

FODC215



Fermanagh & Omagh
District Council
Comhairle Ceantair
Fhear Manach agus na hÓmaí

**Local Development Plan
Tourism
October 2018**

1.0 Introduction

1.1 This background paper has been prepared to draw together the evidence base that has been used to inform the preparation of the Fermanagh and Omagh Local Development Plan (LDP) 2030. It is one of a suite of topic-based background papers that should be read alongside the LDP to understand the rationale and justification for the policies proposed within the draft Plan Strategy.

1.2 It updates the Position Paper prepared and published as the baseline evidence for the Preferred Options Paper (POP) in October 2016 and which identified the key issues that need to be addressed by the LDP.

The paper provides:-

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

1.3 Tourism is recognised as the world's fastest growing industry, encompassing a very wide range of activities including travel and visits for business, professional and domestic purposes as well as for holidays and recreation. In 2013, The World Travel & Tourism Council (WTTC) estimated that the industry contributed 9.5% to the global economy and continues to outperform the wider economy in terms of economic growth (3% vs 2%). In 2017, tourism contributed £926.1m to the Northern Ireland economy, supporting 58,042 jobs across the Province in 2015 (NISRA 2018).

1.4 Through utilising existing environmental, historical, cultural and geographic assets, tourism can be a key economic driver capable of stimulating further growth and development opportunities. Tourism can benefit the assets on which it depends for example through assisting in the financing of conservation or enhancement initiatives. In towns and cities tourism can contribute positively to urban regeneration. In rural areas, tourism is important to the development of the rural economy by offering, for example, opportunities for farm diversification.

1.5 The World Tourism Organisation (WTO) promotes sustainable tourism and defines this as: "*tourism that meets the needs of present tourists and host regions while protecting and enhancing opportunity for the future.*" Sustainable tourism development is brought about by balancing

the needs of tourists and progressing the tourism industry along with protecting the assets of the destination. The land use planning system has a key role in managing tourism-related development through planning policies that provide a framework for identifying appropriate development opportunities and safeguarding tourism assets from harmful development.

2.0 Regional Policy Context

Draft Programme for Government Framework 2016-21

- 2.1 The Draft Programme for Government Framework 2016-21 brings forward an outcome approach which identifies the outcome: “We have created a place where people want to live and work, to visit and invest” supported by the indicator of “Improve our attractiveness as a destination”. The lead measure of this indicator is the Total spend by external visitors.
- 2.2 Aligned with the PfG the Department for Enterprise, Trade and Investment (DETI) published the **Economic Strategy Priorities for Sustainable Growth and Prosperity** on 13th March 2012. The Strategy sets out the economic vision including a framework for growth and key priorities for growth and prosperity.
- 2.3 The Strategy reaffirms the PfG and includes developing the potential of the tourism industry through focusing investment on strategically significant areas and developing the quality of the visitor experience. The Strategy sets a collective goal for the sector to double the income earned from tourism by 2020.

The Regional Development Strategy (RDS)

- 2.4 The Regional Policy Context is provided by the Regional Development Strategy (RDS) 2035 and regional planning policy statements. The RDS 2035 aims to protect and enhance the environment for current and future generations. It recognises that Northern Ireland’s environment is one of its greatest assets which has benefits in terms of the economy and quality of life. The following Regional Guidance (RG) in the RDS 2035 is relevant to this paper:
- 2.5 RG 4: *Promote a sustainable approach to the provision of tourism infrastructure by:*
 - Promoting a balanced approach that safeguards tourism infrastructure while benefitting society and the economy;

- Improving facilities for tourists in support of the Tourist Signature Destinations, including Fermanagh Lakelands and Tyrone & Sperrins, as identified in the draft Tourism Strategy 2010;
 - Encouraging environmentally sustainable tourism development.
- 2.6 The RDS states that sufficient choice of the right type of visitor accommodation in the right areas is important; there must also be an adequate supply of things to do. It is possible to create and/or maintain a feeling of being somewhere unique with quality assets, interesting architecture and built heritage and a feeling of sense of place. All new or extended infrastructure required to support and enhance the tourist industry needs to be appropriately located and sited with proper regard to tourism benefit and the safeguarding of the natural and built environment on which tourism depends. It should also be noted that the spatial framework of the RDS identifies the Fermanagh Lakelands and the Sperrins as Strategic Natural Resources

Regional Planning Policy Statements

- 2.7 The SPPS provides the policy basis, alongside PPS 16 Tourism, for considering planning proposals until such times that the Fermanagh and Omagh District Council has an adopted its own Plan Strategy. The SPPS does not introduce any significant changes to tourism policy, providing condensed, simplified guidance. The regional strategic objectives for tourism are:
- facilitate sustainable tourism development in an environmentally sensitive manner;
 - contribute to the growth of the regional economy by facilitating tourism growth;
 - safeguard tourism assets from inappropriate development;
 - utilise and develop the tourism potential of settlements by facilitating tourism development of an appropriate nature, location and scale;
 - sustain a vibrant rural community by supporting tourism development of an appropriate nature, location and scale in rural areas; and
 - ensure a high standard of quality and design for all tourism development.
- 2.8 With regards to plan-making the SPPS states that councils should consider how best to facilitate the growth of sustainable tourism in their areas and reaffirms the provisions of PPS 16 by bringing forward a tourism strategy tailored to the needs and assets of their local area. Such a strategy should reflect wider government tourism initiatives and should address the following:
- how future tourism demand is best accommodated;
 - safeguarding of key tourism assets;
 - identification of potential tourism growth areas;

- environmental considerations; and
 - the contribution of tourism to economic development, conservation and urban regeneration.
- 2.9 The SPPS states that policies to safeguard tourist assets will be contained in the LDPs, together with policies for tourism development such as tourism accommodation, amenity facilities, and holiday parks, and the criteria for consideration of such proposals.
- 2.10 Finally, the SPPS sets out that a positive approach should be adopted in determining applications for tourism development so long as proposals are sustainable, are in accordance with the LDP and will result in high quality forms of development. Design is particularly important within Conservation areas, Areas of Townscape Character and when considering the impact of tourism development proposals in the countryside particularly within areas designated for their landscape, natural or cultural heritage properties.
- 2.11 Other planning policy statements that provide scope for tourism development in the countryside are PPS 4 Planning and Economic Development and PPS 21 Sustainable Development in the Countryside.
- 2.12 Whilst the RDS, PPSs and SPPS set out the regional planning policy pertaining to tourism development there are other relevant Government policy objectives and strategies which relate specifically to the promotion of the tourism industry.

Fermanagh Omagh Council Corporate Strategy

- 2.13 In regard to local plans and strategies, the overarching vision of the Council's Corporate Strategy is to make Fermanagh and Omagh, the place of choice – where people, communities and businesses prosper and where people choose to live, a place where businesses choose to invest and visitors choose to spend time. The strategy recognises the areas unique and natural environment and the potential to maximise this resource to benefit its people and enhance the quality of life.
- 2.14 The Council has identified **Place and Environment – Protecting and Creating Quality Places** as one of its three corporate themes through which it will deliver on a range of strategic actions. Central to this theme is growing tourism by providing and promoting desirable locations, a wide range of quality outdoor and cultural activities/experiences based around the natural and built environment and heritage.
- 2.15 **The Corporate Plan Update 2017-2019** draws out the link to the Community Plan Outcome 5: Our economy is thriving, expanding and outward looking and related priority: Economic growth including local,

sustainable jobs, infrastructural improvements and tourism. The Council Action in relation to this is to “Manage and service Tourism Partnership and implement Tourism Strategy, including sourcing/applying for funding for tourism projects.”

Fermanagh and Omagh Council Tourism Development Strategy and Action Plan

- 2.16 Fermanagh and Omagh District Council’s Tourism Development Strategy and Action Plan was published in May 2016. The Strategy and Action Plan set out a framework for the future growth and development of tourism in the Fermanagh and Omagh area. It brings forward the vision that:
- “Fermanagh and Omagh will generate 5% p.a. growth in tourism to 2020 by value and volume by building on being one of Ireland’s leading tourism destinations with all stakeholders and businesses collaborating to maximise visibility, market appeal, the quality of welcome and experience of visitors and tourism’s economic value across the whole district.”
- 2.17 Emphasis has been placed on five strategic themes for development:
- Marketing and visibility in the market;
 - Tourism Products and Products Development;
 - Destination Management and Development;
 - Business Engagement and Development;
 - Organisation and Leadership.
- 2.18 The attached Action Plan is a working tool for the Tourism Development Strategy implementation. The Action Plan is organised into the five themes each with strategy actions, tasks and priorities.

3.0 Existing Local Area Plan Context

- 3.1 Both the Fermanagh and Omagh Area Plans are significantly out-of-date and not reflective of the recent emphasis on the promotion of tourism development in Northern Ireland. Whilst both plans clearly recognised the tourist potential of their respective areas, development was not to be at the expense of existing natural or man-made assets.
- 3.2 Given the importance of tourism to Fermanagh, the Fermanagh Area Plan 2007 contains 7 policies relating to tourism development. The stated objectives of these policies are:
- To promote the development of a sustainable tourism industry for the long-term economic benefit of Fermanagh and its people;
 - To ensure that new tourism developments respect the quality of Fermanagh’s landscapes, natural environment and man-made heritage;

- To ensure that resources exploited for tourism are properly managed and conserved for future generations;
 - To provide guidance on the nature, scale and location of acceptable development proposals along the Lough Erne Shoreline and its immediate hinterland.
- 3.3 Whilst most of the policies are non-site specific and reflective of those contained in PPS 16, an emphasis has been placed on protecting Lough Erne and its immediate hinterland. (See Appendix 1)

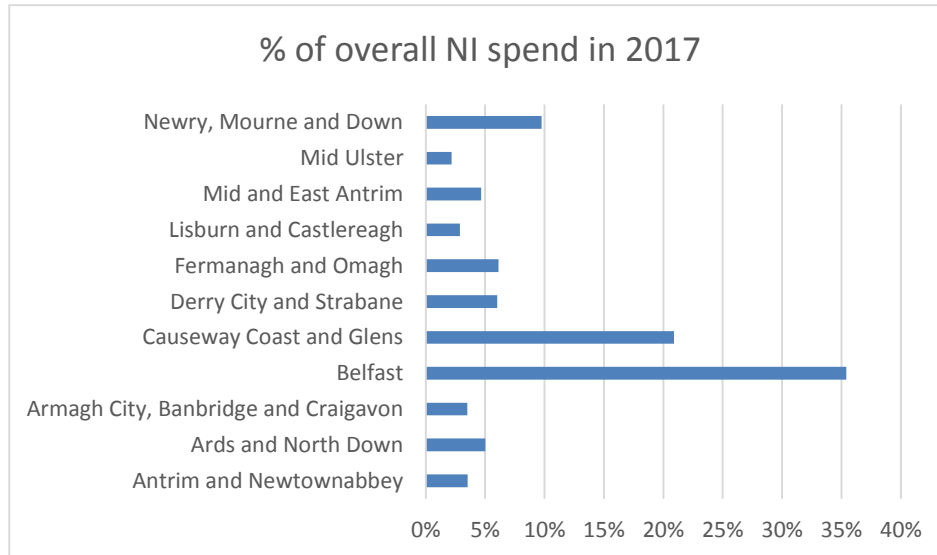
4.0 The Tourism Base in Fermanagh and Omagh

- 4.1 The Council area comprises the Fermanagh Lakelands, part of the Sperrin AONB and river valleys such as the Strule which attract tourists to and provide opportunities for a wide range of outdoor activities including hiking, climbing, fishing and cycling. Its natural heritage is recognised in the numerous designations as Special Protection Areas (SPAs), Special Areas of Conservation (SACs), RAMSAR sites and Areas of Scientific Interest (ASSIs). The area also has a rich archaeological heritage with standing stones, raths, cairns and monuments distributed across the countryside. There is a rich cultural, historical and built heritage as represented by visitor attractions such as the Ulster American Folk Park and Devenish Island. The area is also home to the world's first UNESCO Global Geopark at the Marble Arch Caves.
- 4.2 Tourism is an integral part of the local economy with the sector having generated £56.6m in the Fermanagh area 2017. In 2015, there was an estimated 3,524 tourism related jobs across both Fermanagh and Omagh accounting for approximately 0.5% of total employee jobs within the District Council area¹.
- 4.3 Tourism makes an important contribution to the FODC area's economy with an average tourism expenditure of approximately £58.2 million per annum over the past seven years. The overall number of trips, nights and expenditure in the district has fluctuated since 2011, with a decrease in nights and an increase in trips and expenditure in 2017. In terms of specific tourist attractions, the Belleek Pottery factory and the Ulster American Folk Park are the only destinations in the district in the top 45 most visited attractions in Northern Ireland in 2017.
- 4.4 The combined strength of tourism statistics relating to the Fermanagh and Omagh District Council area have the potential to mislead. It is

¹ Northern Ireland Census of Employment September 2013

therefore important to recognise that examination of these statistics, broken down further into the legacy council areas of Fermanagh and Omagh, demonstrates a more significant contribution by Fermanagh to trips and spend than Omagh (Table 1).

Table 1: Tourism Spend by District Council 2017



Source: <https://www.nisra.gov.uk/publications/local-government-district-tourism-statistics-publications>

4.5 Whilst it is the case that Fermanagh currently contributes more to the tourism sector within Fermanagh and Omagh, recent figures have shown an upward trend for Omagh. In the period 2011-2013 Omagh has shown increases, proportionate to Fermanagh, in the number of overnight trips, estimated number of nights spent and in spend, moving from a position in 2011 of generating 8% of the cumulative Fermanagh and Omagh spend to 32% in 2013 (Table 2). It should be noted that it is not possible to assess the impact of the G8 Summit in Fermanagh in 2013 on the trip, nights and spend figure. Trips decreased from 2014-2016 with an increase in 2017, with Nights having decreased year on year from 2015. Spend decreased from 2014-16 with an increase in 2017.

Table 2: Trips, Nights and Spends in Fermanagh and Omagh 2011- 2017

	2011	2012	2013	2014	2015	2016	2017
Trips	F&O – 366,799 F – 85% O -13%	F&O- 295, 061 F-85.5% O-14.5%	F&O 364,682 F - 80% O- 20%	FODC – 388'105	FODC – 341'051	FODC – 304,155	FODC – 342,847
Nights	F&O 965,257	F&O- 845,443	F&O - 1,215,312	FODC –	FODC –	FODC –	FODC –

	F – 86% O – 14%	F – 75% O – 25%	F – 79% O – 21%	1,067,842	1'136'816	954,074	947,698
Spend	F&O - £56.0m F - 92% O - 8%	F&O - £36m F - 85% O - 15%	F&O - £86.3m F - 68% O - 32%	FODC – £63.7m	FODC – £54.6m	FODC – £54.1M	FODC – £56.6

Source: NISRA, Northern Ireland Tourist Board

- 4.6 Fermanagh with its lakelands, limestone uplands and forests is an established tourist destination and has played a significant role in providing recreational opportunities for local people and visitors from across the world. The islands and Lough shores are rich in heritage interest particularly of the Early Christian period; most noteworthy are the monastic remains and round tower on Devenish Island, Inishmascsaint and the carved figures on White Island. Castles from the Plantation period; Crom, Castle Caldwell, Tully and Castle Archdale, are also a feature of the Lough shores. Belleek Pottery achieved the highest number of visitors across the Fermanagh and Omagh District Council area with 194,067 visitors in 2017.
- 4.7 Like Fermanagh, Omagh has a variety and quality of landscapes and rural scenic heritage which has the potential to generate greater interest and revenue from tourism. The principal tourist attractions centre on the foothills of the Sperrin Mountain range as they extend into the Omagh area including the Ulster American Folk Park, Gortin Glen Forest Park and An Creagan Centre. The Ulster American Folk Park is the top attraction for visitors to the Omagh area and the second most popular in the Fermanagh and Omagh District.
- 4.8 Fermanagh has a higher number of established tourism attractions than Omagh which is a possible reason for the higher number of visitors, overnight trips, nights and spend within Fermanagh (Appendix 2). This is reflected in the reason for overnight trips to both Fermanagh and Omagh with, 56% of trips taken in Fermanagh being for Holiday/Leisure and Pleasure (Table 3) in 2012-13. This figure is well in excess of the Northern Ireland figure of 43% which would suggest a quality in terms of the available attractions and accommodation that exceeds those available in other parts of Northern Ireland. In contrast, the main reason for staying in the former Omagh district was to visit friends and relatives which may reflect a lesser provision of well-established tourist attractions. However, the combined figures for Fermanagh and Omagh are in line with the Northern Ireland figures.
- 4.9 Whilst it is the case that both areas have successful tourist attractions, there are a number that do not appear to generate a large number of overnight stays. As one of the main visitor attractions in the Fermanagh Area, Belleek Pottery experiences large numbers of bus tours on a

daily basis with approximately 66% of those visitors from North America/Canada with the rest being from Ireland, United Kingdom and the rest of the world. As part of linked destination tours the coaches then leave the Pottery and travel north to Derry/Londonderry or south to Sligo/Galway. Similarly, the majority of visitors to the Ulster American Folk Park typically come to the area and leave again within the same day.

Table 3: Reason for Overnight Trips in Fermanagh and Omagh, 2012-2013

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

LGD	Holiday/Pleasure/Leisure	Visiting Friends and Relatives (VFR)	Business	Other	All
2013-2015					
Fermanagh and Omagh	161,844 (44%)	164,392 (45%)	26,270 (7%)	12,568 (6%)	365,074 (100%)
Northern Ireland	1,997,768 (44%)	1,855,005 (41%)	416, 829 (9%)	225,913 (5%)	4,497,514 (100%)
2014-16					
Fermanagh and Omagh	159,830 (46%)	152,051 (44%)	25,453 (7%)	7,943 (2%)	345,277 (7%)
Northern Ireland	2,176,769 (47%)	1,914,028 (41%)	417,347 (9%)	166,673 (4%)	4,674,818 (100%)
2015-17					
Fermanagh and Omagh	168,044 (51%)	125,819 (38%)	26,769 (8%)	9,516 (3%)	330,147 (100%)
Northern Ireland	2,336,567 (49%)	1,897,438 (40%)	419, 628 (9%)	142,858 (3%)	4,796,491 (100%)

Source: Northern Ireland Passenger Survey, NISRA

- 4.10 Tourists from within Northern Ireland provide the main share of the tourism market for Fermanagh and Omagh. Relative distance from the airports and accessibility to Fermanagh and Omagh may have an

impact on those travelling to the area from Great Britain, Europe and Northern America with the Council Area measuring low against the majority of the other Council Areas.

4.11 Whilst NISRA 2015 figures indicate that Fermanagh and Omagh have a well-developed accommodation base, with nearly 9% of available beds in commercial accommodation in Northern Ireland which accounts for 14% of self-catering beds in Northern Ireland, as well as having the third largest number of Guest House/Guest Accommodation/Bed and Breakfast beds across the 11 council areas. In 2017, Fermanagh and Omagh had the third highest hotel bed-space occupancy at 56% after Belfast and Mid and East Antrim.

Table 4: Visitor Place of Origin 2013 - 2017

	Northern Ireland	Great Britain	Other European	North America	Other	All
Fermanagh & Omagh 2011-2013	220,873	54,542	11,378	7,243	48,145	342,180
Northern Ireland 2011-2013	2,011,458	1,151,775	265,592	179,363	515,044	4,123,232
Fermanagh & Omagh 2012-2014	226,911	54,769	11,595	7,872	48,135	349,282
Northern Ireland 2012-2014	2,110,955	1,171,047	268,995	199,863	529,112	4,279,972
Fermanagh & Omagh 2013-2015	220,783	58,154	11,389	8,477	45,810	364,612
Northern Ireland 2013-2015	2,181,671	1,282,586	296,077	228,169	504,358	4,492,861
Fermanagh & Omagh 2014-2016	223,115	56,500	11,996	9,061	44,606	345,277
Northern Ireland 2014-2016	2,183,078	1,361,153	338,600	257,797	534,190	674,818
Fermanagh & Omagh 2015-2017	206,078	57,813	11,964	8,753	45,539	330,147
Northern Ireland 2015-2017	2,136,012	1,442,625	373,905	265,807	578,141	4,796,491

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

4.12 The lack of significant hotel and other accommodation in the Omagh area is a hindrance to attracting visitors, particularly those from overseas, to stay in the area. This was also highlighted in the Omagh

Town Centre Masterplan which suggested the provision of a boutique style hotel aimed at the outdoor activity market and positioned within the town centre to support hospitality and retail.

Table 5: Number of hotels, guesthouses, B&Bs, self-catering and hostels 2017

District	Hotel	Youth Hostel	Self-Catering units	Bed and Breakfast	Guest Houses	Guest Accommodation	Bunkhouse	All
N. Ireland	138	46	176	578	85	99	8	1130
Fermanagh & Omagh Total	12	4	176	51	9	12	1	265

Source: NISRA, Northern Ireland Tourist Board Accommodation Stock 2017

Table 6: Number of Bedspaces within Fermanagh and Omagh District 2017

District	Hotel	Youth Hostel	Self-Catering units	Bed and Breakfast	Guest Houses	Guest Accommodation	Bunkhouse	All
N. Ireland	18,135	2,460	14,678	4,266	1,673	1,357	125	42,694
Fermanagh & Omagh Total	1,013	217	2,009	367	170	425	2	4,203

Source: NISRA, Northern Ireland Tourist Board Accommodation Stock 2017

5.0 Future Tourism Potential

- 5.1 The legacy councils dealt with tourism under the auspices of Fermanagh Lakelands and Tyrone and Sperrins in accordance with the 'destination area' approach promoted by the Draft Tourism Strategy. An indication of future tourism potential in the two areas is provided by the following documents – Fermanagh Lakelands Tourism Area Plan 2013-2020; the draft Tyrone and the Sperrins Destination Management Plan 2013-2018; the Enniskillen Town Centre Masterplan; the Omagh Town Centre Masterplan and the Sperrins Region Outdoor Recreation Action Plan (2013).
- 5.2 The Fermanagh Lakelands Tourism Area Plan recognised that in working to ensure the quality and protection of the natural and built environments for tourism in Fermanagh, there is also a need to facilitate necessary tourism development which would enhance the existing product.
- 5.3 The Enniskillen Town Centre Masterplan also viewed Enniskillen as an under-utilised reserve from a tourism perspective and recommended a number of proposals in order to enhance its role in urban tourism including a dedicated marina, waterside access, suitable hotel

accommodation in the town centre and improving the evening and night-time economy.

- 5.4 Omagh forms part of the area covered by the Tyrone and Sperrins Destination Area 2013-10 which has the objective to achieve sustainable growth for the tourism sector with the key priorities identified being: covering leadership; marketing; enhancing the visitor experience; and improving access to and within the destination.
- 5.5 The Omagh Town Centre Masterplan supports the promotion of the 'Outdoor Omagh' brand which reflects the importance of the town's relationships with its landscape setting, the nearby Sperrins as well as the farming traditions, the rivers and the emerging renewable energy sector. It identified the lack of adequate visitor accommodation as an issue as well as the lack of a strong tourism brand as obstacles to tourism growth. It identifies key assets including the Ulster American Folk Park and Gortin Glen Forest Park as 'hooks' from which to build tourism opportunities which would increase visitor numbers and expenditure in the area.
- 5.6 In relation to our own Council area, the draft Destination Management Plan describes the integration of Fermanagh and Omagh into the new local authority as an opportunity for the promotion of a very strong rural leisure tourism product which has an integrity and robustness of its own - because of the family based leisure market, the rural setting, the contrast of Lakelands with Omagh landscape quality and through the extensions of the range of outdoor activities e.g. the provision of mountain bike trails at Gortin Glen Forest (Both Gortin Glen Forest and Lough Navar are amongst 8 National Trail Centres to be put in place by 2024)².
- 5.7 The Fermanagh and Omagh District Council Tourism Development Strategy and Action Plan was published in May 2016. It sets out the Fermanagh and Omagh District Council's commitment to economic development and tourism as policy priorities, acknowledging the importance of sustaining jobs and ensuring place competitiveness.

6.0 Conclusions

- 6.1 The contribution of the tourism sector to economic growth cannot be underestimated and can bring positive benefits to an area including social well-being and employment opportunities. It is evident that tourism in the Fermanagh and Omagh Council area has performed well in comparison to other councils. It is also evident that there are two distinct tourism 'brands' or identities in operation – one which is long-

² Outdoor Recreation (NI) – Mountain Bike Strategy for NI 2014-2024 (May 2014)

established and focused on the attraction of the Lakelands and one which is focused on the natural appeal of the Sperrins and where there is further tourist potential. Both areas capitalise on their natural assets and their attraction for outdoor activities.

6.2 It is also recognised that the Council's tourism assets are not just confined to areas of unspoilt countryside, lakes and mountains but includes our cultural, archaeological, historic and built heritage. Tourism is an integral part of rural regeneration and diversification but is also important to our towns and villages helping to sustain local attractions such as museums, galleries, festivals and art and craft workshops.

6.3 In line with the policy approach in the SPPS, the Plan's overall approach to Tourism Development should be to ensure that it is in the interest of the local economy and community, is not detrimental to the environment or existing Tourism Assets or Development and indeed helps to maintain and preferably improve them. In light of this, the following key actions for tourism development at strategy level are proposed in the Council area:

- establish Fermanagh and Omagh as a 'Must Visit' destination;
- sustain and increase the number of visitors to the area;
- capitalise upon and further develop our area's tourism assets, facilities and infrastructure in a sustainable manner without adversely impacting upon the landscape, historic environment and building environment;
- provide for any increase demand for sustainable tourism development, including tourist accommodation and tourist amenities, resulting from the promotion of key tourism assets;
- promote tourism development in line with the LDP Growth Strategy;
- use Tourism Hubs within the countryside to consolidate and build up existing tourism assets, amenities and attractions by enabling complementary forms of sustainable tourism development;
- support rural communities and the rural economy by facilitating appropriately sited and designed tourism development;
- promote growth in the tourism sector whilst ensuring the protection of tourism assets and tourism development;
- support tourism facilities, new build hotel, guest house, tourist hostel, holiday parks, touring caravan and camping sites and self-catering accommodation in the countryside outside of Special Countryside Areas and the Lough Shores, subject to criteria across a number of policies; and taking into account environmental considerations.

APPENDICES

Appendix 1

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

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

(i) Conservation Zones

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

(ii) Sensitive Zones

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

(iii) Opportunity Zones

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

Zone	Type
Zone 1 Crom	Conservation Zone
Zone 2 Derryad / Trasna	Opportunity Zone
Zone 3 Colebrooke Estuary	Conservation Zone
Zone 4 Knockninny	Sensitive Zone
Zone 5 Tamlaght / Bellanaleck	Sensitive Zone
Zone 6 Enniskillen	Opportunity Zone
Zone 7 Castlehume / Ely	Opportunity Zone
Zone 8 Tully	Sensitive Zone
Zone 9 Magho Cliffs	Conservation Zone
Zone 10 Belleek	Sensitive Zone
Zone 11 Castle Caldwell	Conservation Zone
Zone 12 Boa Island / Kesh	Sensitive Zone
Zone 13 Lisnarick / Killadeas	Opportunity Zone

Appendix 2

Visitor Attractions in Fermanagh and Omagh and their Visitor Numbers by LGD 2011-2015

Visitor Attraction	2011	2012	2013	2014	2015
An Creagan Visitor Centre	26,450	29,000	31,500	35,750	42,100
Belleek Pottery Visitor Centre	165,297	165,509	187,025	190,765	183,516
Castle Coole	35,282	36,002	43,597	40,943	38,608
Crom Estate Guided Wildlife Walks	20,000	-	-	23,018	19,000
Devenish Island Monastic Site	45,000	40,000	40,000	40,000	33,000
Dún Uladh Cultural Heritage Centre	-	-	26,188	27,121	22,301
Florence Court	40,314	40,692	38,353	42,394	41,010
Forthill Park and Cole's Monument	-	1,500	1,500	1,500	1,500
Gortin Glen Forest Park	6,713	6,240	4,232	4,566	2,554
Marble Arch Caves, Global Geopark	48,449	53,118	54,616	61,143	58,000
Mellon Centre for Migration Studies	-	19,295	18,257	18,996	18,846
Orchard Acre Farm	1,200	900	284	250	850
The Higher Bridges Gallery	7,100	11,000	8,200	9,800	7,050
Tully Castle	15,000	16,500	18,000	18,000	16,000
Ulster American Folk Park	138,418	145,051	134,924	130,434	122,947
White Island	21,000	17,000	18,000	19,500	19,500

Source: Tourism Statistics Branch, NISRA, 2016