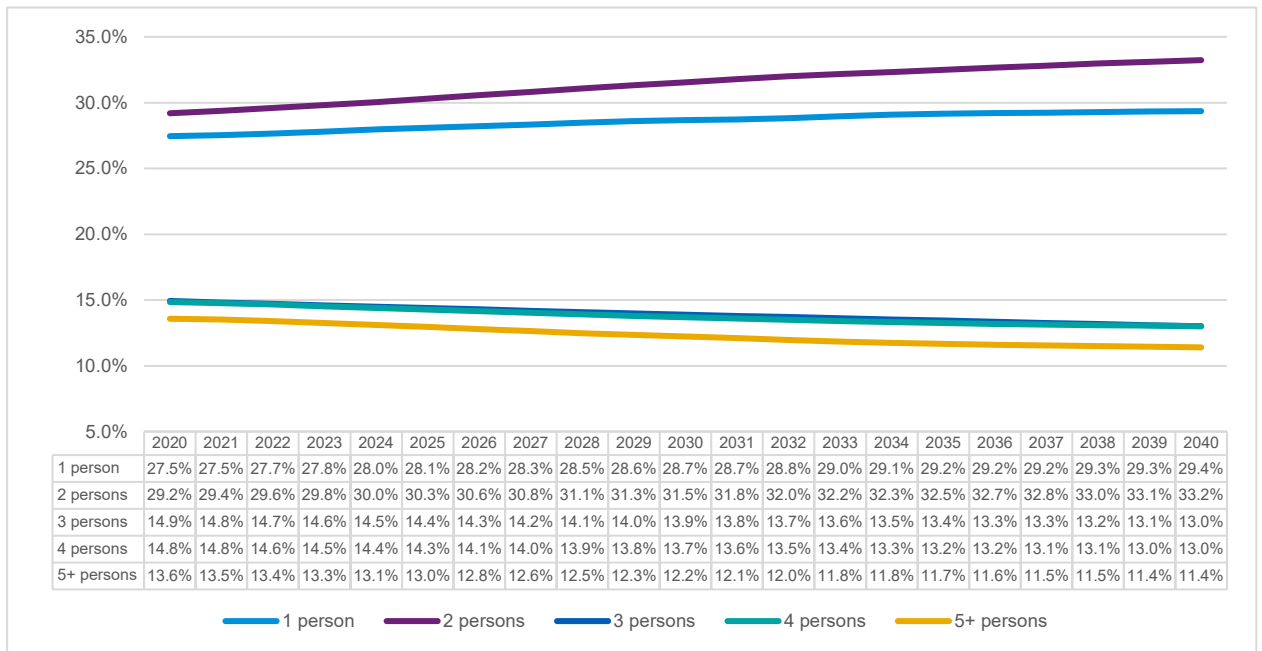
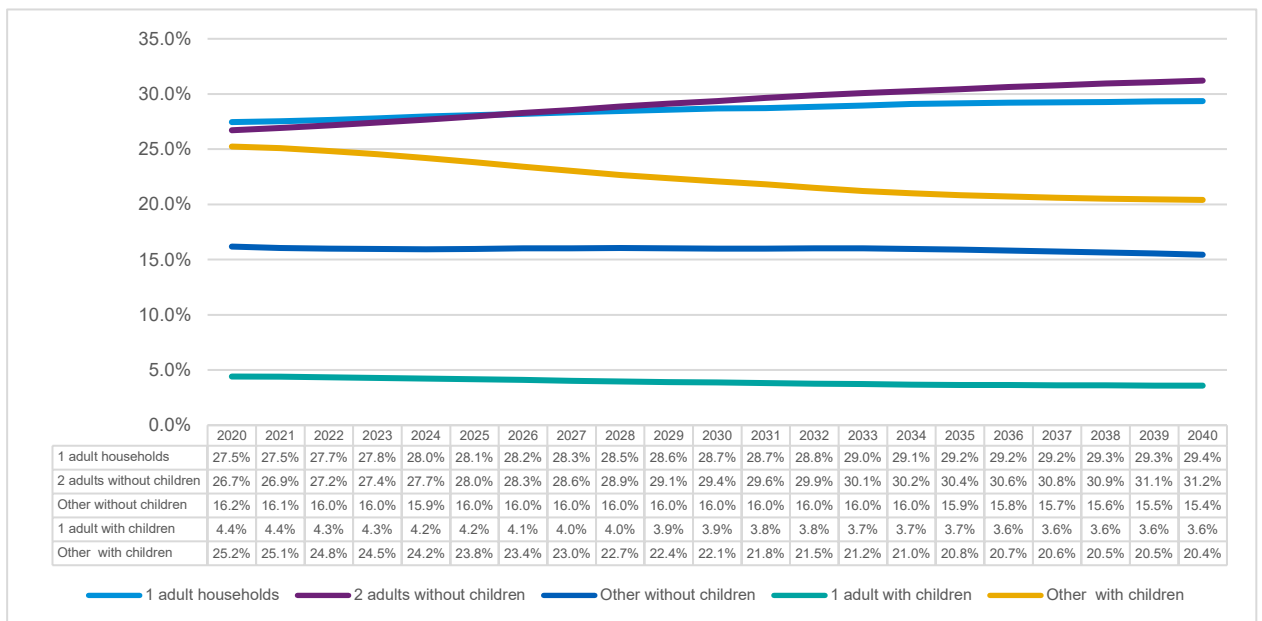


Figure 2-5: Projected share of households with children - Fermanagh and Omagh



2.1.4 Deprivation Rates

Development planning can contribute to the health, wellbeing, and socio-economic outcomes of a community and can assist in the reduction of inequalities and inequities in a population over time. The Multiple Deprivation Measure (MDM) enables the analysis and understanding of relative disadvantage within communities in a consistent and measurable way across Northern Ireland. Updated MDMs were released for Northern Ireland in 23 November 2017 by NISRA, which provide information at the SOA level in

seven domains of deprivation and a spatial ranking which supports relative comparison across Northern Ireland.¹³ The deprivation data measures the 890 SOAs across Northern Ireland and ranks individual metrics from 1 (most deprived) to 890 (least deprived).

Deprivation levels vary within Enniskillen, with areas to the north and central part of the town identified as being more deprived than those within to the east and west. Generally, the more peripheral areas of the Fermanagh and Omagh district area tend to be more disadvantaged when compared to the immediate hinterland of towns and along the river valleys.

Within Enniskillen town, the Devenish SOA is the one of most deprived in Northern Ireland (ranked 44th) with the Portora and Erne SOAs in the north part of the town ranked 214th and 216th respectively. In contrast, the Rossory and Castlecoole_2 SOAs scored well (ranked 409th and 466th out of 890 respectively) with the following notable attributes evident across Enniskillen town:

- Castlecoole_1 ranked 496th in income and 680th in living environment
- Castlecoole_2 ranked 610th in living environment
- Erne ranked 685th in living environment including 797th for Outdoor physical environment
- Rossory ranked 811th in living environment, but 249th in crime and disorder.
- Devenish ranked 595th in access to services.
- The town scored well in relation to outdoor physical environment including Castlecoole_1 (740th), Devenish (713th), Erne (797th) and Rossory (767th)

Furthermore, in the Fermanagh and Omagh District Council 2021 Resident Survey¹⁴, 95% of Enniskillen residents surveyed indicated that they were satisfied with their local area as a place to live and 96% agreed that their local area had a strong sense of community. However, the survey also found that the Enniskillen DEA ranked 4th out of 7 DEAs on general life satisfaction, 5th out of 7 for financial situation, 5th out of 7 in living accommodation, and 3rd of 7 for broadband connectivity, indicating that certain areas still have room for improvement.

2.1.4.1 Health and Wellbeing

Health and wellbeing levels are also particularly important for communities. During the 2011 Census, 78.24% of the population within Enniskillen town identified their health status as 'very good' or 'good' (slightly below the NI average of 79.4%) with just 5.21 % overall identifying as 'bad' or 'very bad' (lower than the NI average of 5.6%). However, significant variances are evident in this metric across the town, with 80.2% of Portora identified as having 'very good' or 'good' health compared to just 68.1% of Devenish.

¹³ The seven types or 'domains' of deprivation, include: Income Deprivation, Employment Deprivation, Health Deprivation and Disability, Education, Skills and Training Deprivation, Access to Services, Living Environment and Crime and Disorder. The seven domains contribute to the overall measure by a weighting system.

¹⁴ Fermanagh and Omagh District Council Resident Survey 2021 - telephone survey of 1002 residents of the Fermanagh and Omagh District.

This is reflected in the health deprivation and disability domain index, where Devenish is ranked 69th compared to Castlecoole_2 at 518th.¹⁵

More up-to-date health information is available from the findings from the Fermanagh and Omagh District Council 2021 Resident Survey. In the Enniskillen DEA, 79% of respondents identified their health status as “very good or good” which made it joint 5th out of 7 DEAs. However, the Enniskillen DEA had the highest proportion of individuals identifying as being in bad or very bad health (5%) of the 7 DEAs in Fermanagh and Omagh. As the Resident Survey represents a sample of the population, if these findings were reflected in the wider population, it may indicate a slight improvement in health outcomes in Enniskillen since the 2011 census. Enniskillen also ranked 5th of the 7 DEAs for mental health using the Warwick-Edinburgh Mental Health Scale and below the district average for satisfaction with physical health (4th of 7) and mental health and emotional wellbeing (5th of 7).

Tackling deprivation and inequalities can contribute to improved social cohesion, an enhanced labour market and better public health across communities. Social inequalities are particularly evident in urban environments, with different social groups experiencing the impacts of inequality to varying degrees. Vulnerable groups within the community such as the young, elderly, those suffering from illness and/or those with low incomes can disproportionately suffer and experience poor outcomes. Cognisance should therefore be afforded to those relatively deprived groups along with targeted action on the particular domains of disadvantage that they experience.

2.2 Spatial Analysis

2.2.1 Introduction

This spatial analysis presents an **overview of the current and future land use in Enniskillen town**. Given Enniskillen’s unique heritage as an island town, its growth and development has benefitted significantly from its strategic location along the River Erne and role as an interregional gateway to Ireland’s northwest. As such, understanding Enniskillen’s unique physical landscape and existing land use, both within the town and its surrounding environs, is necessary to appropriately plan future development and to create a strategic approach that benefits local communities, businesses and the natural environment. The following section is comprised of an analysis of historic and current land use, opportunity sites both within and surrounding Enniskillen and an analysis of vacancy within the town.

2.2.2 Context

Geographic Context

Enniskillen is located along the River Erne, strategically placed between the Upper and Lower Loughs of Lough Erne. Due to the natural assets of the town and its surrounding catchment area, the town hosts a variety of nearby attractions and amenities, such as Enniskillen Castle and Museums, Forthill Park, Castle Coole, Florence Court, Marble Arch Caves, Portora Castle, Necarne Castle and Monea Castle, while also benefitting from natural amenities such as Lower and Upper Lough Erne, the River Erne and their

¹⁵ NISRA, Multiple Deprivation Measure 2017.

associated attractions. The town also benefits from its position near the UK and Republic of Ireland border, with cross-border trade generating significant economic activity for the town and wider economy. Despite the absence of a rail line serving Enniskillen and indeed a wider rail network in Fermanagh, the town's strategic spatial advantages are supplemented by an extensive network of roads serving Enniskillen. This road network includes the A4 route towards Portadown and Belfast to the east and Sligo to the west, the A32 towards Omagh and the A509, which connects to the M3 motorway to Dublin.

Historic Context

Enniskillen (or Inis Ceithleann, meaning 'Island of Kathleen') was thought to be the ancient stronghold of the Maguires, a prominent family in the Fermanagh area, who were chiefs of Fermanagh from the 13th to the 17th Century¹⁶. Developed initially as a strategic crossing point of the River Erne, the oldest building within the town is Enniskillen Castle, built in the early 15th Century, with the earliest known reference to the castle appearing in the Annals of Ulster in 1439¹⁷. Following a succession of sieges on the castle during the 16th and 17th Centuries, the town was officially established as a settlement during the Ulster Plantations by King James I in the 17th Century. Enniskillen developed as an agricultural market town and as a garrison town in the period following its establishment, during the late 18th and 19th centuries¹⁸. The Castle gives its name to the Royal Inniskilling Fusiliers and the 6th (Inniskilling) Dragoons, both famous regiments of the British army, which were founded in the town.

The 19th and 20th Centuries saw significant development of the town, with the construction of St. Macartin's Church in 1842, St. Michael's Church in 1875 and the Town Hall in 1901. The latter half of the 20th Century saw the development of much of the residential housing which is located outside the boundaries of the town centre, in areas such as Carrigan, Coles Hill, Cornagrade and Moneynoe Glebe/Chanterhill.

The quality of Enniskillen's public realm and amenities has been significantly improved in recent years. Facilities such as the Fermanagh Lakeland Forum, public spaces such as the Buttermarket and attractions such as the Enniskillen Castle Museums all aim to improve the quality of life for those living in Enniskillen and to improve the experience of those visiting the town, both foreign and domestic alike.

2.2.3 Historic Land Use

An overview of the historic land uses across Enniskillen town is presented in Figure 2-6, as per the most recent zoning designations¹⁹. Residential land uses were most dominant within the town, followed by industrial uses at the northern and southern fringes of the town. Significant recreation/open space and landscaped areas were also identified along the river corridors and lakes, with existing recreation/open space shown in green and proposed areas shown in green hatch in Figure 2-6.

Retail centres and local services are the most common type of facility within Enniskillen, concentrated along High Street, Church Street and Townhall Street with additional

¹⁶ Enniskillen Castle | The Maguire Story.

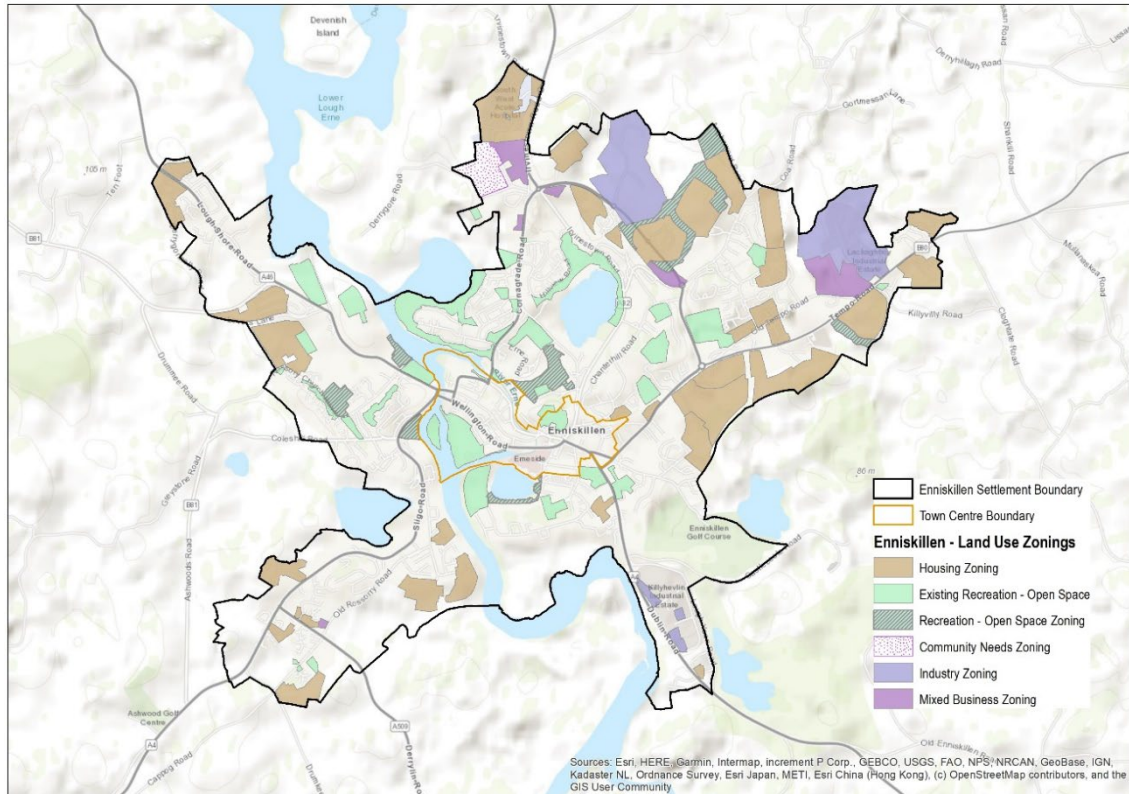
¹⁷ See: Enniskillen Castle | The Maguire Story.

¹⁸ Enniskillen Castle | The Plantation Years.

¹⁹ Fermanagh Area Plan 2007.

shopping centres south from Wellington and Dublin Road. Further detail of the retail offering in Enniskillen is provided in Section 2.4.

Figure 2-6: Land Use Zoning - Enniskillen



2.2.4 Future Development

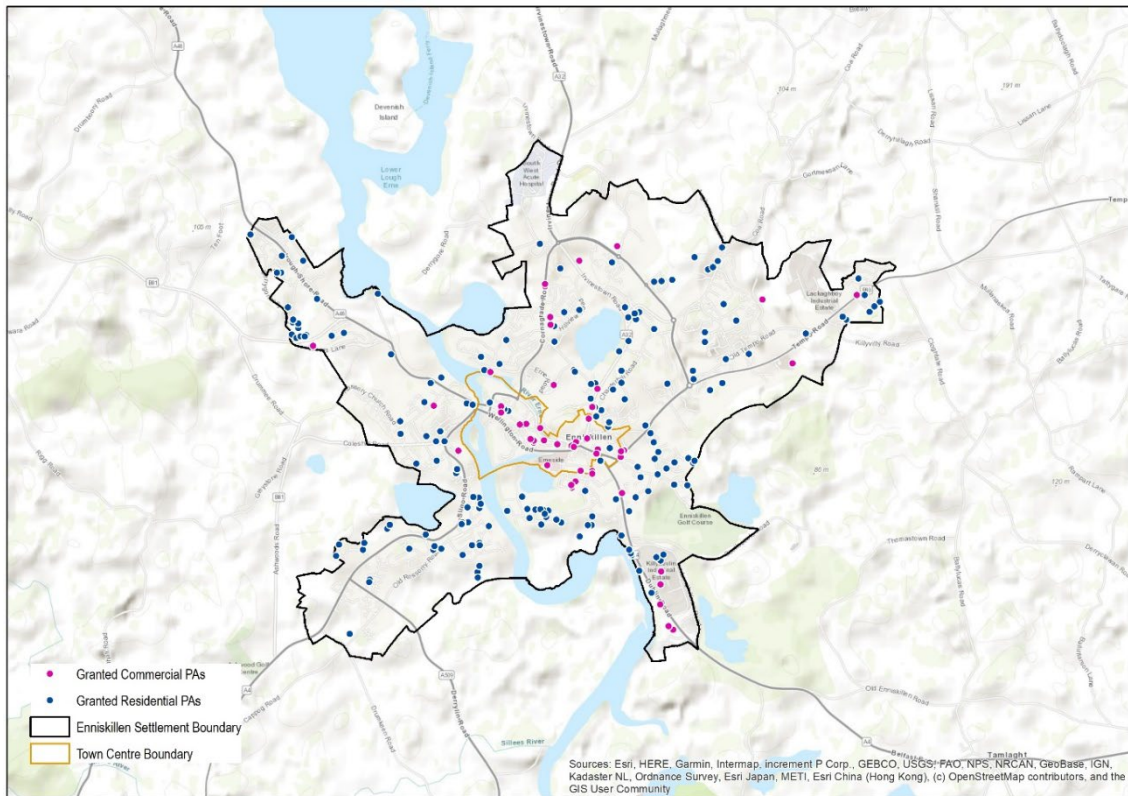
The historical land use zonings within the extant Fermanagh Area Plan 2007, Figure 26, will be reviewed as part of the Council's Local Policies Plan. The Local Policies Plan will set out the Council's local policies, including site specific proposals, designations and land use zonings required to deliver the council's vision, objectives and strategic policies to 2030.

A review of planning applications submitted within Enniskillen over the last five years was undertaken in May 2022. This review provides an indication of forthcoming development within the town, as well as the opportunity sites identified through consultation with Fermanagh and Omagh District Council. A total of 261 granted planning applications (2017—2022) were identified within the area, including **202 residential and 59 commercial developments**, as illustrated in Figure 27.

Residential applications are most dominant (comprising 78% of all grants), with more limited commercial developments also noted at 22% of all grants. However, the *Fermanagh and Omagh Retail Needs Assessment 2020* update determined that there was no capacity for additional comparison goods floorspace and very little capacity for additional convenience floorspace in Enniskillen through to 2030, with a specific recommendation to avoid allocating non-central floorspace across the district.

The *Retail Needs Assessment* considers population and expenditure data, as well as committed developments (permitted and/or not yet constructed developments) data to assess what capacity might exist within the area for additional convenience/comparison goods floorspace. In effect, this means that there is very little to no capacity for additional retail floorspace in Enniskillen through to 2030, due to the level of existing retail commitments which have yet to be built and current expenditure data. This is reflected in the limited level of commercial applications outlined above. However, while the commercial applications are relatively small, and planning policy does promote retail development in the town; they do indicate a continued pipeline of investment and economic activity that supports the development of the local economy, existing sectors, and the community as a whole. Furthermore, this place shaping plan will look to support this economic activity through targeted actions that enhance Enniskillen town to work, invest, visit and live.

Figure 2-7: Extant Planning Applications Pipeline - Enniskillen



2.2.5 Opportunity sites

An overview of the **17 potential opportunity sites for Enniskillen town** is illustrated in Figure 2-8. These sites have been identified by Fermanagh and Omagh District Council as having the greatest potential for development that can enhance Enniskillen’s sense of place and town centre and support economic growth and employment creation.

Five of those sites are within public ownership (i.e., the Former South West College site, Ardhowen Theatre, Fermanagh Lakeland Forum, Enniskillen PSNI Station and site adjacent to Erne Campus and Workhouse). Whilst the remaining twelve sites are under private ownership (Desmond’s Factory, Grosvenor Barracks, Devenish College, TP Toppings, Station Green, Former Unipork Factory, Railway Hotel, Old Cinema and

adjoining sites, site at Cornagrade Road, the Old Enterprise Centre, Café Cellini, the vacant site beside Enniskillen Hotel and the vacant site at Sligo Road).

Figure 2-8: Map of Opportunity Sites in Enniskillen

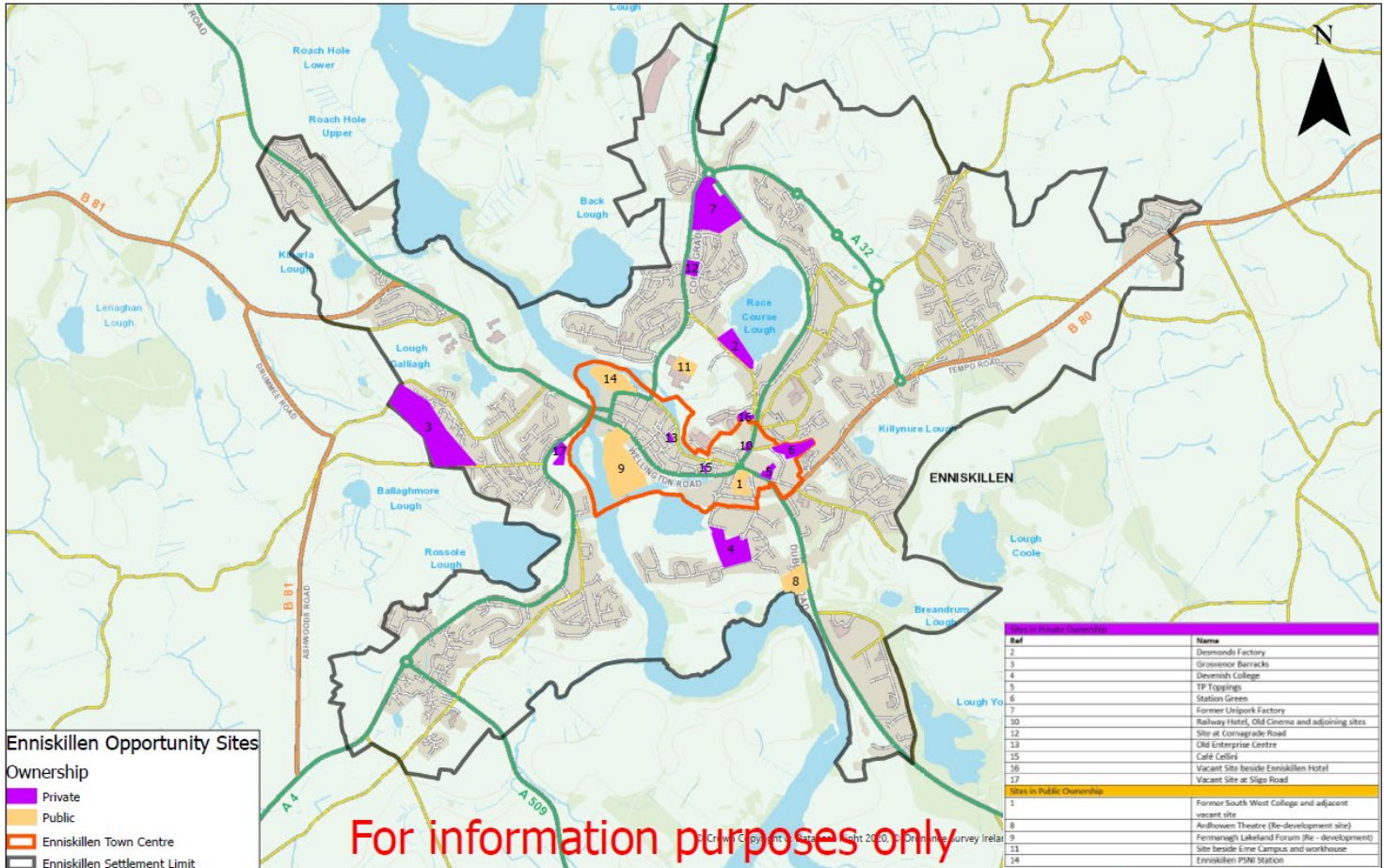


Table 2.3: Opportunity Sites in Enniskillen

Site	Comment
Former South West College and adjacent vacant site	Serviced site in public ownership with two listed buildings contained within the site
Desmond's Factory site	Commercial/industrial site owned by Dunsfort Developments Ltd, adjacent to a listed building and in proximity to Brewster Park
Grosvenor Barracks	Large brownfield site in ownership of the Department for Communities, containing a monument and comprised of 'contaminated' lands
Devenish College	Large site under private ownership with land-zoning under 'existing recreation and open space'
TP Toppings	Small commercial/industrial site under private ownership located within the Enniskillen town centre boundary
Station Green/Old Railway Yard	Large site on 'white land' and under private ownership, consisting mainly of car parking
Former Unipork Factory Site	Brownfield site under private ownership which is prone to surface water flooding

Ardhowen Theatre	Waterside site in public ownership, identified within Tourism Opportunity Zone 6
Fermanagh Lakeland Forum	Large site in public ownership and within an area of archaeological potential
Railway Hotel, Old Cinema and adjoining sites	Site in private ownership located within the Area of Townscape Character and identified within Tourism Opportunity Zone 6
Site adjacent to Erne Campus and Workhouse	Site in public ownership located within a listed building curtilage
Site at Cornagrade Road	Privately owned vacant site located along the A32 trunk route system
Old Enterprise Centre	Privately owned vacant town centre building adjoining the boundary of a Conservation Area
Enniskillen PSNI Station	Large site in public ownership located within Enniskillen town centre boundary, currently in use
Café Cellini	Privately owned small building located within Enniskillen town centre boundary
Vacant Site beside Enniskillen Hotel	Privately owned former industrial site
Vacant Site at Sligo Road	Privately owned vacant site located within the development limits of Enniskillen

As outlined above, there are a number of opportunity sites in Enniskillen town centre and within Enniskillen’s wider built-up footprint, with nine of the seventeen opportunity sites being located within the town centre and the remaining eight sites being located outside of the town centre boundary. While the largest of these sites, Grosvenor Barracks, is located outside of the town centre boundary, other opportunity sites of significant size are located within the town centre and are comprised of various land-use, such as the former South West College site, the Fermanagh Lakeland Forum site and the PSNI Station site.

While these sites present Enniskillen with challenges and risks in relation to the threat of long-term vacancy and dereliction, they also represent an immense opportunity to reimagine and enhance areas of the town through repurposing and perhaps in some cases redeveloping the sites. Confidence can be drawn from the fact that many of these opportunity sites and their associated planning histories indicate a positive sentiment by both the planning authority (Fermanagh and Omagh District Council) and the landowners towards their development, with over 70% of the most recent planning applications associated with the seventeen sites being granted planning permission outright. The planning applications associated with these decisions range from residential and mixed-use to commercial, health and retail developments.

With the large number of opportunity sites located within the town centre, there is significant potential to redevelop and integrate these sites into the existing layout of the town and subsequently improve the attractiveness, vibrancy and vitality of Enniskillen town centre. Sites such as the former South West College site are an example of serviced opportunity sites which are strategically located within the town centre and in prime position to directly improve the character and health of the town.

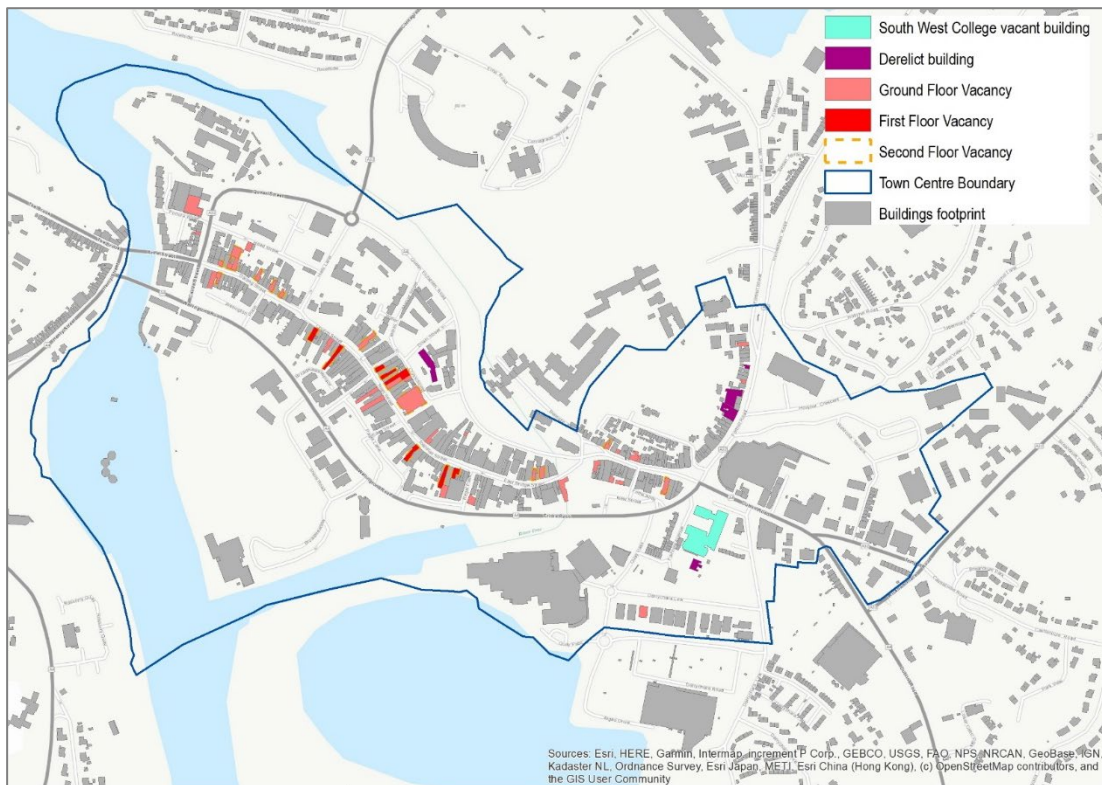
2.2.6 Vacancy Analysis - Enniskillen

Detailed analysis was undertaken in May 2022 to determine the level of commercial vacancy and dereliction within Enniskillen. Desktop research of published statistics was undertaken in late 2021 to establish an assessment baseline, which was supplemented by a field survey undertaken during May 2022. The following rates of commercial vacancy and dereliction were identified during the course of the assessment:

- A **vacancy rate of 10.5%** was identified in 2016-2017 during the preparation of the *Local Development Plan* for Enniskillen.
- At the end of October 2021, the Town Centre Database from the Department for Communities identified **673 non-domestic properties** within Enniskillen town, of which **138 were identified as vacant (i.e., 20.8%)**;
- At the end of April 2022, the Town Centre Database from the Department for Communities identified **673 non-domestic properties** within Enniskillen town, of which **141 were identified as vacant (21%)**
- During the field work in May 2022, **554 non-domestic properties** were identified, of which **50 were identified as vacant and derelict (i.e., 9.0%)**. An overview of vacancy and dereliction identified during the field survey is provided in Figure 2.9, which illustrates vacancy and dereliction by floor.

The difference in rates may be attributable to the variable study areas as well as the definitions of vacancy and dereliction applied, as opposed to rapid property activation and/or a dramatic volatility in vacancy and dereliction which was generally not observed. For instance, from information provided in the Department for Communities data, the definition of non-domestic property would appear to include a wide array of property, both public and private, such as advertising signs, car parks, yards, recreational grounds, hospitals, law and order establishments and more. In contrast, the vacancy studies conducted in May 2022 for the Enniskillen Place Shaping Plan and for the Local Development Plan in 2016/17 focused on more commercial buildings such as shops and offices rather than the wider array of property covered by the Department for Communities. However, regardless of methodology, **vacancy and dereliction were identified across the town centre** as illustrated in Figure 2-9 below. Dereliction was present to the east of the town (i.e., at the junction of Forthill Road and Holyhill Crescent), with additional ground floor vacancy identified along the Townhall, Church and High Streets. First and second floor vacancy was more apparent in the central section of Townhall Street.

Figure 2-9: Vacancy/dereliction Survey – Enniskillen, May 2022



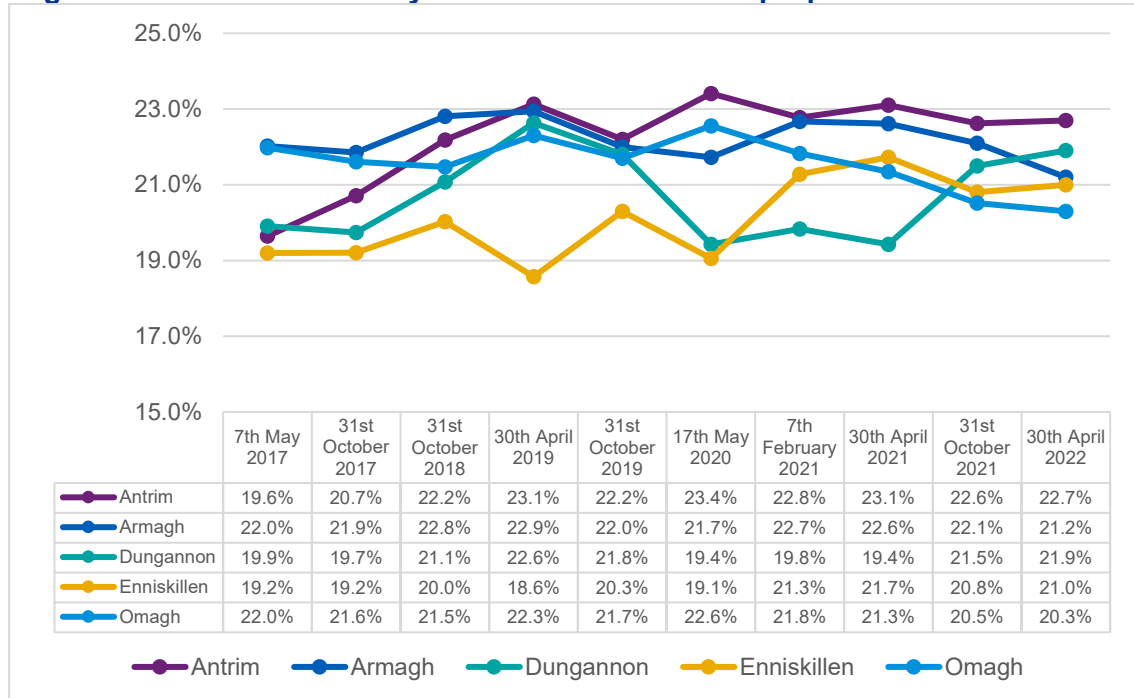
A historic comparison of vacancy within Enniskillen and other towns has also been undertaken, using the historic vacancy rates for non-domestic properties provided in the Town Centre Database from the Department of Communities (using Land and Property Services data) illustrated in Figure 2-10. This data illustrates the clear effect of the COVID-19 pandemic on Enniskillen town. Between 2017-2020, in relation to the comparator towns, Enniskillen was consistently the town with the lowest commercial vacancy rate. However, with the onset of the pandemic in 2020, a significant rise was recorded rising from 19.1% in May 2020 to a peak of 21.7% in April 2021. The rise in vacancy between 2020-2021 was significantly more pronounced in Enniskillen than in the other selected towns, perhaps reflecting the large level of economic activity related to tourism, hospitality and retail which were sectors heavily impacted by the pandemic.

In the context of footfall, a significant decrease in footfall was recorded during the pandemic which can be expected to have had an associated impact on businesses in the town centre and potentially contributed to the rising commercial vacancy rate. In 2019/2020 the footfall for Enniskillen was recorded as 3,797,122. However, this fell by approximately 48.5% to 1,955,069 in 2020/2021. While footfall recovered to 3,210,616 in 2021/2022, this still represents an approximately 15.4% decrease in comparison to 2019/2020 figures.

Similarly, while the commercial vacancy rate has decreased since its peak in April 2021, it remains notably above its pre-pandemic levels and has recorded a slight increase between October 2021 and April 2022 to now stand at 21%. This contrasts with Omagh and Armagh, which have seen a downward trend in commercial vacancy since 2021. As such, the effects of COVID-19 can still be seen in the town and with rising inflation likely to further impact businesses, efforts should be made to tackle commercial vacancy

where it exists and drive economic development to secure the vibrancy and resilience of the town centre.

Figure 2-10: Historic vacancy rates for non-domestic properties



2.3 Permeability, accessibility and transport analysis

The ease of movement by various modes appropriate for transporting people and goods, both within Enniskillen town and within the wider region, is a key consideration in designing for the town centre’s future growth. Competing requirements of individual modes must be skilfully balanced to support both connectivity and liveability. With a recent, renewed value in our sense of place for towns across the island of Ireland and the UK, the opportunity to revive, renew and regenerate our towns has never been greater. To fully realise these aspirations, close attention must be paid to the permeability, accessibility and inclusivity of our towns.

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

2.3.1 Key Documents

Enniskillen Town Centre Masterplan, URS 2012

The Enniskillen Town Centre Masterplan was produced in 2012, with a 20-year time horizon. The aim of the Masterplan was to guide the location and type of development in the Enniskillen Town Centre over its lifetime, directing public and private investment. The Masterplan noted that *“transport issues are of vital importance to the successful delivery*

of the Masterplan, in particular, the management of vehicle movements through the town centre”.

With respect to mobility, the Masterplan has identified two key considerations, including a high volume of through-traffic and a significant provision of surface car parking in the spatially constrained town centre. The then-planned and currently ongoing implementation of the A4 Enniskillen Southern Bypass was deemed to offer an opportunity for environmental improvements to through roads, which would involve reducing road widths and provision of improved walking and cycling facilities in addition to planting of roadside trees. Specific proposals were due to be developed subject to testing with respect to serving the expected traffic volumes and providing appropriate traffic safety. It was also recommended that existing surface car parking be relocated to multi-storey parking facilities with a view to maximise town centre development opportunities.

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

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

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

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

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

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

Fermanagh and Omagh Local Transport Study, Department for Infrastructure 2021

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

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

In the context of Enniskillen, gaps in footpath provision, predominantly narrow footpaths, and lack of segregated cycling facilities have been noted. An analysis of the available bus services indicated that they *“would be most attractive to people without a car and for those who have free concessionary fares”*, including school children, due to uncompetitive travel times and low running frequencies. The analysis in the study found that the town centre has 3 bus routes that operate circular routes at 2-hourly intervals on weekdays and on Saturdays with a focus on the morning interpeak period, with few services between 15.00 and 16.00. The 3 routes are the Ulsterbus service 397a running from 9.00-17.00 serving the South West Acute Hospital and areas to the north of the town, the Ulsterbus Service 397b from 10.00-16.00 serving Cleenish Park and the southwest of the town, and Ulsterbus service 397c from 10.30-17.30 serving Cavanleck and the northeast of the town.

Traffic congestion in Enniskillen town centre has been noted, with particular delays at the bridges at Wellington Road, Anne Street and Cornagrade Road which *“operate at speeds of 15 mph and less”* during peak periods, compared to speeds exceeding 31 mph on the outer roads. This has been linked to all east-west trips having to use the town centre road network and bridges due to the lack of alternative connections (which will be provided in the future in form of the A4 Enniskillen Southern Bypass). The Study also found the level of urban traffic safety in Enniskillen to be deficient, indicating that pedestrians and cyclists are disproportionately often seriously injured in road collisions in urban environments.

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

- Measure 6: town centre parking strategies should be developed as a central measure of the Study, considering the long and short-stay car parking locations and pricing, with a view to reduce town centre congestion and improve turnover of parking spaces;
- Measure 7: improved walking facilities in towns should be provided to remove network gaps and improve local levels of walking, with potential impact of such actions on traffic capacity being noted;
- Measure 8: attractive radial cycling routes in towns and interurban greenways should be developed as a central measure of the Study, so that a larger proportion of

residential areas is served, with potential impact of such actions on traffic capacity being noted; and

- Measure 9: traffic management schemes should be implemented in urban areas to achieve an appropriate modal hierarchy, complementing physical infrastructure schemes.

Fermanagh and Omagh Parking Strategy and Action Plan, AECOM 2017

The Parking Strategy was developed by AECOM on behalf of the Fermanagh and Omagh District Council in the context of the Council assuming responsibility for all public off-street car parks (excluding Park and Ride/ Park and Share sites) in its administrative area. The total number of car parks operated by the Council at the time was 39, with 15 of those located in Enniskillen. The strategy aimed to address issues such as long-stay parking, tariff inconsistency, demand management, additional car parking provision opportunities etc.

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

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

2.3.2 Road Infrastructure and Traffic

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

- Enniskillen can be accessed by A-class roads from the northwest (A46 from/ to Belleek), the north (A32 from/ to Dromore/ Omagh), the east (A4 from/ to Dungannon/ Belfast), the southeast (A509 from/ to Derrylin/ Cavan/ Dublin) and the southwest (A4 from/ to Belcoo/ Blacklion/ Sligo), as shown in Figure 2-11 overleaf.
- The A-class roads passing through Enniskillen town centre converge into a triangular layout formed by two north-south roads (the A32 Cornagrade Road passing by the east part of the town centre and the A32 Irvinestown Road to the west of the town centre) and a single east-west road (the A4 Wellington Road in the south part of the town centre).
- Other key roads include the western access (B80 from/ to Ratoran).

- The area considered as the town centre core is the island on River Erne, which is accessible by road via bridges at six locations: two in the west (Castle Bridge, Erne Bridge), one in the north (Johnston Bridge), and three in the east (Queen Elizabeth Road Bridge, East Bridge, and Inis Ceithleann Bridge), as shown in Figure 2.11 overleaf. In addition, the Erneside Foot Bridge and the Derrychara Bridge provide pedestrian access to the town centre core from the south.
- The road network in Enniskillen is split by River Erne, with the bridges on Wellington Road (Erne Bridge, Inis Ceithleann Bridge), Anne Street (Castle Bridge) and Cornagrade Road (Johnston Bridge) forming the critical joins between the eastern approaches (A46, A4 from/ to Ballygawley, B80) and western approaches (A32, A4 from/ to Belcoo, and A509).
- Due to the existing road network constraints, all east-west movements and a significant proportion of north-south movements through Enniskillen pass by the town centre.
- To facilitate through-traffic, the A-class roads in the town centre core, including Wellington Road, Ann Street, and Cornagrade Road have up to four vehicular mainline lanes (two per direction) with additional turning lanes. However, continuous two lanes are available only to westbound movements along the A4 (from Inis Ceithleann Bridge to Castle Bridge via Wellington Road), with single-lane sections forming bottlenecks on all other through routes. As recognised in the reviewed mobility-related documents, traffic congestion is a significant issue in the Enniskillen town centre core, which is deemed to result from significant through-traffic volumes and exacerbated by limited network capacity due to bottlenecks.

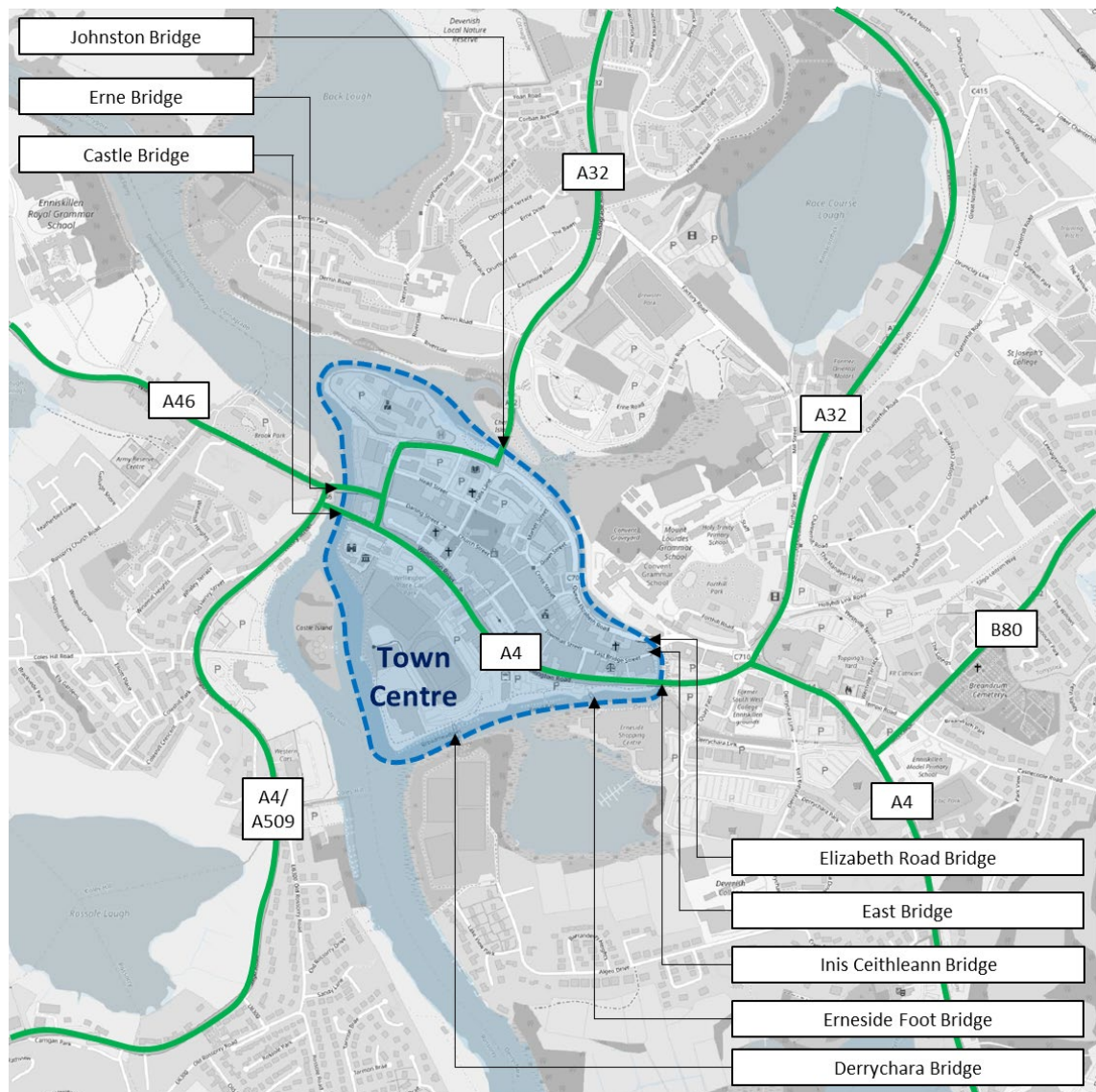


Figure 2-11: Key Roads and Bridges in Enniskillen Town Centre

- The local road network in Enniskillen town centre core features several one-way streets, as follows:
 - westbound movements only allowed on the East Bridge Street/ Townhall Street/ Church Street corridor from the East Bridge to Halls Lane;
 - eastbound movements only allowed on Darling Street from Castle Street to Halls Lane;
 - northbound movements only allowed on Halls Lane from St Michael's Church to Head Street;
 - westbound movements only allowed on the Water Street/ Cross Street/ Market Street corridor; and
 - southbound movements only allowed on Down Street.
- Overall, the one-way roads are not deemed to form a complex one-way system, however they are noted to feature no counterflow cycling facilities thus lengthening travel distances and times and disincentivising its use.

The key future road infrastructure scheme identified in Enniskillen is the A4 Enniskillen Southern Bypass scheme, which is currently under construction and set to be fully delivered by 2024. The indicative layout of the Bypass and the section of the existing A4 corridor due to be bypassed are presented in Figure 2-12, which follows.

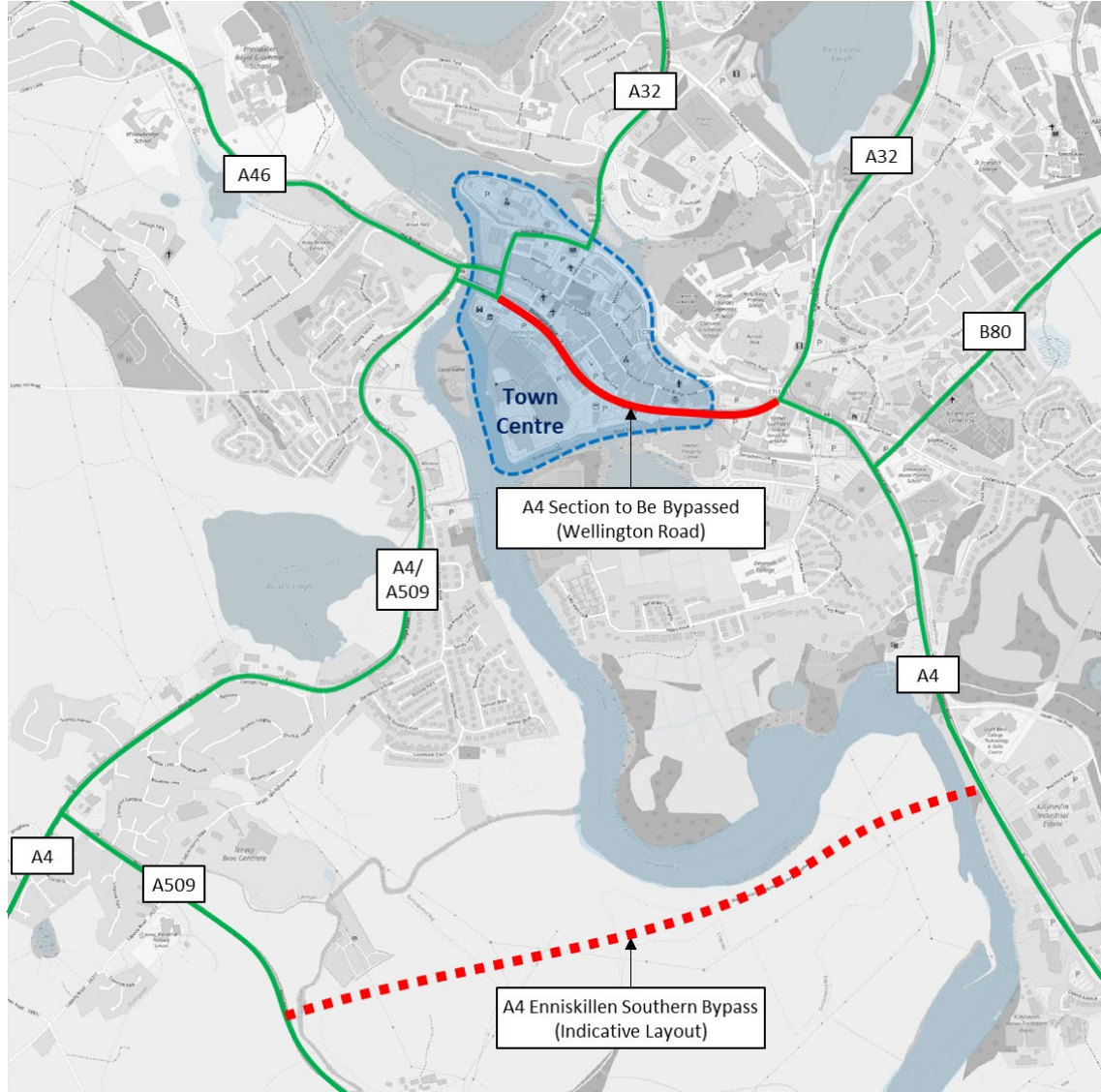


Figure 2-12: A4 Enniskillen Southern Bypass

The A4 Enniskillen Southern Bypass scheme has been considered by the project team based on the materials available in the public domain. The relevant findings in relation to the A4 Enniskillen Southern Bypass scheme are as follows:

- The scheme will include the provision of a southern bypass of own centre routed partially outside of the currently built-up urban area.
- The proposed new road will connect the A4 (Dublin Road) with the A509 (Derrylin/ Cavan Road), providing an alternative for Wellington Road in serving the east-west movements passing through Enniskillen.

- The opening of the scheme should result in re-routing of the existing through-traffic from the Wellington Road to the new A4 Enniskillen Southern Bypass, creating an opportunity for improving pedestrian and cyclist environment in the town centre core.
- Traffic demand management measures in the town centre may be needed to facilitate the re-routing of through-traffic onto the more indirect route via the Southern Bypass and ensure the potential benefits of the Bypass in terms of traffic reduction in the town centre are fully realised.
- With the expected significant reduction in through-traffic due to opening of the Bypass, there are opportunities for road space reallocation in the town centre, as also recognised in earlier planning documents such as the Enniskillen Town Centre Masterplan.
- Detailed assessment, including traffic modelling, and a comparative appraisal of a number of town centre road remodelling measure packages is deemed essential in determining the optimal course of action.

2.3.3 Accessibility

An accessibility assessment of Enniskillen has been undertaken by means of an isochrone analysis. For this purpose, walking time isochrones have been generated for a notional town centre point, located in front of the Enniskillen Town Hall, using a network comprising the existing roads and pedestrian links. A walking speed of 5 km/ h has been assumed. While not exact, such approach has been deemed to deliver a reliable overview of the opportunities for navigating the town by active travel modes, subject to an attractive walking and cycling environment being created. The obtained isochrone map is presented in Figure 2.13 which follows.

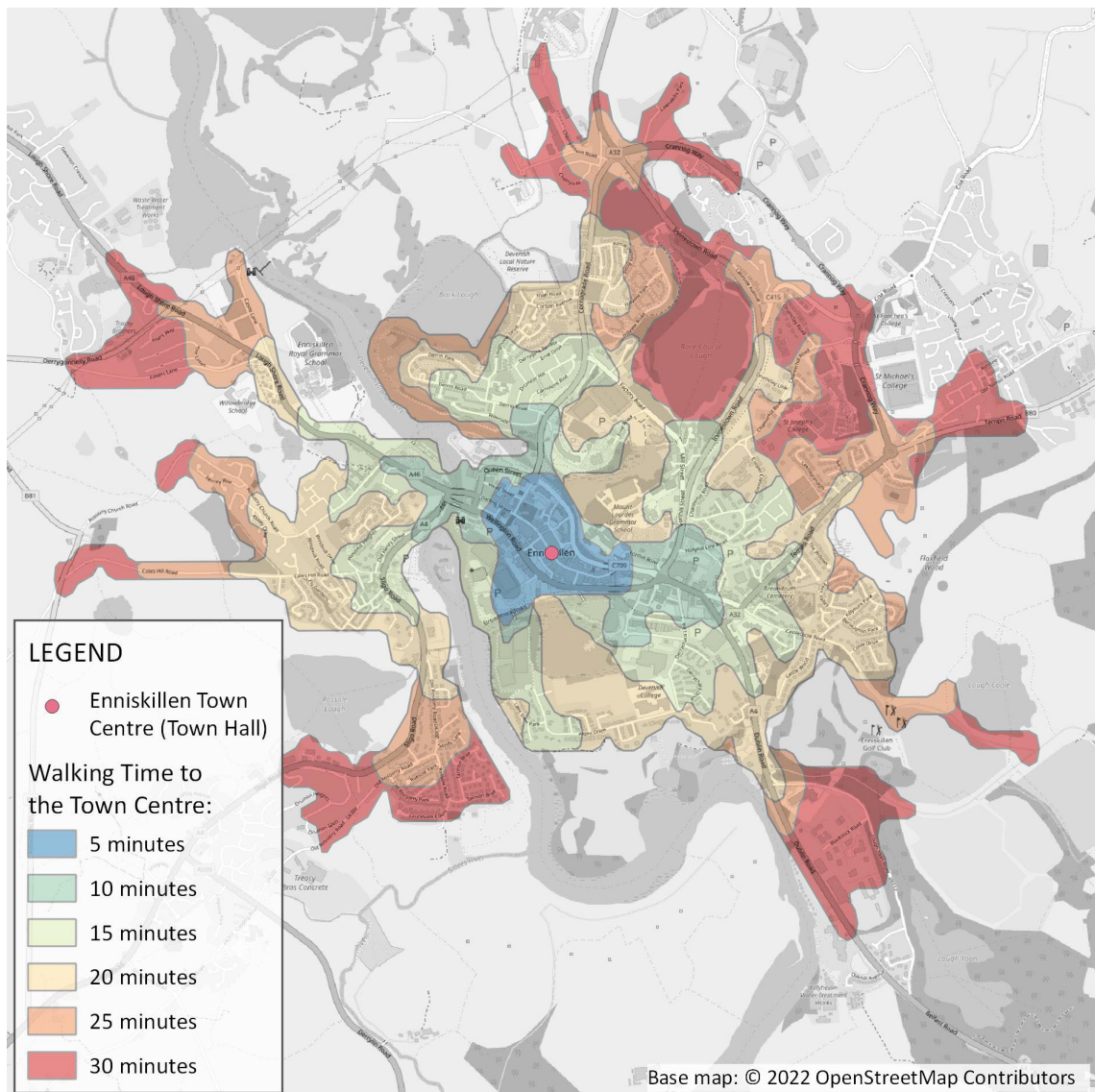


Figure 2-13: Walking Time from Enniskillen Town Centre

As can be seen in the preceding figure, the isochrone analysis has shown that the town centre can be accessed on foot from a significant proportion of the Enniskillen built-up area, with the exception of the suburbs further afield including the areas north of Cherrymount Link Road, Carrigan in the south, and Silverhill in the northwest. This demonstrates that Enniskillen is compact and conducive to walking, subject to non-distance-related hindrances to walking (e.g., narrow/ uneven footpaths, personal safety issues) being minimised and notwithstanding the below-detailed permeability constraints.

The isochrone analysis indicates that the River Erne forms a permeability barrier, with the Castle Bridge and Erne Bridge providing the only connections between the eastern and western parts of town, however the river can also provide an opportunity to enhance permeability through provision of water taxi services. The accessibility of the town centre by walking from the southern suburbs could be improved by provision of a footbridge. Permeability constraints arising from dendritic local road networks between the A32

(Irvinstown Road) and the B80 (Tempo Road) can also be seen in the presented isochrone map.

While a separate travel time analysis with respect to cycling was not undertaken, it may be assumed that a cyclist would move at an average speed two to three times higher, compared to a pedestrian. This indicates that the town centre could be reached by cycling from most points across the town in no more than ca. 15 minutes, while the entire town could be traversed in approximately 30 minutes. As such, **the scale of Enniskillen offers strong potential for cycling as a means of daily utility travel** (i.e. travel to work, school, shopping etc.), subject to the provision of appropriate cycling infrastructure, including additional active travel bridges and connections to address permeability gaps. It is also noted that higher average cycling speed could be achieved on interurban routes where segregated cycling facilities are provided, indicating a potential for accessing the town by non-motorised modes from its rural hinterland.

2.3.4 Car Parking

Current off-street car parking provision has been reviewed based on the available information, including the relevant earlier studies (see Section 2.3.1) and the spatial dataset provided by the Client and including location and capacity of Council-operated car parks in Enniskillen town centre. The above information has been examined in the context of the walking accessibility assessment outputs (see Section 2.3.3) and the town centre road infrastructure assessment (see: Section 2.3.2). The output of this work is presented in the following Figure 2-14.

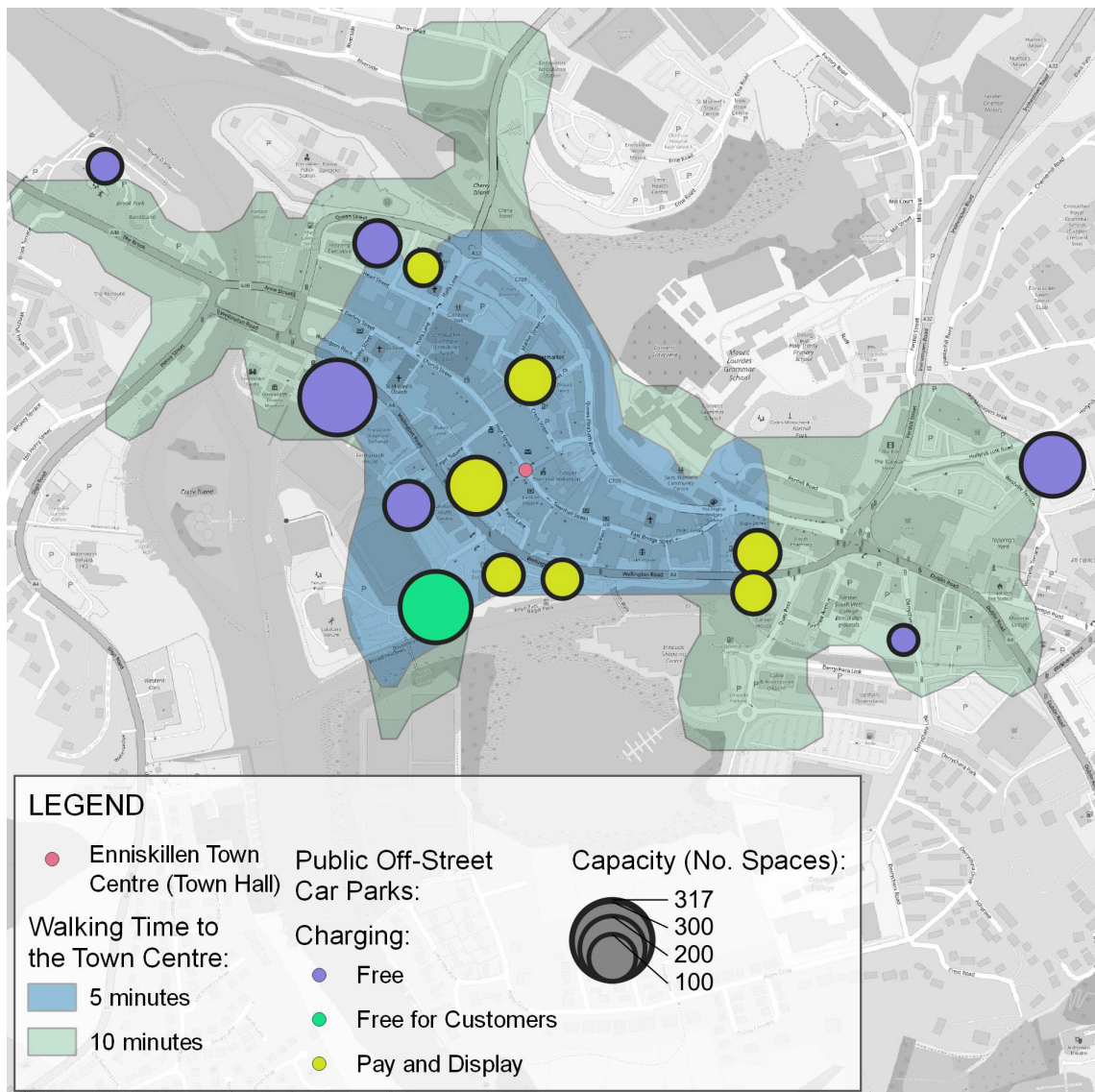


Figure 2-14: Map of Public Off-Street Car Parks in Enniskillen Town Centre

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

- There is a total of 9 public off-street car parks within a 5-minute walk from the notional town centre point, and a further 4 public off-street car parks in the 5–10-minute walking time band, for a total of 13 public car parks within 10 minutes’ walk from the town centre. Detailed breakdown of the public car parks by walking time band and charging regime is provided in Table 2.4 which follows. Private car parks have been omitted due to lack of an equivalent spatial dataset being available.

Table 2.4: Breakdown of Off-Street Car Parks Enniskillen Town Centre

Walking Time to/ from the Notional Town Centre Central Point	Off-Street Council-Operated Car Park					
	Free of Charge		Charged		Customer Only	
	No. Sites	Average Capacity	No. Sites	Average Capacity	No. Sites	Average Capacity
no more than 5 minutes	2	187	6	78	1	240
5 to 10 minutes	4	106	1	78	-	-
no more than 10 minutes	6	133	7	78	1	240

— There is a total of 374 free of charge car parking spaces and 466 paid car parking spaces within a 5-minute walk from the notional town centre point (in addition to 240 spaces available to the Fermanagh Lakeland Forum visitors only). A further 425 free of charge car parking spaces and 78 paid car parking spaces are provided in the 5–10-minute walking time band. Overall, there is a total of 1,583 off-street car parking spaces, including 799 free of charge spaces, 544 paid spaces, and 240 customer only spaces within 10 minutes’ walk from the town centre, excluding private car parks. Detailed breakdown by walking time band and charging regime is provided in Table 2.5, which follows.

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

Walking Time to/ from the Notional Town Centre Central Point	Off-Street Council-Operated Car Park Capacity (No. Spaces)			
	Free of Charge	Pay and Display	Customer Only	Total
no more than 5 minutes	374	466	240	1,080
5 to 10 minutes	425	78	-	503
no more than 10 minutes	799	544	240	1,583

— As can be seen in the two preceding tables, the majority of off-street car parking spaces in the closest proximity to the town centre are provided in Council-operated paid car parks, whereas in the 5–10-minute walk time band the majority of spaces are provided in free of charge car parks, primarily in private ownership. It is noted that duration of stay limitations may be in place in the private car parks and have not been considered as part of this analysis.

— As shown in Figure 2-14, approximately 46% of the public car park capacity in the 5-minute walking time band (excluding the Fermanagh Lakelands Forum car park) and 84% of the public car park capacity in the 5-10-minute walking time band is available free of charge.

— It appears that pay-and display charging mostly applies in the public car parks in the part of the town centre core between Queen Elizabeth Road and Wellington Road. Ample free of charge car parking facilities are provided at edges of the town centre core, in particular south of Wellington Road.

- The compact nature of the town centre means there are opportunities for relocating car parking facilities away from its core part without significant impact on accessibility. This would apply in particular to long stay car parking (e.g., staff car parking), where a potential increase of walking time between the car parking space and the ultimate destination by a couple minutes would be negligible relative to the overall duration of stay (and could be offset, if the time needed to find an available car parking space is reduced).
- Off-street car parks are observed to occupy a relatively significant proportion of the spatially constrained lands within the town centre core, further highlighting the need for land use optimisation, which may involve car park relocation away from the central island and/ or conversion from surface to multi-storey facilities.
- Observations of the town centre indicate that Main Street is often congested with a constant stream of cars seeking spaces to park. This has a negative impact on the visual appearance of the town centre, noise levels, and it can be expected, on air quality.

2.3.5 Walking and Cycling Provision

Active travel infrastructure provision in Enniskillen was previously assessed in detail by the Fermanagh and Omagh Local Transport Study (see Section 2.3.1). As noted therein, while footpaths are provided along most of the roads within the town, their width is at times insufficient. **A highly limited provision of segregated cycle facilities across the town** is also noted, with shared use footways being the main form of cycle infrastructure available in Enniskillen, apart from a section of orbital mandatory cycle lane along Cherrymount Link Road and short sections of traffic-free cycle routes south of the town centre core. The location of the currently provided cycling facilities is presented in the following Figure 2-15 (Source: *Fermanagh and Omagh Local Transport Study*, DfT 2021).

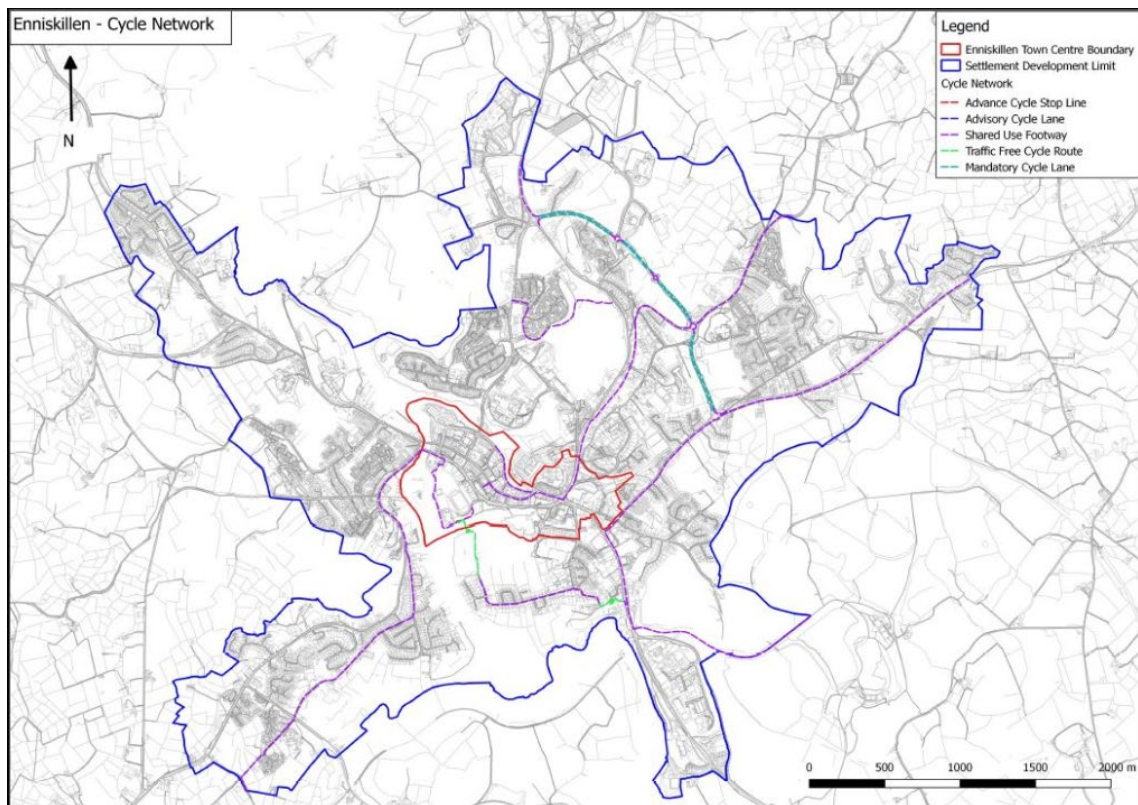


Figure 2-15: Map of Shared Use Footways

As can be seen in the preceding figure, the lack of segregated cycling facilities is compounded by gaps in the shared use footways, which do not form a network and therefore do not allow for completing the majority of trips by bicycle without merging with vehicular traffic. The availability of continuous shared footpaths along several radial corridors to the town centre is noted, however their benefits are partially negated by the lack of consistent cycle provision in the town centre core itself. It is further noted that only one of the three active travel bridges to the town centre core (the Derrychara Bridge) is cyclable, with the remaining ones serving pedestrians only. Finally, the permeability constraints noted in section 2.3.3 apply to both walking and cycling.

In the context of movements in the town centre, **the lack of dedicated cycling infrastructure and a discontinuous network of shared walking and cycling facilities** affect the attractiveness of Enniskillen town centre as cycling environment. This is compounded by the congestion on key town centre roads and lack of counterflow cycle lanes on one-way roads in the town centre core, both of which may discourage cycling due to the resulting safety concerns and circuitous routing.

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

2.4 Economy and Employment

Enniskillen is the County Town of Fermanagh and second largest settlement in the Fermanagh and Omagh District. With a multifunctional role including as an identified

main hub and inter-regional gateway to Ireland's Northwest in the Regional Development Strategy 2035, Enniskillen is an important driver of the economy and employment in its immediate catchment area and across County Fermanagh. To further assist in understanding the town's current role and potential for the future, an analysis of the economy has been undertaken through examination of the economy and employment. It includes information on economic activity, key industries of employment for the town, potential areas for growth and an overview of the retail capacity. It includes information at district level and where possible, for Enniskillen town itself.

2.4.1 Economic Activity

An examination of the existing and historic NISRA data for employment, incomes, educational status and economic activity/inactivity within Enniskillen can provide useful context on the socioeconomic status of the population and labour market dynamics, particularly when compared to other locations. When considered in the context of the area demographics as set out in Section 2.1 and the overall goal of the Enniskillen Place Shaping Plan, this information can be used to assist in optimising the town to attract further investment, enhance educational outcomes and increase employment opportunities.

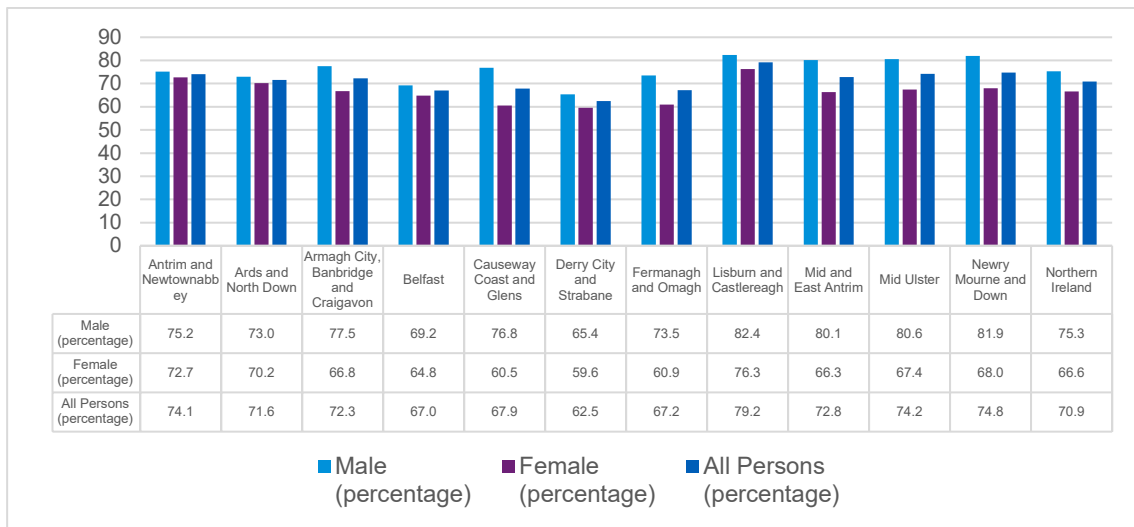
Furthermore, analysis of the latest *Labour Force Survey* (a sample survey of around 2,500 households across Northern Ireland, last published in April 2022) has been undertaken to understand these indicators and dynamics at the relevant geographic levels. However, it should be noted that the information provided for Enniskillen is relatively limited (i.e., the 6 SOAs are only explored as part of the annual report).

The NI average and local rate of employment during 2020²⁰ including breakdown by gender in each Local Government District (LGD) is illustrated in Figure 2-16. This specifically relates to the proportion of the working age population (i.e., those aged 16 – 64 years) who are employed which is a key indicator for sustainable growth and economic resilience as it represents a source of reliable income to households and families. It should be noted that the working age population within Fermanagh and Omagh is the fourth smallest of all LGDs across Northern Ireland. Overall, the rate of employment in Fermanagh and Omagh (67.2%) is slightly lower than the NI average (70.9%) and the third lowest of all LGDs, however it has increased in three of the last five years. The lower economic activity rate may be partly attributed to early retirees and a culture towards one parent staying in the home in the FODC area.

Disparities in the rate of employment between males and females are evident within Fermanagh and Omagh (absolute difference of 12.6%) and the gender gap is larger than the NI comparison (8.7%). However, in terms of employment rates, this inequality by gender is greater in the other four LGDs. Female participation in the labour force has historically been a driver of economic growth and gender diversity across all types and levels of employment should be encouraged.

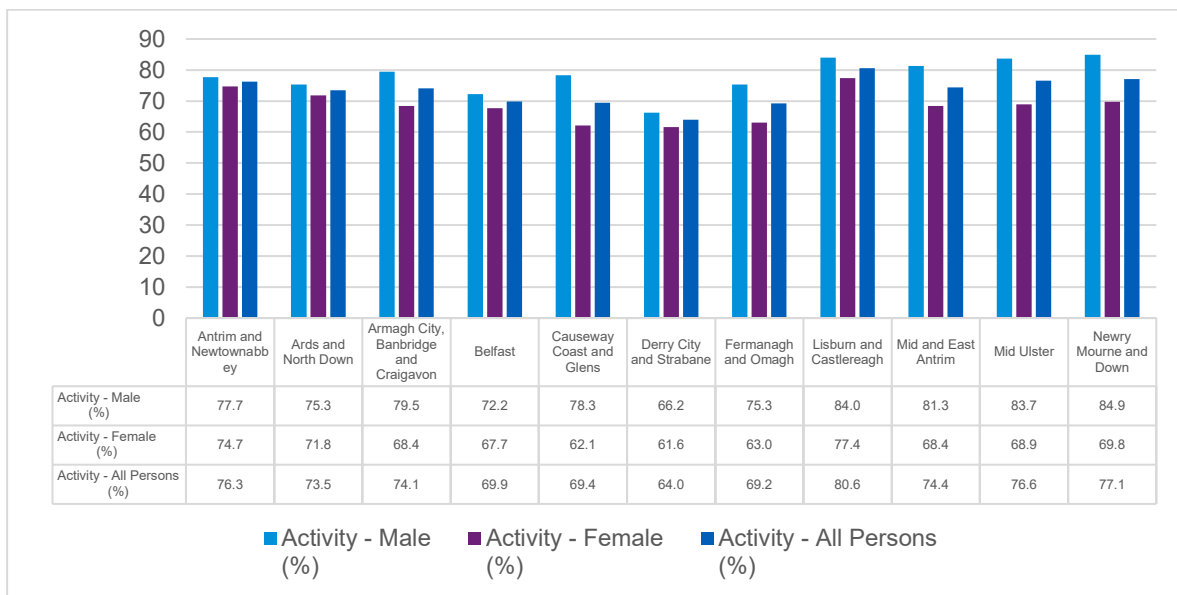
²⁰ This relates to the employment rate by sex and Local Government District from the Labour Force Survey January to December 2020.

Figure 2-16: Employment rate (pop. aged 16-64) by gender and LGD, 2020



The rate of economic activity²¹ (i.e., labour market engagement) for the population aged 16-64 was relatively low within Fermanagh and Omagh in 2020 (69.2%) when compared to other areas and the average rate for NI (73%) as presented in Figure 2-17. This may be attributable to the relatively low rate of economic activity for females (63%). The level of gender disparity is also notable across Fermanagh and Omagh which had a 75.3% economic activity rate for males compared to 63% for females (absolute difference of 12.3%) in 2020 compared to the national rate (9% difference).

Figure 2-17: Economic activity rate (pop. aged 16-64) by gender and LGD, 2020



Analysis of historic economic activity within Fermanagh and Omagh with respect to employment and educational qualifications is illustrated in Figure 2-18. The rate of economic activity has been closely aligned with the rate of employment (as would be

²¹ Labour Force Survey January to December 2020, Economic activity by sex and Local Government District, Aged 16 to 64

expected) and in recent years, the general increase in qualifications has generally coincided with an increase in employment and economic activity. By 2020, the population of Fermanagh and Omagh has rebounded to previous peaks evident in 2015 when economic activity was at 77.2% and employment at 73.8%.

Figure 2-18: Rates of economic activity, employment and educational qualifications in Fermanagh and Omagh, 2009 – 2020

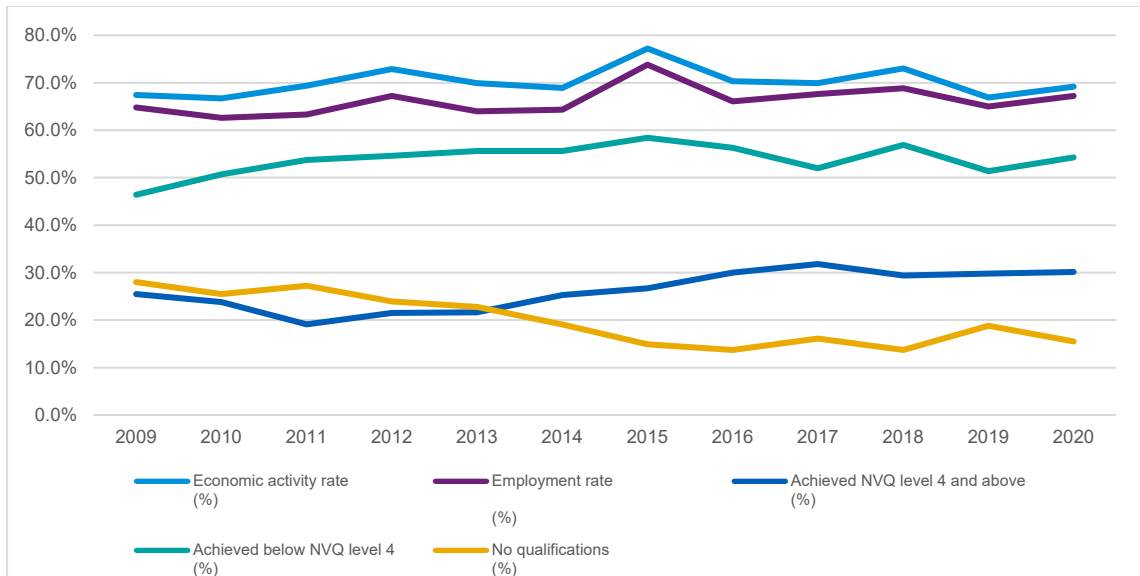
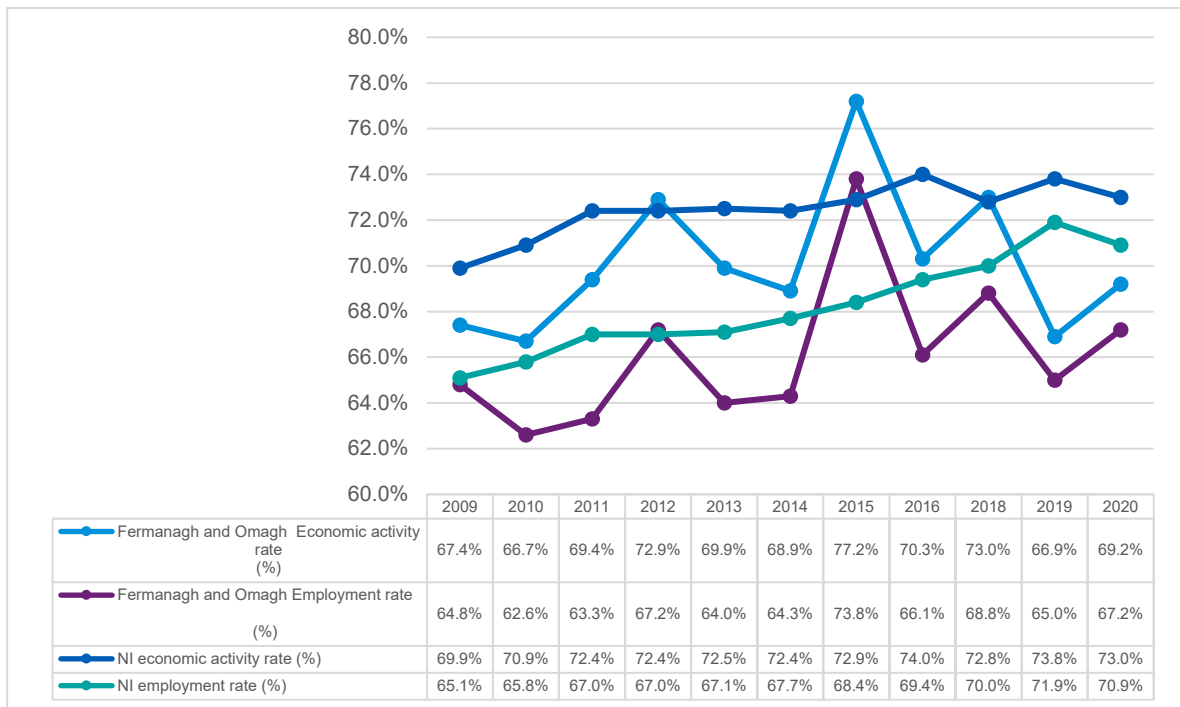


Figure 2-19 provides a comparison of local rates of economic activity and employment against the NI average. The 2015 peak in rates for Fermanagh and Omagh was more pronounced than the NI average, with more moderate performance observed in 2018. However, we note that the temporal trends in Fermanagh and Omagh have been more volatile than the national rates, with significant drops in activity recorded in 2010 and 2013-14.

Figure 2-19: Rates of employment and economic activity in Fermanagh and Omagh and Northern Ireland, 2009 - 2020



In 2020, the economic inactivity rates (i.e., the proportion of the working age population aged 16-64 that are neither in employment nor unemployed) stood at 30.8% for Fermanagh and Omagh, which is slightly higher than the NI average (27%) shown in Table 2.6.²² When the skill profile of this cohort is examined, some 35% of the economically inactive population have no formal qualifications, compared to only 11% of those in employment, further highlighting the link between qualifications and economic activity.²³ Addressing economic inactivity within the area, particularly among the younger age cohorts, through place-making can help unlock the labour market potential.

Table 2.6: Overview of economic inactivity of pop. aged 16-64 by LGD, 2020

Local Government District	Number	Rate (%)
Antrim and Newtownabbey	21,000	23.7
Ards and North Down	25,000	26.5
Armagh City, Banbridge and Craigavon	34,000	25.9
Belfast	66,000	30.1
Causeway Coast and Glens	26,000	30.6
Derry City and Strabane	34,000	36.0
Fermanagh and Omagh	22,000	30.8
Lisburn and Castlereagh	18,000	19.4
Mid and East Antrim	20,000	25.6

²² Labour Force Survey January to December 2020, Economic Inactivity by Local Government District, Aged 16 to 64

²³ NISRA, Skills profile of the economically inactive in FODC, 2019 cited in FODC & UUEPC, *A Socio-Economic Profile of the Fermanagh and Omagh District (2022)*

Mid Ulster	23,000	23.4
Newry Mourne and Down	26,000	22.9
Northern Ireland	314,000	27.0

While detailed data is not available at this geographic level of Enniskillen, relevant socio-economic trends identified across Northern Ireland and the UK in 2020 are summarised by age cohort below:

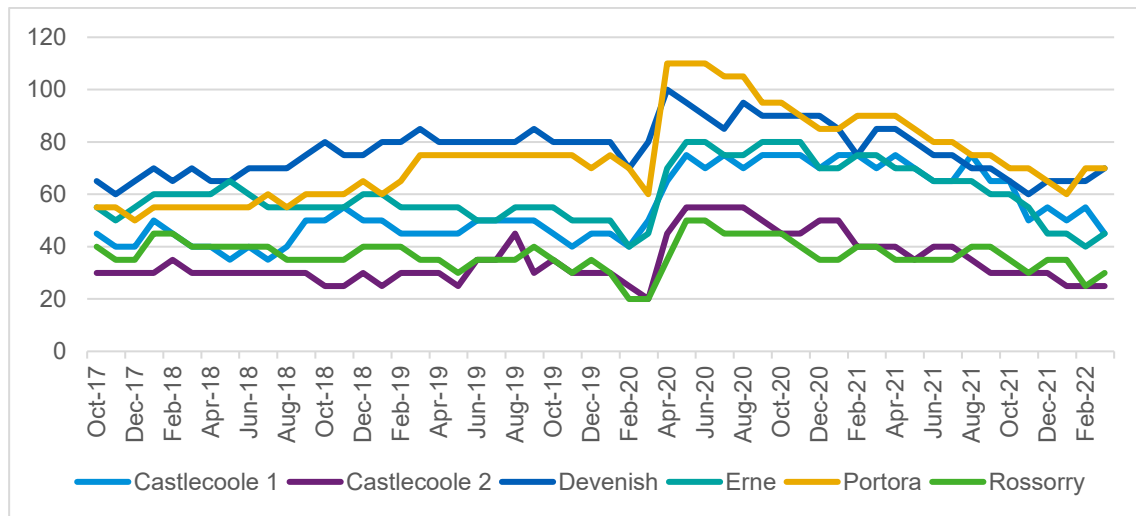
- For the 16 – 24 years cohort, some 17.3% in Northern Ireland and 13.2% in the UK were economically inactive;
- For the 25 – 34 years cohort, some 6.8% in Northern Ireland and 5.7% across the UK were economically inactive;
- In Northern Ireland, a total of 6% of the 35 – 44 years cohort and 7.5% of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

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

An overview of the claimant count²⁴ within Enniskillen is provided in Figure 2-20. As can be seen below, a clear rise in claimants occurred with the onset of the COVID-19 pandemic during 2020 and the first half of 2021. In recent months the number of claimants in Enniskillen has fallen which aligns with overall regional trends. However, it should be noted that the number of claimants in March 2022 was slightly higher than in March 2020 (285 and 275 respectively). Within Enniskillen, it is noted that Portora and Devenish generally had the highest number of claimants with Portora increasing in recent months.

²⁴ This is the monthly count of all people seeking the Jobseeker's Allowance and some out-of-work Universal Credit claimants.

Figure 2-20: Claimant count within Enniskillen, 2017 - 2022



In terms of income²⁵, the mean annual wage of the population by LGD from 2014 – 2021 is presented in Table 2.7. As would be expected, the mean wages in Belfast are consistently higher than the other areas, while wages in the Causeway Coast and Glens and Ards and North Down area were lowest overall. A general increase is noticeable across all areas, with Fermanagh and Omagh rising to an average wage of £23,339 in 2021 (an increase of 30.6% on 2014 values).

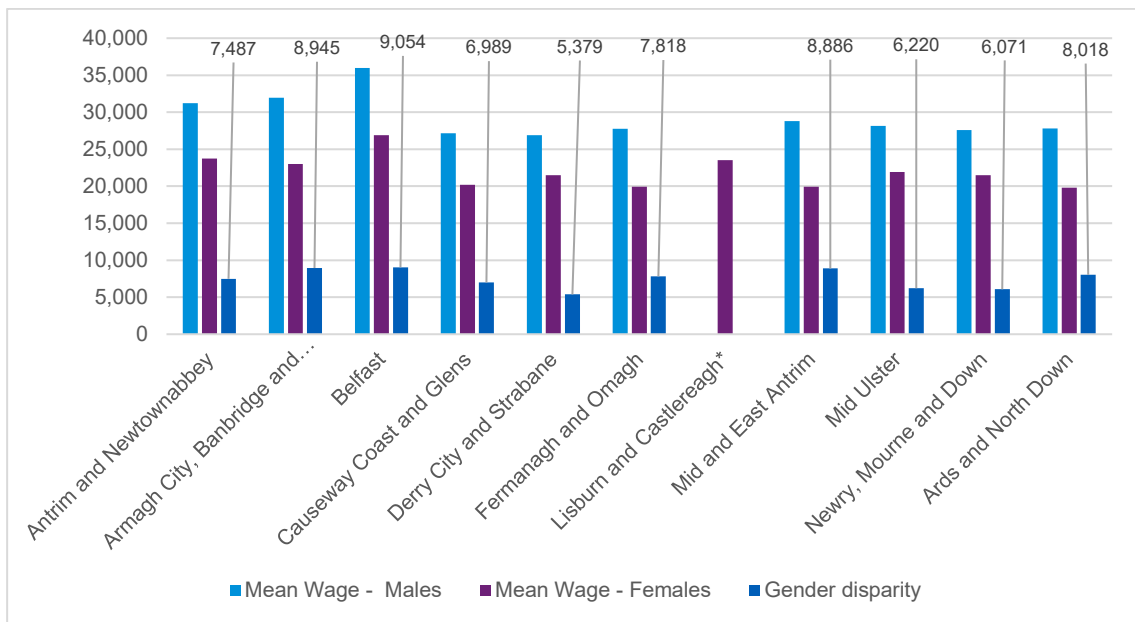
Table 2.7: Mean annual wages for all persons by LGD, 2014 - 2021

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

²⁵ This relates to the gross annual pay of employees on adult rates who have been in the same job for at least 12 months, including those whose pay was affected by absence.

Significant differences in the average wage for males and females were evident across all LGDs in 2021, as illustrated in Figure 2-21. A more moderate wage gap of £7,818 was observed in the Fermanagh and Omagh district for males and females compared to other regions. Within Fermanagh and Omagh, the pay gap by gender may be associated with the different rates of employment and economic activity by gender as highlighted in Figure 2-16 and Figure 2-17. However, it should be noted that the gender pay gap measures a broader concept than just pay discrimination alone and can reflect other inequalities women face in access to work, progression and rewards which is not unique to Fermanagh and Omagh.

Figure 2-21: Mean wages for males/females and the gender gap by LGD, 2021



2.4.2 Employment

Prominent industries of employment in Enniskillen were identified through the analysis of the Northern Ireland Town Centre Database from the Department of Communities which includes data on employee jobs, business demography and business turnover. As outlined in the table below, the top three industries for employment in 2021 in Enniskillen were Wholesale And Retail Trade; Repair Of Motor Vehicles And Motorcycles (31%), Accommodation and Food Service Activities (14%), and Public Administration And Defence; Compulsory Social Security (10%). Combined, Wholesale and Retail trade and Accommodation and Food Services accounted for approximately 35% of employment in 2021 and 54% of business turnover in 2019²⁶, highlighting the dominance and importance of these two sectors in Enniskillen, which undoubtedly benefits from Enniskillen’s wide catchment area and cross-border trade.

²⁶ Most recent data available.

Table 2.8: Employment by industry section 2011 and 2021

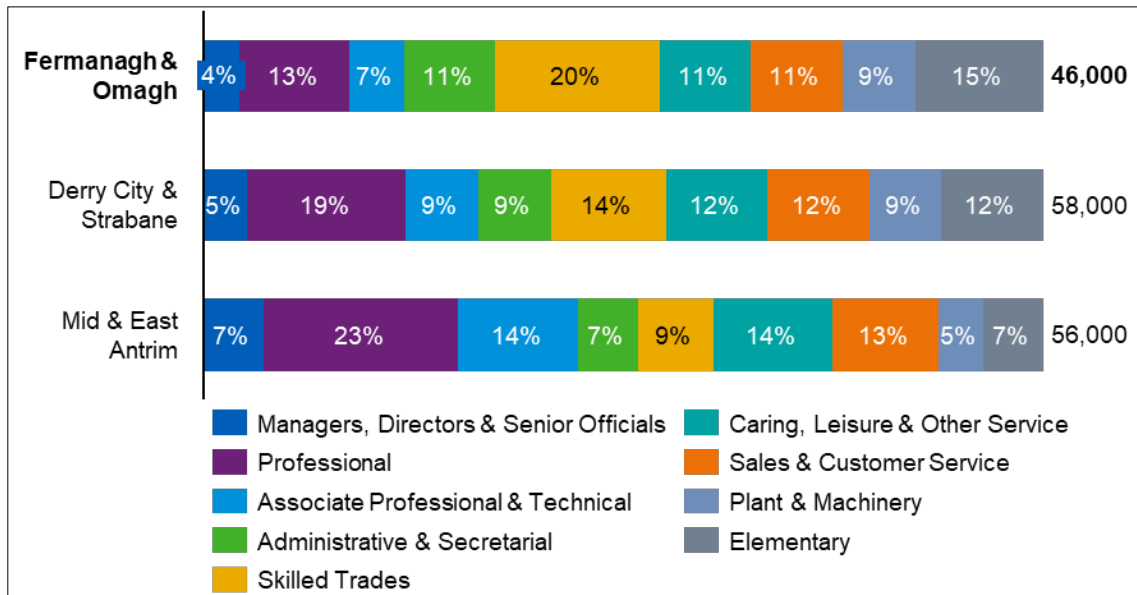
Industry Section	Employee Jobs 2011	% of Total Employees 2011	Employee Jobs 2021	% of Total Employees 2021
Agriculture, Forestry And Fishing	N/A	N/A	*	*
Mining And Quarrying	N/A	N/A	N/A	N/A
Manufacturing	16	0%	*	*
Electricity, Gas, Steam And Air Conditioning Supply	N/A	N/A	N/A	N/A
Water Supply; Sewerage, Waste Management And Remediation Activities	*	*	N/A	N/A
Construction	59	1%	50	1%
Wholesale And Retail Trade; Repair Of Motor Vehicles And Motorcycles	1,510	34%	1,307	31%
Transportation And Storage	166	4%	158	4%
Accommodation And Food Service Activities	547	12%	598	14%
Information And Communication	*	*	*	*
Financial And Insurance Activities	177	4%	143	3%
Real Estate Activities	23	1%	70	2%
Professional, Scientific And Technical Activities	155	3%	171	4%
Administrative And Support Service Activities	190	4%	128	3%
Public Administration And Defence; Compulsory Social Security	543	12%	433	10%
Education	*	*	*	*
Human Health And Social Work Activities	313	7%	264	6%
Arts, Entertainment And Recreation	131	3%	103	2%
Other Service Activities	96	2%	135	3%
	4,485		4,246	

* Data has been suppressed to prevent disclosure

Between 2011-2021, the industries that have seen the largest growth in the overall % of employment are classed in the categories of Accommodation and Food Service Activities, Real Estate Activities, Other Service Activities, and Professional, Scientific And Technical Activities. Similarly, the industries that have seen the largest declines in the overall % of employment are classed in the categories of Wholesale and Retail Trade and Public Administration And Defence; Compulsory Social Security. Overall, employment by industry in the town has recorded a decrease of approximately 5.3%, from 4,485 in 2011 to 4,246 in 2021.

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

Figure 2-22: District employment by occupation, 2020



Similarly, examining district level data from Invest NI²⁷ also allows for further insight into the economy of Enniskillen and to identify additional sectoral strengths that are not easily identifiable from the Town Centre database. Invest NI supports 128 businesses in the Fermanagh and Omagh District Council area which in 2021 accounted for over 5,511 jobs, £418m in exports and £1.3bn in total sales. The 3 largest sectors of employment for Invest NI supported businesses are Advanced Engineering & Manufacturing (35%), Agri-Food (27%), and Construction (21%). Other sectors include Financial Professional & Business Services (8%), Leisure & Tourism (4%), Life & Health Sciences (3%), and Digital & Creative technologies (1%). Notably 37% of businesses supported were micro-businesses (0-9 employees) and 44% of businesses were small businesses (10-49 employees) while 20% were classed as medium and large businesses (50-249 & 250+ employees). In relation to sales, the top 3 sectors were Agri-food £586m (46.2%), Advanced Engineering & Manufacturing £339m (26.7%), and Construction £253m (20.0%). In 2021, 6 of the top 10 investors in the FODC area as indicated by Invest NI had a presence in Fermanagh, including Balcas (Manufacturing – wood pellets) which is located close to Enniskillen Airport and Elite Electronic Systems (manufacturing-electronics) in Enniskillen itself.

Overall, the data broadly aligns with several known employers in Enniskillen with particular clusters around manufacturing, retail, and leisure and tourism. For instance, some key employers in the town include Flex (manufacturing – packaging), Tracey Concrete (manufacturing– concrete), GT Exhausts (Manufacturing – vehicle exhausts), Tracey Brothers (Engineering), Kerry Foods (Agri-business), KillyhevlinHotel and Westville Hotel. There is also a presence of telecommunications and insurance industries in the town with BT and Liberty Insurance identified as some of the larger employers in Enniskillen. The town’s function as a public service hub is also evident with significant employment through the FODC, Waterways Ireland, South West Acute Hospital and the Department of Agriculture, Environment and Rural Affairs (DAERA).

²⁷ Invest NI, Fermanagh and Omagh Council Briefing, June 2022.

However, from analysis of the Inter-Departmental Business Register in 2021, small and micro businesses dominate the enterprise landscape in the FODC area with 94% of registered businesses in the FODC consisting of 9 or less employees. As highlighted above, while Enniskillen does have several large employers, it is expected that the business composition of the town broadly aligns with the Invest NI and IDBR data at district level and that the majority of companies are small and micro businesses. Furthermore, the business birth rate²⁸ in Fermanagh and Omagh District was recorded at 8.1% in 2020 which was below the NI Average of 9.9% and the 2nd lowest of all the NI districts.

Tables 2.9 and 2.10 below compare Enniskillen to the selected comparator towns in relation to the number of businesses recorded and employee jobs by industry section. In relation to the number of businesses recorded, Enniskillen performed better than the other key town in the FODC area, Omagh, which saw a decrease of -8.5%, as well as Dungannon that recorded a decrease of -3.4% and Antrim that recorded a decrease of -5.1%. Out of the comparator towns only Armagh (+4.4%) fared better than Enniskillen in relation to percentage change in number of businesses recorded.

Table 2.9: Number of Businesses by Comparator Town 2012 and 2021

Town	No. of Businesses 2012	No. of Businesses 2021	% Change 2012 - 2021
Antrim	195	185	-5.1
Armagh	450	470	4.4
Dungannon	290	280	-3.4
Enniskillen	415	430	3.6
Omagh	470	430	-8.5

In relation to the number of employee jobs recorded by industry section in each town, all of the comparator towns recorded a decrease between 2011-2021. Enniskillen's recorded decrease of -5.3% was the second smallest decrease after Armagh (-0.5%), with Dungannon (-23.2%), Antrim (-14.3%) and Omagh (-5.6%) all recording larger decreases in employee jobs during the 2011-2019 period.

Table 2.10: Number of Employee Jobs by Comparator Town 2011 and 2021

Town	Employee Jobs 2011	Employee Jobs 2021	%Change 2011-2021
Antrim	2224	1907	-14.3
Armagh	4569	4544	-0.5
Dungannon	2751	2114	-23.2
Enniskillen	4485	4246	-5.3
Omagh	4920	4645	-5.6

However, similarly to Omagh and Armagh, Enniskillen's status as a principal town and main hub as outlined in the Regional Development Strategy (RDS) 2035 is clearly reflected in the number of jobs and businesses recorded both in 2011 and 2021, which is significantly more than that of Dungannon and Antrim. Furthermore, the level of economic activity is evidently supported by the town's role as an inter-regional gateway

²⁸ IDBR Business Demography defines a business birth as a business that was not present in the previous 2 years, while the birth rate is expressed as a percentage of total active businesses in the stated year.

to Ireland's Northwest, its location on a key transport route from east to west and the natural resources, amenities and attraction provided by the Fermanagh Lakelands. This multifunctional role offers the town numerous opportunities on which it can build and contrasts with Antrim, which despite substantial population growth since 2001, has a significantly lower level of businesses and jobs pointing towards its main role as a commuter town for Belfast based employees. Enniskillen should continue to work to attract new investment, support existing businesses, and foster entrepreneurship (including through the likes of the Enniskillen Workhouse innovation, enterprise and heritage hub²⁹) to enhance the economy of the town and associated employment opportunities.

2.4.3 Remote Working

The shift towards remote and hybrid working also presents opportunities for growth in smaller towns and villages through the attraction of workers that would otherwise be based in larger cities. The global Covid-19 pandemic has accelerated the transition to remote and hybrid working, with local authorities across the UK and Ireland keen to capitalise on the potential economic benefit that changes to the traditional working environment may offer. A UUEPC Report³⁰ on the remote work in Northern Ireland highlighted that less than 10% of Northern Ireland's workforce were either partially or fully working from home pre-pandemic. This rose to 41% in April 2020, and although it subsequently declined, it remained at 17% in February 2022. Importantly, the report noted that in the ONS Opinion and Lifestyle Survey (September 2021), 82% of the working population expected to work remotely at least in part post-covid. Similarly, analysis completed by ONS BICS and the UUEPC found that the percentage of employers who expected to increase "the level of homeworking" as part of their permanent business models increased between October 2020 - June 2021³¹. However, while the UUEPC report highlighted that between 40%-61% of jobs could be conducted remotely (at least in part), it noted that sectors such as agriculture, construction and manufacturing had lower potential for remote working.

Enniskillen may be able to benefit from the enhanced acceleration towards hybrid and remote working. The town's scenic setting, natural amenities and proximity to a number of attractions (such as Lough Erne, and the Marble Arch Caves) may be attractive to those looking to relocate from larger urban areas. With sectors such as ICT and professional services forecast to grow in the FODC area between 2020-2030, with such sectors potentially being identified as being more suited to remote and hybrid working, there may also be opportunities in these areas for the town.³² Enniskillen has also been selected as a location for a planned NI Civil Service Connect2 Hub.³³ These hubs aim to provide strategically located work and collaboration spaces for civil service staff. They will support the new ways of working, promote regional economic balance, reduce commuting times (and emissions) and promote a better work-life balance.³⁴

However, more generally, caution should be used in the development of remote working hubs, with the majority of those surveyed for the UUEPC Future of Remote Working In Northern Ireland report indicating a preference to work from home rather than hubs and

²⁹ See: <https://www.fermanaghomagham.com/services/business/invest/enniskillen-workhouse/>

³⁰ The Future of Remote Working in Northern Ireland, Ulster University Economic Policy Centre, 2022

³¹ See: The Future of Remote Working in Northern Ireland, UUEPC, 2022

³² See: The Future of Remote Working in Northern Ireland, UUEPC, 2022

³³ See: <https://www.finance-ni.gov.uk/news/murphy-launches-transformational-civil-service-regional-hubs>

³⁴ See: <https://www.finance-ni.gov.uk/news/murphy-launches-transformational-civil-service-regional-hubs>

taking into account widespread hybrid approaches by employers that may still require lengthy commutes for employees working from more distant locations.

2.4.4 Housing Affordability

In 2021 the mean annual pay by place of residence for FODC was £24,374, below the NI average of £27,618. However, as the average house price in FODC is £152,000 and below average for NI (£169,000), the district is one of the most affordable in which to buy in NI.

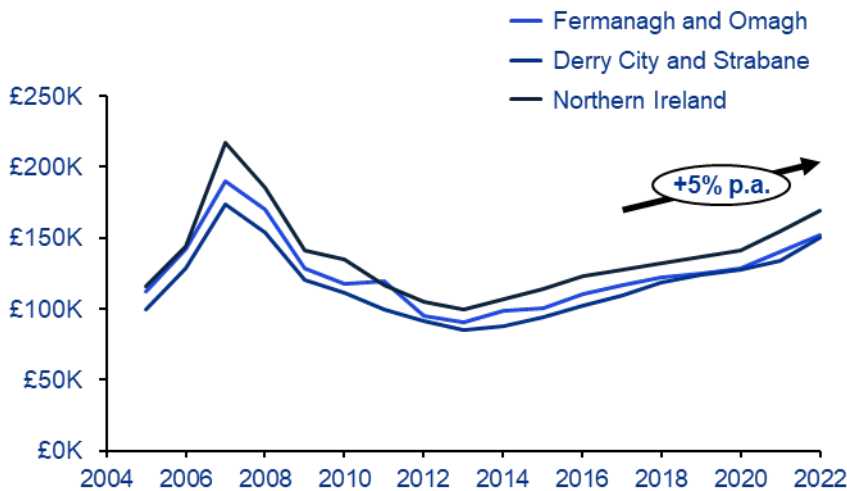


Figure 2-23: Standardised house price, £, 2005 – 2022

Over the past 5 years the average house price for FODC has increased by 34% (5% p.a.). This increase has largely been attributed to a post-lockdown surge in demand for homeownership, and a fall in the supply of available housing stock.

Local house prices will continue to be affected by wider, macroeconomic influences, such as central bank interest rates. Determining land use, granting planning permission and encouraging housing investment can be controlled locally and should be a key consideration for the future of the town.³⁵

Compared to other local councils, FODC has a lower house price to earnings ratio, showing that houses in the area are more affordable compared to local incomes than other locations. Affordable housing makes an area more attractive to live, especially for encouraging young professionals to stay in the area. Ensuring a long-term plan for new housing supply will help maintain affordability in the face of uncertainty around macroeconomic influences, such as interest rates and high inflation.³⁶

³⁵ Source: NISRA

³⁶ Source: NISRA, InvestNI, KPMG analysis

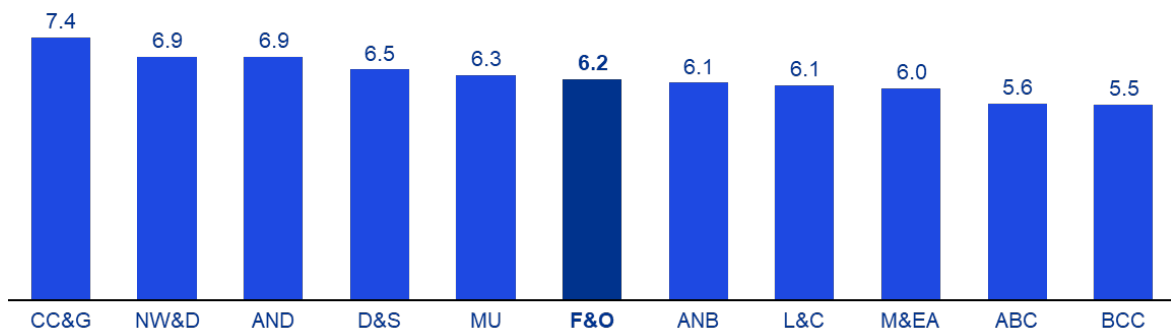


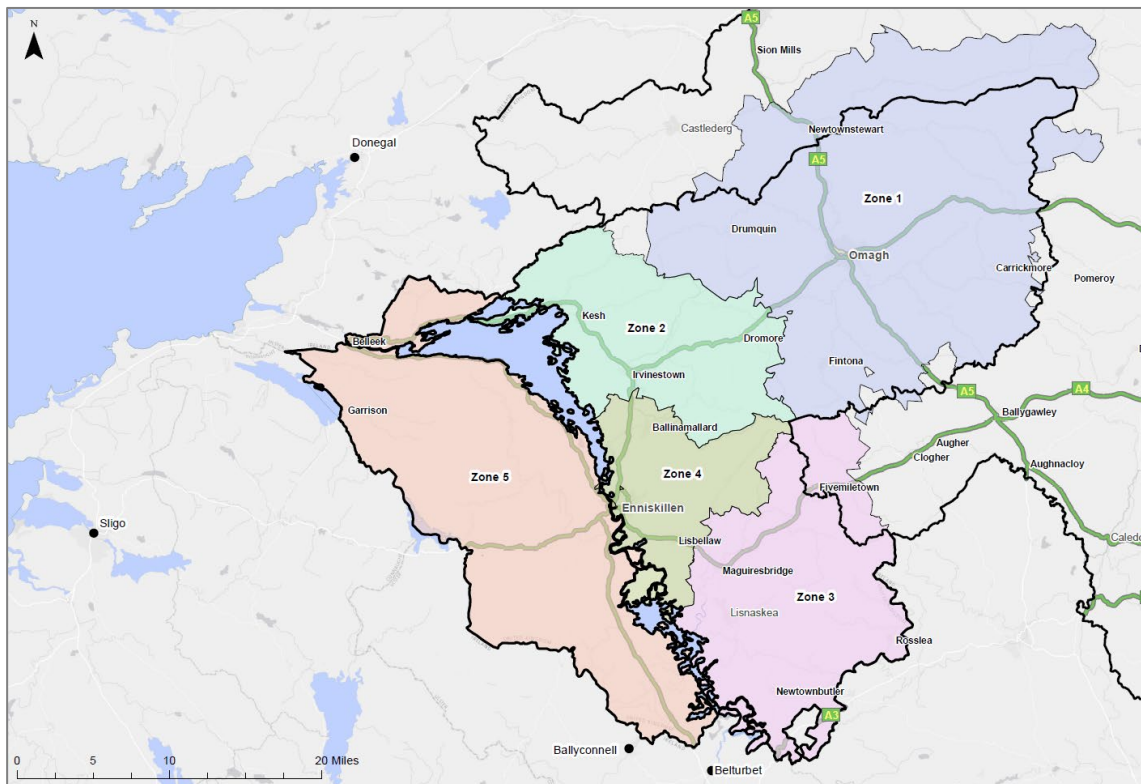
Figure 2-24: Standardised house price/mean annual earnings ratio per council

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

2.4.5 Retail Capacity

The retail capacity of Enniskillen can be assessed through examination of the Fermanagh & Omagh Retail and Commercial Needs Assessment 2017 and 2020 update. The assessment separates the Fermanagh and Omagh District area into 5 zones (including catchment areas outside the district) plus a 6th Zone in the Republic of Ireland. Enniskillen Town Centre is located within Zone 4, which covers the main town centre and built-up footprint of Enniskillen.

Figure 2-25: Map of Survey Area Zones from Fermanagh and Omagh Retail and Commercial Leisure Needs Assessment 2017



Within Enniskillen, the primary retail core comprises Darling Street, Church Street, Townhall Street and East Bridge Street, which together form the main retail area in the town. This main thoroughfare contains a high proportion of the retailers of Enniskillen and subsequently a high proportion of Enniskillen's retail expenditure. Outside of the main thoroughfare, significant retail activity is present at large retail centres such as Erneside Shopping Centre, Erneside Retail Park, Tesco Superstore Enniskillen and the Dunnes Stores/Cathcart Square area.

The assessment found that the percentage of convenience units (6.8%) was below the UK average (8.6%) and that the presence of comparison units (32.2%) was marginally higher than the UK average (32.1%). Retail services units (46.7%) numbers were also marginally below the UK average (47.8%). However, when floorspace was examined, the assessment noted that comparison goods accounted for 64.6% of the floorspace which was significantly higher than the UK average (35.9%) and resulted in lower levels of convenience (10.0%) and retail services floorspace (20.1%). This large level of comparison floorspace in Enniskillen town centre was attributed to the fact that the town had avoided out-of-town retail parks (prevalent in other parts of the UK) which had contributed to a healthy town centre.

As noted in the assessment, **Enniskillen town has a substantial market share** and provides well for its residents in relation to both convenience goods (main food and top-up shopping) and comparison goods (a wide range of goods from clothing to furniture). Given the town's position as the main commercial centre for its wider catchment area (which will include cross border shoppers), the assessment identified how Enniskillen experiences **comparatively low levels of leakage compared to other destinations within the assessment**. In relation to main food shopping, it found that Zone 4 of which

Enniskillen is a part, accounts for approximately 95.3% of its resident's expenditure, with a marginally smaller amount recorded for "top-up shopping", at approximately 93.4%. Within Zone 4, outside of the Enniskillen urban area other locations in the surrounding rural catchment areas that provide for the top-up shopping needs of the local population were shops in Ballinamallard (5.8%), Lisbellaw (5.4%) and Tempo (5.4%). Very low levels of trade leakage outside of Zone 4 were seen in Lisnaskea and Letterbreen for main food shopping and Irvinestown, Dromore, Lisnaskea, Belcoo and Ballymote for top-up shopping. Furthermore, the assessment noted that in relation to comparison goods, Enniskillen accounted for 86.2% of comparison goods expenditure for Zone 4 residents, which again indicates that the town provides well for the needs of its population. Similarly, in relation to trade leakage for comparison goods, the largest proportion of expenditure for Zone 4 residents outside of the zone was Omagh and Belfast.

Several trends were also identified in the assessment, including increased expenditure on convenience goods between 2016-2019 and a decline in comparison goods expenditure. The increased use of online shopping was also highlighted which was noted to have a particular impact on local comparison goods expenditure. However, the global pandemic has further accelerated the use of online shopping with online and mobile retail expenditure increasing by approximately 27% in Northern Ireland between 2019 and 2020.³⁷ Although online shopping expenditure remained broadly flat in Northern Ireland in 2021 and is expected to decrease in 2022 due to the effect of cost pressures and the lifting of Covid-19 restrictions, it is still expected to remain above 2019 levels.³⁸ As outlined in the graphic below, online shopping is likely to experience weaker growth over the next number of years before growing from 2025-2027. Similarly, the Covid-19 pandemic had a somewhat positive effect on convenience goods, with grocery shopping sales increasing due to initial stockpiling in the early phases of the pandemic as well as increased at home dining driven by restrictions over the course of 2020-2021.³⁹ However, with the lifting of restrictions in 2022 and increasing cost pressures, it is expected that grocery shopping expenditure will return to something like pre-pandemic levels.⁴⁰

Table 2.11: Mintel Online Retailing Forecast

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

Source: Mintel Group Ltd.

³⁷ Mintel, Online and Mobile Retailing – Ireland Report, 2022

³⁸ Mintel, Online and Mobile Retailing, 2022.

³⁹ Mintel, Changing Attitudes towards Grocery Retailing- Ireland Report, 2021

⁴⁰ Mintel, Changing Attitudes towards Grocery Retailing, 2021

In relation to additional floorspace and taking into consideration data on the population, expenditure and existing development commitments, the *Fermanagh and Omagh Retail Needs Assessment 2020* update determined that there was no capacity for additional comparison goods floorspace and very little capacity for additional convenience floorspace in Enniskillen through to 2030, with a specific recommendation to avoid allocating non-central floorspace across the district. Given the findings and forecasts outlined above in relation to increased online shopping and a return to pre-pandemic levels of grocery shopping expenditure, **the recommendations in the 2020 Retail Needs Assessment remain valid**. Planning policy continues to promote retail developments within town centres and developments that are in compliance with the policy will be permitted.

2.5 Community Infrastructure

2.5.1 Social Infrastructure Audit

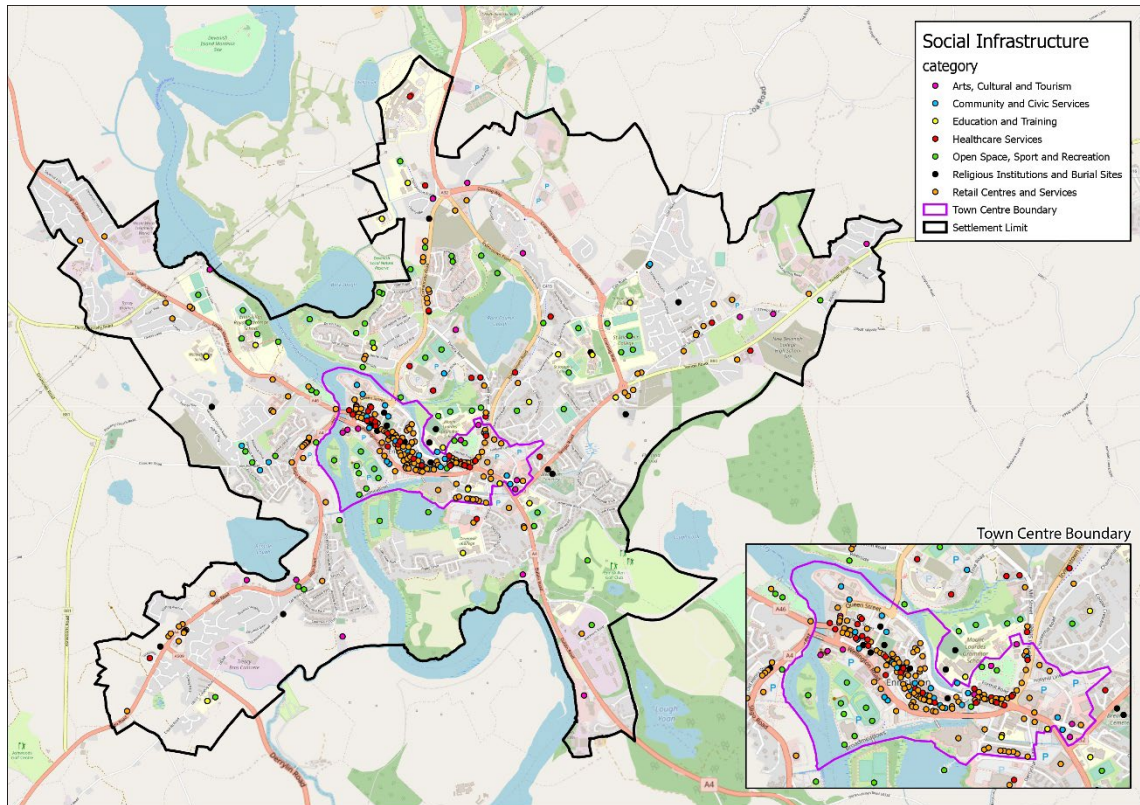
A Social Infrastructure Audit (SIA) of Enniskillen was undertaken to record the social infrastructure contained within the town centre boundary. Seven categories were used which are outlined in the following table:

Table 2.12 – Social Infrastructure categories

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

The analysis found that Enniskillen contains a total of 379 social infrastructure facilities and amenities within the settlement boundary. An overview of the spatial distribution of the social infrastructure across Enniskillen is presented in Figure 2-26 below.

Figure 2-26: Distribution of social infrastructure across Enniskillen town



When the breakdown of the categories is examined, it is found to consist of 42 Healthcare Services, 20 Education and Training centres, 30 Community and Civic Services, 65 Open Space, Sport and Recreation areas, 18 Religious Institutions and Burial Sites, 25 Arts, Cultural and Tourism centres and 179 Retail Centres and Services. A total of 379 social infrastructure facilities were recorded in the Social Infrastructure Audit. Further information on each category is provided below.

Table 2.13 – Social Infrastructure Count

Category	Number
Arts, Cultural and Tourism	25
Community and Civic Services	30
Education and Training	20
Healthcare Services	42
Open Space, Sport and Recreation	65
Religious Institutions and Burial Sites	18

Retail Centres and Services	179
TOTAL	379

Healthcare Services: In relation to healthcare services, 42 facilities were recorded in the town. The South West Acute Hospital is a significant healthcare facility for both Enniskillen town and the wider District and opened in June 2012. The hospital contains 210 inpatient beds and 22-day case beds. The hospital also includes an education centre, lecture theatre, worker accommodation, an energy centre and a creche. Furthermore, £18.5m has been allocated by the Western Health & Social Care Trust for the construction of a new Lisnaskea Health & Care Centre with estimated completion date of 2025.⁴¹

Education and Training: There is considerable provision of education facilities within Enniskillen, with a total of 13 education facilities in the town, including the South West College – Erne Campus and Technology and Skills Campus. Enniskillen contains a number of primary and post-primary schools, with five primary schools and six secondary schools within the settlement boundary of the town. Enniskillen also contains five preschools, after-school centres and kindergarten facilities.

Community and Civic Services: Enniskillen is also a centre of community and civic services, with 30 facilities located across the town. These services range in scope and scale, with Enniskillen Police Station, Enniskillen Town Hall, Courthouse and Enniskillen Fire Station contributing to the civic services of the town and several community resource centres, post offices, banks and non-profit organisations on the community services elements of the town. Furthermore, an investment of approximately £3m by Libraries NI has been earmarked for the redevelopment of Enniskillen Library.⁴²

Open Space, Sports and Recreation: In relation to the open space, sports, and recreation category, 65 areas, amenities and facilities were identified. These amenities and facilities contribute to the development of a healthy community and the environmental wellbeing of the town. Significant open spaces and recreation areas in Enniskillen include Broadmeadow, Inis Ceithleann Park and the Erneside Marina. Significant sports facilities include Fermanagh Lakeland Forum, Brewster Park (home ground of Fermanagh County GAA and Enniskillen Gaels GAA), Enniskillen Golf Club, and Enniskillen Lawn Tennis Club. It is noted by the project team that the Fermanagh Lakeland Forum requires significant investment to maintain its status as a high-quality sport facility within Enniskillen and the wider Fermanagh and Omagh district area.

Arts, Culture and Tourism: While there are a relatively small number of Arts, Cultural and Tourist facilities and amenities in Enniskillen, with 25 facilities and amenities identified, the pedigree of these facilities and attractions are of high quality, with Enniskillen Castle and its associated museums being significant additions to the arts and cultural facility in the town. There is also the National Trust Castle Coole Estate on the outskirts of the town further adding to Enniskillen’s heritage attractions. Given Enniskillen’s riverside location and strong heritage identity, there are a variety of tourist accommodation facilities within the town, with 15 tourist accommodation facilities identified. These include hotels, apartment rentals, guesthouses and B&B’s. However, it could be expected that this number would be higher given the importance of tourism and the opportunity it brings to the town.

⁴¹ Investment plan information provided by Western Health & Social Care Trust to FODC, 2022.

⁴² Investment plan information provided by Libraries NI to FODC, 2022.

Retail Centres and Services: As would be expected in towns of the nature of Enniskillen, the most prominent category recorded in Enniskillen was retail centres and services, with 179 facilities and amenities located within the town. The study found that this category was particularly focused around the Darling Street, Church Street and Townhall Street area, which comprises the main commercial core of the town. Clusters of retail activity were also present in the Scaffog and Forthill areas of the wider town. There is a high level of individual retailers within Enniskillen, highlighting the role that independently owned businesses play in the town and more generally the importance of the retail sector in the town's economy.

Overall, the assessment of social infrastructure in the town, highlights and reaffirms Enniskillen's role as an economic, public service and educational hub for its catchment area and more broadly County Fermanagh. As noted above, the town has significant provision around open spaces and sporting facilities which will contribute to the overall wellbeing of the community. A relatively small number of arts, cultural and tourism facilities and amenities is offset by the quality and significance of these amenities to the town's identity and attractiveness as a place to visit, which is reflected in the provision of a limited amount of tourist accommodation within the town. Similarly, due to the town's position as a key economic centre for the County of Fermanagh, its retail services provision is the most well-represented social infrastructure category recorded in the SIA.

2.5.2 Community and Voluntary Sector

The Community and Voluntary Sector (CVS) in Enniskillen provide vital services across the community within the town and for communities in its wider and rural catchment areas. In doing so, the Community and Voluntary Sector contributes to the wellbeing of residents and enhances Enniskillen as a place to live, work and visit. Enniskillen has several CVS organisations operating within the town centre including the Enniskillen Food Bank, the Salvation Army, Fermanagh Women's Aid and Fermanagh House and advice service. Findings from the Fermanagh and Omagh District Council 2021 Resident Survey highlight that 22% of residents in Enniskillen identified themselves as regularly taking part in local groups or community activities (district average 28%) and 15% of those surveyed in Enniskillen identified as having volunteered in the last 12 months (district average 25%).⁴³

FODC also provide a wide range of community networks and support services within the Enniskillen area and across the district, with the Community Services Department offering individual and organisational support within the Community and Voluntary Sector. This includes in areas such as trust and safety, diversity and inclusion, and citizen activity and participation, which all contribute to a sense of place and community wellbeing. A small sample of some of the activity in these areas is outlined below.

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

⁴³ Fermanagh and Omagh District Council Resident Survey 2021

neighbourhood watch schemes, hosting community safety events, and the PCSP e-Newsletter.

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

Citizen Activity and Participation: The ASPIRE Programme, an FODC-led employability programme, aids those aged sixteen or over that are currently unemployed or not in full-time education through a range of free tailored support packages including skills training, work placements, interview skills and CV development. Enniskillen is also home to Fermanagh House, a social enterprise and venue for community events, workshops, training and conferences available for use by other community and voluntary organisations within Enniskillen and Fermanagh.

While the above selection is only a small sample of the numerous CVS organisations and related supports that are active and available to the community in Enniskillen, it is evident that the Community and Voluntary Sector is an important contributor to community wellbeing and Enniskillen's overall sense of place. As such, support for the sector should be continued and opportunities for enhanced collaboration explored, with an aim to maximise service delivery and realise the benefits that can be achieved through shared resources.

2.6 Education

The provision of educational facilities and availability of schools along with associated educational outcomes and skills levels are important elements both for people and businesses that may be looking to locate to an area. In Enniskillen, a strong education provision is evident with a significant level of educational infrastructure present in the town. This includes primary, post-primary, further and higher educational facilities, with the town acting as a clear educational hub for a catchment area well beyond its settlement boundary. The former SWC site also presents an opportunity to enhance the town through being repurposed/redeveloped and brought back into use. As such, the education sector in Enniskillen will play an important role in the overall success of the town both in terms of preparing the community for employment and attracting investment through development of a talent base for employers. Furthermore, the recently established Fermanagh and Omagh Labour Market Partnership, composed of stakeholders from across the public, private and community/voluntary sectors, will also play a key role in this area to ensure that a skilled workforce is available for employers.⁴⁴ The below outlines the educational provision of the town as well as outcomes in relation to school leavers and overall skills attainment.

2.6.1 Higher and Further Education

Further and higher education is provided through South West College's (SWC) Erne Campus and Technology and Skills Campus, both located in close proximity to the town

⁴⁴ See: <https://www.fermanaghomagh.com/article/fermanagh-and-omagh-labour-market-partnership-launch-2022-23-action-plan/>

centre and the College of Agriculture, Food and Rural Enterprise (CAFRE) campus, located approximately 2 miles from the town centre. Offering both higher education and further education courses and qualifications, South West College provides excellent opportunities for both students, industry and the local economy, through its wide range of foundation degrees, BSc Top Ups, apprenticeships, specialisms and pathways across a number of different subjects. Specific areas of expertise at SWC Enniskillen include Sustainable Construction, Computing, Health and Social Care, and Creative Industries. The SWC Erne Campus building was also the world’s first and largest educational building to achieve Passive House Premium Status and the BREEAM Outstanding certification for sustainable design when it opened in September 2021.⁴⁵ CAFRE also provides agricultural focused tertiary education with the Enniskillen campus having a specialism in Equine education with the campus providing the widest range of equine courses in Ireland.⁴⁶

Table 2.14 SWC Students Achieving Regulated Qualifications 2018-2021 (All Campuses)

Year	2018/2019	2019/2020	2020/2021
Students finishing/graduating	5,784	5,359	4093

2.6.2 Post-Primary

In relation to the post-primary provision, there are eight post-primary schools in Enniskillen. These are outlined in the table below. Investment plans from the Department of Education indicate that Devenish College has received investment of £26.56m for works with an estimated completion date of 2022 and Enniskillen Royal Grammar School allocated £17m for works that have an estimated start date in 2026.⁴⁷ In total, these eight schools account for over 4,300 students, again highlighting the role that Enniskillen plays as an educational hub and its wide catchment area.

Table 2.15 Post-Primary Schools in Enniskillen

School	Description	Attendance
Devenish College	Controlled School providing education for children between 11 and 18 years	665 pupils
Enniskillen Royal Grammar School	Voluntary School providing education for children between 11 and 18 years	900 pupils
Erne Integrated School	Grant Maintained School providing education for children between 11 and 18 years	400 pupils
Mount Lourdes Grammar School	Voluntary Grammar School providing education for girls between 11 and 18 years	760 pupils
St. Fanchea’s College	Catholic Maintained School providing education for children between 11 and 18 years	350 pupils
St. Joseph’s College	Catholic Maintained School providing education for children between 11 and 18 years	370 pupils
St. Michael’s College	Voluntary School providing education for children between 11 and 18 years	770 pupils

⁴⁵ See: <https://swc.ac.uk/about/corporate/sustainability/sustainable-buildings>

⁴⁶ See: <https://www.cafre.ac.uk/about-us/our-campus/enniskillen/history/>

⁴⁷ Investment plan information provided by the Department of Education to FODC, 2022

Willowbridge School	Controlled School providing special education for children with intellectual difficulties between 3 and 19 years	162 pupils
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2.6.3 Primary

In relation to primary level education, there are 5 primary schools located within Enniskillen town. Investment plans from the Department of Education indicate that Enniskillen Integrated Primary School has received £6m investment for works that are estimated to be completed in 2022 and Holy Trinity Primary School will receive £9.8m for works to be commenced in 2027.⁴⁸ In total, these 5 schools provide education to over 1,800 pupils. These are as follows:

Table 2.16: Primary Schools in Enniskillen

School	Description	Attendance
Holy Trinity Primary School	Catholic Maintained School providing education for children between 3 and 11 years.	695 pupils
Enniskillen Integrated Primary School	Grant Maintained School providing education for children between 4 and 11 years	392 pupils
Enniskillen Model Primary School	Controlled School providing education for children between 4 and 11 years	420 pupils
Jones Memorial Primary School	Controlled School providing education for children between 4 and 11 years	203 pupils
Willowbridge Primary School	Controlled School providing special education for children with intellectual difficulties between 3 and 19 years	162 pupils

2.6.4 Education Outcomes

To assess educational outcomes in Enniskillen, School Leaver data (DEA level) from the Department of Education, and Economic Activity and Qualifications data from the Labour Force Survey (Fermanagh LGD 1992 level) have been examined. Overall Enniskillen education outcomes have been improving with a particularly strong performance recorded in 2019/2020 school leaver year. However, there is an element of underachievement in certain areas still evident in the data, although when examined over time, there is positive progression towards enhanced educational outcomes and attainment.

For instance, looking at the School Leaver data for the Enniskillen DEA, in 2019/2020, 58% of school leavers went on to higher education (HE) and 21.8% went on to further

⁴⁸ Investment plan information provided by the Department of Education to FODC, 2022

education (FE), which is significantly higher than the NI average of 47.9% (HE), although below the NI Average of 29.2% for Further Education. However, this is a marked improvement on the 45.5% of school leavers that went to higher education in 2014/2015 and Enniskillen has consistently been above the NI Average for those going on to Higher Education between 2014/2015 - 2019/2020. Furthermore, in 2019/2020, 2.7% of school leavers were recorded in the unemployed/unknown category which is significantly lower than the NI recorded average of 4.7%.

In relation to educational attainment, while improving, underachievement has also been evident in the last number of years, except for the 2019/2020 period which saw strong performance. For instance, those achieving at least 5 GCSEs (A*-C) was recorded at 93.6% in 2019/2020 which is higher than the NI average (91.3%) and a significant improvement from 78.5% in 2014/2015. Similarly, 80.9% of school leavers in the 2019/2020 academic year achieved at least 5 GCSE's grades A*- C or equivalent, including English and Maths which again is above the NI average of 76.2%. This is an increase of approximately 17.8% on the low of 63.1% recorded in the 2014/2015 academic year and an increase of 11.5% on the 69.4% recorded in the 2018/2019 year. However, while 2019/2020 saw particularly strong education attainment, it was the only period between 2014/2015 – 2019/2020 that Enniskillen was above the NI average for those achieving at least 5 GCSEs (A*-C). Similarly, in 2014/2015, 2015/2016 and 2018/2019 Enniskillen was also below the NI Average for those attaining 5 GCSE's grades A*- C or equivalent, including English and Maths.

Figure 2-27: School leavers by destination, 2019-2020



When analysed in relation to the comparator towns, Enniskillen performs strongly in relation to school leavers entering Higher Education with the town recording the highest percentage of those going on to Higher Education in 2019/2020. Similarly, in 2019/2020, Enniskillen experienced the highest achievement levels (amongst the comparator towns) amongst school leavers that achieved at least 5 GCSE's grades A*- C or equivalent, including English and Maths at 80.9%.

However, the effect of deprivation on educational outcomes is also evident in Enniskillen. When data on school leavers related to those entitled to free school meals (FSME) (those from the most disadvantaged backgrounds) is examined, the difference in achievement is significant. In 2019/2020, 70.7% of those entitled to free school meals achieved at least 5 GCSEs grades A*-C (or equivalent) including English and Maths, in comparison to 85.4% of non-FSME school leavers. However, despite the clear gap in achievement in Enniskillen, the 70.7% recorded was substantially above the average FSME achievement rate in NI of 55.7%. Furthermore, as outlined in the table below, Enniskillen performed significantly better than the other comparator towns in relation to the gap in achievement between Non-FSME and FSME school leavers. Yet despite this, work is still needed to close the achievement gap, with the gap being much larger in years prior to the 2019/2020 period. For instance, examined over a 5-year period from 2015/16 to 2019/20, those achieving at least 5 GCSEs grades A*-C (or equivalent) including English and Maths for non-FSME school leavers stands at 77.9%, while only 56.1% of FSME school leavers achieved the same. As such there is a clear and continued need to support those from disadvantaged backgrounds to achieved enhanced educational outcomes.

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

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

In relation to overall educational attainment in Enniskillen, Economic Activity and Qualifications data from the Labour Force Survey (Fermanagh LGD 1992 level) has been examined. In 2019, 26.0% of the working age population were recorded as having Achieved NVQ Level 4 and above which is significantly below the NI average of 36.7%. Similarly, 49.4% of the working age population were recorded as having achieved below NVQ level 4 which is marginally below the NI average of 49.5% and 24.5% were recorded as having no qualifications which is significantly above the NI Average of 13.8%. Given the high level of school leavers entering higher education, the relatively lower levels of qualification attainment may be reflective of a significant level of educated young people leaving the town to access higher education and related employment opportunities. However, as outlined in the table below, when examined over time educational attainment is improving with those Achieving NVQ Level 4 and above increasing from 18.5% in 2011 to 26% in 2019, and those with No Qualifications decreasing from 29.1% in 2011 to 24.5% in 2019. Yet as noted, attainment remains significantly under the NI Average with a slight decrease recorded in attainment in 2019 and a rise in those with no qualifications which remains above the NI Average. As such, despite progress since 2011, work is still needed to ensure that educational attainment in the town continues to improve.

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

Achieved NVQ Level 4 And Above (%)	Achieved Below NVQ Level 4 (%)	No Qualifications (%)
------------------------------------	--------------------------------	-----------------------

2011	18.5	52.4	29.1
2012	18.6	58.2	23.2
2013	17.9	63.4	18.7
2014	21.8	60.9	17.3
2015	24.2	62.5	*
2016	28.4	58.8	*
2017	30.5	48.1	21.4
2018	32.3	54.1	*
2019	26.0	49.4	24.5

* Too small for a reliable estimate

2.7 Natural, Built and Cultural Heritage

2.7.1 Natural Heritage

The natural environment surrounding Enniskillen is heavily influenced by Lower and Upper Lough Erne to the north and south of the town with lake land areas and islands which vary in size and scale. This landscape character is no more apparent than within Enniskillen town centre itself, which is on an island on the River Erne, which connects the Lower and Upper Loughs. Located at a significant convergence and strategic crossing point along the Erne, Enniskillen benefits from steep drumlins located throughout the town. These features historically provided natural defences for Enniskillen, with many of its prominent cultural and natural landmarks being located at the site of these drumlins.

Beyond the town, the surrounding landscape is mainly comprised of grassy and vegetated, low-lying drumlins and flat wetlands along the banks of the River Erne and Loughs. Given this landscape, the areas surrounding the town are the sites of several large, wooded estates, such as Castle Coole to the southeast of the town and Castle Archdale on the north shores of Lower Lough Erne as well as Lough Navar Forest to the northwest.

The spectacular and 340-million-year-old Marble Arch Caves, located 12.5 miles from Enniskillen, is the most active river show cave in Ireland and the UK, with a beautiful backdrop of rivers, gorge, waterfalls, mountains and ancient woodlands. The nearby Cuilcagh Boardwalk Trail (Stairway to Heaven) provides breath-taking views of the surrounding lowlands and, along with Marble Arch Caves, is a popular visitor attraction in the area.

Designations

As a result of Enniskillen's rich cultural heritage and history, both natural and built, the town itself has several significant designations. Parts of Enniskillen town centre are designated as both an 'Area of Townscape Character' and as an 'Area of Archaeological Potential'. These designations ensure that the character, history and urban fabric of Enniskillen is not compromised or diminished as a result of any new development or any redevelopment in these designated areas.

To the immediate south-west of Enniskillen, the Castle Coole estate is designated as an 'Area of Special Scientific Interest' (ASSI) and is officially defined as the 'Castle Coole Area of Special Scientific Interest'. In addition, to the north-west of Enniskillen, Devenish Island is also designated as an ASSI, officially defined as 'Devenish Island Area of Special Scientific Interest' and is also designated as an 'Area of Special Archaeological Interest'.

2.7.2 Built and Cultural Heritage

Town Centre

The town centre of Enniskillen is located on an island at the centre of Lough Erne with much of the town's open space and natural amenities located near the town's commercial core. Several parks, playgrounds, walkways, recreational facilities and sports clubs can be found along the waterways which run through the town. Many of these amenities are located within walking distance of the town's commercial core. The town centre has also benefited from a significant investment of over £5.4m, including funding from the Department of Communities, for public realm improvements between 2017-2022.⁴⁹

The expansive heritage of Enniskillen has lent itself to the high number of architectural styles being found throughout the town. Much of the high-quality built heritage within Enniskillen can be found along the main thoroughfare of the town (Darling Street, Church Street, Townhall Street and East Bridge Street) with a number of buildings of 'special architectural or historic interest' listed and a substantial level of Edwardian and Victorian architectural styles evident. Notable buildings belonging to these styles include the Buttermarket (a former dairy, now a craft and design centre), Danske Bank building, the AIB building (former Royal Hotel site) and Enniskillen Courthouse. St. Michael's Church and St. Macartin's Church, both constructed in the 19th Century, are also strong features of Enniskillen's built and cultural heritage, due to their prominent locations along the main thoroughfare in the town centre. Other significant buildings within the town centre area include the Town Hall, constructed in the early 20th Century, and Enniskillen Castle, which is recorded as the oldest and arguably most significant built and cultural asset in Enniskillen, with the structure dating to the 15th Century. Subsequent development of the Castle site included the construction of the Plantation Castle and Watergate in the 17th Century, and the military barracks and garrison in the 18th and 19th Centuries.⁵⁰

Forthill Park provides an often-overlooked haven of peace in the centre of the town. The Victorian Park includes walks and a children's play area, as well as the 30m high Cole's Monument, one of the most prominent landmarks of the town. Built in memory of Sir Galbraith Lowry Cole G.C.B. and completed in 1857 there are 108 spiral steps leading to a viewing platform with magnificent views of Enniskillen and the surrounding area.

The name Enniskillen is derived from Inis Ceithleann or Caithleen's Island. This refers to the Irish mythological figure Cethleen who is said to have been wounded in battle and when trying to swim across the River Erne, which historically would have been wider at this point, managed to reach the island after which she is named. The site is in the town centre and is now a small and over-looked park, where a small memorial commemorating

⁴⁹ Investment plan information provided by the Department for Communities to FODC, 2022.

⁵⁰ See: <https://enniskillen.com/portfolio/enniskillen-castle/>

a visit by Princess Diana is located. The site offers significant potential for enhancement commensurate with its link to the town's history and name.

Local area

Beyond the main thoroughfare and town centre area, Enniskillen's built and cultural heritage changes. With many of the lands beyond the town centre's core historically facing away from the main thoroughfare, these lands have become sites for many of the modern commercial buildings and developments within Enniskillen. As noted in the 2012 Enniskillen Masterplan, due to the nature of these sites and their commercial functions, their built and cultural merit is of low quality and often add little benefit to Enniskillen's public realm aesthetic.

There are several notable heritage properties near Enniskillen. These include Castle Coole, Devenish Island, Florence Court, and Necarne Castle. This provides a significant opportunity for a cohesive visitor offer.

2.8 Tourism and Hospitality

The wider Fermanagh and Omagh District Council area attracted £79 million spend in 2019 and attracted 0.4 million trips, which is 7.5% of the total trips to NI.⁵¹ Almost two thirds of overnight trips can be attributed to the domestic market. Key markets include ROI & other (18%), Great Britain (14%). Comparatively few visitors from further afield come to the district with 3% of visitors coming from Mainland Europe, and 2% from North America. The District and Enniskillen town has potential for further development of tourism activities and attractions, and for growing the international market. Indeed, in the Fermanagh and Omagh Resident Survey 2021, 92% of those surveyed in Enniskillen stated that tourists were welcomed to the area and 88% thought tourism was important for the local economy.⁵² Additional detail on tourism data has is provided in section 3.3.

The *Fermanagh Lakelands & Omagh and The Sperrins Visitor Experience Development Plan 2022-2032* indicates that while domestic visitors are important, the best prospects for growth for the region "are in generating sustainable increases in Out of State Visitors and associated spend".⁵³ It is important to communicate itineraries to the ROI market, while Itinerary development is important to encourage the ROI.

In 2022, Enniskillen was awarded the Booking.com's Traveller Review Award as the most welcoming town in the UK, priding itself in its rich history and natural heritage and subsequently tourism and hospitality. Tourists can visit and experience a wide range of places based around culture, gastronomy, or water activities. Such places include town's castles, museums and galleries, restaurants and bars, tour providers and water equipment rentals. Tourism in Enniskillen is supported by good quality infrastructure, reflected in various forms of accommodation that vary in price and level of luxury. Enniskillen is also recognised as an ideal starting point to explore the rest of the Fermanagh and Omagh District.

The current tourism offering

⁵¹ <https://www.nisra.gov.uk/sites/nisra.gov.uk/files/publications/LGD-Infographic-Fermanagh-Omagh-2019.pdf>

⁵² Fermanagh and Omagh District Council Resident Survey 2021.

⁵³ Fermanagh Lakelands & Omagh and The Sperrins Omagh Visitor Experience Development Plan 2022-2032, page 32

Tourism in Enniskillen is based primarily around water activities on the River Erne and cultural heritage displayed through archaeological and historic monuments, and architecture and storytelling in several castles and historic houses. Enniskillen has a unique status as Ireland’s only island town.

Table 2.19: Visitor Numbers to attractions in or near Enniskillen (2019)

Attraction	Visitor Numbers (2019)	Distance from Enniskillen (Miles)
Castle Archdale Country Park	319,000	11
Belleek Pottery	182,296	24.5
Cuilcagh Boardwalk	99,000	12.2
Marble Arch Caves	64,093	12.5
Enniskillen Castle Museums	85,722	0
Florence Court House	43,593	8.9
Castle Coole	31,134	1.5
Devenish Island	12,704	2.3 (by road to closest shore)

The historic **Enniskillen Castle** represents an important part of Fermanagh’s rich history and heritage, documented in the heritage centre. Enniskillen Castle hosts the visitor information centre which enables visitors to find out about things to see and do in the area. In 2016 significant investment of £3.5m saw a new visitor information centre, galleries and exhibition space opened in the castle. Enniskillen Castle is proposed as the Enniskillen Destination Town Hub in the Fermanagh Lakelands & Omagh and The Sperrins Visitor Experience Development Plan 2022-2032. This envisages Enniskillen Castle being the primary destination and information hub for visitors to Fermanagh Lakelands. The historic courtyard of the building provides significant opportunities for events such as Halloween and Christmas seasonal festivals. In this context the location of the Roads Service offices is not ideal and would be better located elsewhere, with enhancement of the courtyard service, conservation of the historic buildings, and use for a tourism related purpose.

Castle Coole, situated on the outskirts of Enniskillen, owned and managed by the National Trust, offers a unique experience to its visitors set in beautiful parkland with one of Ireland’s finest neo-classical houses, formerly home to the Earls of Belmore. Importantly the Castle Coole estate is only 40 minutes’ walk or less than 15 minutes cycle from Enniskillen Castle, offering further opportunities for linkages to the town.

Devenish Island on Lough Erne is accessible by boat from the town centre. The island was the most important of Lough Erne’s many island monasteries, and a safe meeting place for powerful chieftains and religious leaders. Hence, it plays a key role in depicting Enniskillen as a history and tourism rich town. The island can be accessed through several water transport providers. There is an opportunity to capitalise on the proximity of Devenish Island.

Through **water-based activity tourism**, visitors can experience Enniskillen’s wildlife and familiarise themselves with its rich history. The Enniskillen Blueway Water Activity Zone, beside the Erneside Footbridge, provides a focus for a range of water-based activities including kayaking, canoeing, stand-up paddle boarding and water bikes. The Erne

Water Taxi and Erne Boat Hire are also located here and provide an opportunity to experience the town and wider river and Lough from the water. Cruising on the Erne is one of Enniskillen's strong selling points. Erne Boat Hire allow visitors to explore at their own pace with various stops, while Erne Water Taxi is more structured and can incorporate a food tour. Canoeing experiences also dominate the Erne River, where more adventurous visitors hire canoes and boats. Erne Adventures introduced unique water sports experience with rental hydrobikes. 'Row the Erne' also provide rowing experiences on a traditional curragh. Angling is an important sector and brings many visitors to the town. A recent study on angling on the Erne recommends investment on infrastructure, events, marketing, capacity building, club development, and research on economic impact.⁵⁴

Enniskillen has numerous **land-based activities** such as golfing in private estates and air activities. Cutting Edge Helicopters offers a bird's eye view of the town through their helicopter tour. Enniskillen, also known for its gastronomy, offers a tasting tour and sampling delights around the town as part of Enniskillen Taste Experience⁵⁵. Enniskillen does utilise historic buildings for tourism, such as 'Buttermarket Enniskillen' where crafts like pottery, fly-tying, ceramics, and handmade jewellery; a unique and exclusive product, designed and crafted by locals. There is potential for extension of markets to the neighbouring carpark on a temporary basis e.g. a weekend food market. Visitor interested in history have the possibility to tour the Boatyard Distillery for 90 minutes and see the behind-the-scenes of spirits making.

The centre of Enniskillen is characterised by **Broadmeadow** – a place that is used by many to spend some time by the water's edge and on the water too. The appeal of Broadmeadow is not only in its picturesque scenery but also in the heart shaped art installation in its core. The location of Broadmeadow mean it could be an ideal venue for events in the town.

Ardhowen Theatre occupies a beautiful lakeside setting a short distance from the town. The 290-seat theatre provides a year-round programme of events and activities. There are plans to retrofit and upgrade the theatre.

Marble Arch Caves located 12.5 miles from the town centre allow visitors to explore a natural underworld of rivers, waterfalls, winding passages, and lofty chambers. Even though the Caves are not located in the heart of Enniskillen, they still play a vital role in tourism and visitor numbers. Tours associated with the Caves is informative and attracts different visitor demographics – from families to seniors of average fitness.

Cuilcagh Boardwalk is a 4 miles/6km trail through one of the largest expanses of blanket bog in Northern Ireland. A steep climb leads to a viewing platform with a spectacular view over the surrounding lowlands. The trail has become increasingly popular and now attracts around 100,000 visitors each year.

Hospitality

According to Trip Advisor, there are 47 restaurants in Enniskillen and one of the best acclaimed restaurants is 'At the Hollow' that is in the heart of the town. The restaurants build onto the existing tourism offering around the town and support the hospitality industry. There are 3 primary hotels with 4 stars: The Enniskillen Hotel and The Westville Hotel, as well as one 3-star motel: Belmore Court & Motel. These are located on the outskirts of the town centre, but still walking distance from major attractions and activities. There are a number of hotel located outside the town such as the Killyhevlin, Lough Erne Golf Resort and Manor House

⁵⁴ Angling Development Report and Action Plan for the Erne System - Draft, FODC, 2022

⁵⁵ <https://www.enniskillentasteexperience.com/>

Marketing

Fermanagh Lakeland Tourism, a membership body made up of a wide range of tourism operators provide an active tourism network and promote the area on behalf of Fermanagh and Omagh District Council.

Challenges

Enniskillen's major issues arise from seasonality and high dependence on the domestic market for visitation. Seasonality should be addressed through developing winter activities and events. Tourism in Enniskillen is potentially inhibited through the lack of public transportation on key locations and the lack of scheduled services that someone can access any day of the year. Domestic visitors will naturally dominate the area as they have private means of transport and the ability to access remote locations. Translink have recently piloted a seasonal bus linking visitor attractions. This could be extended to provide a visitor transport network, encouraging increased dwell time. The lack of a cohesive public transport network is recognised in the *Fermanagh Lakelands & Omagh and The Sperrins Visitor Experience Development Plan 2022-2032* which says, "...onward travel to visitor experiences and attractions can be restricted".⁵⁶

If tourism is to develop further, more town centre accommodation will be necessary to match the demand – especially more affordable youth hostels and B&Bs.

Opportunities

Enniskillen has a clear Unique Selling Point – it's USP is the water that surrounds the town and that links to Lough Erne. However, the town centre is to a degree disconnected from the water due to the significant road infrastructure passing through the island. The new bypass may bring an opportunity to rationalise this infrastructure and enable better connections. While some water-activities currently taking place there is a significant and arguably untapped opportunity to make Enniskillen a water-activity hub for the region. The Lakeland Forum and Broadmeadow area is key to this, and it is understood proposals to renovate the Forum include measures to realise this. A renovated Forum water activity centre could provide the hook to encourage visitors to come to Enniskillen.

Getting people to Enniskillen and once they are there ensuring they are aware of attractions and activities in the town and local area is essential. Opportunities here include enhancing public transport connections, packaging of activities and accommodation, better networking between businesses and cross promotion. Better wayfinding would enable visitor to walk or cycle around the town with confidence and understanding of what there is to see and where to go. This is particularly the case for riverside walks and linkages to Castle Coole for example.

The Fermanagh Lakelands & Omagh and The Sperrins Visitor Experience Development Plan 2022-2032 refers to a hub and bespoke approach to destination development for the wider region i.e. a series of destination hubs that link to nearby attractions and activities. One of the hubs proposed is Enniskillen Destination Town Hub. This proposed Enniskillen Castle and Museum as the arrival point for Fermanagh Lakelands. It is envisaged that this would be the primary location for visitor information and orientation, for example this would include detail on a range of stand-alone itineraries such as:

- Water activities
- Day boat hire and cruising
- Kayaking and canoe trails

⁵⁶ Fermanagh Lakelands & Omagh and The Sperrins Omagh Visitor Experience Development Plan 2022-2032, page 20

- Hikes and trails through Cuilcagh Lakelands Geopark and the Marble Arch Caves
- Historic buildings, parks and gardens around Florence Court and Castle Coole and Castle Irvine.

Enhancing linkages between the town and nearby attractions, such as Castle Coole, Devenish Island, Florence Court, Marble Arch Caves and Cuilcagh Boardwalk Trail, provide an opportunity to enhance the local offer and provide visitors with unique heritage experiences. Each of these attractions can provide a half day experience, contributing to increased visitor dwell time and encouraging more overnight stays. There is an opportunity to expand the water taxi offer, with permanent stops in multiple locations, contributing to a reduction in town centre traffic.

Diversifying the accommodation offer could include exploring opportunities to enable motorhomes to stay overnight near the town centre, and encouraging cruise hire companies to consider shorter hires, particularly in shoulder season months.

Key projects that are in development that will benefit Enniskillen include:

- **Fermanagh Lakeland Forum:** full Business case being developed to transform the building and provide better connections to the town and water.
- **Enniskillen Workhouse:** restoration with part of ground floor redeveloped as mixed-use heritage exhibition, reminiscence and display space.
- **The Ardhowen:** upgrading and refurbishment of the theatre and lakeside enhancements.
- **Cuilcagh Lakelands Landscape Project:** clusters of attractions and sites being developed to encourage visitor dispersal. This includes a new visitor centre at Marble Arch Caves, as well as a range of enhancements to the visitor offer in the area.
- **Necarne Estate & Castle:** conservation works to the castle and plans to develop a multi-purpose tourism and leisure destination to include a range of accommodation and activities.
- **Enniskillen to Sligo Greenway:** work underway on the design of a 72km route west from Enniskillen-Belcoo/Blacklion-Sligo, with a projected project cost of £11m.

There is perhaps additional potential for an off-road 55-mile/88km greenway connection linking Enniskillen-Belleek-Ballyshannon-Bundoran-Sligo towns taking in Lough Erne and the Wild Atlantic Way, and in tandem with the planned greenway, could provide a spectacular 160km greenway loop.

The PSNI site, while not currently vacant nor do the PSNI have plans to vacate the site, is a prime site with opportunities for tourism and residential development. Redevelopment could enable a round-the-island walk, as well as sustainable water-based activities and amphitheatre for events.

Providing a broader range of things to see and do, in tandem with an enhanced accommodation offer, and better linkages of attractions through packages, including online and complementary ticketing, will help to encourage increased visitor numbers. However, it is essential that the night-time economy becomes more vibrant in the town centre. Key to this is better place-making, creating places where people want to be.

2.9 Leisure and Recreation

As outlined in Section 2.5.1, in relation to the category of open space, sports and recreation, Enniskillen has a relatively healthy provision, with 65 amenities and facilities recorded within the town boundary. As well as the recreational areas such as Forthill Park and the Riverside Park and Walk, there are also a high number of sports clubs and playing fields located across the town. The town is also the location of the Fermanagh Lakeland Forum, a sports complex which includes a fitness suite, 25m swimming pool, outdoor pitches, running track and children play zones. In addition, the town also benefits from the presence of the Erneside Marina, Round 'O' Jetty and several other docks and jetties located throughout the town along the River Erne, which host a variety of water sport activities and clubs.

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

As noted in that report, Enniskillen provides well for its residents and the wider region in relation to leisure activity, with the town being the most popular destination for Health & Fitness, Cinema, Restaurant, Pubs and Bars, and Swimming among the Irvinestown and Enniskillen areas surveyed as part of the report. Enniskillen was also the most popular destination among all areas surveyed for restaurant and cinema visits. However, for the Irvinestown and Enniskillen areas, in relation to the category of Ten Pin Bowling, the most popular destination was Irvinestown. This may have since changed with the provision of bowling now available in Enniskillen town itself.

Through survey analysis completed as part of the Retail and Commercial Leisure Needs Assessment in 2017, it was established that the most popular potential leisure requirement for the future within the Irvinestown and Enniskillen areas would be the provision of a new bowling alley facility and more children's facilities. However, the top answer among those surveyed in the Enniskillen East area was for new health and fitness facilities. The findings above broadly align with the assessment of social infrastructure in Section 2.5.1 which notes a healthy provision of leisure and recreation facilities in Enniskillen.

Findings from online public surveys as part of this Plan highlight how Enniskillen's leisure and recreation provision is not seen as one of the town's best assets, with only **15.2%** of respondents seeing recreation and leisure facilities as one of the town's top three assets⁵⁷. A significant opportunity exists to enhance the current leisure offering through a transformative redevelopment of Fermanagh Lakeland Forum to a state-of-the-art leisure centre capable of stimulating recreational activity and acting as a hub for water-based activities for the town.

Engagement undertaken for this study has indicated that the Enniskillen Gaels Club currently lacks sufficient space to enable a full schedule of training and matches to be undertaken. With over 1,000 members, including 650 children, enabling increased participation in the activities undertaken by the club would contribute to wider objectives with regarding to social participation, and health and wellbeing. Brewster Park currently has one pitch, while another at Broadmeadow is not considered fit for purpose due to lack of infrastructure and the poor quality of the pitch. A priority would be the development of another pitch near Brewster Park, with the club currently engaged in discussions in this regard.

⁵⁷ See Section 5.2 - Online Survey Findings

Other sporting clubs also have a need for enhanced facilities - for example, Derrychara Playing Fields is not fit for purpose due to incidents of flooding. A study of future availability for playing fields, matched against future demand, is currently being undertaken by Fermanagh and Omagh District Council. This Pitch Strategy will be completed for the Enniskillen area, as part of the wider demand in the district in the coming months. The study aims to inform and guide investment decisions for the provision of high-quality sports facilities across the wider district.

2.10 Marketing and Branding

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



Figure 2-28 Enniskillen Place Brand

The *Fermanagh Lakelands & Omagh and The Sperrins Visitor Experience Development Plan 2022-2032* highlights a challenge with multiple and competing brands for the wider Fermanagh and Omagh area, and the need to provide a consistent message to visitors under a brand hierarchy.

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

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

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

3 Economic Outlook and Growth Scenarios

This section presents trends for Fermanagh and Omagh District and demonstrates economically where the area’s strengths, weaknesses and opportunities are. Considering the analysis in the previous sections in relation to population, employment and housing affordability, this section examines economic indicators (GDP and sales), recent trends, and forecasts for Enniskillen over the coming years. It also examines the effects of COVID-19 pandemic and EU Exit on Enniskillen’s economic outlook.

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

3.1 Economic Growth

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

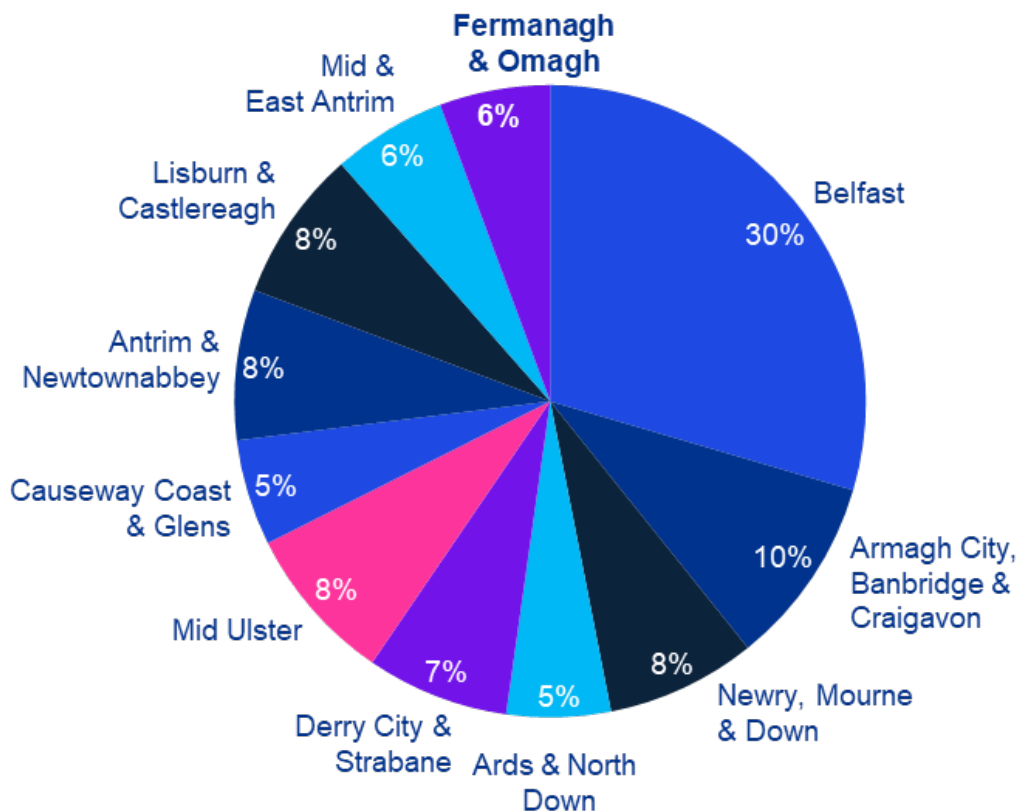


Figure 3-1: Breakdown of Northern Ireland GDP (2020), % (Total GDP £48,477m) ⁵⁸

⁵⁸ Source: ONS

Pre-COVID (2019), NI GDP was £50,279m with Fermanagh and Omagh contributing 5.5% (£2,763m). This contribution has been consistent across the previous 20 years, with Fermanagh and Omagh accounting for 5.3%-5.7% of NI's total GDP. Fermanagh and Omagh has the lowest population of the 11 district councils but makes a greater contribution to GDP per person than 6 of the other councils.

While data on Enniskillen's contribution to GVA is unavailable, a population-adjusted estimates puts it at £271m (11% of total).

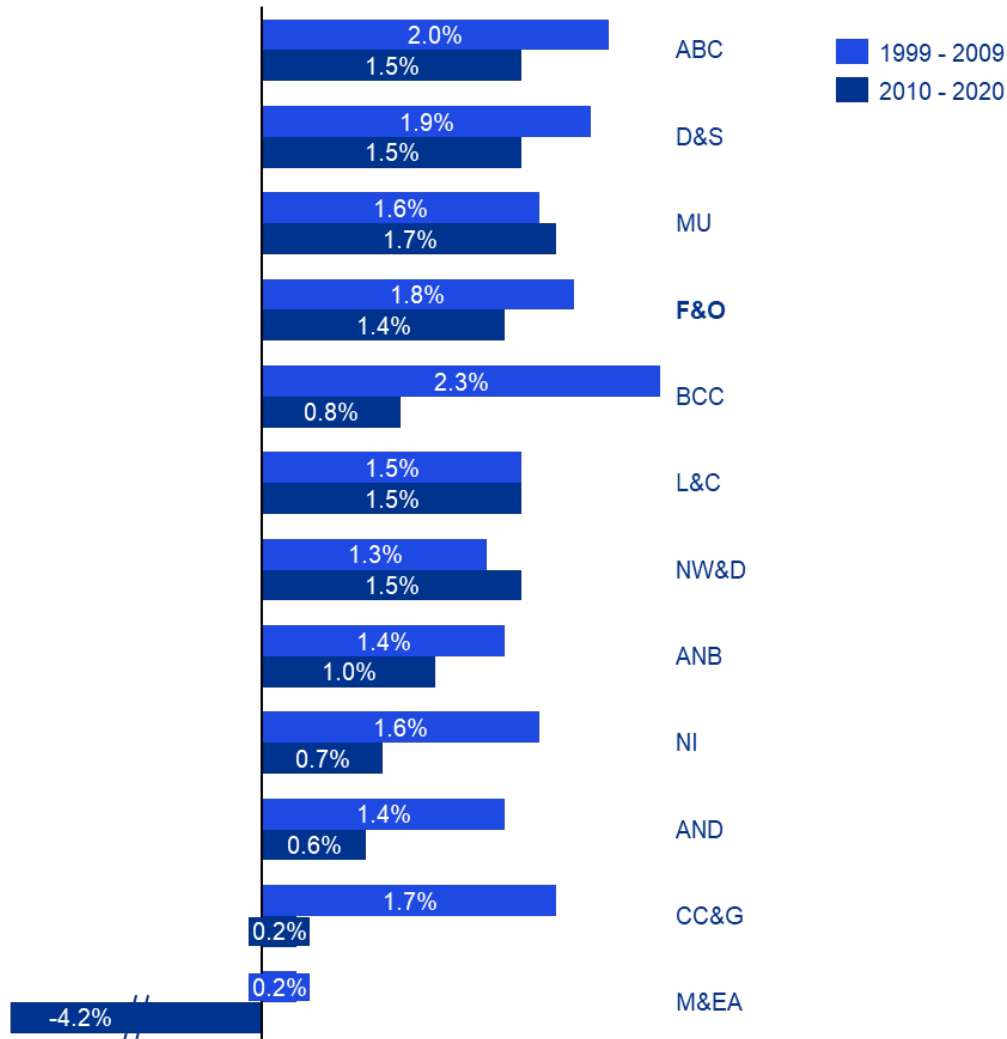


Figure 3-2: Average GDP Annual Growth Rates %, 1999 - 2009 & 2010 – 2020

The average annual GDP growth rate for FODC was 1.9% between 1999-2017, with lower levels of 0.5% in 2018 and 0.1% in 2019. However, in light of ambitions in the 10X economy agenda and the regional growth deals. Danske Bank, UUEPC and NIESR forecast the growth rates to reach between 3.6% to 4.2% for 2022, decreasing to between 0.5% to 2.1% in 2023 due to increased inflation pressures and tightening of monetary policies⁵⁹.

⁵⁹ <https://danskebank.co.uk/economic-analysis/quarterly-sectoral/danske-bank-northern-ireland->
https://www.ulster.ac.uk/_data/assets/pdf_file/0018/1106550/ULSTER-UNIVERSITY-EPC-Outlook-Spring-2022.pdf
<https://www.niesr.ac.uk/wp-content/uploads/2022/08/NIESR-UK-Economic-Outlook-Summer-2022.pdf>

As well as looking at GDP contributions, total sales per sector provides an indication of the contribution to economic output per industry and per person. Total sales from Fermanagh and Omagh have increased in recent years, to £1,369m in 2020 (48% increase from 2019), with the pandemic generating significant opportunities for a range of sectors in which the region has key strengths. Sales have slowed slightly in 2021 with a 7% fall to £1,269m. The Advanced Engineering & Manufacturing and Agri-Food make up over 66% of the districts sales.

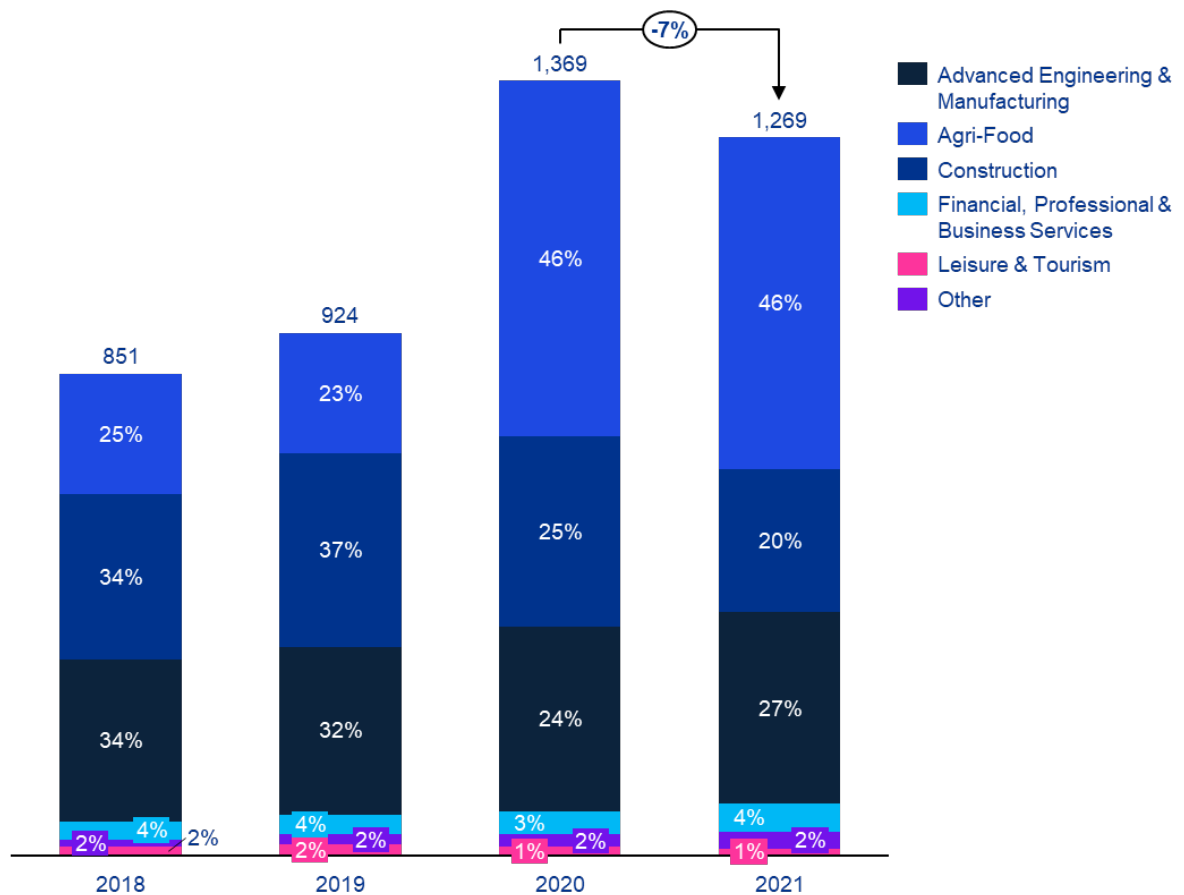


Figure 3-3: Fermanagh & Omagh District Sales per Sector, £m, 2018-21⁶⁰

On a sector level, there has been a substantial increase in sales in the agri-food industry from £213m in 2018 to £586m in 2021 (growth of 175%), accounting for 46% of total sales. Within the district, 27% of 2021 sales were within the advanced engineering and manufacturing sectors, with notable key players in Enniskillen and its surrounds including Crust & Crumb and Balcas: these firms invested a combined £20m in 2021.

⁶⁰Source: NISRA

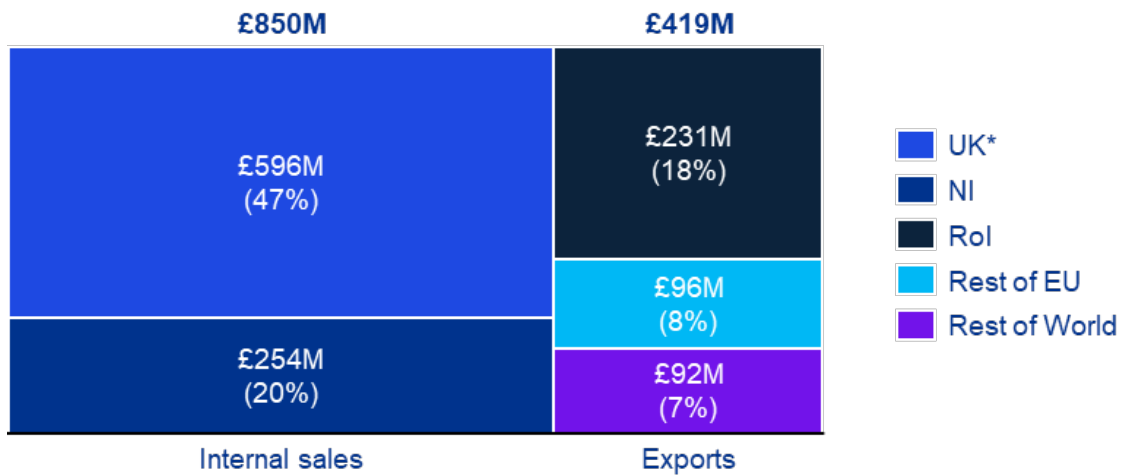


Figure 3-4: Breakdown of FODC 2021 Sales (Total sales £1,269 million)⁶¹

Between 2017 and 2021, the sales from Fermanagh and Omagh going to GB and throughout NI increase from €378m to €596m (+38%) and 178m to €254m (+58%) respectively, whilst exports to EU (inc. ROI) have increased by 79%, however has fallen slightly between 2020 and 2021. This increase in EU sales reflects the unique position and opportunity provided to NI as the only land border between the UK and EU.

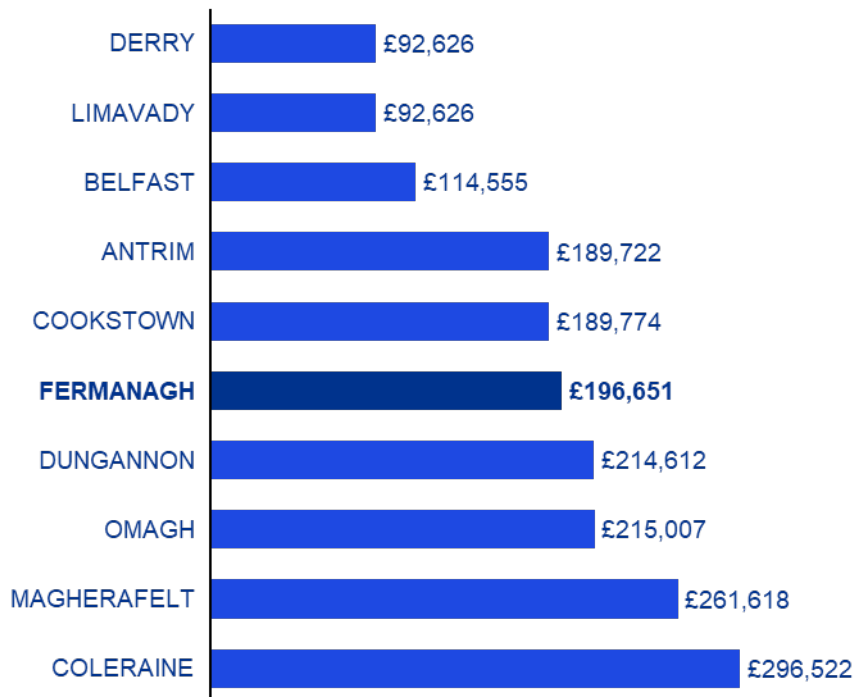


Figure 3-5: Sales per FTE 2020 (LGD 1992) ⁶²

Although data on Enniskillen is unavailable, in terms of sales per worker on a district council level is as follows:

- Omagh and Fermanagh are rank 8th and 10th respectively out of the 26 LGD 1992 council district areas.

⁶¹ Source: Invest NI Key Performance Indicators

⁶² Source: Invest NI Key Performance Indicators

- In 2020, the average sales per FTE worker was £185,848, which Fermanagh exceeded with £196,651 and Omagh with £215,007.
- Omagh has maintained this position from 2016 and had an increase in sales per worker from £211,063 per worker in 2016, whilst Fermanagh has improved positioning and sales from £151,999 per worker in 2016.

This high and improving level of productivity highlights the relative growth in competitiveness amongst businesses based in Fermanagh and Omagh council area.

3.2 Future economic outlook

Enniskillen, like the rest of the world, was impacted by the COVID-19 pandemic. Potential movement restrictions, impact on tourism, health provision and work absences impacted the economic outlook of the district. However, some industries are well-placed to grow from the pandemic. Similarly, whilst there will be reductions in EU funding and negative consequences from the EU Exit, Northern Ireland’s land border between the UK and Europe provides opportunity for the area to provide a unique service, Enniskillen’s proximity to the Republic of Ireland is a key advantage for the town. Figure 3.6 below shows the impact of COVID-19 and EU Exit on key industries in Fermanagh and Omagh council area. The implications are discussed in more detail below.

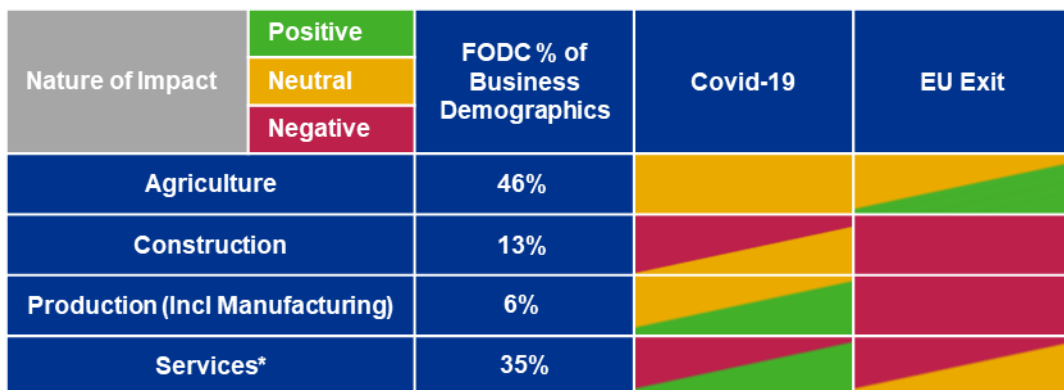


Figure 3-6: Impact of COVID-19 pandemic and EU Exit on key industries in FODC (KPMG outside-in perspective)⁶³

EU land border

Since the NI Protocol came into force at the start of 2021, certain goods, particularly agri-food products, are being checked at Northern Ireland ports when being received from GB which can then move freely to RoI. In terms of the UK, NI is in a unique position to trade with RoI, therefore the large agri-food industry within Fermanagh and Omagh are less exposed to EU Exit complications. However, issues around staffing shortage because of EU Exit have occurred across sectors, particularly in production and in the retail and hospitality sector with businesses having staffing difficulties for evening and weekend work due to staff migration.

⁶³ NISRA, KPMG Analysis

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

Manufacturing NI reported in May 2021 the main concern coming from manufacturers across NI was the availability of raw materials/ supply chain with 66% of surveyed businesses saying it's an issue and 63% concerned with the impact and uncertainty of EU Exit⁶⁴. In January 2022 the sector was resurveyed, a year after the NI protocol came into operation, the survey identified the main concern coming from manufacturers across NI is the lack of staff within the sector rather than the NI Protocol. 60% of manufacturers reported labour as their biggest challenge⁶⁵. NI has faced a continuous loss of EU migrant workers since 2016, with its migrant workforce falling by approximately one-third.

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

EU funding gap

Enniskillen and NI overall will no longer benefit from the European Social Fund and the European Regional Development Fund, with SMEs, small businesses, and long-term unemployed programmes no longer eligible for support from these funds. This funding will end in March 2023, which is a £70m annual loss across NI. This will have impacts throughout the economy, local communities and retail sites which relied on and benefitted from EU funding.

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

COVID-19 Pandemic

The pandemic created significant challenges for many sectors with lockdown measures halting activity, (e.g., hospitality, retail, construction) and economic growth declined in a number of these sectors. With tourism a key sector for Enniskillen the town was heavily affected by COVID19 due to the drop off in visitors to the town. During the recovery phase, while there have been some returns to growth, several sectors are struggling to fill labour vacancies. This has been worsened by the loss of migrants from the UK exiting the EU.

However, the pandemic generated significant opportunities for a range of sectors (e.g. online retail and professional services) including the transition to remote-working for the majority of office-based workers. An example of this is Houstons (clothing and homeware store) in Enniskillen that saw a 400% increase in its monthly online sales and as a result has hired four additional employees⁶⁶.

3.3 Sectoral analysis

Enniskillen has a range of successful sectors in the town and wider district. As shown in the figure below, GVA per head for manufacturing and for retail and wholesale are higher in Fermanagh and Omagh than the NI average, whereas GVA per head is lower in

⁶⁴ Manufacturing NI Report: *Findings from a survey of businesses in the manufacturing industry 2021*

⁶⁵ Manufacturing NI Report: *Traders Experience of the NI Protocol 1 year on 2022*

⁶⁶ The Impartial Reporter

Fermanagh and Omagh in the construction and services sectors. Lower construction GVA per head may stem from sector employees working outside of the FODC area. Retail and wholesale trade is the largest sector of employment (37%) within Enniskillen town, with construction being the lowest (1%).

Furthermore, the IDBR Business Demography identified 20 high growth⁶⁷ businesses in Fermanagh and Omagh every year during 2015 – 2020. The high growth rate⁶⁸ in the FODC area during 2020 (4.4%) was above the NI average (4.3%), ranking second of all District Council areas in NI only behind Belfast (4.8%). Those industries that experienced the largest high growth rates across NI in 2020 included Information & Communication (9.5%), Education (5.9%), Construction (5.3%), production (5%) and health (5%).

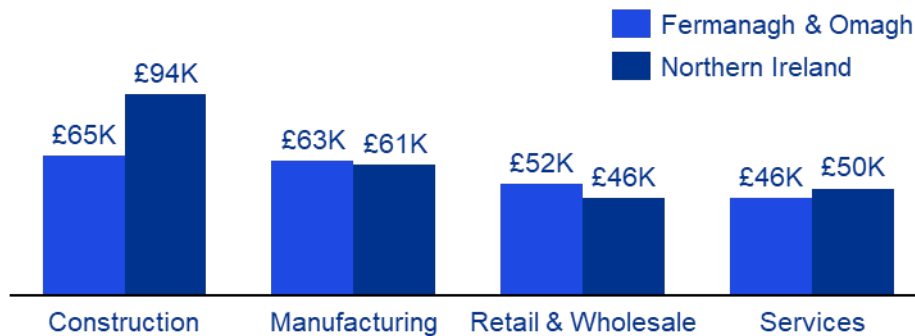


Figure 3-7: FODC GVA per head by industry (2019)⁶⁹

An overview of sectoral employment forecasts at FODC area level for 2020-2030 is provided through a local model developed by the Ulster University Economic Policy Centre (UUEPC)⁷⁰. This forecast indicates significant growth in the sectors of Construction (20%), Professional & Scientific (22%), and Arts & Entertainment (11%) at FODC area level.

However, these growth sectors are not the most significant employers within Enniskillen. Key employers are Retail & Wholesale trade (31%), Accommodation & Food Service Activities (14%) and Public Admin and Defence (10%), remaining consistently top when compared to pre-COVID 2017 and 2019 levels.

⁶⁷ High growth measures businesses, who had at least 10 employees in 2017, that had an average growth in employment of greater than 20% per year between 2017 to 2020.

⁶⁸ This high growth rate is expressed as a percentage of the 2020 active businesses with 10 or more employees (Businesses born in 2017 are not included).

⁶⁹ Source: Invest NI Key Performance Indicators

⁷⁰ Local model developed as part of the UUEPC Spring Outlook 2021 cited in FODC & UUEPC, *A Socio-Economic Profile of the Fermanagh and Omagh District* (2022).

¹³ Department for Communities, Town Centre Database: Business Turnover, Business Demography and Employee Jobs



Figure 3-8: Enniskillen town employee jobs by industry, 2021⁷¹

When examined through the UUEPC local model at FODC area level, a decline of -8% is forecast for the retail sector, however accommodation is forecast to experience 9% growth along with 11% in arts and entertainment. Enniskillen’s other main employers Public Admin and Health are both expected to experience 5% growth.

Despite the district level forecasts, there has been little change in the number of non-domestic properties in Enniskillen between 2018 and 2021, which may hinder retail growth within Enniskillen town.

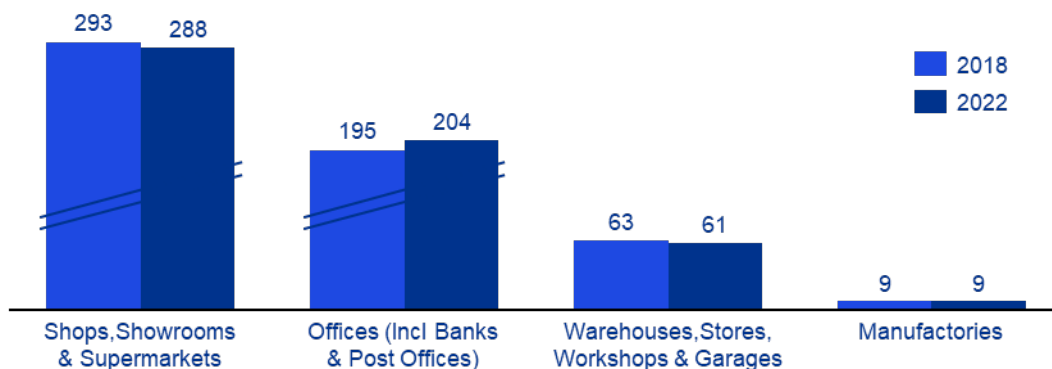


Figure 3-9: Enniskillen town number of non-domestic properties, 2018 & 2022⁷²

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

⁷¹ Department for Communities, Town Centre Database: Business Turnover, Business Demography and Employee Jobs

⁷² Department for Communities

Tourism and Hospitality

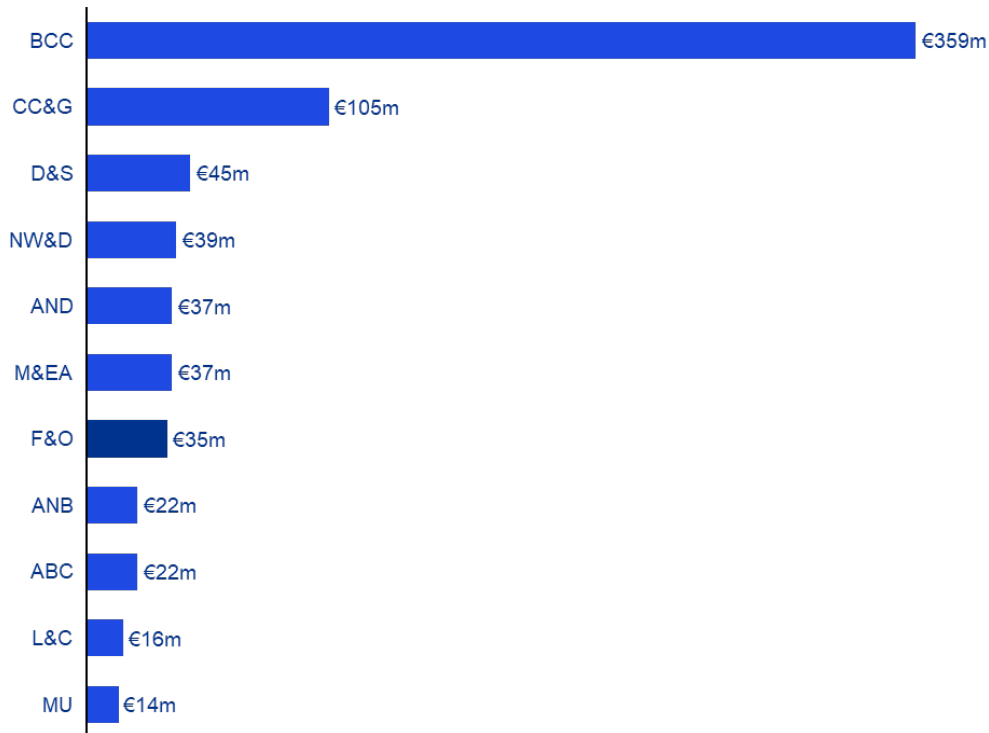


Figure 3-10: Expenditure of Overnight Trips by Local Government Districts Moving Average 2017-19 NI Total £1bn⁷³

The broader Fermanagh and Omagh Council area has the potential to build on existing tourism to increase expenditure and overnight stays. In 2017-2019 the main reason for overnight trips was holiday/leisure, accounting for 57% of trips, followed by 36% visiting friends and relatives and 6% for business. Fermanagh and Omagh accounted for an estimated 8% of overnight trips in NI in 2019 with a gradual 40% growth in stays from 304,855 in 2016 to 427,568 in 2019. Tourism in 2019 accounted for 9% of employment within Fermanagh and Omagh. As outlined in section 2.8, amongst the area’s attractions, the most popular by number of visitors are Castle Archdale Country Park, Belleek Pottery Visitor Centre, Ulster American Folk Park, Cuilcagh Pathway, Enniskillen Castle Museum and Marble Arch Caves (2019 visitor numbers).

Of these attractions, those that are located in the Enniskillen area are dispersed throughout the surrounding areas rather than in the town, and as such there is an opportunity for Enniskillen town to capitalise on its tourism potential and further develop its tourism offering, maximising the potential of Lough Erne and the surrounding natural environment. Transport to these areas has been supported through the 2022 announcement from Translink of a pilot daily bus service from Enniskillen to the Marble Arch Caves and Cuilcagh boardwalk Monday to Friday through the summer. There are additional opportunities to promote Enniskillen as a desirable destination to other tour companies who are already visiting the District e.g. ROI providers going to Cuilcagh Boardwalk and returning directly to ROI without taking in all that the area has to offer.

⁷³ Source: NISRA

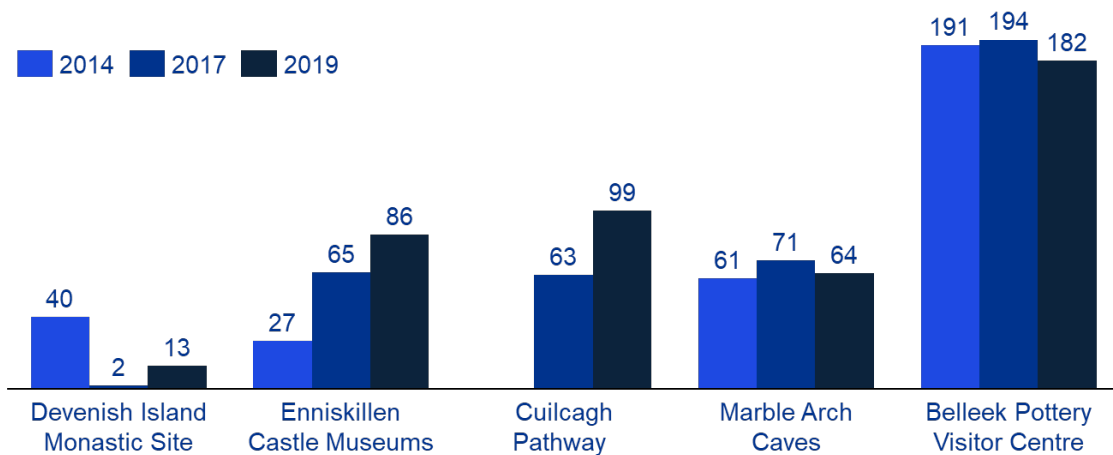
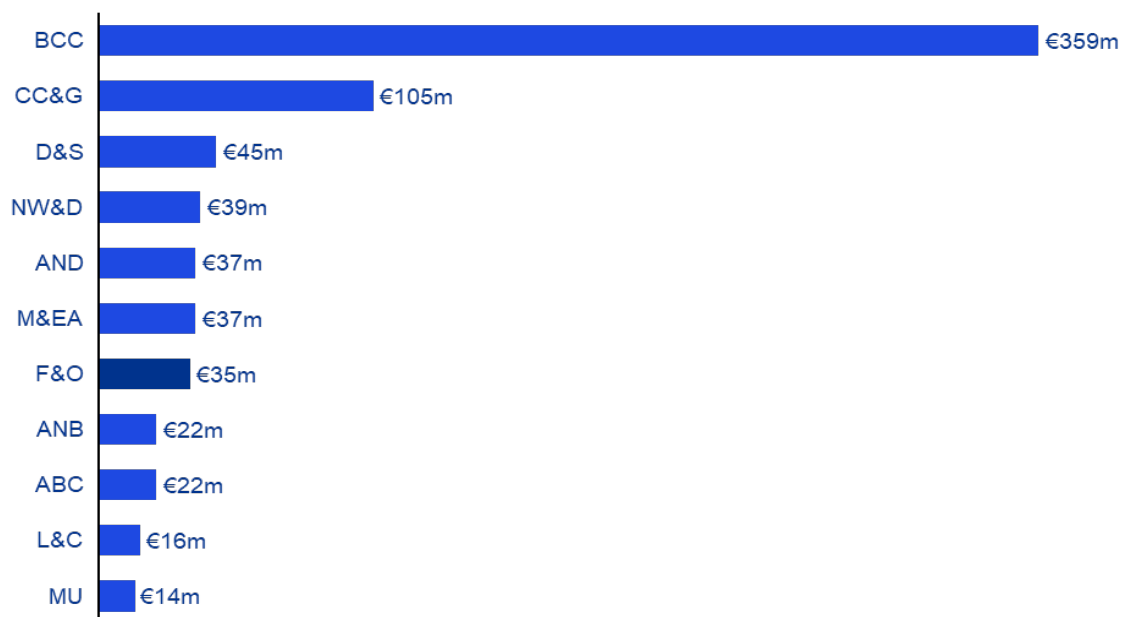


Figure 3-11: Visitor numbers at attractions in Enniskillen & popular attractions nearby (000s)⁷⁴

The accommodation and food service sector is also important to Enniskillen’s economy as the second largest industry in employment numbers. 14% of employee jobs in Enniskillen are across the industry, including staff for hotels such as Lough Erne Resort and Killyhevlin Lakeside Hotel & Lodges.

In 2019, Fermanagh and Omagh had 303 accommodation options (self-catering (70%), B&Bs (15%), guest accommodation (7%), hotels (4%), guesthouses (3%), and hostel (2%)) with 1,959 rooms and 4,460 beds across the area. In 2019, the hotel room occupancy rate was 67% which has been a gradual increase from 2013’s rate of 58%, when the Fermanagh and Omagh had 285 accommodations with 1,961 rooms and 4,501 beds. ⁷⁵ Estimated tourism spend at a district level (as reported) has increased year on year with a 46% increase since £24m in 2015 to £35m in 2019. However, FODC has potential to increase tourism spend as it only ranks 7th highest out of the 11 Councils and accounts for 4.7% of the NI total estimated tourism spend in 2019.



⁷⁴ Source: NISRA

⁷⁵ Source: NISRA

Figure 3-12: Tourism Spend by LGD 2019⁷⁶

Retail

Retail accounts for the largest portion of employment within Enniskillen town, at 31% of employee jobs in 2021. The split of retail sales sold per type of good is shown below with the sale of convenience goods making the largest contribution to retail trade. More recently, sales decreased in clothing and furniture sales between 2016-2020 and increased in small household goods and chemist in relatively large proportions. Reductions in clothing and furniture trade is likely due to the data not capturing internet sales. In 2020, 75% of convenience goods sales were from Asda, Derrychara Road (£46m) and Tesco, Derrychara Link (£37m).

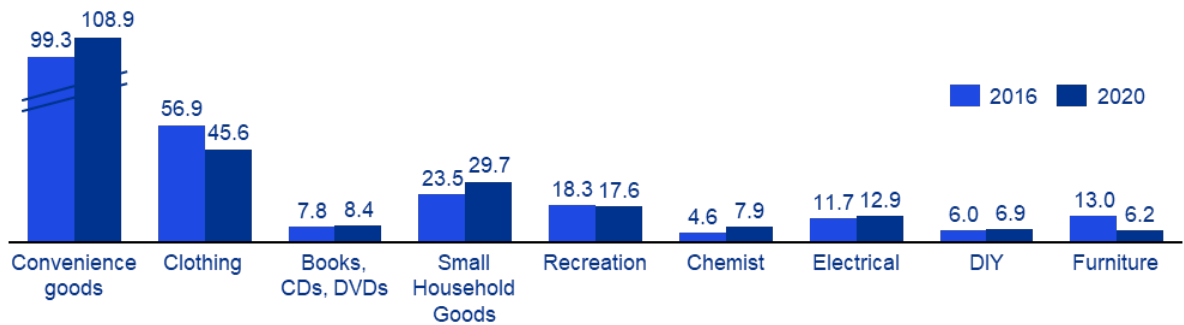


Figure 3-13: Retail trade in Enniskillen, £ millions 2016 and 2020⁷⁷

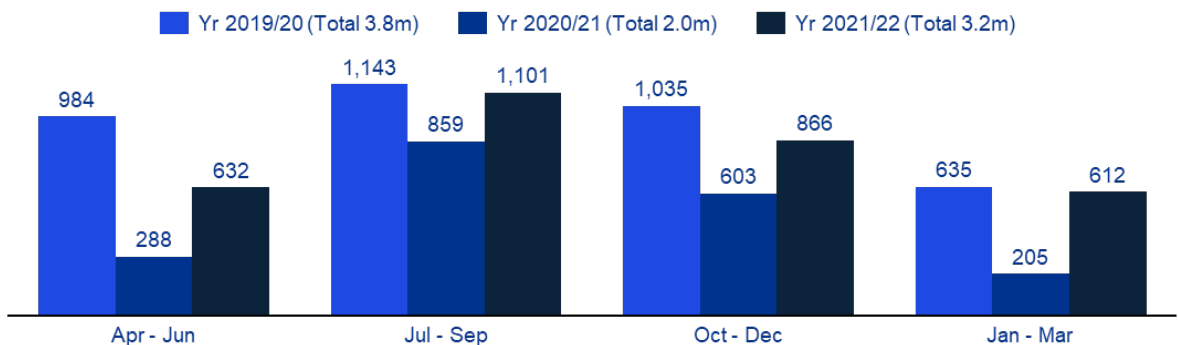


Figure 3-14: Quarterly footfall in Enniskillen centre (000s)⁷⁸

As highlighted in Section 2.2.6, Enniskillen footfall totalled 3.2 million for the financial year 2021/22 (April to March) a 65% increase from the previous financial year, though still below pre-pandemic levels. This reflects the ease in COVID-19 restrictions and peak retail time in the lead up to Christmas. It suggests that when people are able, they are keen to visit the town centre. Undoubtedly the town also benefits from cross border trade owing to its wide catchment area and geographical location.

Construction

The construction sector accounts for 9% of GVA and 7% of the employment within the Fermanagh and Omagh district. The sector has since seen significant growth in recent years, with a 15% increase in employment between 2016 to 2020. Key businesses

⁷⁶ Source: NISRA

⁷⁷ Source: Nexus Planning - Retail and Commercial Leisure needs Assessment 2017 & 2020

⁷⁸ Source: Fermanagh & Omagh District Council Data

include PJ Treacy & Sons, and Tracey Brothers. The sector is facing challenges in supply chains driven by UK Exit, COVID-19, and the conflict in Ukraine.

Figure 3.14 above displays the negative impacts EU Exit and COVID-19 have had on the sector with COVID-19 halting activity and EU Exit creating uncertainty around supply chains.

Advanced Engineering & Manufacturing

The manufacturing sector accounts for 16% of GVA and 14% of the employment within Fermanagh and Omagh district. The sector has greatly contributed to the recent increase in GVA for the region with a 19% increase in sales between 2018 to 2021. Key engineering & manufacturing businesses in Enniskillen include Balcas, Elite Electronic Systems and Tracey Concrete. The large contribution to growth in GVA from the sector and Enniskillen should ensure there is the right environment to support further opportunity for growth. However, the sector is struggling with staff shortages due to EU Exit.

Agri-Food

The agriculture sector, which accounts for the majority of businesses demographics within the FODC area, has seen little negative impact as a result of the impact of COVID-19 and EU Exit. The sector has seen an increase in costs of inputs, however this has been offset by the increased price received for outputs.

In 2021, 46% of the businesses within Fermanagh and Omagh were agri-food businesses, employing 36% of total employed. The sector contributed £586m in sales, accounting for 46% of total sales in 2021. Crust and Crumb are a key agri-food manufacturing business in Fermanagh.

3.4 Future Scenarios

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

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

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

Scenario	2021	2022	2023	2024	Average 2021-24
Danske Bank ⁷⁹	6.8%	3.6%	1.0%	-	3.8%
UUEPC16 ⁸⁰	7.7%	4.2%	2.1%	1.8%	4.0%
NISER ⁸¹	7.4%	3.5%	0.5%	1.8%	3.3%

⁷⁹ <https://danskebank.co.uk/economic-analysis/quarterly-sectoral/danske-bank-northern-ireland->

⁸⁰ https://www.ulster.ac.uk/_data/assets/pdf_file/0018/1106550/ULSTER-UNIVERSITY-EPC-Outlook-Spring-2022.pdf

⁸¹ <https://www.niesr.ac.uk/wp-content/uploads/2022/08/NISER-UK-Economic-Outlook-Summer-2022.pdf>

Average of estimates	7.3%	3.8%	1.2%	1.8%	3.7%
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Four scenarios have been created to forecast growth for Enniskillen to 2030. These scenarios are displayed in Table 3-2 below each with a different proposed annual growth rate and the probability for each scenario occurring. The scenario that has the highest probability of occurring is Central B with an annual average growth rate of 1.5% per annum.

Table 3.2: Enniskillen scenarios considered

Scenario	Narrative and rationale	Annual average economic growth rate, 2022-2030 ¹	Scenario probability (KPMG viewpoint)
S1 Central A	<ul style="list-style-type: none"> The Town's economy grows in line with the 3-year average growth rate pre-COVID (2017-2019) for NI overall Assumes recent trends pre-COVID extend into future; allows for headwinds such as the 2022 cost of living crisis continuing over a number of years; allows for other headwinds (e.g. trade friction) 	0.5% p.a.	30%
S2 Central B	<ul style="list-style-type: none"> The Town's economy grows in line with the 5-year average growth rate pre-COVID (2015-2019) for NI overall Captures recent growth per Central A as well as higher growth in years pre-EU Exit referendum, assumes cost-of-living crisis abates in the short-term; assumes no friction to NI-EU trade 	1.5% p.a.	45%
S3 Upside	<ul style="list-style-type: none"> The Town's economy grows at a faster rate than it has grown at in recent years, and at a faster pace than the NI economy is expected to grow at overall Assumes the Town can achieve a step change in growth relative to NI; requires strong UK based growth 	2.5% p.a.	20%
S4 Downside	<ul style="list-style-type: none"> The Town's economy does not grow materially over the entire period Scenario would arise only in context of an economic downturn that reduces annual average growth 	0.1% p.a.	5%

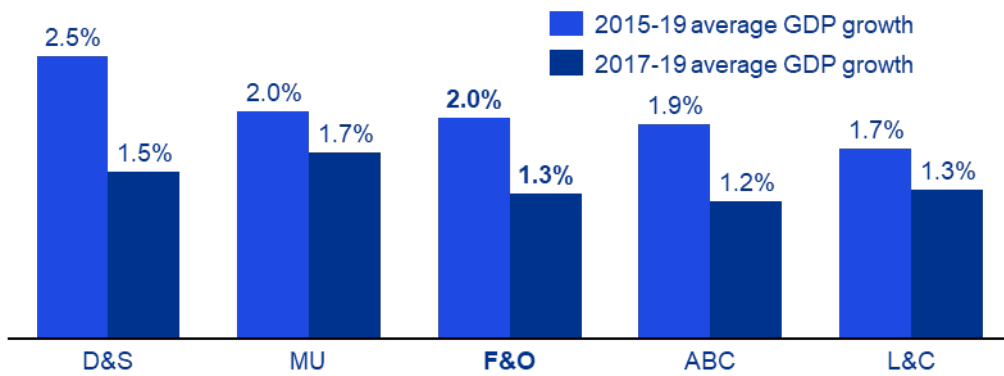


Figure 3-15: Average GDP growth at peer councils, %⁸²

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

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

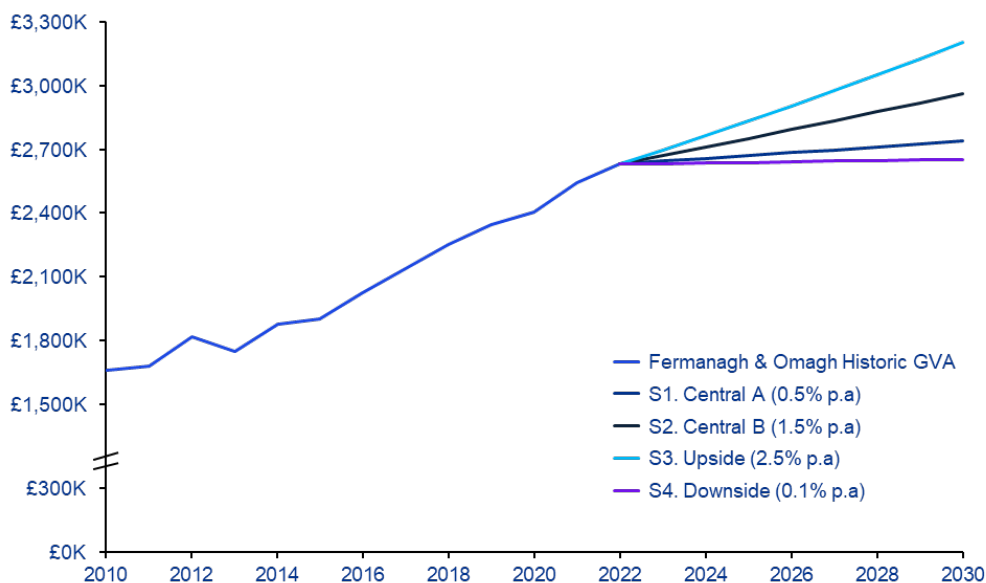


Figure 3-16: Fermanagh and Omagh district GVA, 2010-2030, £⁸³

⁸² Source: ONS

⁸³ Source: ONS, KPMG analysis

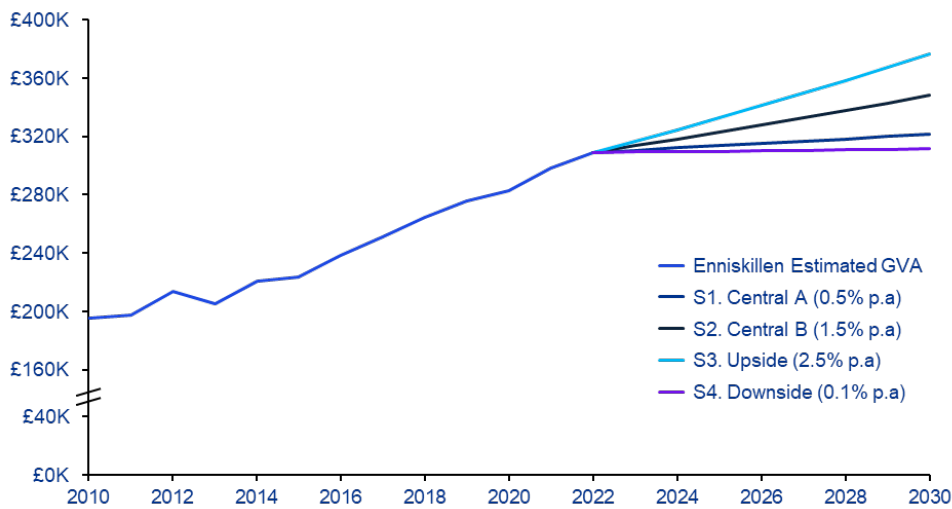


Figure 3-17: Estimated Enniskillen GVA (based on population), 2010-2030, £⁸⁴

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

- The cumulative difference between Central A and Central B for 2022 to 2030 is estimated to be £117 million GVA for Enniskillen. i.e., achieving growth of 1.5% compared to growth of 0.5% would create an additional £177 million
- The cumulative difference between Central B and Upside for 2022 to 2030 is estimated to be £122 million GVA for Enniskillen. i.e., achieving growth of 2.5% compared to growth of 1.5% would create an additional £122 million

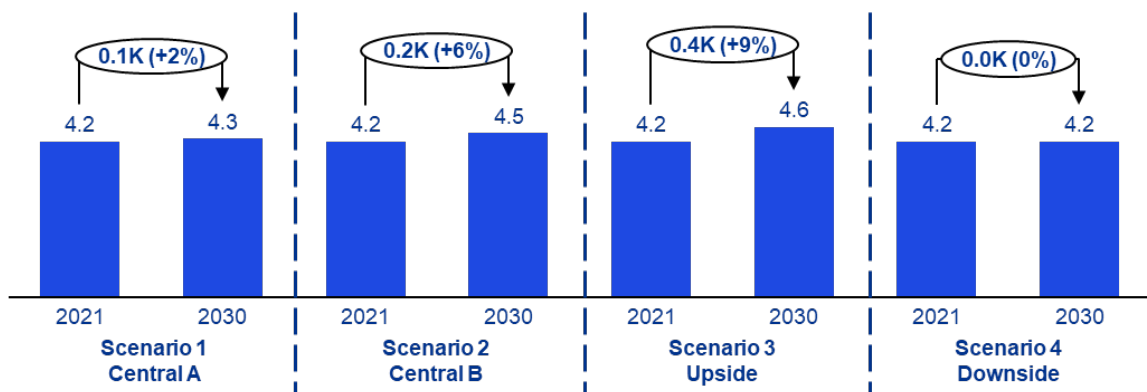


Figure 3-18: Expected job growth for Enniskillen town 2022 and 2030⁸⁵

Total employment in 2021 was 4,200 based on the NI Town Centre Database. Under Scenario 2 Central B, the number of jobs in Enniskillen is estimated to increase by ~300 (+7%) between 2022 and 2030, with growth of 0.8% per annum. To achieve the higher growth targets set in Central B (1.5% p.a.) and Upside (2.5% p.a.) there is a need for higher levels of FDI, higher growth in indigenous exporting businesses, increased levels of R&D and skills development, investment in schools’ sites, innovation hub spill overs, and additional induced spending arising from higher footfall through public realm improvements.

⁸⁴ Source: ONS, KPMG analysis

⁸⁵ Source: Department for Communities, KPMG analysis

Potential actions to consider enabling growth in the range between Scenario 2 and Scenario 3 could include:

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

4 Policy Analysis

4.1 Introduction

This section sets out the policy context to underpin the Enniskillen Place Shaping Plan 2035. This includes international, European, regional, and local frameworks that set policy and best practice for social, economic and community development. The plan will be aligned with the UN Sustainable Development Goals and will complement the Local Development Plan to which this Place Shaping Plan is linked. Overall, this sets a strong foundation for shaping a vision and objectives for an attractive and vibrant Enniskillen in 2035. This policy foundation suggests several key principles that the Enniskillen Place Shaping Plan 2035 vision can draw on:

- Promoting the **island town identity** of Enniskillen, both within its communities and to tourists and visitors alike.
- Promoting and maintaining a **healthy and connected built and natural environment** which improves the well-being of Enniskillen’s communities.
- Supporting Enniskillen and other Main Towns in the FODC area and their roles in providing for **housing, retail, employment, leisure, cultural and social functions**.
- Developing a **strong local economy** to boost business and create attractive experiences for customers and consumers across all sectors.
- **Conserve and promote** Enniskillen’s strong cultural assets - both built and natural.
- Creating **sustainable, connected communities** to ensure prosperity and quality of life for generations of the future.

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

Table 4.1: Policy Review

Scale	Policy Document
International	The 2030 Agenda – UN Sustainable Development Goals
United Kingdom	Levelling Up the United Kingdom
	UK Net Zero Strategy: Build Back Greener
Northern Ireland	Northern Ireland Economic Recovery Action Plan
	Northern Ireland Domestic Tourism Strategy 2020
Regional	Regional Development Strategy 2035
	MSW Regional Economic Strategy
	DfI Strategic Planning Policy Statement
	High Street Task Force – Delivering a 21 st Century High Street
	Regional Strategic Transportation Strategy 2002-2012
District	Regional Transportation Network Plan 2015
	FODC 2030 Community Plan
	FODC 2030 Community Plan – 2020 Update

	FODC Climate Change and Sustainable Development Strategy 2020-2030
	FODC Corporate Plan 2020 – 2024
	Local Development Plan 2030
Local	Enniskillen Town Centre Masterplan 2012
	Experience Enniskillen: BID Business Plan 2022-2027

4.2 The 2030 Agenda – UN Sustainable Development Goals

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

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

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

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

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

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

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

4.3 Levelling Up the United Kingdom

Levelling Up the United Kingdom or the 'Levelling Up White Paper' is a UK-wide flagship document which outlines how the Government plans to address social, economic and geographical disparity across the UK. The document provides a framework for effectively tackling these disparities by setting out 6 'capitals' from which to chart progress towards social, economic and geographical equality:

1. **Physical Capital** - infrastructure, machines and housing
2. **Human Capital** - skills, health and experience of the workforce
3. **Intangible Capital** - innovation, ideas and patents
4. **Financial Capital** - resources supporting the financing of companies
5. **Social Capital** - strength of communities, relationships and trust.
6. **Institutional Capital** - local leadership, capacity and capability

With these 6 'capital' drivers providing the thrust for action, the policy's 4 key objectives help chart the development and growth of equal opportunity across the UK set against these drivers:

- i.) Boost productivity, pay, jobs and living standards by growing the private sector, especially in those places where they are lagging.
- ii.) Spread opportunities and improve public services, especially in those places where they are the weakest
- iii.) Restore a sense of community, local pride and belonging, especially in those places where they have been lost
- iv.) Empower local leaders and communities, especially in those places lacking local agency

Under these 4 objectives, the policy is designed to begin to deliver the missions and overarching objectives contained within the document. These objective areas also outline specific interventions towards achieving the objectives of the document.

The document also contains details on funding programmes with specific relevance to the policy objectives and interventions outlined in the White Paper. Several of these funding programmes which aim to leverage development and growth in Northern Ireland are of specific relevance to Enniskillen, including:

- **Community Renewal Fund: £12m** from the Community Renewal Fund to support 30 projects, as well as national projects supporting communities across Northern Ireland. Enniskillen is outlined as a specific town for direct benefit of this funding programme.
- **New Deal for Northern Ireland: £400m** guaranteed for the New Deal, aimed at boosting economic growth, increasing Northern Ireland's competitiveness and invest in infrastructure, while also aiming to help businesses operate following the UK's exit from the EU.
- **Culture Recovery Fund: A £2bn** Recovery Fund helping museums, theatres, cinemas and heritage organisations across the UK survive the pandemic and its long-term impacts.

4.4 Net Zero Strategy: Build Back Greener

The UK Government’s *Net Zero Strategy: Build Back Greener* is the overarching policy document which sets out the policies and proposals for decarbonising all sectors of the UK economy in an effort to realise the government’s target of having a net zero economy by 2050. Building on the approach set out within the foundational policy document *The Ten Point Plan for a Green Industrial Revolution*, the *Net Zero Strategy* aims to ensure the UK maintains consistency with regards to its carbon budgets and net zero targets among other commitments. Directing the strategy for net zero are the Ten Point Plan proposals:

- | | |
|--|--|
| <ol style="list-style-type: none"> 1 Advancing Offshore Wind 2 Driving the Growth of Low Carbon Hydrogen 3 Delivering New and Advanced Nuclear Power 4 Accelerating the Shift to Zero Emission Vehicles 5 Green Public Transport, Cycling and Walking | <ol style="list-style-type: none"> 6 Jet Zero and Green Ships 7 Greener Buildings 8 Investing in Carbon Capture, Usage and Storage 9 Protecting Our Natural Environment 10 Green Finance and Innovation |
|--|--|

The Strategy outlines several projects, initiatives schemes and actions taken by Northern Ireland in supporting the UK’s transition to a net zero economy, including:

- Adoption of hydrogen energy within public and private transportation systems
- A £74 million investment in the purchase of zero and low emission vehicles and associated infrastructure in the public transport sector
- Blue/Green infrastructure investment fund of £20 million
- Publishing of the Forests for our Future Programme
- Legislative provisions to increase building energy standards, limiting greenhouse gas emissions and legislation to help roll out renewable electricity generation

From this, Fermanagh and Omagh District and the wider Northern Ireland region is strategically placed to leverage the policies within the UK Net Zero Strategy, in tandem with the initiatives and schemes presented above, to place Northern Ireland as a climate action champion within the UK.

4.5 Northern Ireland Economic Recovery Action Plan

The purpose of the *Northern Ireland Economic Recovery Action Plan* is to both revitalise Northern Ireland’s economy and to embrace the challenges presented by the Covid-19 pandemic in building a more competitive, inclusive and greener economy for Northern

Ireland. The Action Plan sets out a range of decisive actions to kick-start economic recovery over the 12 to 18 months from the Plan’s adoption in February 2021.

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

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

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

Table 4.2: NI Economic Recovery Action Plan - Action Areas

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

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

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

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

4.6 Northern Ireland Domestic Tourism Strategy 2020

In 2018, domestic tourism accounted for 44 percent of all overnight trips taken in Northern Ireland and 31 percent of all spend. In real terms this equates to approximately 2.2 million overnight trips and an estimated expenditure of £300 million by Northern Ireland residents. The domestic market is a critical part of Northern Ireland’s tourism economy. Its continued development will be key to Northern Ireland achieving its overall tourism ambitions.

The domestic tourism strategy aims to capitalise on the domestic tourism market's opportunities for growth. It outlines a situational analysis of the current state of the domestic market, sets out the scale of ambition for the future, details the new segmentation model, and outlines the strategy and key actions required to support future development and growth opportunities.

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

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

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

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

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

4.7 Regional Development Strategy 2035

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

1. A **Spatial Framework** which divides the region into 5 components based on functions and geography
2. **Guidance** at two levels:
 - a) A Regional level that is to be applied to all parts of the region and
 - b) Specific guidance for each element of the Spatial Framework

3. A Regionally Significant Economic Infrastructure section which identifies the need to consider strategic infrastructure projects

4. Implementation: This section sets out how the strategy will be implemented.

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

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

This vision is supported by 8 high-level aims:

Table 4.5: Regional Development Strategy High-level Aims

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

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

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

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

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

Enniskillen is identified within the Spatial Framework as both a Hub and a Gateway, with its strategic position along the South West Gateway linking Northern Ireland to Sligo and the wider Republic. The main SFG for Enniskillen is primarily related to its inter-regional gateway function and opportunities for the provision of services with Sligo on a cross-border basis. Its landscape and associated heritage features make it a significant tourist destination for the South West region.

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

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

Table 4.6: Sample SFGs

SFG	Theme
SFG10: Identify and consolidate the roles and functions of settlements within the clusters	Economy and Development
SFG11: Promote economic development opportunities at Hubs	Economy and Development
SFG12: Grow the population in the Hubs and cluster of Hubs	Demographics and Society
SFG15: Strengthen the Gateways for Regional competitiveness	Economy and Development

4.8 MSW Regional Economic Strategy 2020

The Regional Economic Strategy (RES) for the Mid South West region (MSW) sets out the vision and ambition for the MSW region economy. It identifies the opportunities and challenges faced by the region and sets out the priority pillars around which future investment and actions to realise the region’s ambitions will be framed. The Strategy establishes four pillars for action in key priority areas:

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

Within each of these four pillars are a suit of potential actions and project concepts for future development and prioritisation. For example, in relation to Enniskillen, the following are particularly relevant:

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

Pillar 3: Boosting Innovation and Digital Capacity supporting our businesses to be more productive and to enhance their capabilities in enabling technologies such as data

analytics, automation, machine learning and Industry 4.0 among others. Industries of particular relevance to the future economic development of Enniskillen include the agri-food sector, with the location of a CAFRE campus in Enniskillen providing significant opportunities to stimulate innovation in the wider region.

Pillar 4: Building a High-Performing Tourism Economy focuses on developing the competitive advantages of the region, with the aim of positioning the MSW region prominently within the ‘all-island’ visitor economy of Ireland. A key catalyst for realising these aims is the promotion of cross-border tourism product development, with particular emphasis on the inland waterway network, which includes the Erne basin, river and loughs.

4.9 DfI Strategic Planning Policy Statement

The Department for Infrastructure (DfI) Strategic Planning Policy Statement (SPPS), as stated by the Department, sets out the Department’s regional planning policies for securing the orderly and consistent development of land in Northern Ireland under the reformed two-tier planning system. It has been agreed by the Northern Ireland Executive and it is judged to be in general conformity with the Regional Development Strategy 2035.

The core principles of the SPPS are grounded in the foundational pillars of sustainable development, namely:

- Improving Health and Wellbeing
- Supporting Good Design and Positive Placemaking
- Creating and Enhancing Shared Space
- Preserving and Improving the Built and Natural Environment
- Supporting Sustainable Economic Growth

The Statement also contains a suite of subject policies relating to the spatial planning of Northern Ireland’s cities, towns, villages and rural areas. In particular, the Statement outlines specific policy objectives concerned with town centres:

6.269 It is important that planning supports the role of town centres and contributes to their success. The SPPS seeks to encourage development at an appropriate scale in order to enhance the attractiveness of town centres, helping to reduce travel demand.

In addition, Regional Strategic Objectives are also specifically outlined within the Statement regarding town centres and retailing:

6.271: The regional strategic objectives for town centres and retailing are to:

- *Ensure LDPs and decisions are informed by robust and up to date evidence in relation to need and capacity*

- *Protect and enhance diversity in the range of town centre uses appropriate to their role and function, such as leisure, cultural and community facilities, housing and business*
- *Promote high-quality design to ensure that town centres provide sustainable, attractive, accessible and safe environments; and*
- *Maintain and improve accessibility to and within the town centre.*

4.10 High Street Task Force – Delivering a 21st Century High Street

On 6 August 2020, the Executive Office formed the cross-departmental High Street Task Force, chaired by the Junior Ministers in the Executive Office. The High Street Task Force membership draws from central and local government, academia and business groups and aims to deliver “sustainable city, town and village centres which are thriving places for people to do business, socialise, shop, be creative and use public services as well as being great places to live.”

As part of this, in March 2022 the High Street Task Force launched the report ‘Delivering a 21st Century High Street’. The report summarises the findings, advice and recommendations of the High Street Task Force in achieving the vision set out above.

The Report contains 14 Recommendations as part of its Proposals section. Among these recommendations is an outlined support for schemes and initiatives such as:

- *Recommendation 9: High Street Challenge Fund*
- *Recommendations 2 and 3: Living High Streets Programme and Fund, and*
- *Recommendation 4: Reinstating the Back in Business Rate Relief Scheme.*

Notably, *Recommendation 6: High Street Council Plans* strongly recommends that district councils each develop dereliction strategies and action plans and that they use their existing powers to transform streets and village centres.

4.11 Regional Strategic Transportation Strategy 2002-2012

The Regional Transportation Strategy (RTS) for Northern Ireland 2002-2012 identified strategic transportation investment priorities and considered potential funding sources and affordability of planned initiatives over that 10-year period. The RTS is a “daughter document” of the Regional Development Strategy (RDS) which sets out the spatial development framework for Northern Ireland up to 2025. The purpose of the RTS was to support the RDS and to make a significant contribution over the 10 years towards achieving the longer-term vision for transportation contained within the RDS:

“to have a modern, sustainable and safe transportation system which benefits society, the economy, and the environment and which actively contributes to social inclusion and everyone’s quality of life”.

The Strategy considered Northern Ireland as four discrete areas with particular transport needs, problems, priorities and solutions. The areas are the Regional Strategic Transport

Network (RSTN) (as defined by the RDS), the Belfast Metropolitan Area (BMA), Other Urban Areas (cities and towns outside the BMA with populations over 5,000) and Rural Areas. Implementation of the Strategy was through three Transport Plans covering the Regional Strategic Transport Network (RSTN), the Belfast Metropolitan Area (BMA), and the Sub-Region.

4.12 Regional Transportation Network Plan 2015 (under review)

The Regional Strategic Transport Network Transport Plan 2015 (RSTN TP) was prepared by the Department for Regional Development. The Plan was based on the guidance set out in the Regional Development Strategy (RDS) and the Regional Transportation Strategy (RTS). The RSTN comprises the complete rail network, five Key Transport Corridors (KTCs), four Link Corridors, the Belfast Metropolitan Transport Corridors and the remainder of the trunk road network.

The Plan consisted of proposals for the maintenance, management and development of this transport network up to the end of 2015. It took a realistic view of the scale of possible investment by closely following the funding levels envisaged in the RTS, which have been extrapolated to match the longer period of the RSTN TP. The Plan presented a number of key outcomes compared against a benchmark of the situation in 2001. The objectives of the RSTN TP included:

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

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

- Walking and Cycling
- Bus
- Rail
- Highways

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

- Environment
- Economy

4.13 FODC 2030 Community Plan

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

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

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

Within these overarching themes are 6 key evidence-based priority areas. These priority areas are made accountable and actionable through the 6 long-term outcomes informed by the priority areas. These actions align closely with those of the FODC’s Corporate Plan and are similarly focussed on improving quality of life in Fermanagh and Omagh:

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

Progress on these outcomes is monitored and measured using key performance indicators (KPI’s) specific to each outcome. Accompanying this Community Plan is three Thematic Action Plans based on the initial strategic actions considered during consultation and engagement for the Community Plan.

Table 4.8: Sample of Actions from the FODC 2030 Community Plan

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

Usage of quality listed walkways and cycle paths in the district

Our outstanding natural environment and built and cultural heritage is sustainably managed and, where possible, enhanced

4.14 FODC 2030 Community Plan – 2020 Update

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

- | | |
|---|--|
| Priority 1: Support Positive Mental Health | Priority 5: Trauma Aware Communities |
| Priority 2: Reduce Social Isolation & Loneliness | Priority 6: Deliver on Tourism and Economic Recovery |
| Priority 3: Tackle Poverty and Disadvantage | Priority 7: Promote Green Recovery |
| Priority 4: Nurture the CVS to enhance capacity and resilience, including promotion of volunteering | Priority 8: Build on the strong foundations of partnership working |

4.15 FODC Climate Change and Sustainable Development Strategy 2020 – 2030

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

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

Each of these thematic areas are supported by a series of outcomes and accompanying actions towards realising the sentiments of these three thematic areas. This includes actions related to retrofitting, sustainable production and consumption, air quality

monitoring, supporting opportunities for environmental enhancement and the promotion of cycling, walking and running.

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

4.16 FODC Corporate Plan 2020 – 2024

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

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

These six outcomes are supported by the UN Sustainable Development Goals. The outcomes are further structured under three overarching themes which are consistent across both the Corporate Plan, Community Plan and Local Development Plan. The three themes also relate to the three sustainable development pillars – social, economic and environment:

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

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

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

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

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

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

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

Table 4.7: Sample of Actions from the FODC Corporate Plan

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

4.17 Local Development Plan 2030 – Draft Strategy

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

The Strategy is structured in three parts:

Part One provides a legal and policy context to the district which is accompanied by a socio-economic and spatial profile of the district. The Strategy for future growth is based on an understanding of the unique and distinguishing features of this district profile. This

is accompanied the vision and objectives of the document, the spatial growth strategy, the distribution of growth as well as strategic policies.

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

Part Three comprises all the appendices and other areas of guidance which forms part of the plan. It includes specific guidance for developments which vary in scope, scale, site location and sector. It also contains the council’s Wind Energy Plan.

Within the Strategy, Enniskillen, along with Omagh, is designated as a Main Town within the district, being a focal point for housing, retail, employment, leisure, cultural and social functions.

4.18 Enniskillen Town Centre Masterplan 2012

The Enniskillen Town Centre Masterplan carries on and builds upon the 2001 plan for Enniskillen, *Enniskillen – The Island Town Integrated Development Plan*. Its aim is to provide an action plan which charts the future development of Enniskillen and sets out future strategies to facilitate regeneration within the town centre. It also acts as a reference point for Fermanagh and Omagh District Council to help inform planning application decisions. As part of an evidence-base to help inform the development of the Masterplan, a suite of documents was prepared, including:

- Enniskillen Retail and Commercial Leisure Capacity Study (November 2010)
- Enniskillen Town Centre Health Check (November 2010)
- Enniskillen Town Centre Masterplan, Baseline Report (September 2010)

The Plan sets out seven key aims and objectives to help maximise the opportunities present in the town centre and inform the proposals set out in the masterplan:

- | | |
|---|--|
| <ol style="list-style-type: none"> 1. Promote and strengthen the town’s strong independent retail offering 2. Maximise the town’s tourism potential, making the most of its physical assets and geographical location 3. Develop the town’s leisure and cultural offering 4. Promote the town’s unique identity as an Island town | <ol style="list-style-type: none"> 5. Increase the town’s domestic and international tourist figures 6. Provide more opportunities for living on the Island 7. Reduce traffic congestion within the town centre |
|---|--|

As part of this hierarchy of aims and objectives, the plan outlines ten regeneration goals, with each goal relating to thematic areas such as the town centre offering, tourism, heritage, retail, and transport among others. These goals link the vision of the plan with the proposed interventions, outlining 24 main interventions for action.

Nine potential development sites which include three major opportunity sites⁸⁶ are also set out as part of the masterplan concept. The three major opportunity sites identified were as follows:

1. The PSNI Site
2. The Buttermarket
3. The Bus Station & Garage

It was felt that these three large sites provided Enniskillen with the greatest potential for both re-development and new development within the settlement boundary of the town.

4.19 Experience Enniskillen: BID Business Plan 2022-2027

Following on from the first five-year term of the Enniskillen BID (Business Improvement District), *Experience Enniskillen: BID Business Plan 2022-2027* sets out the actions and plans to fully maximise economic and business development within Enniskillen over the next five-year term out to 2027 in a relevant and achievable manner.

The Plan is structured across three 'strategic pillars' which provide the framework from which past objectives can be measured and benchmarked, and from which future objectives can be shaped. These strategic pillars each focus on a particular thematic area for consideration:

1. Boost Business
2. Entice Customers
3. Enhance Experiences

Each pillar contains details on past and future commitments of the BID towards achieving their specific focus. These commitments range from funding, incentives, business development, marketing and communications, to events, festivals and tourism development.

The budget for the five-year period out to 2027 is also set out within the plan, containing breakdowns of BID income, expenditure and running costs for the plan period.

⁸⁶ Opportunity sites have since been updated see Section 2.2.5

5 Consultation and Engagement

5.1 Overview of Approach

This chapter summarises consultation undertaken as part of the development of the new Enniskillen Place Shaping Plan. This includes the outcome of online surveys that were prepared to capture the views of the private sector and community in Enniskillen. To seek the input of community, businesses, community/voluntary and schools sectors surveys were issued in June 2022 for a period of four weeks. A total of 400 responses were received for the public survey, 36 responses for the business survey, 34 for the community and voluntary sector, and 120 for the schools; each demonstrating the depth of interest and engagement with the perceived issues, solutions to address issues, and possible interventions required. Targeted strategic conversations and webinars were also held with a range of key stakeholders, listed in Appendix 1, to elicit their views on the future of Enniskillen. Together these have provided valuable insights for the development of the new Place Shaping Plan.

5.2 Online Survey Findings

Ensuring a plan which is fully informed and reflective of the views and needs of all relevant stakeholders, including the community and private sector, is paramount to securing buy-in to create an effective and successful strategy which looks to address current and future challenges and opportunities in Enniskillen.

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

- 1 Public Survey
- 2 Business survey
- 3 Community and voluntary sector survey
- 4 Young People survey
5. Primary School Survey

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

The surveys received **590 responses** collectively:

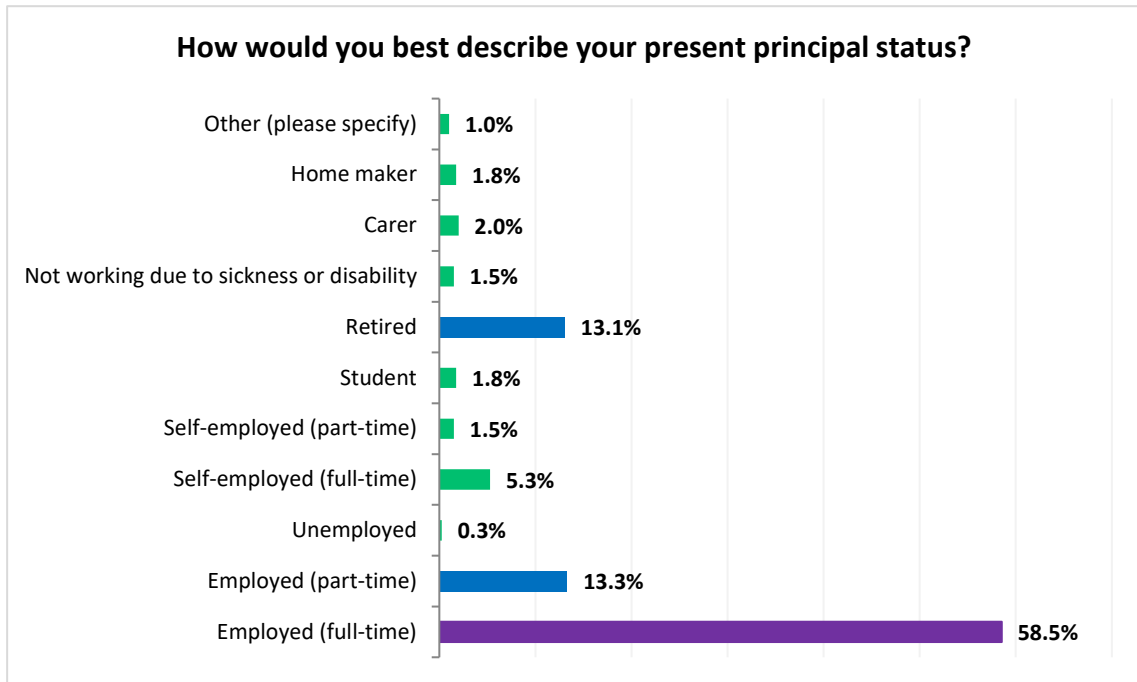
- **Public Survey** – 400 responses
- **Business Survey** – 36 responses
- **CVS Survey** – 34 responses
- **Student Survey** – 116 responses
- **Primary School Survey** – 4 responses

5.2.1 Public Survey

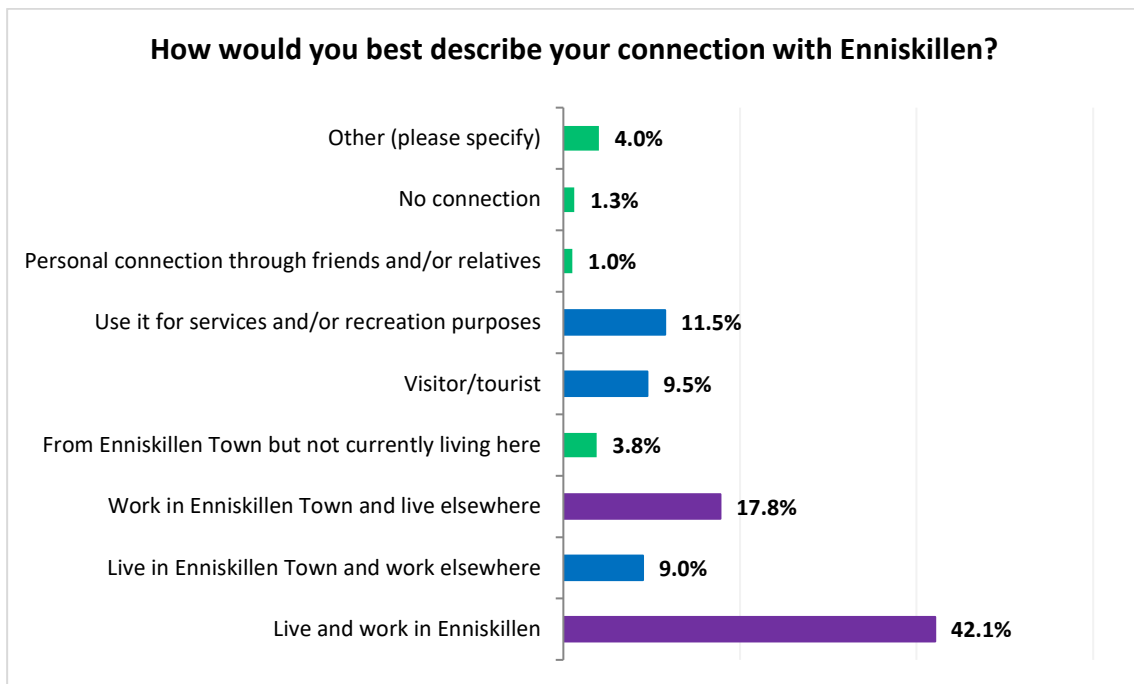
A total of 23 questions were included as part of the Public Survey. These questions ranged from profiling-style questions to SWOT-style and open-end response-style

questions. Each style of questioning focused on particular aspects of Enniskillen, it's people, businesses, strengths, weaknesses and opportunities to identify key trends and themes to be carried forward throughout the life of the project. These trends and themes will help inform the outputs of the Plan and to ensure the Plan is representative of the views and needs of Enniskillen's community.

5.2.1.1 Profiling Questions



In total, **78.6%** of respondents were employed, either full-time, part-time or self-employed.



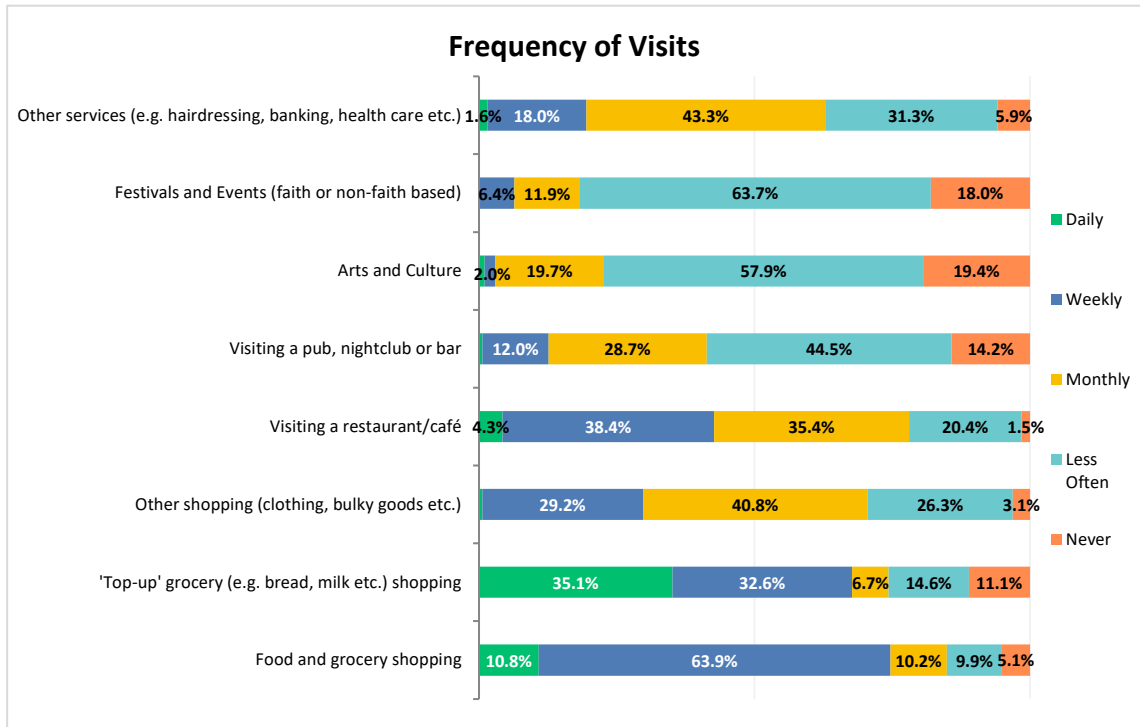
42.1% of respondents live and work in Enniskillen town, while **17.8%** of respondents work in Enniskillen town and live elsewhere. In addition, **69.6%** of respondents have lived in Enniskillen for more than 20 years and **86.8%** of respondents living in Enniskillen for over 10 years.



While **42.8%** of respondents are currently unable to work from home due to the nature of their work, **44.3%** of respondents outlined interest in working more from home going forward. **26.6%** of respondents would prefer to work as per their previous arrangements.

Regarding visiting the town during the work week, better public and private transport was outlined by **38%** of respondents as the main pull factor for spending part of their work week in Enniskillen.

5.2.1.2 SWOT-Style and Ranked Questions



‘Top up’ grocery (e.g., bread, milk, etc.)’ was the most popular ‘Daily’ activity among respondents, at **35.1%**.

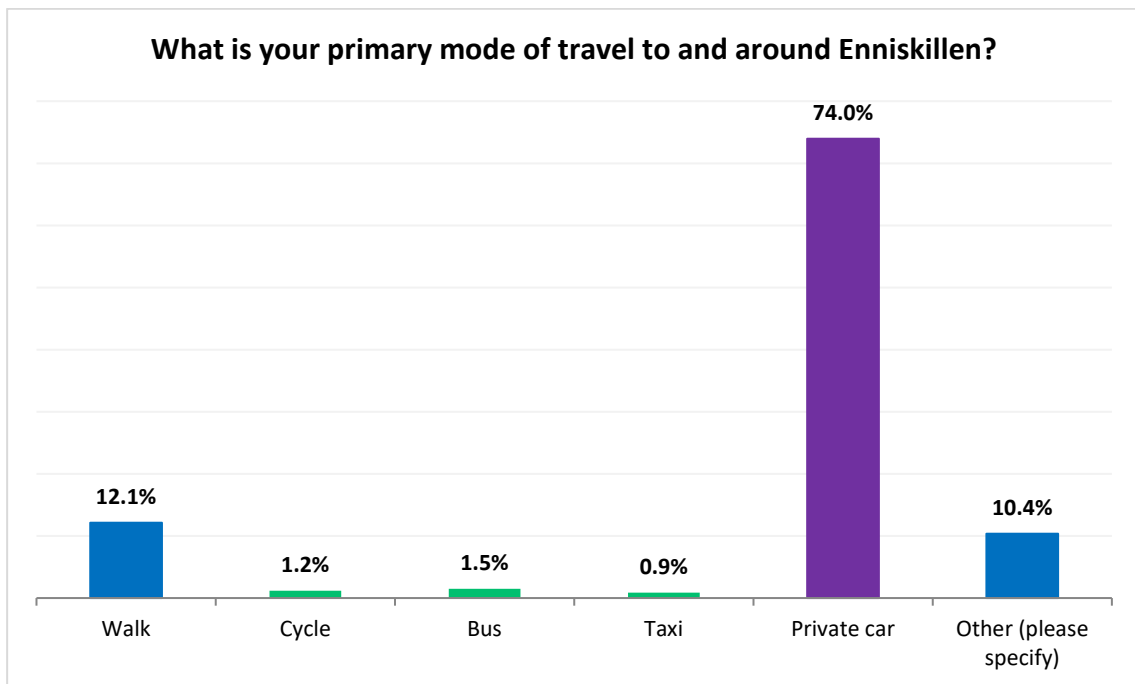
‘Food and grocery shopping’ was the most popular ‘Weekly’ activity among respondents, at **63.9%**.

‘Other services (e.g., hairdressing, banking, health care etc.)’ was the most popular ‘Monthly’ activity among respondents at **43.3%**.

‘Festivals and Events (faith or non-faith based)’ was the most popular ‘Less Often’ activity, at **63.7%**.

‘Arts and Culture’ was the most popular ‘Never’ activity, at **19.4%**.

Regarding other activities, **46%** of respondents took part in recreational/low intensity activities (walking etc.) and **45%** of respondents took part in personal/team sports activities (GAA, soccer, running, etc.).



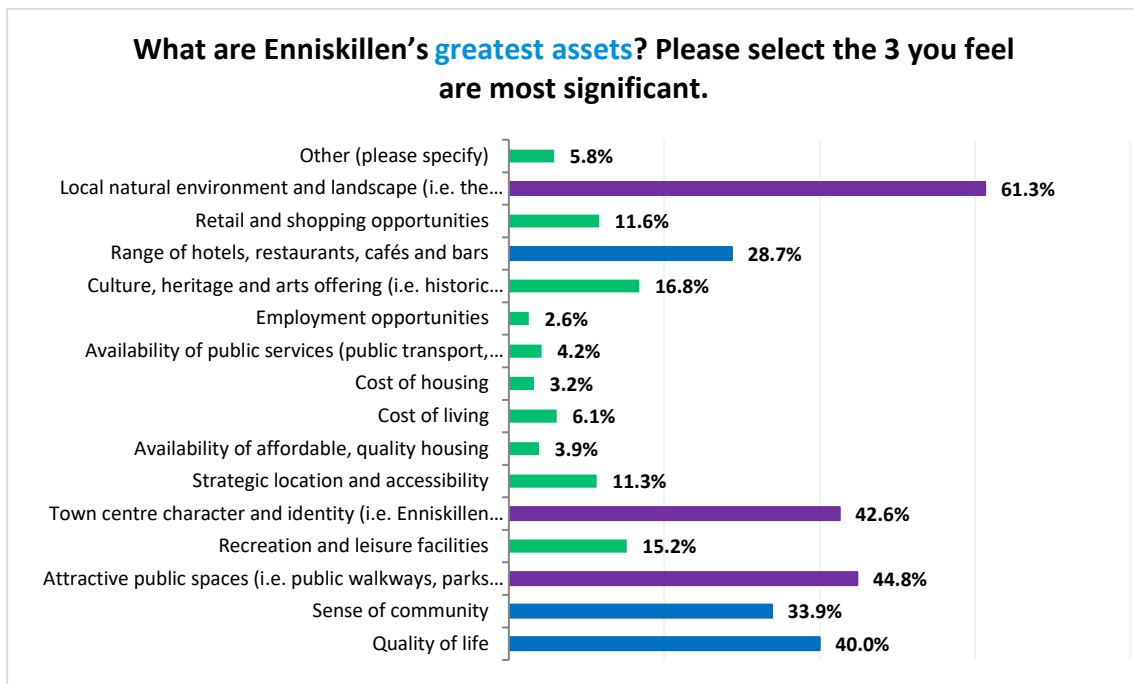
Travel by *private vehicle* (private car or taxi) was the most popular mode of transport among respondents, at 74.9%.

Green Transport (walking, cycling or bus) accounted for **14.8%** of respondents primary mode of transport.

Cycling was the least popular mode of transport among respondents, at **1.2%**.

'*Other*' popular modes of transport included campervan and motorhome travel, with the majority of these respondents identifying as a 'visitor/tourist' of Enniskillen.

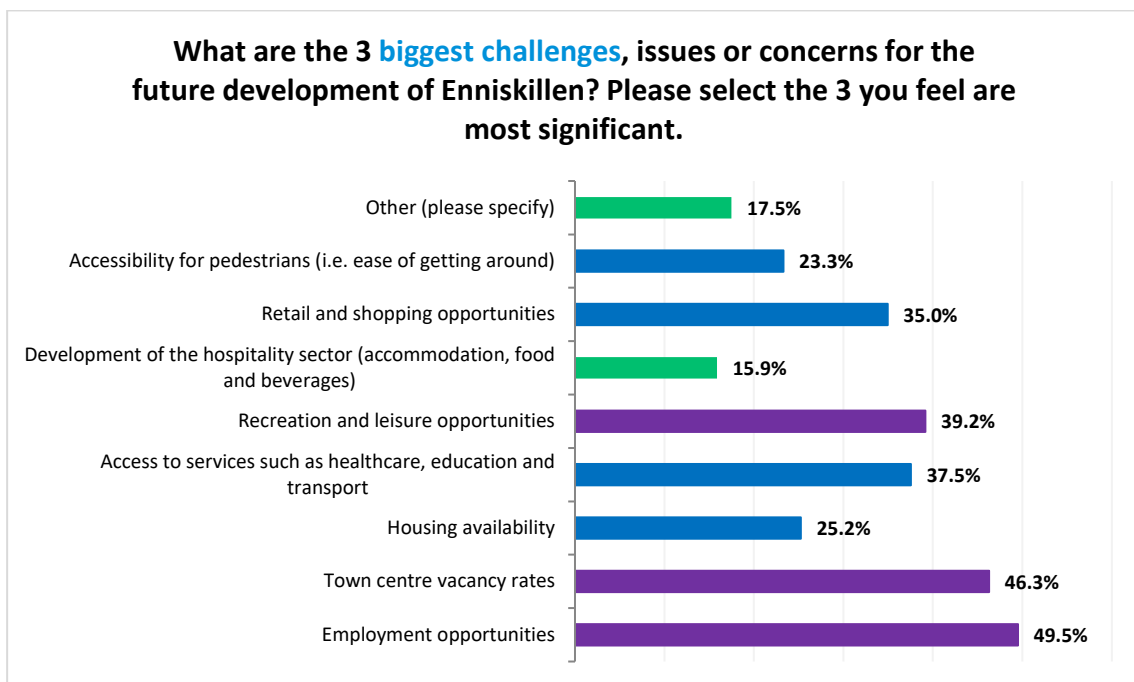
Regarding changes which would increase walking or cycling within Enniskillen, improved infrastructure (i.e., *a new footpath or cycle lane*) was outlined as the most effective potential change, at **62%**.



'Local natural environment and landscape' was outlined as Enniskillen's most popular asset, at **61.3%**.

'Attractive public spaces' was outlined as Enniskillen's second most popular asset, at **44.8%**.

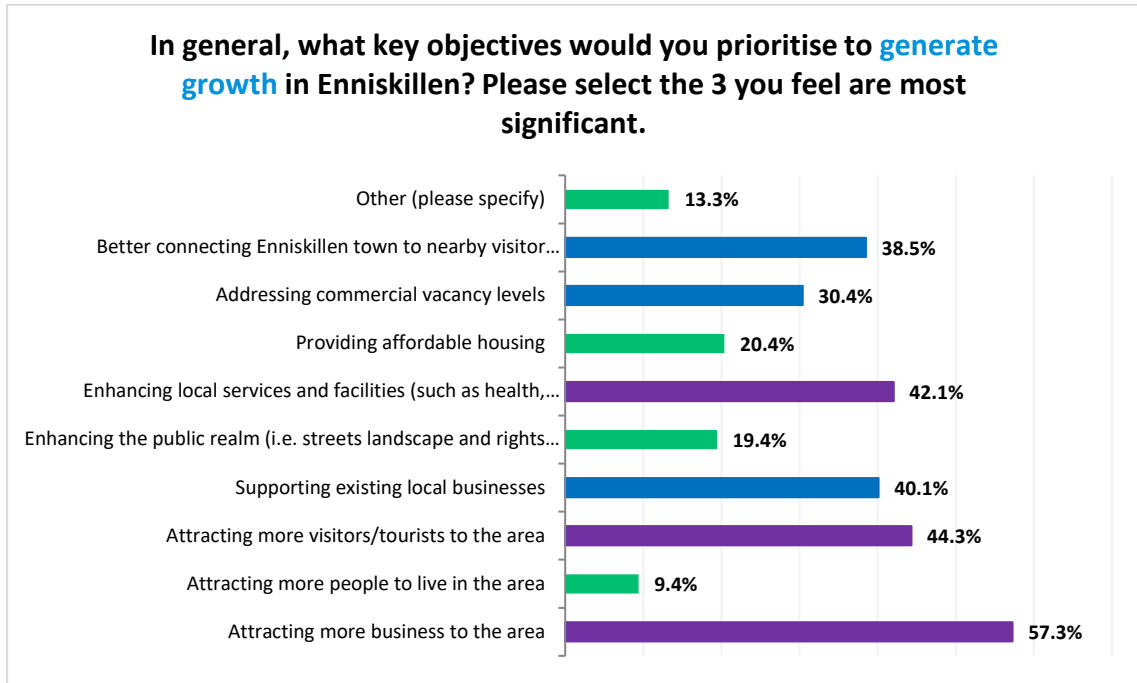
'Town centre character and identity' was outlined as Enniskillen's third most popular asset, at **42.6%**.



'Employment opportunities' was outlined as Enniskillen's biggest challenge, at **49.5%**.

'Town centre vacancy rates' was outlined as Enniskillen's second biggest challenge, at **46.3%**.

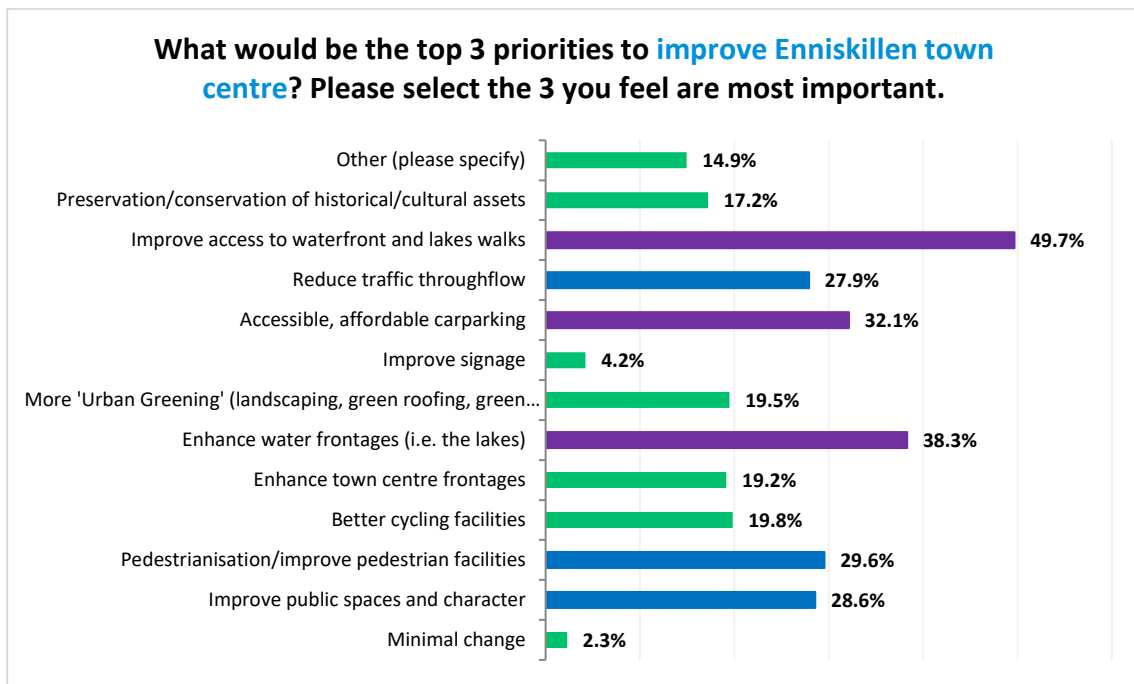
'Recreation and leisure opportunities' was outlined as Enniskillen's third biggest challenge, at **35%**.



'Attracting more business to the area' was outlined as the most significant growth objective for Enniskillen, at **57.3%**.

'Attracting more visitors/tourists to the area' was outlined as the second most significant growth objective for Enniskillen, at **44.3%**.

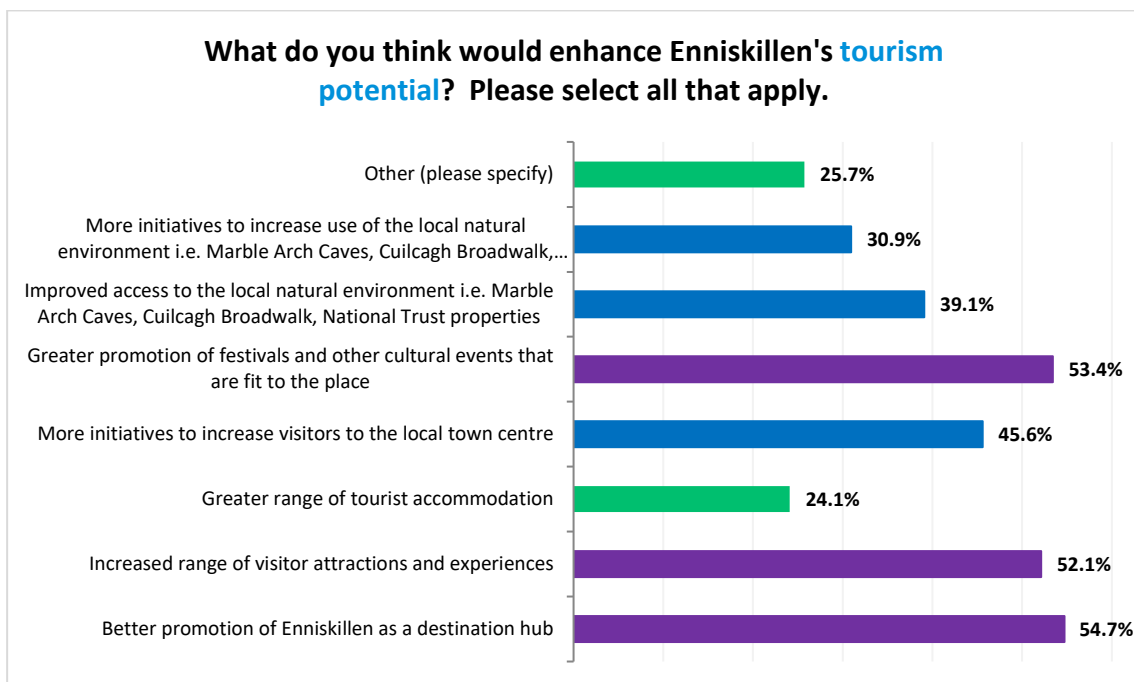
'Enhancing local services and facilities' was outlined as the third most significant growth objective for Enniskillen, at **42.1%**.



'Improve access to waterfront and lakes walks' was outlined as the most important priority for Enniskillen town centre, at **49.7%**.

'Enhance water frontages' was outlined as the second most important priority for Enniskillen town centre, at **38.3%**.

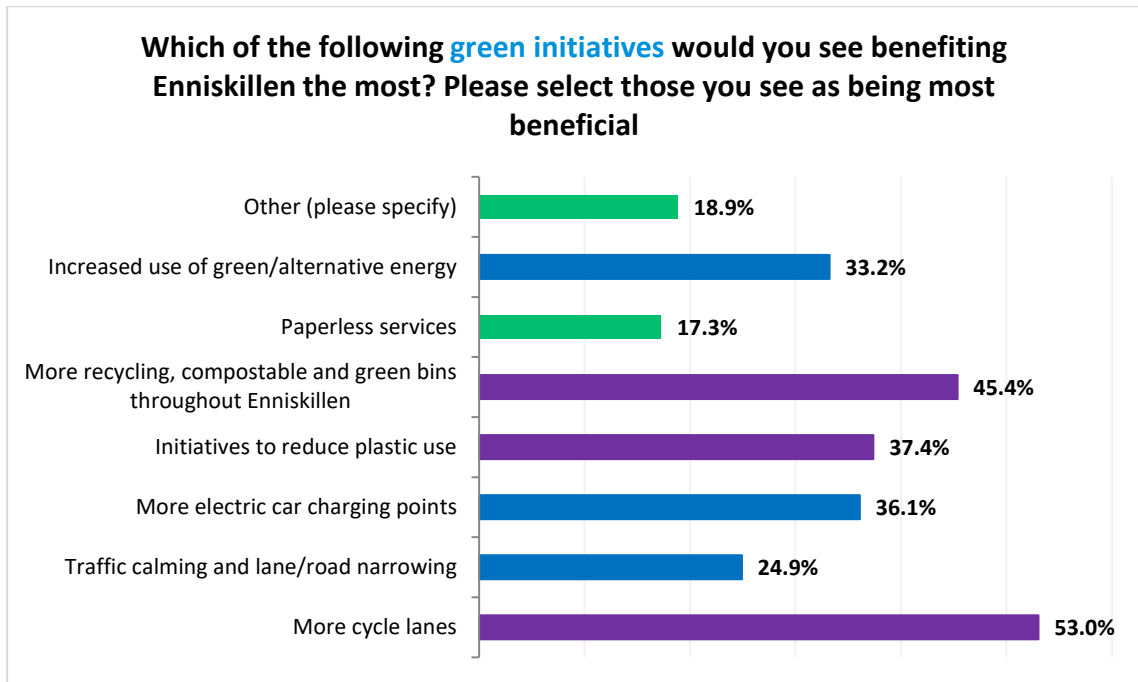
'Accessible, affordable carparking' was outlined as the third most important priority for Enniskillen town centre, at **32.1%**.



'Better promotion of Enniskillen as a destination hub' was outlined as the most significant tourism initiative for Enniskillen, at **54.7%**.

'Greater promotion of festivals and other cultural events that are fit to the place' was outlined as the second most significant tourism initiative for Enniskillen, at **53.4%**.

'Increased range of visitor attractions and experiences' was outlined as the third most significant tourism initiative for Enniskillen, at **52.1%**.



'More cycle lanes' was outlined as the most beneficial green initiative for Enniskillen, at **53%**.

'More recycling, compostable and green bins throughout Enniskillen' was outlined as the second most beneficial green initiative for Enniskillen, at **45.4%**.

'Initiatives to reduce plastic use' was outlined as the third most beneficial green initiative for Enniskillen, at **37.4%**.

5.2.1.3 Open-ended Questions

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



Tourism, Accommodation and Culture: *“As Ireland’s only island town, Enniskillen has the potential to be a major tourist destination, to rival towns such as Westport and Galway. But if I was a tourist looking for a B&B in the town centre, or looking to camp or stop over in my campervan, there is currently nowhere I could do this.”*

Town Centre Vibrancy: *“We need the balance between visitor and local; maintain high standard of floral display, use of water / island identity - Venice of the north, ability to walk a circuit around the island , police station is a strategic site, more event/cultural activity e.g., permanent support for Becket and Wilde type festivals who bring an international audience, build up the island town brand which is unique with a sense of entry and exit points, pop up food and coffee carts, use the diamond for dining and performing space.”*

Traffic, Parking and Transport: *“A bypass will help reduce traffic for anyone not actually visiting the town and just passing through. Trains would be good for better connection around NI and ROI.”*

Recreation, Open Space and Leisure: *“There needs to be more facilities for sporting activities such as GAA and Soccer. The Lakeland Forum has served its purpose but a new building is desperately needed. The area involving SWC, Scout hall and Brewster park needs to have a dedicated pathway into the town centre to appeal to the large influx of people who attend sporting meetings/students.”*

Walking, Cycling and Mobility: *“Better pathways and cycle paths linking all the schools so that children in Enniskillen town area can cycle to school safely”, “Better connections to the main facilities around the town to connect to the town centre.”*

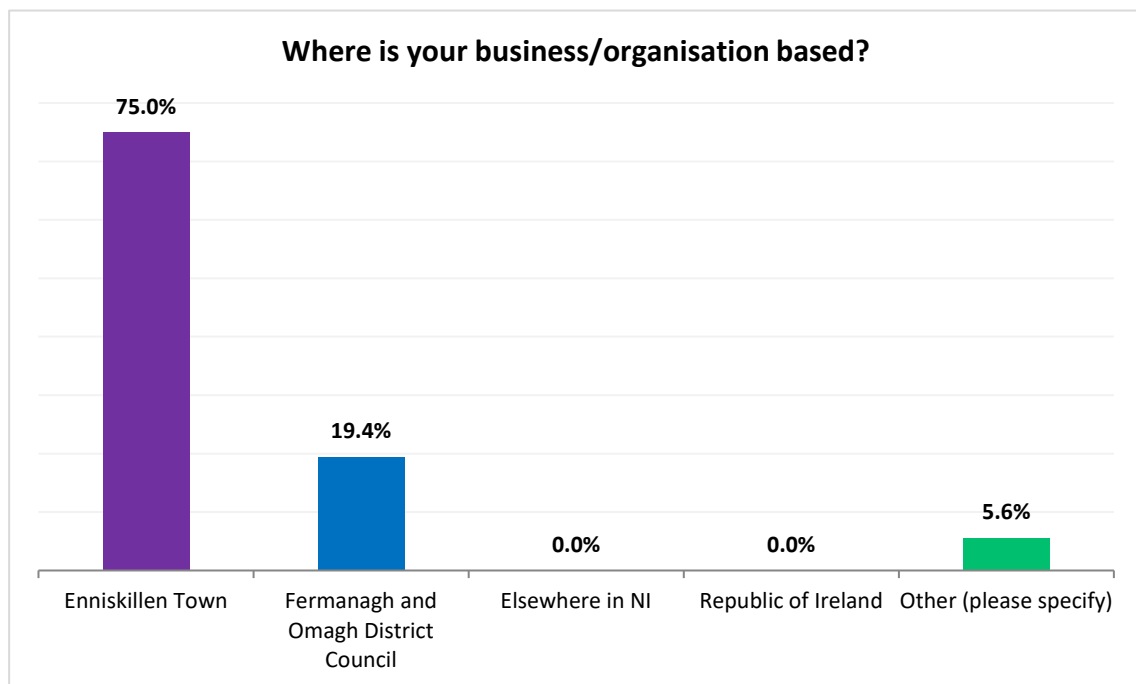
Imagination Inclusion and Innovation: *“A little imagination is all that is required to make Enniskillen a truly attractive visitor and business destination. I propose listening more to the people who live here than have businesses here.”*

Retail and Rates: *“Would be good to have more variety of affordable shops as I find I have to travel to towns like Omagh a lot more to get what I need.”*

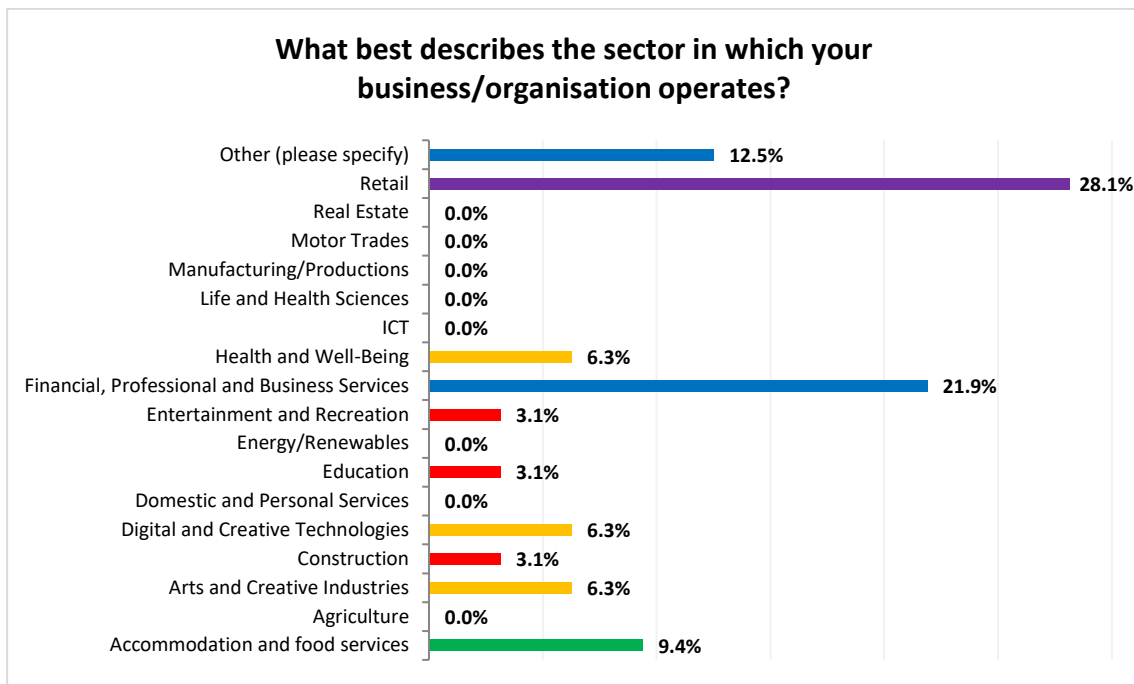
5.2.2 Business Survey

A total of 29 questions were included as part of the Business Survey. Like the previous survey and those that follow below, the questions for the Business Survey ranged from profiling-style questions to SWOT-style and open-end response-style questions. Each style of questioning focused on aspects of Enniskillen, its businesses and enterprise environment regarding strengths, weaknesses, opportunities and threats to identify key trends and themes to be carried forward throughout the life of the project. Similarly, to the Public Survey, these themes and trends will help inform the development of the Plan and to ensure the Plan is representative of the views and needs of Enniskillen’s business community.

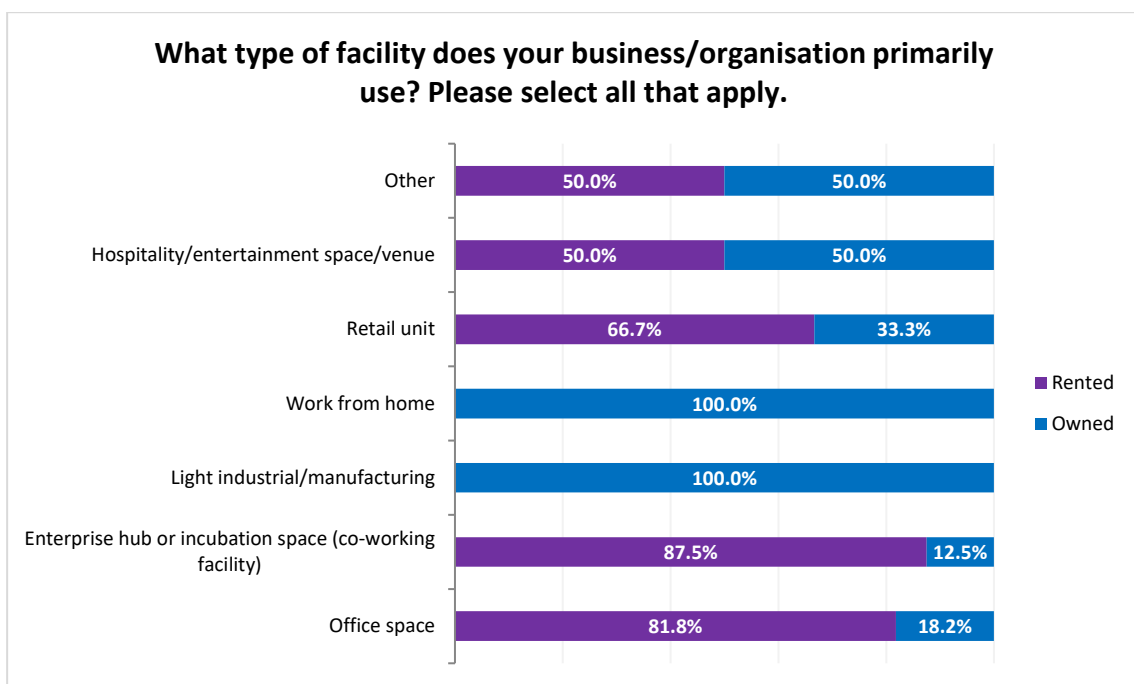
5.2.2.1 Profiling Questions



Overall, **75%** (27) of respondents were located in Enniskillen Town, with **19.4%** (7) located in the wider Fermanagh and Omagh District Council area.

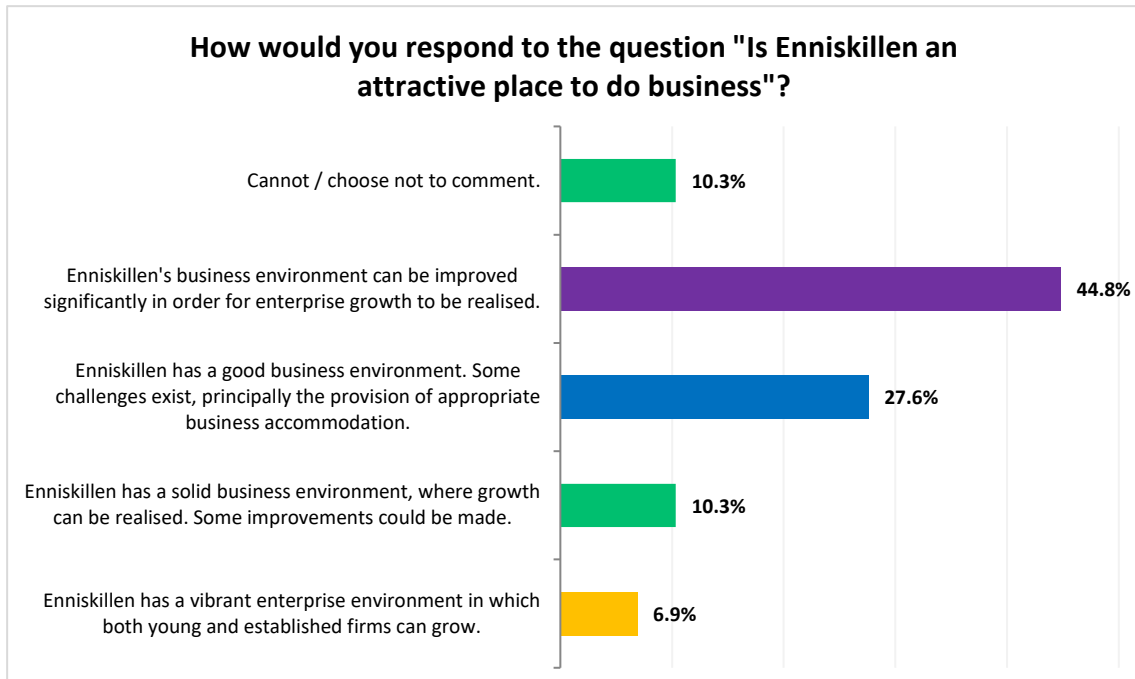


The 'Retail' sector was the most selected sector among respondents, at **28.1%** (9). Other significant sectors among respondents included the 'Financial, Professional and Business Services' at **21.9%** (7).



The majority of respondents which used 'Enterprise hub or incubation space (co-working facility)', 'Office Space' or 'Retail unit' facilities **rented** these facilities. All respondents who used 'Light industrial/manufacturing' facilities **owned** these facilities.

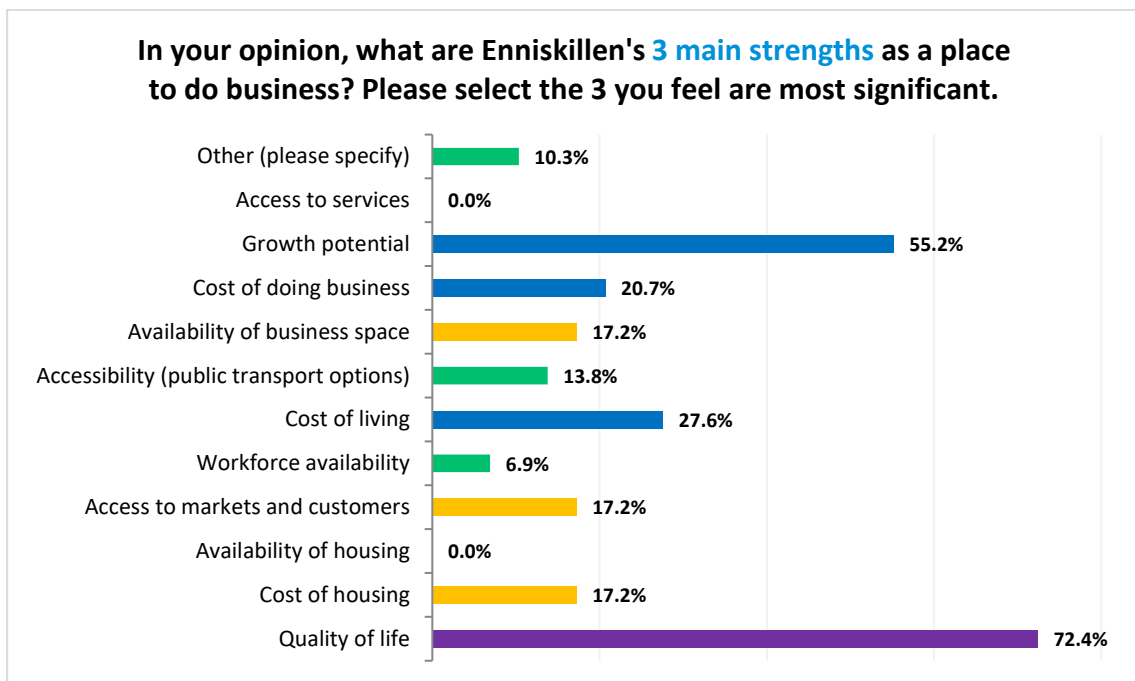
5.2.2.2 SWOT-Style and Ranked Questions



44.8% (13) of respondents described the Enniskillen business environment as having *'room for improvement'*.

27.6% (8) of respondents described the Enniskillen business environment as having a *'solid business environment where some challenges exist'*.

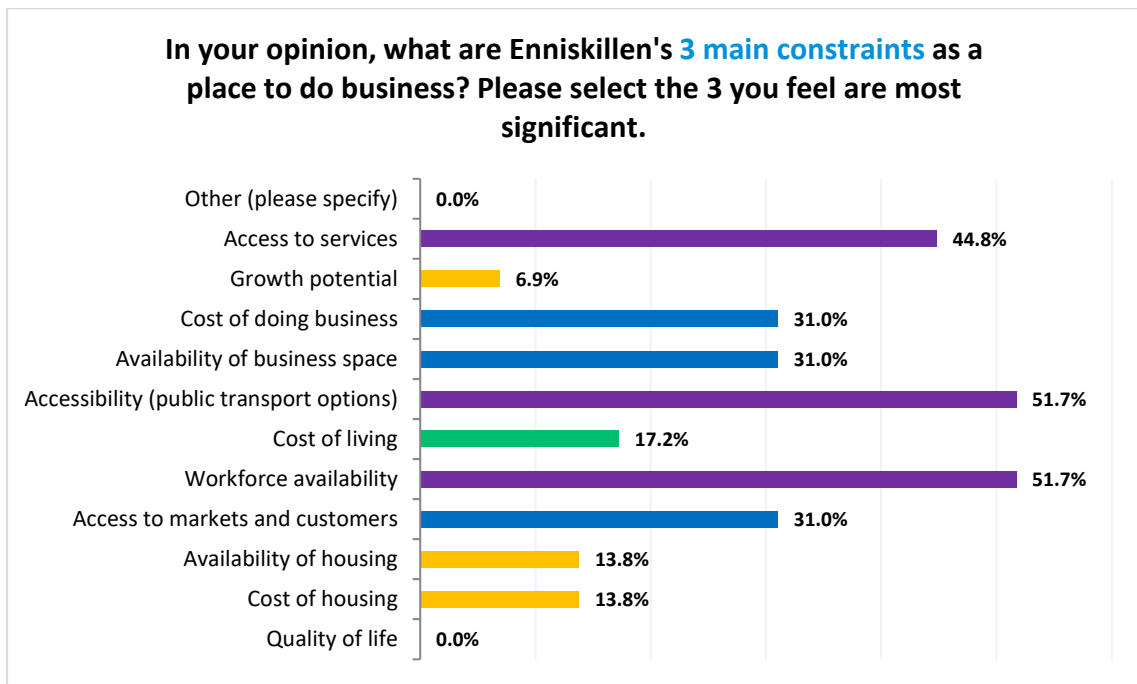
10.3% (3) of respondents described the Enniskillen business environment as having a *'solid business environment, where growth can be realised'*.



'Quality of life' was outlined as Enniskillen's greatest strength as a place to do business, at **72.4%** (21).

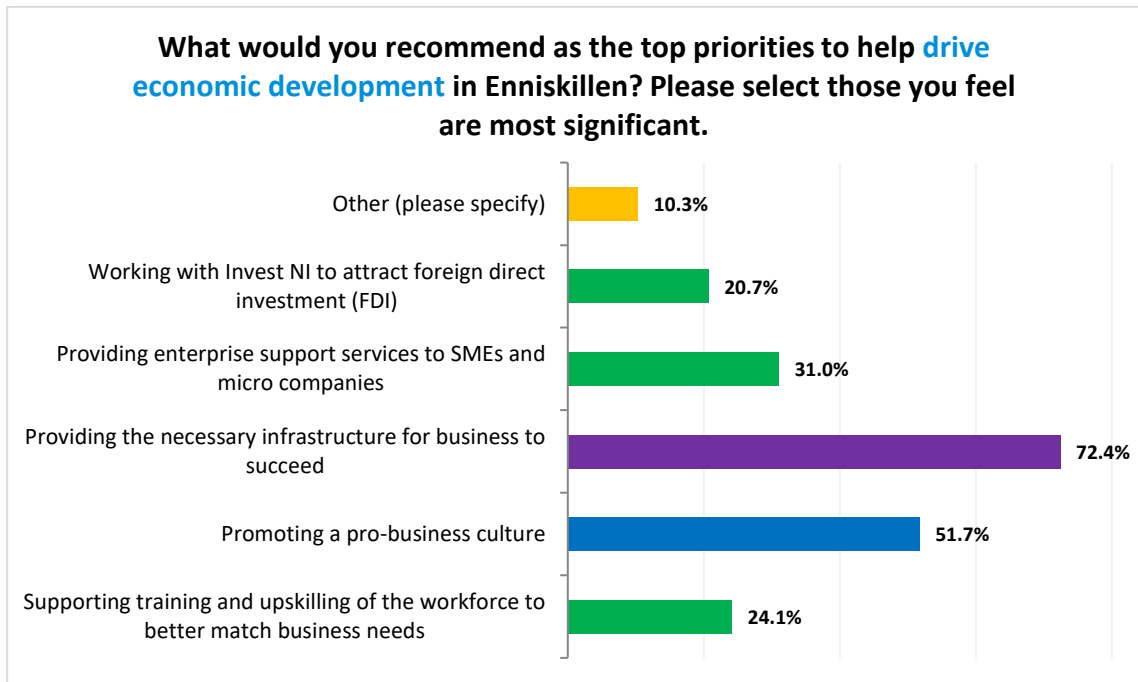
'Growth potential' was outlined as Enniskillen's second greatest strength as a place to do business, at **55.2%** (16).

'Cost of living' was outlined as Enniskillen's third greatest strength as a place to do business, at **27.6%** (8).



'Workforce availability' and 'Accessibility (public transport options)' were both seen as Enniskillen's greatest constraint as a place to do business, at **51.7%** (15) each.

'Access to services' was outlined as Enniskillen's second greatest strength as a place to do business, at **44.8%** (13).



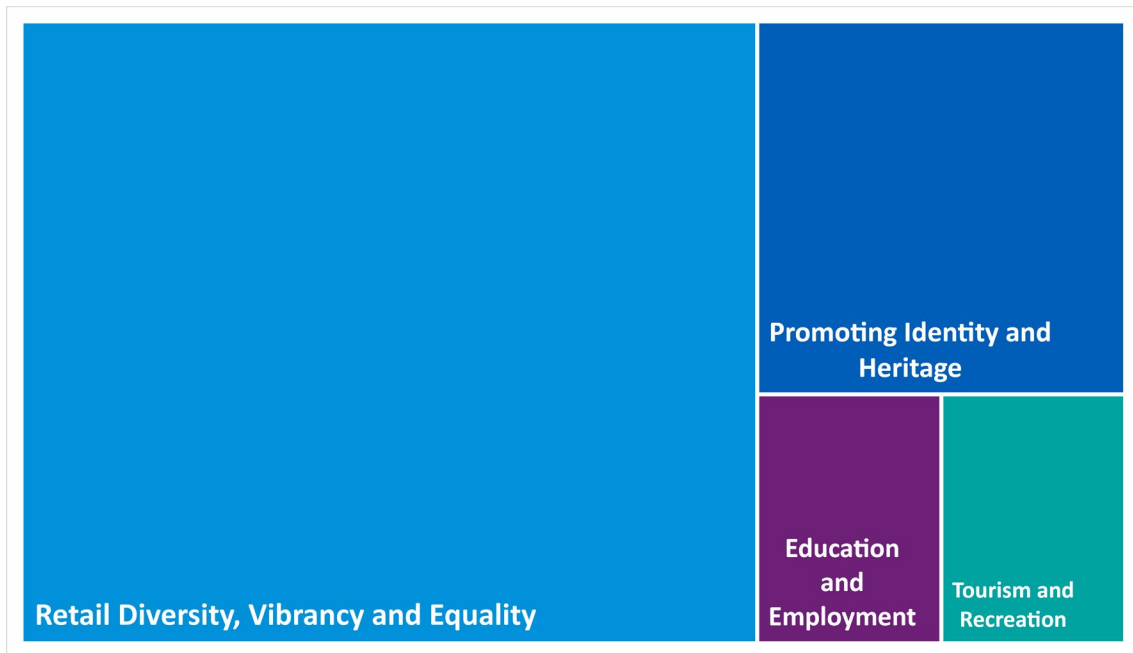
‘Providing the necessary infrastructure for business to succeed’ was outlined as the top priority for driving economic development in Enniskillen, at **72.4%** (21).

‘Promoting a pro-business culture’ was outlined as the second most important priority for economic development, at **51.7%** (15).

‘Providing enterprise support services to SMEs and micro companies’ was outlined as the third most important priority for economic development, at **31%** (9).

5.2.2.3 Open-ended Questions

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



Retail Diversity, Vibrancy and Equality: Attracting new business, encouraging diversity in retail offering and support for existing businesses inside and outside of the town centre.

Promoting Identity and Heritage: Promoting the town's island identity and marketing this to help increase economic activity within the town and develop the town as a visitor and tourist destination.

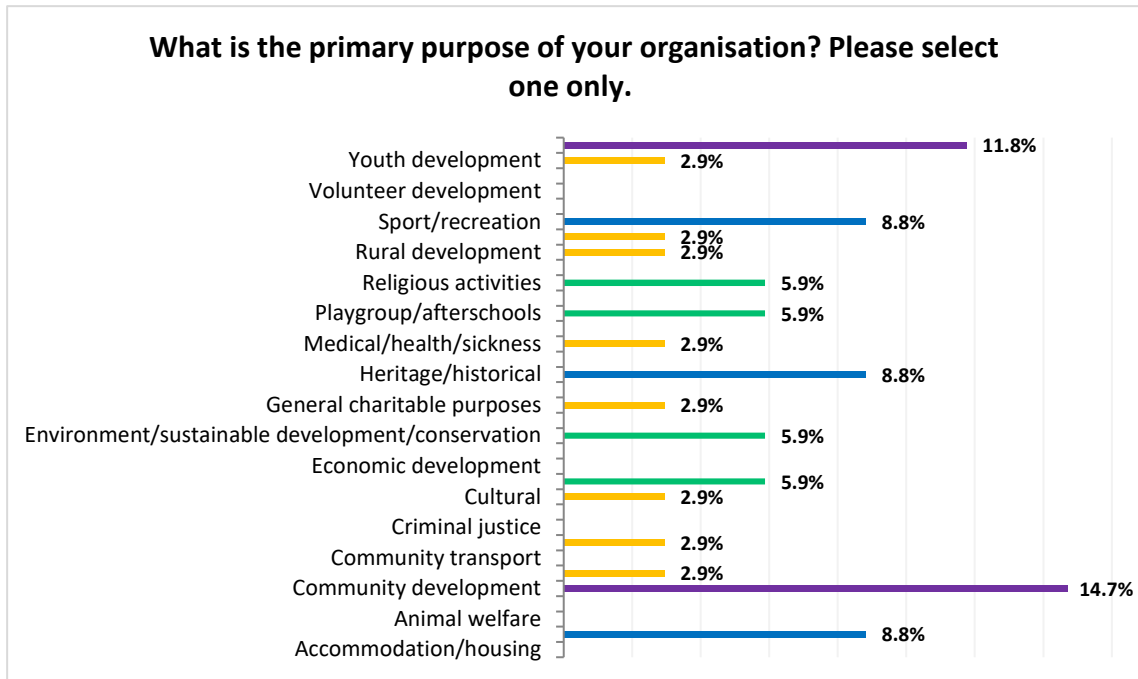
Education and Employment: Better education and apprenticeship programmes for broader employment opportunities and to support young people and potential start-ups in Enniskillen.

Tourism and Recreation: More outlets for off-season/wet tourism attractions in tandem with a greater provision of leisure and recreation facilities for visitors and residents alike.

5.2.3 CVS Survey

A total of 9 questions were included as part of the Community and Voluntary Sector (CVS) survey. These questions ranged from profiling-style questions to SWOT-style and open-end response-style questions. Each question focused on particular aspects of Enniskillen in relation to its community and voluntary sector (CVS) and social enterprise environment. It included questions on strengths, weaknesses, opportunities and threats to assist in identifying key trends and themes. These themes and trends will be used to further develop the outputs of the new Place Shaping Plan and ensure that it reflects the needs of the Community and Voluntary Sector in the town.

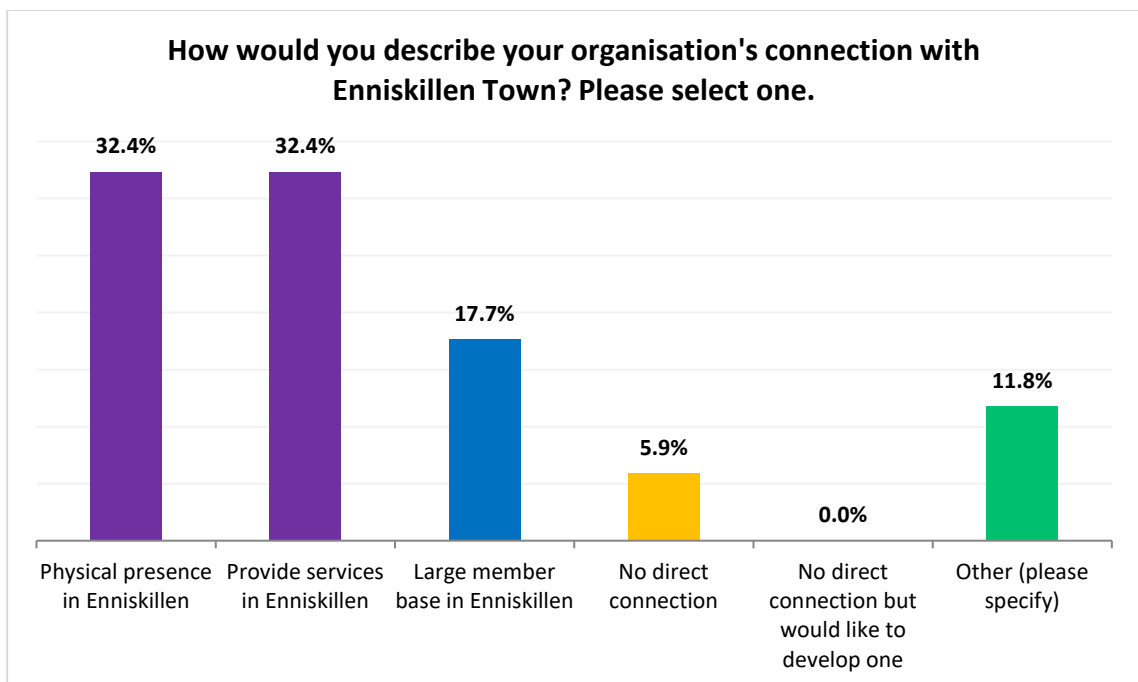
5.2.3.1 Profiling Questions



Community development was the most selected purpose among respondents, at **14.7%**.

Youth development was the second most selected purpose among respondents, at **11.8%**.

Other popular responses included *Sport/recreation*, *Heritage/historical* and *Accommodation/housing*.

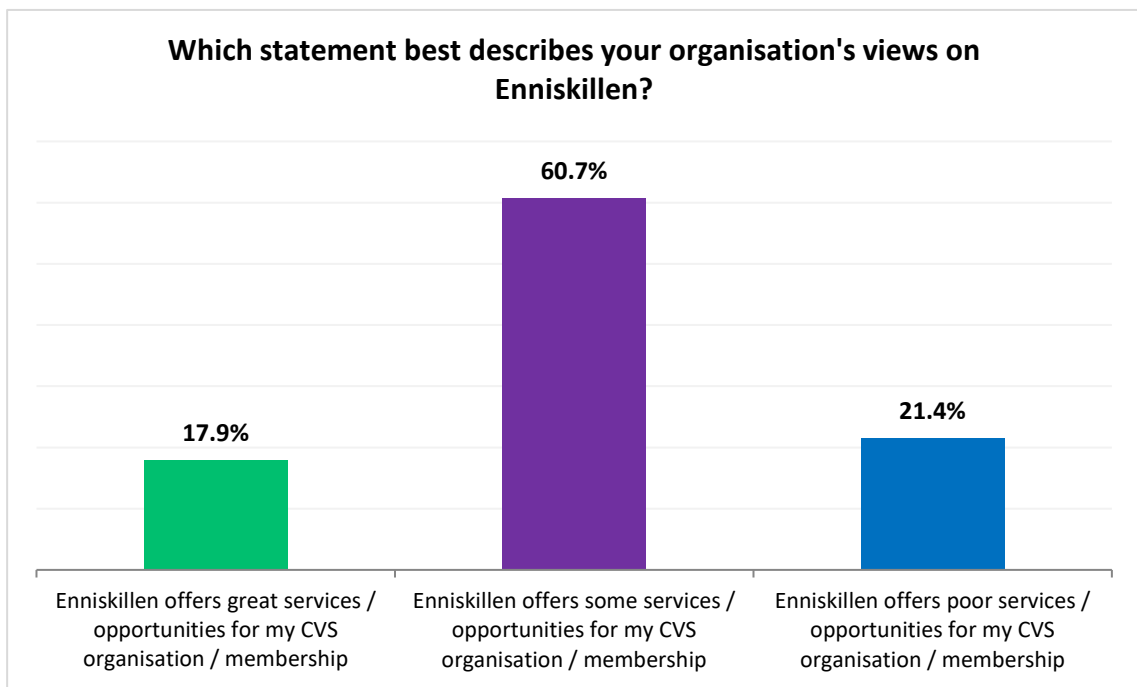


64.8% of respondents had a direct connection with Enniskillen, through the provision of services in Enniskillen or through having a physical presence in Enniskillen itself.

17.7% of respondents had a large member base in Enniskillen, while **5.9%** had no direct connection to the town.

Other connections included having a physical presence in close proximity to the town and in other nearby outreach areas.

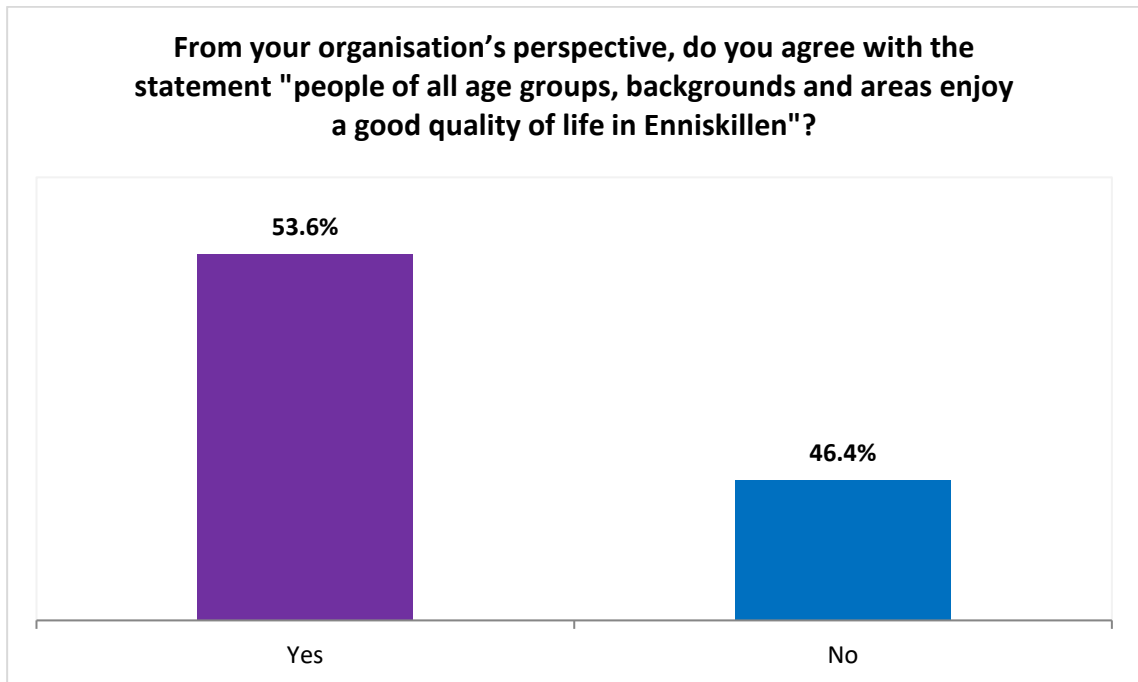
5.2.3.2 SWOT-Style and Ranked Questions



60.7% of respondents described Enniskillen as offering *some services/opportunities* for their CVS organisation or membership.

21.4% of respondents described Enniskillen as offering *poor services/opportunities* for their CVS organisation or membership.

17.9% of respondents described Enniskillen as offering *great services/opportunities* for their CVS organisation or membership.

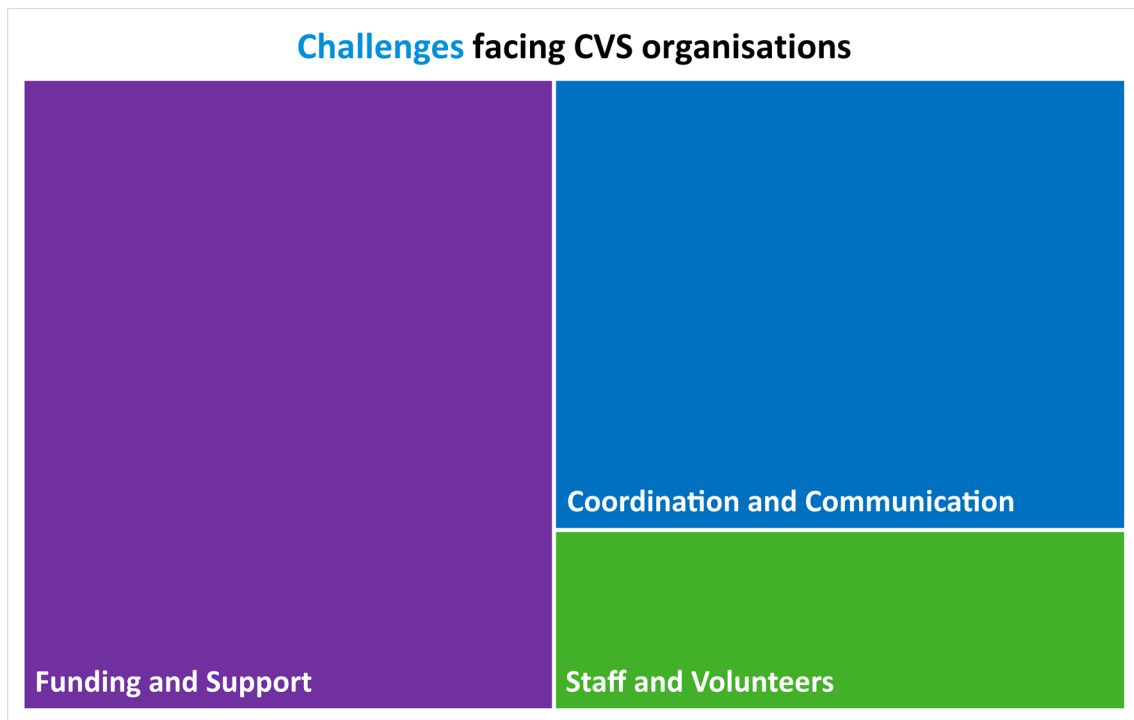


The majority of respondents (**53.6%**) *agreed* that people of all age groups, backgrounds and areas enjoy a good quality of life in Enniskillen.

The remaining **46.4%** of respondents did *not agree* that people of all age groups, backgrounds and areas enjoy a good quality of life in Enniskillen.

5.2.3.3 *Open-ended questions*

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



Funding and Support: Funding and support in the form of additional grants, assistance with funding applications and access to meeting/training spaces/

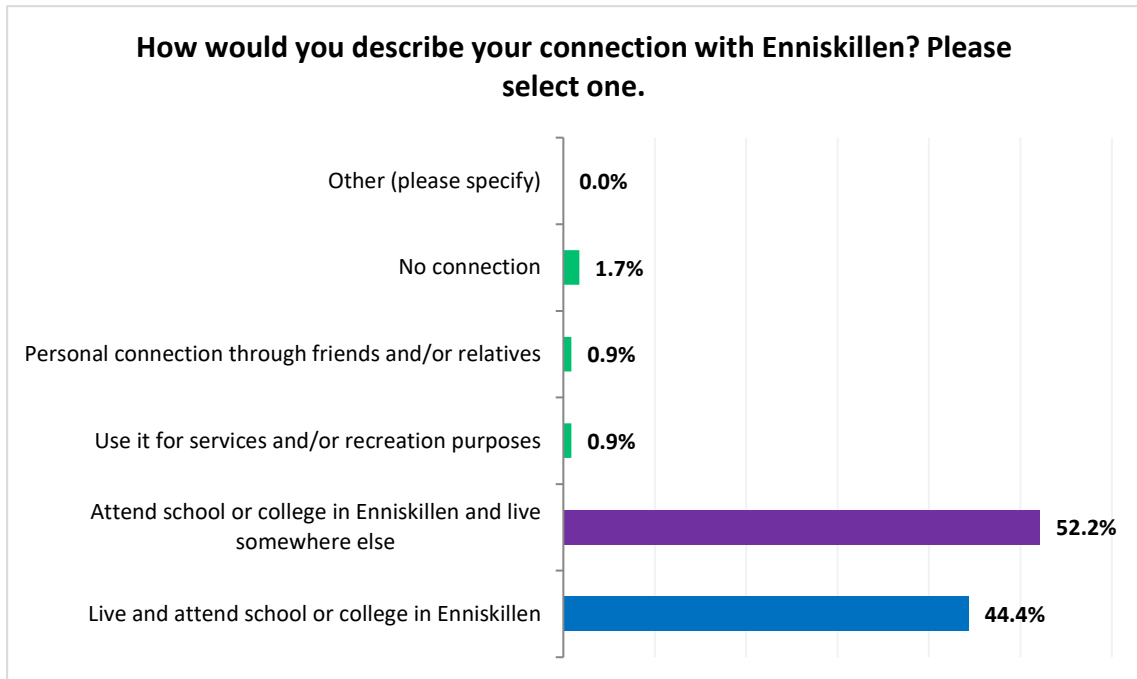
Staff and Volunteers: Lack of staff and volunteers available to help run organisations and events.

Coordination and Communication: More communication between CVS organisations and FODC to help with coordination of support and services within the sector and ways in which the Enniskillen Place Shaping Plan could improve this.

5.2.4 Student Survey

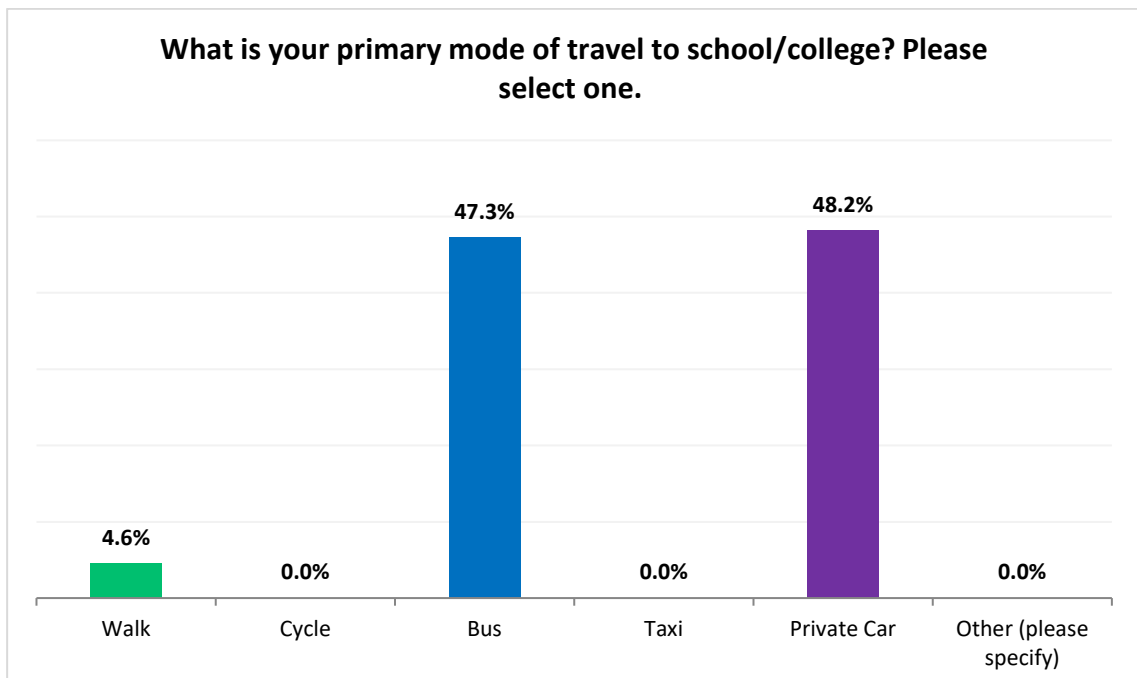
A total of 13 questions were included as part of the Student Survey. With the voices of Enniskillen’s students and young people heavily influencing the town’s future growth, the questions focused on the perception and relationship the town has with its students and young people, as well as Enniskillen’s strengths, weaknesses and opportunities from their point of view. As with the other surveys, views and needs identified from the analysis of responses to the Student Survey will be used to further develop the new Place Shaping Plan.

5.2.4.1 Profiling Questions



52.2% of respondents attend school or college in Enniskillen and *live elsewhere*.

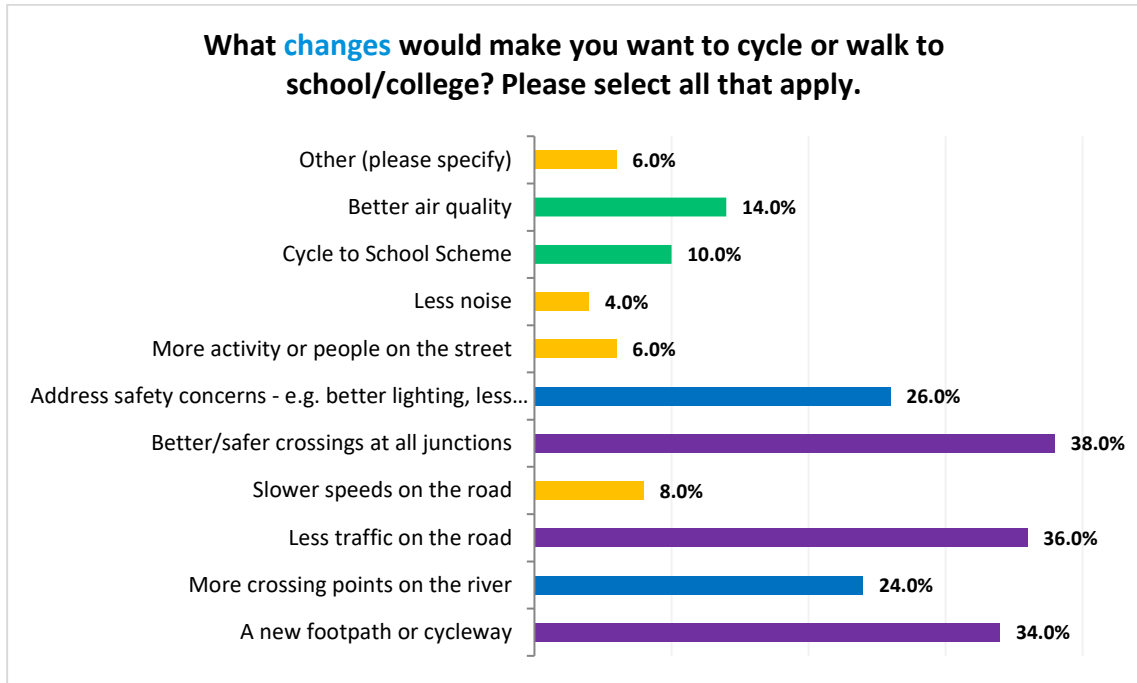
44.4% of respondents *live and attend* school or college in Enniskillen.



51.9% of respondents used *green transport* (walk, cycle or bus) as their primary mode of travel to school or college.

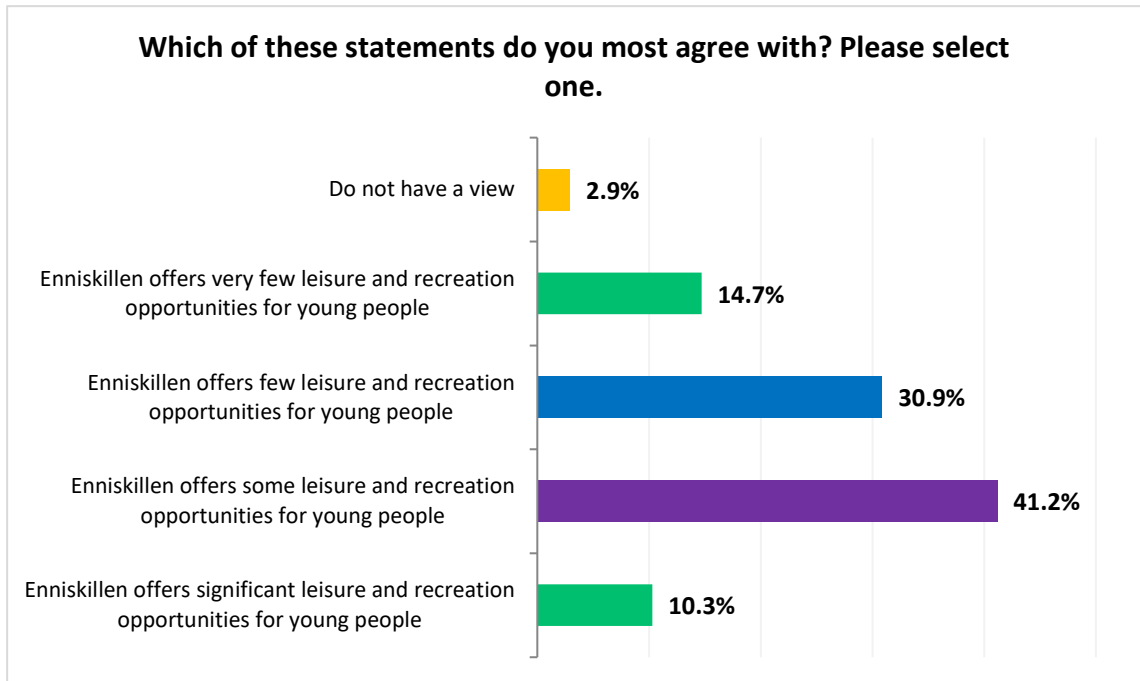
48.2% of respondents used *private transport* (private car or taxi) as their primary mode of travel to school or college.

No respondents cycled or used a taxi as their primary mode of travel to school or college.



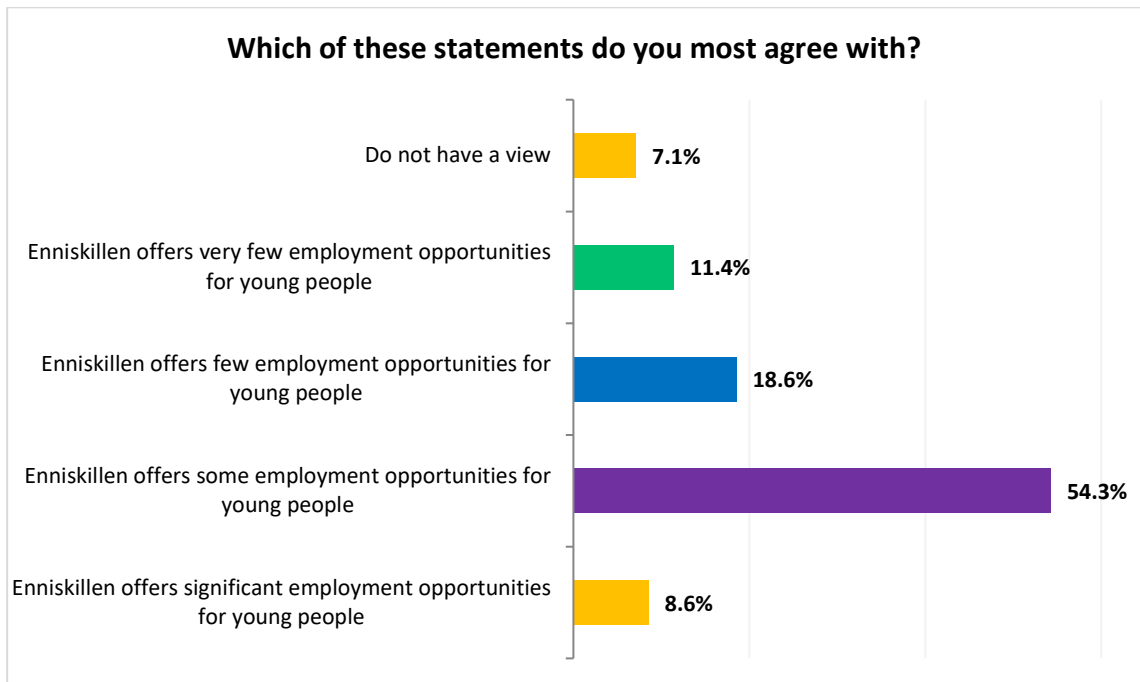
Better/safer crossings at all junctions (38%), less traffic on the road (36%) and a new footpath or cycleway (34%) were the most selected changes which would make respondents want to cycle or walk to school or college.

5.2.4.2 SWOT-Style and Ranked Questions



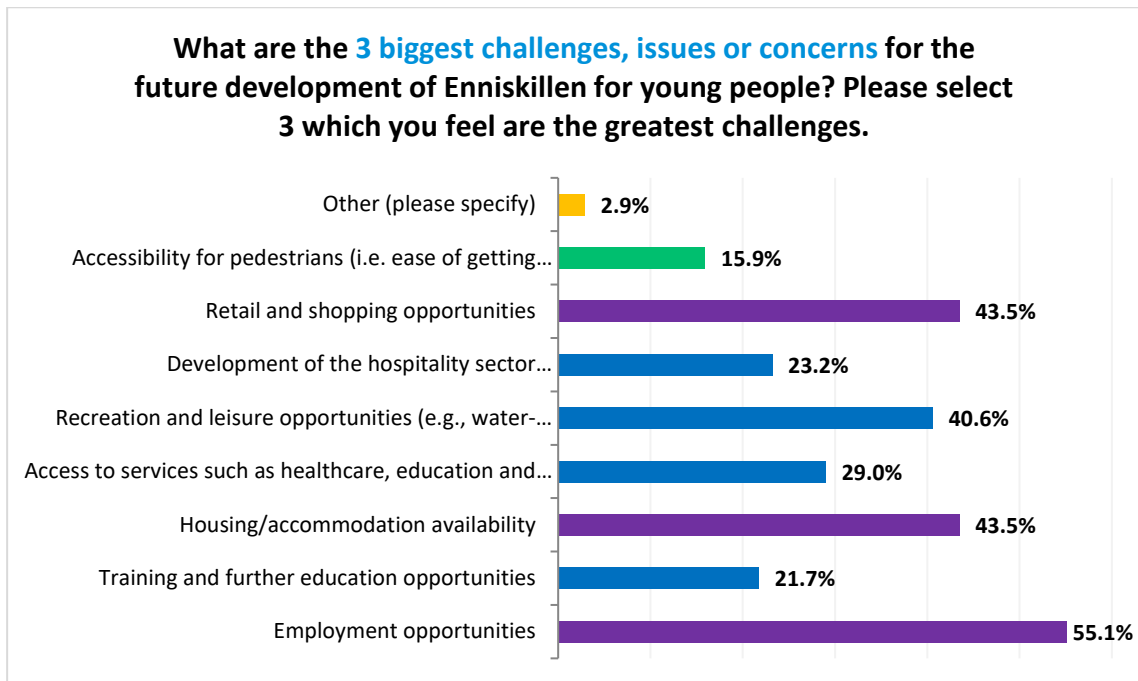
51.5% of respondents described Enniskillen as having *some or significant* leisure and recreation opportunities for young people.

45.6% of respondents described Enniskillen as having *few or very few* leisure and recreation opportunities for young people.



62.9% of respondents described Enniskillen as having *some or significant* employment opportunities for young people.

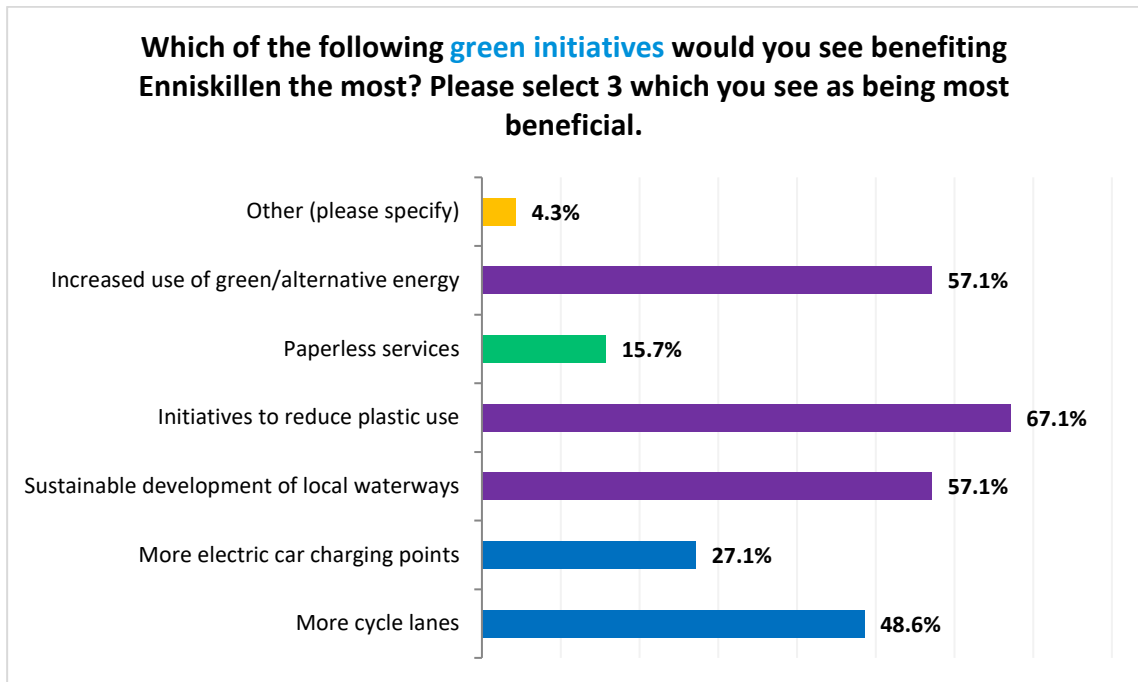
30% of respondents described Enniskillen as having *few or very few* employment opportunities for young people.



Employment opportunities was seen as the biggest challenge for the development of Enniskillen for young people, being selected by **55.1%** of respondents.

Housing/accommodation availability and *Retail and shopping opportunities* were seen as the second biggest challenges for the development of Enniskillen for young people, each being selected by **43.5%** of respondents.

Recreation and leisure opportunities was seen as the third biggest challenge for the development of Enniskillen for young people, being selected by **40.6%** of respondents.



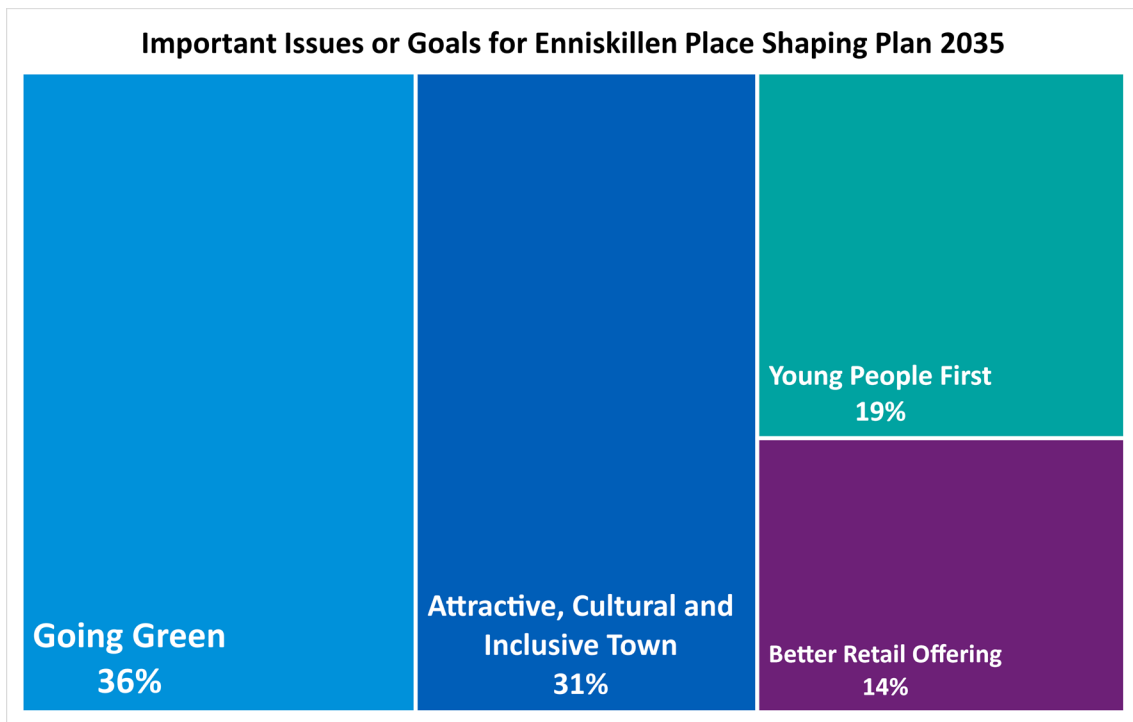
Initiatives to reduce plastic use was seen by respondents as the green initiative which could benefit Enniskillen the most, being selected by **67.1%** of respondents.

Increased use of green/alternative energy and *Sustainable development of local waterways* were the second most selected green initiatives, both being selected by **57.1%** of respondents.

More cycle lanes was the third most selected green initiative would benefit Enniskillen the most, being selected by **48.6%** of respondents.

5.2.4.3 Open-ended Questions

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



Going Green: *“I think if the town wants to make it to 2035, the main priority would be a greener approach. The only way to do this is by education...”*

Attractive, Cultural and Inclusive Town: *“More events and workshops surrounding history and culture of Enniskillen could benefit young people as well as tourism, which will help the local economy.”*

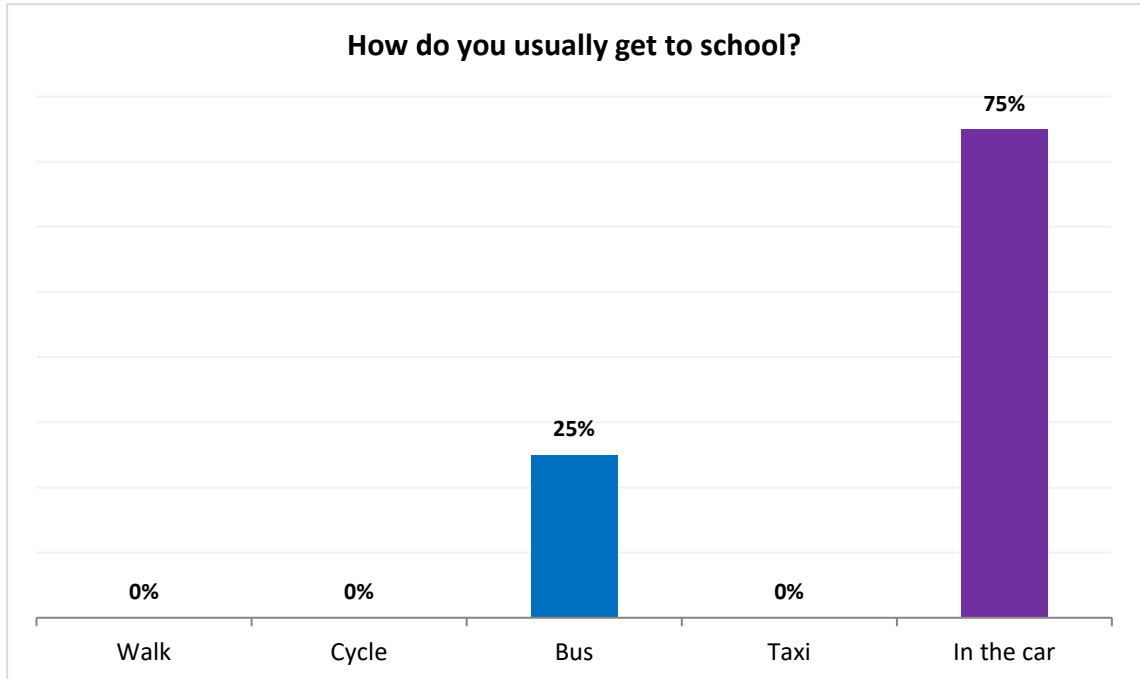
Young People First: *“Letting young people have a voice.”, “The public should really be listened to and given more opportunity to have a say on the redevelopment of public spaces, such as the Enniskillen public realm, theatre, leisure centre etc...”*

Better Retail Offering: *“Better retail and shops so we don’t have to leave the town to buy things people want.”*

5.2.5 Primary School Survey

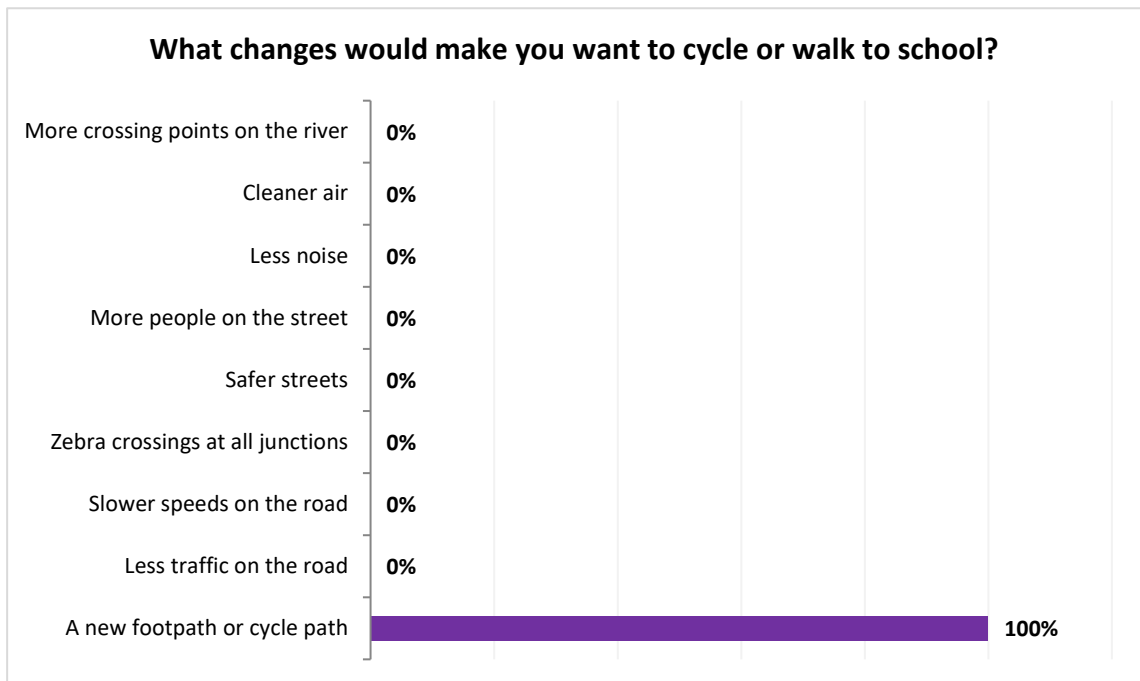
A total of 7 questions were included as part of the Primary School Survey. With the voices of Enniskillen’s young people heavily influencing the future growth of Enniskillen, each style of questioning was tailored towards engaging primary school students and focused on the relationship and perceptions they had of the town. Trends and themes identified from these responses will be used to assist in the development of the new Place Shaping Plan to ensure that it is reflective of the views and needs of Enniskillen’s primary school students.

5.2.5.1 Getting to School



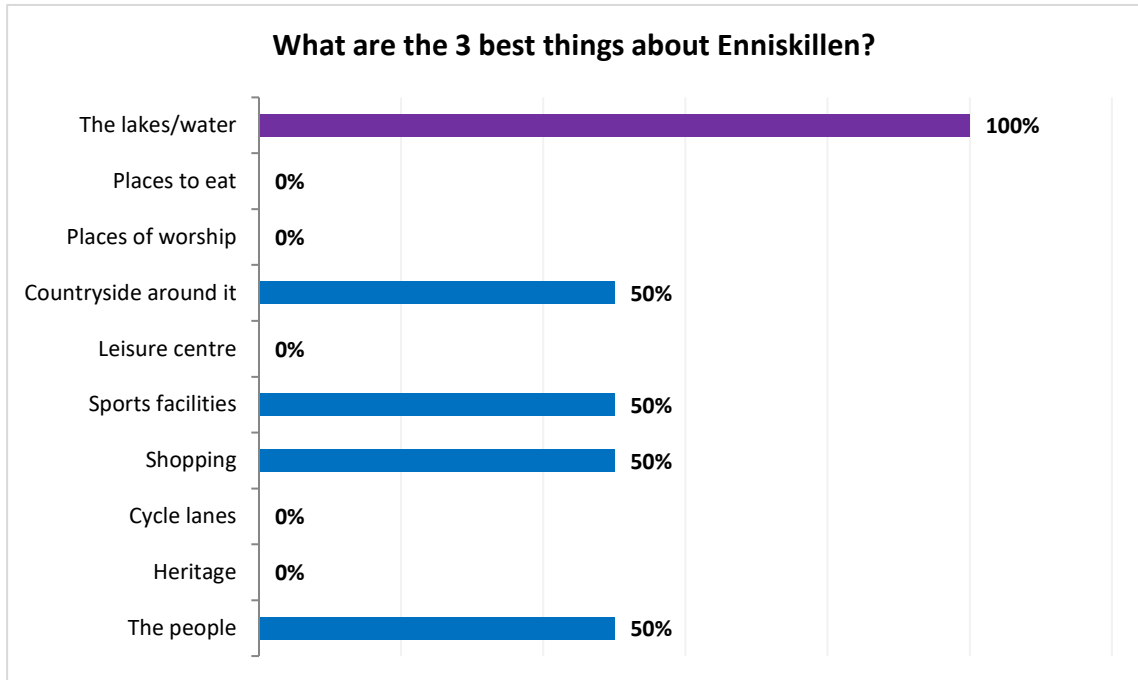
75% (3) of respondents used *private transport* (private car or taxi) to get to school. The remaining **25%** (1) used *green transport* (walk, cycle or bus) to get to school. **No respondents** cycled to school.

5.2.5.2 Using Green Transport



All respondents (100%; 3) felt that a new footpath or cycle path would be the most effective change that would make them want to cycle or walk to school.

5.2.5.3 Enniskillen’s Strengths



The lakes/water was seen by all respondents (100%; 2) as the best thing about Enniskillen.

Countryside around it, Sports facilities, Shopping and the People were all seen by half of all respondents (50%) as additional strengths of Enniskillen.

5.2.5.4 Perfect Enniskillen in 3 Words

“Busy, clean, vibrant.”

“Relaxing, Friendly, Welcoming.”

5.3 Workshop Findings

A workshop was conducted with OPP members in July 2022 and a series of breakout sessions discussed opportunities and ways to (a) maximise Enniskillen’s unique location, its heritage and natural assets, (b) improve the economy and increase the number of jobs and employment opportunities in Enniskillen, (c) develop the range of opportunity sites and (c) examined what was required to ensure inclusiveness and that everyone benefits in an Enniskillen Place Shaping plan.

What would you like to see in the Place Shaping Plan to maximise Enniskillen's unique location, its heritage and natural assets?

The range of suggestions and ideas was as follows:

An Island Town – its USP

- Enniskillen's unique selling point is as an island town.

History and Heritage and Public Spaces

- Enniskillen has a rich history, many heritage sites and beautiful public spaces and there was scope to utilise and market these more. Inis Ceithleann (Island of Kathleen), the new public realm and Forthill Park were all highlighted as assets to be promoted, as was the potential for the Castle to be used as a hub for festivals/ markets, international food festival and an event schedule that would go beyond its current seasonal activity. Forthill Park was highlighted as needing to be promoted more and utilised more.
- It was suggested that the Buttermarket should not allow long term leases so that units would become available to new and upcoming businesses. There was scope to develop craft/workspaces in the town centre.
- The town turned its back on the water and there was scope to improve the look of the back of buildings which bordered the water.

Market Town

- There was scope to capitalise on Enniskillen as an island and market town with a unique shopping experience that would complement the tourist offering.
- The new public realm offered new opportunities to use this space, albeit trading laws needed to be considered as Ulster Farmer's Market owned the trading rights.

Tourism

- There was a need to elongate the tourist season through diversification, all weather activities, and increased use of existing assets.

Town centre vibrancy

- It was suggested to close the town centre (on a pilot/temporary basis) one day per week; and to pilot Saturday evenings; and to promote independent shops; and to promote a market in the town centre on Thursdays, (which would be helped by the development of the traffic/by-pass).

Walking and cycling paths

- There was a desire for more walking and cycle paths, including walking bridge(s) across the water (especially to/from the SW College locality), and to accentuate the sense of an island town through an interconnected all-island walk, which would include the PSNI site, thereby allowing a walkway around the entire waterfront of the island. This would also help to encourage local residents to continue walking around the town which had increased during lockdowns. The PSNI sites was seen as a "missed opportunity" to help develop Enniskillen.

Airport

- There were opportunities to increase the use of St Angelo's airport, with suggestions including it acting as a refuelling stop for the air ambulance and the coast guard.

Increased but sustainable use of the water

- There was agreement on increasing the use of the waterways but in a sustainable manner which protected the water frontage and restricted building on the lake shore; this would include increased jetty access, especially around the Forum in Broadmeadow, and for more businesses to be supported to have pop-ups at the water's edges. Other suggestions included more outdoor water sports, including a hydro park.
- Increased activity on the water would have benefits to tourism.

A Green Agenda

- Sustainability and climate change, biodiversity and ecological conservation were highlighted as key considerations, and suggestions included:
 - o More greening in public spaces and to reinforce ecological uses.
 - o There was scope to adopt an eco-friendly approach to roundabout planting and roadside verges and amenity grassland mowing, thereby increasing biodiversity and rural pollination.

Signage

- The entrance roundabouts to Enniskillen were highlighted as being unwelcoming with poor signage.
- There was a desire for more informative and wayfinding type signage to help both tourists and residents to navigate around the town and help signpost them to various attractions and assets. By way of example, it was acknowledged that the topography and planning constraints did present challenges in accessing Forthill Park from Forthill Road, but correspondingly there was no signage to an alternative and more accessible entrance from the back of the Park.

Infrastructure

- There was a need for increased investment in and improvements in infrastructure, including:
 - o road and transport links
 - o The development of the A4 Enniskillen Southern By-pass would alleviate traffic congestion on the island and support with the development of the opportunity sites.
 - o waste treatment plants to improve water quality in the lough, especially given its importance for tourism and for angling and other water sports.
 - o broadband connectivity to support hybrid working and town centre office type hubs.
- There was a desire for a public sector hub to be in the town, and there was an opportunity to provide more office space in the town to exploit opportunities from hybrid working arrangements and in light of poor rural broadband coverage.
- Public transport was expensive and infrequent, and there was a decline in private taxis.

- More boat jetties would provide an opportunity for cruise boats to visit the town.
- Transport niche/hub facility linking the SWAH and the airport

Accommodation

- There was a need for an increase in tourist accommodation and a broader range of accommodation type including, for example, a youth hostel, more B&Bs, and a motorhome park.

What would you like to see in the Place Shaping Plan to improve the economy and to increase the number of jobs and employment opportunities in Enniskillen?

Key themes and suggestions were:

- **Further development of the hospitality industry:** creation of a café-culture in the town and development of the night-time economy as well as essential shops on the island.
- **Seasonal events:** more festival type events (similar to music festivals such as Belsonic in Belfast) as well as community events.
- **“Stock and flow”:** Ensure better linkages and pathways for students at the local schools/college and local businesses.
- **Attracting people back:** WFH models could encourage people to move back to/relocate to Enniskillen and would need to be accompanied by affordable housing (to buy and/or rent) and good broadband. Affordable and available childcare was required and was dependent on an available workforce.
- **Inward investment:** Explore inward investment opportunities with Invest NI; Examine what large companies need and then pull together an investment prospectus.
- **New Businesses:** A need to attract well paid jobs. Opportunities to attract light manufacturing/IT, warehousing, to be located both within and on the outskirts of the town.
- **Support infrastructure and policies:** The A4 by-pass is needed to support businesses moving to and expanding in Enniskillen. Rates were seen as an issue and need to be considered to ensure rates are fair and representative of Enniskillen.
- **South West Acute Hospital (SWAH):** There were potential opportunities to create/bring jobs to the town via spin-offs from the SWAH, such as step down facilities and staff accommodation in self-contained units.
- **Marketing:** Develop a marketing campaign to attract people to work and live in the area. Develop a marketing campaign of Enniskillen town as a place for/to attract businesses e.g. an investment prospectus.
- **Education and skills:** Maximise opportunities from the SWAH by having an app illustrating medical careers, and also making greater links between the SWAH and Magee Campus and the local schools.
- **Living over the Shops:** There was potential to develop living accommodation from vacancies in the town centre i.e. develop the 1st/2nd floor of vacant buildings in the town centre.

There is a wide range of opportunity sites in Enniskillen. What and how would you like these sites to be developed as part of the Place Shaping Plan?

- The **PSNI site**, while not vacant (and no plans in the immediate future for the PSNI to relocate) was nevertheless seen as a key asset and should be repurposed as a site for tourism
- The **Courthouse** had potential to be converted into an art gallery, making a link to William Scott, a renowned 20th Century Ulster artist who had spent some of his childhood in Enniskillen and commenced art classes while there.
- The **vacant SW College site** on the Dublin Road had the potential to be office accommodation and/or an innovation hub; other suggestions for this site included hotel accommodation or a university outreach facility. There was a discussion on the opportunity to attract a chain hotel to Enniskillen.
- Care facilities need to be considered especially given an older population; suggestions included supported living villages, and SW College was advocated as step down care facilities for the hospital patients from the SWAH.
- An aging population in Enniskillen offered opportunities to consider a **retirement village type facility**, but also consideration was need for a range of accommodation for locals, including housing for those with disabilities, respite support accommodation and social housing.
- The **Intec centre and New Hope Centre** were suggested for office hub space given their prime locations.
- It was recognised that the former **Grosvenor Barracks** site is to be developed for mixed tenure housing (i.e. it will include social housing). It was highlighted that available housing is limited and housing waiting lists do not adequately reflect housing need in the town, that private rents are above NI average, and housing stock quality is very poor in parts. Drumbeg woman's aid building had potential to be redeveloped as accommodation as did the former Desmond's factory site.
- **Enniskillen Gaol** (which sits behind the vacant SW College) should be developed, potentially as an art centre.
- Other suggestions for the edge of town sites included a festival site, motorhome park or crematorium, while suggestions for town centre sites include recreational facilities such as an escape room and a skate park and to facilitate a food tour / gin tour.
- An accessible community hub was suggested that would be vibrant and meets needs of its people.
- It was noted that the library is currently being redeveloped and therefore the library is seeking an alternative (temporary) site of sufficient size and scale.
- It was suggested that additional enterprise space was needed as there were no vacant units and that the former **Telephone Exchange** could be redeveloped as small enterprise units.
- It was highlighted that youth facilities are very much needed, including support services / spaces for mental health provision in the town.
- The old **Enniskillen cinema** site (on Factory Road) needed to be considered given its size and that it stretched to the water's edge.
- Industry investment was needed for example for warehouses/ sustainable energy provision outlines however the current (road) infrastructure prohibited this.
- It was highlighted that **Holy Trinity primary school** is split on two sites and needs to relocate onto one site and so could be relocated on an opportunity site.

What would you like to see in the Place Shaping Plan to ensure inclusiveness and that everyone benefits?

- Neighbourhood Renewal Partnership was seen as a mechanism to support and facilitate engagement.
- Enniskillen Gaels have a severe lack of space and would benefit from development of additional facilities which would contribute to exclusivity and activity objectives.
- It was highlighted that Enniskillen has practical challenges in relation to its topography and this needs to be considered in the urban design of public spaces, carparking facilities and play parks. However, it was emphasised that **inclusivity needed to look beyond physical accessibility** and that there was a need to consider how Enniskillen could be developed to be inclusive and accessible to everyone from children to older people, including, for example, children with autism to older people with dementia.
- **All planning decisions/proposed works should go through the Disability and Inclusion Forum** and to ensure that governance around place shaping / community planning ensures statutory partners are working together.
- Newcastle County Down was highlighted as an example of a town which has been named as Northern Ireland's first **autism friendly town**; other examples included Ballybay in County Monaghan which has an integrated play park with additional playing facilities to cater for children with disabilities.
- An **accessibility audit** was suggested as was the need to ensure that buildings in public ownership and especially public spaces did not exclude large sections of the community. Accessibility around Essentially needed to mirror the town's demographics.
- **Poverty was seen as an issue and barrier for residents** to participate in events/venues and so consideration need to be given to free access.
- **Sports and water sports were seen as opportunities to be inclusive for all**, but again, consideration needed to be given to the costs associated with using such facilities.
- **Poor transport links were seen as a barrier**, with no local bus option.

5.4 Strategic Conversations Overview

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

Principal points echo many of the comments made by those completing online surveys and Steering Group. The main themes and key points are presented below.

Tourism

- Tourism was recognised as a key industry in Enniskillen, but many considered more could be done to develop tourism but in a more sustainable way; for example, this would not mean attracting substantially more visitors but attracting the type of visitor who stays longer and spends more.
- There was scope to enhance the tourism offering and there was a need to market, package and advertise the tourism assets in a manner which made it easy for the visitor to navigate. This included more information on what to do and where to go, more linkages/offers between attractions and local hotels/eating establishments, a shuttle bus between/around attractions including those outside the town; it was highlighted that Translink had run a free service between

Enniskillen town and Marble Arch Caves and Florence Court National Trust property.

- It was highlighted that the Visitor Information Centre and the public toilets needed extended opening hours to facilitate visitors.
- Innovation and digital technology offered opportunities to help with wayfinding, tourist information etc, but also with marketing of Enniskillen to external markets using virtual reality type technology.
- The concept of an Island Town was improving but more needed to be done to give visitors and residents the sense of an island town and being on an island. For example, it was not possible to walk around the island; nor to navigate a boat, and this would require potentially notable modifications to Johnston Bridge and the bridges at East Bridge Street. There was also a need to give a sense of arriving on the island, and potential to enhance the area around East Bridge Street and specifically Inis Ceithleann (Island of Kathleen).
- Tourism infrastructure needed to be further developed to deal with more visitors/those staying longer; suggestions included more beds (potentially a chain hotel), signage and wayfinding around the island town, better transport links between assets and greater linkages to assets outside of the town, for example, Cuilcagh Boardwalk and the Geopark.

Current Heritage and Natural Assets

- There is a desire to maximise the use of current assets; the Castle could be used to host more events and concerts – the continental market was seen as a successful event; the Diamond had potential as an entertainment space and to host a food market; Forthill Park was underutilised, while events such as the annual Easter Picnic, and especially the Easter bonnets, was highlighted; the jetty beside the Castle was underused. The Buttermarket had greater potential but currently most traders were long term tenants paying peppercorn rents and so there was limited incentive to develop this concept further; the adjacent carpark and the vacant ex-Telecoms site were both suggested as opportunities to expand on the Buttermarket with more craft units and an outdoor (weekend/Sunday) market. More could be done on the Round O such as a pleasure garden.

Town Centre

- There is a good nightlife in Enniskillen and good sports facilities. However, the town centre was described as “empty” at night with all coffee shops closed, no newsagent/local metro supermarket facility and limited footfall. There was a desire to bring more footfall to the town centre especially in the early evenings, and suggestions included more events to be held, and more accommodation to be built on the island.
- There was a suggestion that large corporate retailers preferred out of/edge of town retail sites, so Enniskillen town centre needed to focus more on the independents and “quirky” type shops to attract footfall.

Vacant premises

- There was a “proliferation” of vacant and/or poorly maintained premises in Enniskillen, and current rates policy, which meant such buildings were zero rated,

meant there was no incentive to maintain such buildings or to bring them back into use.

Pedestrianisation

- Pedestrianisation was seen as an attractive and viable feature by many of the consultees, albeit some recognised that some local businesses were opposed to it and accessibility issues needed to be considered. The new public realm was highlighted as an opportunity to make more use of the town centre for outdoor events, especially at key times. This could be done on a trial basis and accompanied by, for example, free car-parking in adjacent carparks. It was also suggested that part of The Diamond/East Bridge Street area could be covered over, which would mean events and activities would not be weather dependent.

The Forum

- The Forum was seen to be dated, unattractive and not making use of the water and/or its waterside location. Some were aware of plans for its redevelopment but were unclear of what this entailed and when it would happen.

Housing

- There is a need for more social housing in Enniskillen and, while it was noted that Grosvenor Barracks has planning permission for mixed tenure housing, this has yet to be delivered.
- There is also a lack of affordable private rental.
- There was a desire for more housing to be provided on the actual Island, which would also be beneficially in increasing town centre footfall and adding more vibrancy in the evenings.
- Enniskillen is an attractive place for people to retire and in addition, a WFH model / post Covid considerations has led to families relocating back to Enniskillen from the UK or further afield; however, these developments in turn have put pressure on local available housing stock, with retirees/returnees generally in a position to outbid locals for available housing.

Signage

- Wayfinding signage was needed to help visitors/residents navigate around Enniskillen.
- Signage was described as too corporate (e.g. Welcome to Fermanagh and Omagh District Council) and so not considered to be sufficiently welcoming or informative, and Council needed to adopt a more pro-business and supportive stance on local businesses advertising their services rather than imposed was perceived to be unnecessary restrictions.
- Signs to pick up after dogs were too explicit and resulted in unsightly activity.

Employment

- Greater links with SW College to ensure training and skills opportunities matched available jobs and future jobs in the locality and this would also help to retain young people.
- There needed to be greater linkages between careers guidance teams working with the schools and with local employers to determine skills deficits and job opportunities.

Opportunity sites

- The vacant SW College site was seen as a potential office hub or for hotel accommodation.
- The PSNI site was considered to be a “prime site” which was ideal for tourism and housing redevelopment. Although many knew that the PSNI did not have plans to vacate this site, all considered that they should do so as it was more valuable as a development site. It would also allow for a walk around the entire island, accentuating the sense of an island town. Tourism potential included the sensitive redevelopment of the historic police training facilities (thereby maintaining its historic links), while the site’s extensive waterfront frontage offered potential for sustainable water-based activities and associated development and the scale of the site was a natural amphitheatre for events.

Workforce availability

- Challenges in recruiting / retaining staff across a range of industry sectors, and not just the hospitality sector. It was recognised this was not an issue unique to Enniskillen but was a common issue across Northern Ireland. Some firms were using more creative measures to recruit staff (e.g. a staff referral scheme; flexibility in contracts/working hours etc.) but it also led to “poaching” of staff as the overall labour pool was not increasing. There was also a perceived brain drain with young people leaving Enniskillen for work elsewhere and a more enticing social/nightlife than that offered in Enniskillen.

6 Case Studies

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

Adaptive Reuse

Parkhead Public School (Glasgow, Scotland)

Parkhead Public School is a B-listed Victorian building built in 1878 that served as a school until 1963, and then a resource centre for Glasgow City Council up until approximately the 1990s. It then lay vacant for over 15 years. The regeneration project cost £4.1 million and saw the building refurbished and restored into a community enterprise centre. It had previous damage such as water ingress, rot and structural failure. The project received a significant level of public funding including from Glasgow City Council and the Government Regeneration Capital Grant Fund. Upon completion it was acquired by the Parkhead Housing Association and includes public and office space.⁸⁷ It is a Heritage Angel Awards finalist, indicating the success of the design and adaptation of the formerly vacant school building.

This project is of relevance to the potential redevelopment of the former South West College site and highlights the use of public funds as a catalysts to redevelopment of key sites in urban areas, where the cost of redevelopment would be a disincentive to the private sector.

Regeneration

Preston Barracks Project (Brighton, England)

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

In 2014, the Council signed agreements with the University of Brighton and developers U+I Plc for the purchase and redevelopment of the site as part of a public-private partnership. Planning permission for the regeneration scheme was granted in 2017. It is an ambitious regeneration project, projected to create over 1,500 jobs and inject £280 million into the local economy. The regeneration scheme seeks to develop an innovation hub, 369 new residential units, and 534 student rooms on the 5-acre site.⁸⁸ A portion of the residential units will be affordable housing. It should be noted that it was treated as a brownfield site and existing derelict buildings were demolished.

⁸⁷ See: <https://www.purcelluk.com/projects/parkhead-school-westmuir-street-glasgow>

⁸⁸ See: <https://www.uandi plc.com/our-places/preston-barracks/>

The first building, the Plus X Innovation Hub opened in Summer 2020. It is a 50,000 sq. ft. hub that provides space for start-ups and SMEs. The developer U+I Plc describes it as an industry leading space with sustainability at the heart of its design including in relation to air quality, temperature and humidity.⁸⁹

This is a very ambitious regeneration project through former vacant barracks, but it showcases the potential for similar sites. While it is understood that the PSNI currently do have no plans to relocate from their existing location in Enniskillen, the site offers significant regeneration potential for the town in the long term.

The Tramyard, Dalkey (Dublin, Ireland)

Dalkey is a suburban village in South County Dublin. Given its strategic location along south Dublin’s coast, it’s relatively close proximity to Dublin City Centre and it’s identification as a heritage town, the town is a popular destination year-round by both residents and visitors alike. As such, any development within the town must consider these inherent natural and physical assets of the village in any plans for development of new or existing sites, particularly those located within the well-defined village centre.

The Tramyard is a historic site located in the centre of the Dalkey Architectural Conservation Area. Built in 1879 and noted as the terminus of the Number 8 tram and the terminus of the last Dublin tram in 1949, the site holds great historical significance within the village core and the wider Dún Laoghaire-Rathdown area.

The site was sold in 2018 for €3 million to FL Partners, an investment consortium based in Dublin, Ireland. Planning permission for the development of the 0.2 ha site as a mixed-use retail, cultural and community centre was granted in November 2020.⁹⁰ The regeneration of the historic site aims to re-integrate the Tramyard back into the Dalkey public realm through the diverse and mix of uses proposed for the vacant site. These uses include a main piazza at the centre of the yard and the re-use of the Tramyard depots as a health centre, retail and café space, rooftop pavilion and garden, along with a cinema and enterprise/workspace.

As outlined by the project architects, Project Orange, the Tramyard *“is a chance to create a lively public plaza with a community spirit.”*⁹¹

The Tramyard is of interest in relation to the former Enterprise Centre (Opportunity site 13) which is located in a conservation area, is a brownfield site and include serviced buildings.

Pedestrianisation

Parliament Street & Capel Street (Dublin, Ireland)

Dublin City Council introduced a series of trial pedestrianisation plans for Capel Street and Parliament Street in June 2021 to support the hospitality sector and facilitate outdoor

⁸⁹ See: <https://www.uandi plc.com/our-places/preston-barracks/>

⁹⁰ [FL Partners](#)

⁹¹ [The Tramyard | Project Orange](#)

dining. This scheme ran from 18.30 – 23:30 on weekends (Friday – Sunday). The trial was initially intended until July but due to the success of the trial and delays to the reintroduction of indoor dining it was extended twice to September 2021.

The pilot programme was very successful, with a survey carried out over August and September 2021 indicating that both the public and businesses were in favour of the pedestrianisation of these streets in some form.⁹² In relation to Capel Street, 95% of respondents (public, residents and businesses) said that it improved their experience, and the same level of support was identified for Parliament Street. For Capel Street 80% of businesses were in support of developing some form of traffic free arrangements on the street, while Parliament Street also had a majority of businesses in support, albeit at lower levels. In both cases the public were overwhelming in favour of introducing some form of pedestrianisation. Common benefits mentioned included a better atmosphere, cleaner air, felt safer and better sense of community. Some retailers were keen for a balanced approach that limited the pedestrianisation to the evenings when retailers were closed with other issues highlighted including increased litter and traffic congestion elsewhere.

Following further consultation, Capel Street became fully pedestrianised in May of 2022. This example provides Enniskillen with a blueprint for trialling pedestrianisation and gathering feedback on the results to ascertain if it would be suitable for certain areas of the town. Stakeholder engagement and consultation with the public, residents and private sector will be key to its success.

Further examples of pedestrianisation schemes with a positive impact.

Over the last 20-30 years there are increasing numbers of evidence-based studies which demonstrate that removing cars from city and town centres has a positive impact not only on quality of life, air quality, vibrancy, and safety, but also increases footfall and has a positive economic impact on local businesses.

A 2015 study of Queen Street West in **Toronto's Parkdale neighbourhood** found that half of local businesses had estimated that over 25% of customers arrived by car. In fact, the figure was 4% and those walking and cycling was 72%.⁹³ Closing central Madrid to cars in 2018 resulted in a 9.5% boost to retail spending, with evidence provided by analysis of 20 million anonymized transactions.⁹⁴

One of the most successful pedestrian streets in the world, the 1.1km long **Strøget in Copenhagen** was filled with cars until a 2-year pilot project in 1962. The opposition argued “no cars means no business” but the street has been a massive retail success, the city's busiest shopping street. There was a 45% increase in pedestrian volumes the

⁹² Capel Street and Parliament Street Report on Non-Statutory Consultation, Dublin City Council, November 2021

⁹³ [Birmingham Reveals Radical Ghent-Style Plan To Cut Car Addiction \(forbes.com\)](https://www.forbes.com)

⁹⁴ Ibid

year after the conversion to pedestrianisation. **Businesses realised that traffic-free environments provide increased financial revenue.**⁹⁵

Since 2007, the Slovenian capital of **Ljubljana** has been redesigning its city centre, so now 12ha are reserved exclusively for pedestrians and cyclists. Now, in these zones, only delivery vehicles are allowed, for a few hours in the morning. In these areas, CO2 emissions have been reduced by 70%, while noise has dropped by an average 6 dB. Electric taxis and buses can access the centre, while exceptions are made for elderly and disabled people, as well as mothers with infants, who are allowed to drive in the city, or they can opt for free rides with electric taxis.⁹⁶

The city of Lancaster in California spent \$11.5m creating a pedestrian-friendly downtown between 2007 and 2012. Within four years the city attracted \$130 million in private investment and generated \$273 million in economic output, doubled tax revenue from the area, created 48 new businesses and 800 jobs, and reduced road injuries by two-thirds.⁹⁷



A perceived negative impact on local businesses is often used as a rationale to stop pedestrianisation proposals. The evidence suggests the opposite is the case and pedestrianisation can have a positive impact for communities and business. These examples further illustrate the importance of listening to all sectors of a community rather than one particular interest group when considering place-making proposals.

Strabane Footbridge (Strabane, Northern Ireland)

Strabane Pedestrian Bridge (Strabane Footbridge) was installed in mid-2015 to provide a key pedestrian crossing point along the River Mourne. Connecting the residential areas of Melvin Park and Ballycoleman to the town centre, the bridge has provided a much-needed link between these two distinct areas within Strabane’s built-up footprint.

⁹⁵ <https://globaldesigningcities.org/publication/global-street-design-guide/streets/pedestrian-priority-spaces/pedestrian-only-streets/pedestrian-streets-case-study-stroget-copenhagen/>

⁹⁶ <https://www.forbesindia.com/article/forbes-lives/sustainable-cities-learning-from-ljubljanas-carfree-zones/69017/1?s=03> and <https://lovinmalta.com/lifestyle/environment/ljubljana-is-a-car-free-haven-with-300000-residents-is-malta-up-next/>

⁹⁷ <https://www.cnu.org/what-we-do/build-great-places/lancaster-boulevard>



The design and construction of the bridge was undertaken by a project team consisting of architects WYG/Doran Consulting and structural engineering firm AECOM, with the principal contractor being Fox Contracts. SH Structures installed the new cable stay bridge in mid-2015⁹⁸. The project totalled to a cost of £3.2 million and was funded by a number of private and public bodies, which included a £1 million funding contribution by the Department for Social Development⁹⁹.

The design, construction and installation of the bridge was influenced by the proposed location of the structure being within a Special Area of Conservation, a wildlife designation within Europe. The project illustrates a successful integration of wildlife and natural habitat concerns with the provision of key infrastructure, enabling greater mobility within Strabane; between its suburban, residential communities and its town centre and commercial core.

Since its construction and opening in 2015, the bridge and its 38-metre-high wishbone mast has become a landmark feature within the physical landscape of Strabane, while also positively contributing to the connectivity and mobility assets of the town.

It is understood that a footbridge is proposed to connect the new SW College site with Enniskillen town centre. The Strabane Footbridge example illustrates the potential of such investment.

Tourism

Waterford Greenway (Waterford, Ireland)

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

The project was developed at a cost of €15 million. The Greenway has been a huge success for Waterford, winning two awards, at the All-Ireland Community and Council Awards 2018, and Chamber Ireland Excellence Award in 2017. It has contributed significantly to the local tourism industry, creating up to 90 new jobs for the local community. In a 2017 survey¹⁰⁰ of Greenway users, 68% of those surveyed said they

⁹⁸ [SH Structures | Strabane Footbridge](#)

⁹⁹ [Belfast Telegraph | Strabane footprint set to open... but name row rumbles on](#)

¹⁰⁰ Waterford Greenway Intercept Survey 2017, AECOM, 2017.

<https://waterfordcouncilnews.com/2018/01/29/landmark-study-shows-high-approval-rating-for-waterford-greenway/>

had travelled to Waterford mainly to use the Greenway and 80% of people visiting from outside Waterford paid for accommodation. By December 2017, only 9 months after it had opened, the greenway had seen 247,545 users.

Royal Canal Greenway (Ireland – Restoration and Redevelopment)

The Royal Canal Greenway is a greenway in Ireland which spans over 130km of towpath along the historic Royal Canal. The Greenway comprises walkways, cycleways and water-based navigations spanning from Maynooth in County Meath out to Cloondara in County Longford. Since the Greenway's official opening in March 2021, more 640,000 trips have been taken annually on the Royal Canal Greenway. Returning a dividend of €17.2 million within the first full year of operation, the Royal Canal Greenway is placed as a significant generator of economic activity for the towns, villages and areas surrounding the Canal and Greenway.

The Royal Canal navigation spans 145km from Dublin City to the Shannon, completed and opened in 1817. Initially functioning as a key infrastructure network for trade and commerce, by the mid-twentieth century the canal had experienced significant deterioration, closing in 1961. However, following extensive restoration work the Royal Canal was re-opened for navigation in 2010. In addition to this, further works and input by state bodies, semi-state bodies and volunteer organisations, such as multiple local authorities, Waterways Ireland, FÁS, the Office of Public Works (OPW) and the Royal Canal Amenity Group (RCAG), saw significant acceleration of the Canal and Greenway's transformation from the turn of the century onwards.¹⁰¹

The total cost of restoring the 130km amenity equated to €12 million. Research undertaken by Tracsis Traffic Data on behalf of Waterways Ireland found that the Canal and Greenway returned a dividend of €17.2 million in its first full year of operation and saw a return on the initial investment of €12 million within the first eight months of full operation.¹⁰²

The Royal Canal Greenway restoration and development showcases a best practise example of successful restoration, enhancement and promotion of Ireland's inland navigations' history, physical and natural assets, through effective resourcing and partnerships between multiple stakeholders across the public, private and volunteer sectors. The Royal Canal Greenway now functions as a recreation amenity for walker, runners, cyclists, anglers and water sport enthusiasts in tandem with being home to a diverse array of wildlife and ecosystems.

Enniskillen could explore the possible opportunity for further greenways, in addition to the planned Enniskillen-Sligo Greenway, to attract further tourism, increase active transport and improve linkages between the town and surrounding attractions and amenities. This could be beneficial both for community and businesses located in Enniskillen town.

¹⁰¹ <https://royalcanal.ie/about-us/rcag-history/>

¹⁰² [Waterways Ireland | News Centre | News | Royal Canal Greenway Visitor Monitoring Project](#)

Inis Cealtra Visitor Experience, Lough Derg



Inis Cealtra is a 20-hectare (50-acre) island located in Scariff Bay in the south-west part of Lough Derg between County Clare and County Galway. The village closest to the island is Mountshannon in Co. Clare, and boat access is available from both the village marina, which lies 2km from the island.

Having taken 41 acres on the island into public ownership in 2015, Clare County Council commissioned The Inis Cealtra Visitor Management and Sustainable Tourism Development Plan in 2017. The remit was to seek to ensure the long-term conservation of this significant historical and cultural site, while expanding its attractiveness as a sustainable tourist destination for an increased number of visitors. Solearth Architecture were commissioned to prepare the plan and, with their team of experts, undertook extensive comprehensive research into all aspects of the island, as a heritage, tourism and cultural destination, and to formulate a series of comprehensive recommendations and objectives as to how to realise its potential in the short to medium term.

The development of the Inis Cealtra Visitor Experience has, in 2022, now taken a significant step forward with the announcement of plans for a proposed new Inis Cealtra (Holy Island) visitor centre in the heart of Mountshannon village. Referred to locally as the 'Jewel of the Lough', Inis Cealtra is one of the most important historical and ecclesiastical sites in Ireland and has important links to Brian Ború, the last High King of Ireland.

Clare County Council has acquired the Old Rectory building overlooking Mountshannon Harbour, Scarriff Bay and Lough Derg. A Part 8 Planning Application has been secured to transform the building into a mainland visitor centre, interpreting the monastic site and its surroundings. The Old Rectory building will be re-purposed and extended to provide an impressive Visitor Centre scheduled to open in the second half of 2023.

The Inis Cealtra Visitor Experience is a collaborative project involving Clare County Council, Fáilte Ireland, Waterways Ireland, the OPW and National Monuments Service and National Parks and Wildlife Service. The Inis Cealtra Visitor Experience, which is being funded in partnership with the Department of Rural and Community Development through the Rural Regeneration and Development Fund, represents an exciting milestone following detailed preparatory work by the Local Authority's Tourism Department.

The project seeks to conserve Inis Cealtra as an important historical, ecclesiastical, archaeological and cultural site; as well as expand its attractiveness as a sustainable

tourism destination and, in so doing, address population decline and rural deprivation by providing social and economic benefits derived from tourism for East Clare and the wider Mid-West region.

There is a clear similarity between this project and Devenish Island. Development of a visitor centre for Devenish Island on Enniskillen Island, linked by ferry, would provide a significant visitor attraction for the town.

Marine recreation structures, Denmark

In Denmark, as in many other countries there is a growing trend for natural swimming pools. Towns have commissioned lake or harbour side recreation areas which are of architectural interest such as the Hasle Harbour Bath, commissioned to cater for a growing number of seasonal visitors.



Faaborg commissioned the Faaborg Harbour Bath, giving an accessible waterfront to this seaside town. This multi-functional structure has a pavilion information point, facilities for renting, storing and maintaining kayaks, a water playground including a sheltered paddling and swimming area for children, changing rooms for rowers, a diving platform, and a sauna.



There is potential for development of similar structures at the redeveloped

and reimagined Lakelands Forum. This would reinforce the connection between the town and water and provide infrastructure to enable a range of water sports.

Hodson Bay Watersports, Lough Ree

Baysports Water Sports Centre is located on the shores of Lough Ree in Hodson Bay and is the home of the world's tallest floating slide. This water adventure centre covers almost an acre of interlinking walkways, slides, towers and obstacles. Baysports is a playground for children and adults alike.



Source: www.baysports.ie

There could be an opportunity to consider support the inclusion of a similar seasonal facility, likely private sector led, in close proximity to the redeveloped Lakelands Forum.

Wayfinding

Legible Leeds (Leeds, England)

Legible Leeds is a pedestrian wayfinding system that has been implemented in Leeds City Centre. Before being implemented there were a number of different and conflicting signage systems being used across the city centre which failed to effectively aid navigation. In 2009-2010, to address this issue and prepare the city for increased footfall in relation to then upcoming retail developments, the Legible Leeds wayfinding system saw its initial development.¹⁰³

The system was developed to assist people to navigate the different districts (business, shopping and cultural) of the city centre on foot, highlight specific destinations and increase awareness of the waterfront and available greens spaces close to the city centre.¹⁰⁴ A number of the street signs used solar power to illuminate the street maps to aid with the ease of navigation in low light. Furthermore, the signs use robust material that allows for easy maintenance and updating.¹⁰⁵

This is particularly relevant for Enniskillen, with shopping areas, conservation areas, green space and a riverfront all in close proximity in the town centre. Linkages between these areas and the amenities such as Broadmeadow and the Round O, as well as SW College, could be greatly aided by a clearer wayfinding system. Thought could be given to potential categorisation of districts, the unique identity of different areas and distinctive landmarks across the town centre.

¹⁰³ See: <https://www.citywayfinding.com/legible-leeds/>

¹⁰⁴ See: <https://www.citywayfinding.com/legible-leeds/>

¹⁰⁵ See: http://www.lacockgullam.co.uk/walkit_leeds.html

7 SCOT Analysis

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

Strengths

Location

- Strategically located in Fermanagh and recognised as a main hub and inter-regional gateway to Ireland's Northwest in the Regional Development Strategy 2035.
- County town of Fermanagh and well positioned to benefit from cross-border trade and visitors.
- The River Erne provides the town with a beautiful location and natural amenity

Tourism and Heritage

- Enniskillen has a clear Unique Selling Point – it's USP is the water that surrounds the town and that links to Lough Erne. Enniskillen Blueway Water Activity Zone provides focus for water-based activities.
- Strong built heritage such as Enniskillen Castle, the Buttermarket, and the Town Hall and cultural heritage through Adrhowen Theatre.
- pedigree of the town's architectural merit and built heritage - many of the buildings found along its main thoroughfare and commercial core are listed buildings of 'special architectural or historic interest'.
- Several key heritage attractions near the town including Castle Coole (walking and cycling distance), Devenish Island, Florence Court, Necarne Castle, Marble Arch Caves and Cuilcagh Boardwalk Trail.
- In 2022, Enniskillen was awarded the Booking.com's Traveller Review Award as the most welcoming town in the UK.
- Fermanagh Lakelands Tourism providing networking and promotion services.

Education & Skills

- Strong educational attainment among school leavers in the 2019/2020 period.
- Consistently performing above the NI Average for school leavers entering Higher Education
- Strong Education infrastructure across the town including in Higher Education with two SWC campuses and a CAFRE campus.
- SWC Erne Campus is the location of the World's first and largest education building that achieved the Passive House Premium status and the BREEAM Outstanding certification for sustainable design.
- Specialisms and strengths in sustainable construction, computing, health and social care, creative industries and equine studies.

Community & Services

- Enniskillen's people and the town's unique island identity.
- A number of areas in the town rank very strongly for their outdoor physical environment.
- Good amenities such as the Marina, Forthill Park and Ardhowen Theatre.
- Good healthcare provision through the South West Acute Hospital.
- Home of Fermanagh GAA and good sporting culture.

Accessibility

- Relatively compact town centre which has immense potential for walking and cycling. The town centre could be reached by cycling from most points across the town in no more than approximately 15 minutes.
- Good provision of car parking with over 1,500 off-street car parking spaces available within 10 minutes' walk of the town centre.
- Access to a number of A-Class roads and planned A4 bypass scheme.

Economy

- Enniskillen has a multifunctional role as an economic, public service and educational hub for a wide catchment area. Significant employment through the FODC, Waterways Ireland, South West Acute Hospital and the Department of Agriculture, Environment and Rural Affairs (DAERA).
- Strong tradition of independent and local retail and good hospitality offering.
- Attractive tourism destination which supports the local economy.
- Strong manufacturing sector as well as significant employers in the agri-business, telecommunications and insurance sectors.
- Enniskillen Business Improvement District which has had a number of successful initiatives and been reinstated for another 5-year period.

Constraints

Accessibility and Appearance

- Traffic congestion and bottlenecks in the town centre detracting from the town's beautiful location. Due to the existing road network constraints, all east-west movements and a significant proportion of north-south movements through Enniskillen pass by the town centre. While the new public realm works have improved the physical appearance of the town centre, it is observed that Main Street is often congested with cars seeking spaces to park in close proximity to shops – leading to negative impacts on the town centre in terms of visual impact, noise impact and air quality.
- River Erne forms a permeability barrier, with the Castle Bridge and Erne Bridge providing the only connections between the eastern and western parts of town.
- The entrance roundabouts to Enniskillen were highlighted as being unwelcoming with poor signage.
- Environmental and health impact associated with high rates of car usage.

- Beautiful waterside location being underutilised by the town and businesses who have turned their back on the river.
- Town centre is to a degree disconnected from the water due to the significant road infrastructure passing through the island.
- Inadequate signage and wayfinding lead to lack of awareness of amenities in the town such as Forthill Park.
- Narrow footpaths and a lack of cycling infrastructure which discourage residents and visitors from using more active modes of transport (i.e. cycling and walking). Lack of segregated cycling facilities is compounded by gaps in the shared use footways, which do not form a network and therefore do not allow for completing the majority of trips by bicycle without merging with vehicular traffic.
- Somewhat remote location of the town with a lack of access to rail and motorway.
- Limited and infrequent public transport.
- Enniskillen currently lacks a cohesive wayfinding approach that links orientation, directional and interpretation signage together under a brand that reflects the towns offering.

Community and Population

- Stagnation in population growth in recent years with a decrease of approximately 1% in the last 10 years.
- High levels of deprivation evident in Devenish, one of the most deprived SOAs in Northern Ireland (ranked 44th) and the most deprived area in the Fermanagh and Omagh District.
- Decline in key working cohort of people aged 16-39 and increasingly elderly population.
- Vacant South West College building dominates the area around the Dublin and Derrychara Roads and detracts from the areas sense of place.
- Enniskillen Gaels have a severe lack of space and would benefit from development of additional facilities which would contribute to exclusivity and activity objectives.

Economy and Employment

- Residents of the Fermanagh and Omagh District fall below the Northern Ireland average for employment and economic activity.
- Employment levels appear to have decreased since 2011.
- Limited capacity if any to expand retail floorspace through to 2030.
- Commercial Vacancy rate in the town centre has risen in recent years.
- Business dominated by small and micro enterprises.
- Prominent vacant sites including the former South West College site, and the former Railway Hotel.
- Historic trading laws hindering development of new markets in the town centre.

Education and Skills

- Despite strong performance in educational achievement for school leavers in 2019/2020, longer-term trend shows more modest achievement levels which are often below the NI Average.
- Those with qualifications NVQ Level 4 and above are significantly below the NI Average and those with no qualifications are significantly higher the NI Average.
- Despite educational attainment for those from disadvantaged backgrounds being above the NI average, the gap between those from FSME backgrounds and Non-FSME backgrounds remains.

Tourism and Heritage

- Enniskillen has perhaps not capitalised upon the nearby tourism assets to the degree to which it undoubtedly could
- Tourism in Enniskillen is potentially inhibited through the lack of public transportation on key locations.
- Enniskillen Castle, while benefiting from recent investment, is not utilised to the full extent, nor is use of the historic castle buildings by Roads Service officers considered an optimum use of the buildings.

Opportunities

Accessibility & Public Realm

- Planned A4 Southern bypass should result in traffic being rerouted away from the town centre, reducing traffic congestion and freeing up road space for potential reallocation, creating an opportunity for improving pedestrian and cyclist environment in the town centre core, in turn further reducing traffic congestion and contributing to a more appealing and healthier town centre.
- Enhance connections between the town centre, the waterfront, associated amenities and sites of interest.
- Explore options to reduce traffic congestion in the town centre including the feasibility of pedestrianisation around East Bridge Street, Townhall Street, High Street and Church Street.
- Completion of town centre public realm work and wider inclusion of greenery across the island town. Scope to adopt an eco-friendly approach to roundabout planting and roadside verges and amenity grassland mowing, thereby increasing biodiversity and rural pollination.
- Further promote and capitalise upon the town's natural, built and cultural heritage and history.
- Improve accessibility of the town for walkers through the construction of additional footbridges.
- The compact nature of the town centre means there are opportunities for relocating car parking facilities away from its core part without significant impact on accessibility.
- Expand the water taxi offer, with permanent stops in multiple locations, contributing to a reduction in town centre traffic.

Tourism

- Further enhance and capitalise upon Enniskillen’s immense tourism potential in a sustainable manner that benefits the entire community.
- Planned re-development of Fermanagh Lakeland Forum which will contribute to a re-imagining of the town’s relationship with the water.
- Potential for an off-road 55-mile/88km greenway connection linking Enniskillen-Belleek-Ballyshannon-Bundoran-Sligo towns taking in Lough Erne and the Wild Atlantic Way, and in tandem with the planned greenway from Enniskillen to Sligo via Belcoo, could provide a spectacular 160km greenway loop.
- Enhancing linkages between the town and nearby attractions, such as Castle Coole, Devenish Island, Florence Court, Marble Arch Caves and Cuilcagh Boardwalk Trail, would provide an opportunity to enhance the local offer and provide visitors with unique heritage experiences.
- Investing in an effective and well-designed wayfinding system would enhance the identity of the town and enable residents and visitors to discover more of Enniskillen.
- More walking and cycle paths, including walking bridge(s) across the water would accentuate the sense of an island town through an interconnected all-island walk.
- Providing a broader range of things to see and do, in tandem with an enhanced accommodation offer, and better linkages of attractions through packages, including online and complementary ticketing, will help to encourage increased visitor numbers.
- Enniskillen Castle to be used as a hub for festivals/ markets, international food festival and an event schedule that would go beyond its current seasonal activity. Potential for historic castle buildings to be used for tourism-related use (e.g. visitor centre for Devenish Island) were the Roads Service offices to be relocated.
- Potential for a new food market in the town e.g. at the car-park near the Buttermarket or in the Castle courtyard.
- Water quality in the lough could be improved through a new wastewater treatment plant, especially given its importance for tourism and for angling and other water sports.

Economy

- Build on existing strengths and clusters in areas such as manufacturing and agri-business.
- Essential that the night-time economy becomes more vibrant in the town centre
- Increase linkages between industry and academia in areas of specialist expertise in Enniskillen including equine studies, sustainable construction, computing, creative industries and health and social care.
- Opportunity to build Enniskillen’s reputation for sustainability with SWC’s Erne Campus building being the first and largest educational building in the world to be awarded Passive House Premium status and the BREEAM Outstanding certification for sustainable design.

- Opportunity to further highlight and build upon the equine reputation of the town with CAFRE’s Enniskillen Campus offering the widest range of equine courses in Ireland.¹⁰⁶
- Capitalise on opportunities arising from Northern Ireland’s unique position in relation to the EU Exit e.g. increasing cross-border trade in relation to Agri-business in Enniskillen.
- Opportunity to capitalise on remote and hybrid forms of working to attract more people to the town and increase expenditure to support the local economy.
- Enniskillen experiences comparatively low levels of economic leakage compared to other destinations within the assessment.
- Work to attract further investment and promote and support the development of SMEs and entrepreneurship to increase employment opportunities in the area and enhance the town’s attractiveness as a place to live and work.

Community

- Increase collaboration in the community and voluntary sector and other key agencies and stakeholders to ensure effective service delivery across the communities of Enniskillen and its wider catchment area.
- Opportunity to build upon the strong educational performance recorded in the 2019/2020 period to the benefit of the community and increase overall attainment levels in the town.

Opportunity Sites

- The opportunity sites represent great potential for further development of Enniskillen through repurposing and in some cases redevelopment of sites that could enhance and contribute to a vibrant town centre.
- The current PSNI location is a prime site in the town centre with a significant opportunity for it to be repurposed to the benefit of Enniskillen should it be vacated over the period of the plan.
- The South West College Site represents a significant opportunity to reimagine the area and enhance the town centre.
- Inis Ceithleann or Island of Kathleen offers significant potential for enhancement commensurate with its link to the town’s history and name.
- The vacant SW College site on the Dublin Road has potential for a range of uses.
- A renovated Forum water activity centre could provide the hook to encourage visitors to come to Enniskillen.
- There was potential to develop living accommodation from vacancies in the town centre i.e. develop the 1st/2nd floor of vacant buildings in the town centre.
- Closing the town centre (on a pilot/temporary basis) one day per week; and pilot Saturday evenings; and promoting independent shops; and promoting a market in the town centre on Thursdays, would encourage increased footfall and vibrancy.

Threats

¹⁰⁶ See: <https://www.cafre.ac.uk/about-us/our-campuses/enniskillen/history/>

Community

- Decreasing levels of young people and stagnated growth could lead to economic decline.
- 1.33% population growth identified for Enniskillen significantly below the projected Northern Ireland growth rate of 4.26% while being slightly higher than the rate for Fermanagh and Omagh (1.25%) for the same period.
- Devenish a particularly disadvantaged area that could decline further should drivers of deprivation in the area not be adequately addressed.
- The ageing population will increase the need for associated services for the elderly and may put pressure on the existing health and social care provision.

EU Exit and COVID-19

- Increased vulnerability to volatility from the EU Exit given Enniskillen's location, existing cross-border trade and role as an inter-regional gateway
- Loss of EU Funding and uncertainty around UK replacement funding.
- Long term consequences of COVID-19 and the potential for restrictions to be re-imposed.
- Staffing shortages as result of the EU Exit could impact key sectors in Enniskillen including manufacturing, hospitality, retail and agri-business.

Economy and Employment

- Economic activity rates are also below the NI Average.
- Impacts of the EU Exit and the COVID-19 pandemic will continue to impact Enniskillen's economy and growth into the future.
- Threat from online shopping to the significant retail sector in the town.
- Enniskillen's major tourism economy challenges arise from seasonality and high dependence on the domestic market for visitation
- Clusters of vacancy in East Bridge Street, High Street and Darling Street could affect the vibrancy of the town centre if not addressed.
- Inflation could increase costs for businesses affecting their viability, whilst also contributing to decreased consumer spending leading to an overall decline in the local economy.
- Commercial vacancy has remained above pre-pandemic levels in contrast to other similar sized settlements, and appears to have increased in 2022, which threatens the vibrancy of the town centre and could contribute to economic decline.
- Decreasing businesses and employee numbers could lead to further migration of young people due to perceived lack of employment opportunities and accelerate population decline.
- Automation may lead to job losses in a number of sectors including manufacturing.

Town Centre

- The Opportunity sites, should some of them remain vacant, may threaten the vibrancy of the town centre and fall into dereliction including the large former South West College building which has the potential to become an eyesore in the area.

- Traffic congestion detracting from the town centre's sense of place and beautiful natural setting, could contribute to poorer health outcomes.
- Edge of town retail space may have a negative effect on footfall in the town centre.

Education and Skills

- Significantly lower levels of qualification attainment than the NI Average threatens the competitiveness of the town and its ability to attract investment as well as the ability of Enniskillen's residents to find employment.
- The gap in educational achievement for those that are from the most disadvantaged areas risks increasing deprivation and inequality in the town, particularly in areas such as Devenish.
- Failure to prepare the community for jobs of the future and embrace technology and skills development may lead to an uncompetitive workforce that will negatively impact the town and its residents.

8 Strategic Priorities

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

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

- Developing and promoting Enniskillen as an attractive and vibrant place.
- Increasing employment opportunities and ensuring supports for existing businesses.
- Enhance the Enniskillen visitor experience offer with a focus on regenerative tourism and an integrated people-centred and place-based approach.
- Improving connectivity and accessibility throughout the town including in relation to walking and cycling.
- Identifying how to progress the many opportunity sites located in and around the town.
- Ensuring that Enniskillen is an inclusive place that has a community that is prosperous, well educated, vibrant and healthy.

A Appendix 1: Consultees

Strategic Conversations

Organisation
Enniskillen BID
Erne Water Taxi
Fermanagh Enterprise Centre
Fermanagh Lakeland Tourism
GAA
Head of Place Shaping, NIHE
National Trust
Smyth Leslie & Co Estate Agents
Tourism NI
Tourism NI

Steering Group Workshop

Organisation
Libraries NI
Enniskillen Town Centre Forum (business owner)
Enniskillen BID
Fermanagh Lakeland Tourism
Dept of Education (Director, Sustainable Schools Policy & Planning)
Rural Affairs Division (West)
Senior Manager, Health Improvement Equality & Involvement, WHSCT.
Dept for Communities
CVS
CVS
CCMS
Enniskillen Town Councillor
Enniskillen Town Councillor
Enniskillen Town Councillor
Enniskillen Town Councillor
Head of Community Services
Head of Parks, Estate & Property, FODC
Head of Place Shaping, FODC
Strategic Planning and Performance Manager
Lead Principal Planning Officer
Project Coordinator
Audience Development and Marketing Manager
Director of Regeneration & Planning, FODC
Capital Projects Manager