

COUNTY CAVAN TOURISM DEVELOPMENT PLAN 2017-2022

prepared for

Cavan County Council by

CHL Consulting Company Ltd.



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FOREWORD

Cavan's Local Economic and Community Plan 2016-2021, which sets out the strategic framework for economic and community development in Cavan over the next five years, outlines a vision that "Cavan 2021 will be a place that we can be proud of; a place where people can have a good quality of life; a better place to live to work and enjoy".

This is particularly relevant when it comes to the tourism sector. We, as a local authority, are committed to continuing to make Cavan both a place that we are proud to welcome visitors to from all over the world, and a place that visitors can enjoy.

In that respect, we are lucky that Cavan, from east to west, is blessed with such an extraordinary landscape, wonderful lakes and rivers, fascinating heritage, world-class restaurants and accommodation, and a warm, welcoming people. Visitors clearly agree, as the county compares favourably with surrounding counties and the rest of the North-West, with County Cavan attracting 144,000 overseas visitors in 2015, generating an estimated spend of €50 million, according to the CSO.

Important strides have been taken in recent years, with the €1.2m development of Cavan Burren Park, the award winning World War One Trench and 1916 Experiences in Cavan County Museum and the phase one Castle Saunderson trail all proving excellent additions to the county's tourism infrastructure. The inclusion of Cavan in Fáilte Ireland's 'Ireland's Ancient East' proposition also bodes well for the county, providing greater opportunity for overseas visitors to discover this hidden gem and additional avenues for funding. Challenges undoubtedly exist, and improvements can and will be made to the Cavan tourism

offering. The Local Economic and Community Plan charts a number of key niche areas to be developed, including tourism. Foremost among them is the development of this Tourism Strategy, which will be our guide as we seek to develop our Tourism product. Immense credit is due to CHL Consultants for their diligence and thoroughness in compiling this strategy, and to the tourism stakeholders throughout Cavan who engaged in the process with great enthusiasm.

Tourism was worth almost €9 billion to the Irish economy in 2016, and with local authorities' increased remit for economic development as mandated in the Local Government Reform Act, Cavan County Council will strive to increase Cavan's share in this thriving indigenous industry. If all stakeholders, locally and nationally, pull together to tap into the significant potential that exists for increased tourism in the county, then the knock-on effect in terms of job creation and economic growth will be significant.

Cavan County Council looks forward to working with all parties over the course of this strategy and beyond to achieve this goal.



Mr Tommy Ryan
Chief Executive,
Cavan County Council



Councillor Paddy McDonald
Cathaoirleach,
Cavan County Council

1. INTRODUCTION

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In mid-2016, Cavan County Council undertook to develop a five year Tourism Development Plan [the Plan] that would put forward a fresh vision for tourism in Cavan and engender growth in Cavan's tourism sector in alignment with the priorities of Fáilte Ireland's umbrella promotional brand, 'Ireland's Ancient East'.

CHL Consulting Company Ltd. were appointed in the Autumn of 2016 to undertake the research, analysis and preparation of this Plan, and to work with the Council in achieving the following core objective:

“To develop an all-county Plan that will galvanise the tourism proposition and enable Cavan to grow and develop successfully as a unique destination within the island of Ireland.”

Working with Cavan County Council executive and staff, CHL identified key areas of opportunity and connectivity among the County's assets, natural and built. The preparation of the Plan included workshops with members of the tourism trade across the County and numerous site visits as well as a mystery shopping exercise (see Figure 1). Consultations were held with key operators and partner agencies to shape the project team's understanding of Cavan's unique characteristics and to identify areas in which it might increase its market share of visitors.

The team considered the visitor's journey and the process of choosing where to spend vacation time, reviewing what would make Cavan stand out most as an exceptional and memorable experience on a visit to Ireland. CHL worked through each market segment, domestic and

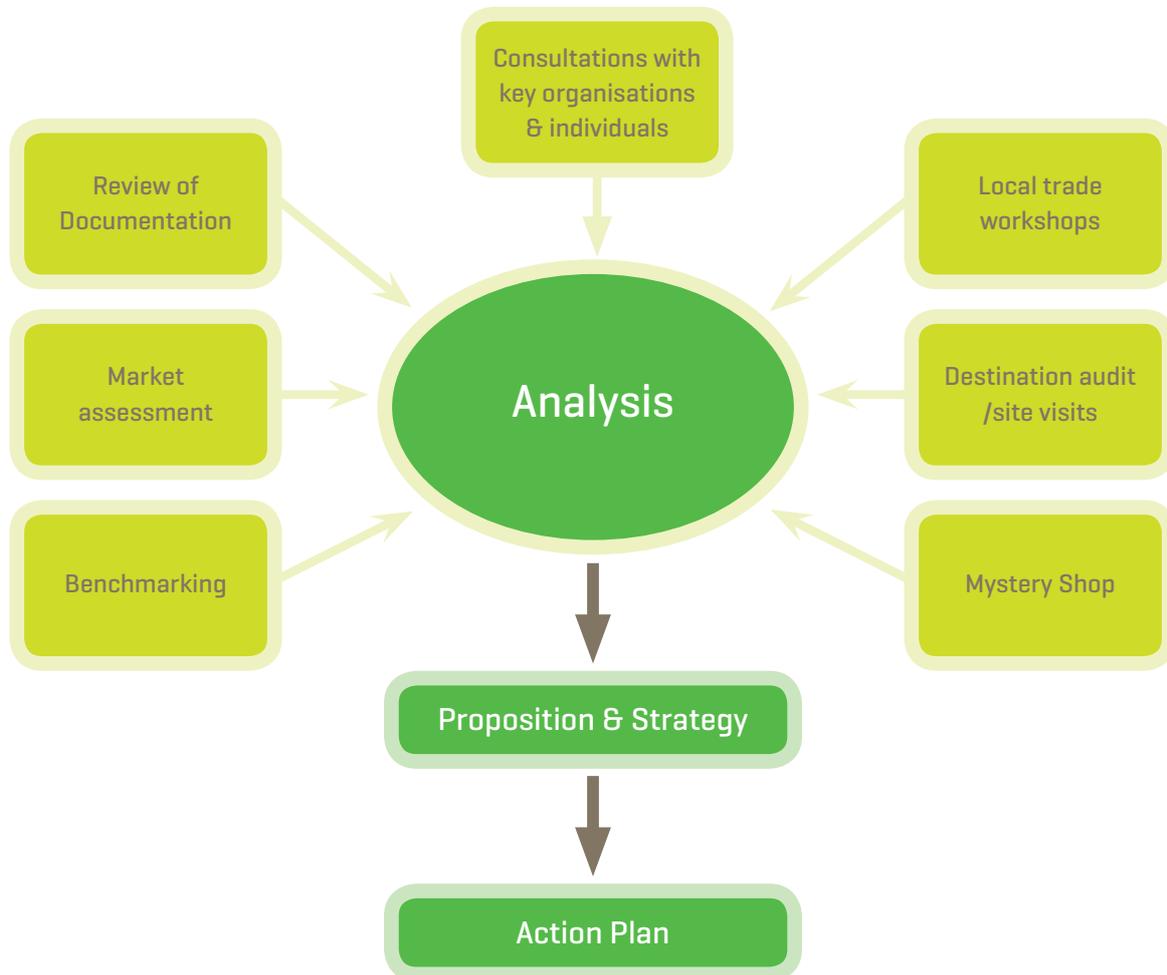
international, assessing Cavan's suitability for delivering a range of types of experiences. This assessment tested the concept of Cavan as a destination in its own right, as a partner with its neighbouring counties, and as a destination to be enjoyed as part of Ireland's Ancient East and a wider island experience of the North-West segments of the Wild Atlantic Way.

In consultation with Cavan County Council, the following aims were agreed:

- ▶ To increase tourist visits and economic return by 15% - 20% over the next five years.
- ▶ To reach a target return from overseas visitors of €60 million by 2022, attracting in excess of 165,000 overseas visitors.
- ▶ To grow domestic visits and increase dwell time to increase revenues to the region of €45 million.
- ▶ To invest in and improve on Cavan's leisure experiences to set a standard of excellence across the County.
- ▶ To build capacity and galvanise tourism providers, local business and industry partners in delivering Cavan's full potential as a leisure destination.
- ▶ To provide strategic direction for the development and marketing of Cavan tourism, setting a framework for prioritising actions and initiatives to be taken in support of these aims.

1 below illustrates the various elements of inquiry and assessment that informed the Plan:

Figure 1: Plan Preparation Process



The inputs received from the different strands of enquiry and research, provided the consultant team with a wealth of material to study and analyse. The findings of the analysis are presented in this report. The proposals for the future direction of tourism in County Cavan are based on a synthesis of the conclusions emerging from these findings. Additional research, analysis and relevant information is contained in the Appendices.

As the above outline of the research methods employed in preparing this plan indicates, the consultant team relied heavily on the co-operation and inputs of numerous organisations and individuals. We wish to record our sincere gratitude to all those who participated so willingly in the project. We also wish to acknowledge the considerable assistance provided by the chief executive, senior management and tourism officer of Cavan County Council.

CHL are pleased to present the Tourism Development Plan for County Cavan 2017 - 2020.



Taste of Cavan



Visitor Centre, Cavan Burren Park

2. OPERATING ENVIRONMENT

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This Chapter considers the wider policy context and operating environment within which the Plan has been framed, and the relevant aspects which have been taken into consideration by the team.

2.1 National Tourism Policy

The Government's tourism strategy, People Place and Policy – Growing Tourism to 2025, was launched in 2015 and it identified the following overall goals.

- ▶ By 2025, revenue from overseas visitors, excluding carrier receipts, will increase to €5 billion in real terms (i.e. excluding the effects of inflation).
- ▶ Employment in the tourism sector will be 250,000 by 2025, compared with around 200,000 at the time of preparing the policy
- ▶ There will be 10 million visits to Ireland annually by 2025.

It is fair to say that, given performance to date, these goals are likely to be achieved well in advance of their target date, and the Irish Tourist Industry Confederation is calling for their revision. Initial figures published by the Central Statistics Office indicate that there were more than 9 million overseas trips to Ireland in 2016, with associated revenue of €4.6 billion.

In expanding on these goals, the Government underlined a clear focus on the importance of overseas tourism, yet sought to establish a balance between overseas and domestic tourism by stating that:

“The Government's primary objective in tourism is to maximise the services export revenue of the sector and, therefore, this policy statement is centred on Ireland achieving its full potential as a destination

for overseas tourism. However, it is recognised that the domestic tourism market underpins the range of visitor accommodation and services that provide competitive advantage to Ireland in the international market and many of the measures contained in this Statement will similarly benefit the domestic tourism sector.”

It is notable that the document highlights the “visitor accommodation and services that provide competitive advantage to Ireland” and acknowledges that many of these service providers are in fact underpinned by a strong domestic market. Without this domestic market, it is likely that many operators would struggle to survive and therefore might not be available to provide services and activities to overseas visitors when they arrive in Ireland.

The new policy also emphasises the benefits that accrue when local authorities and local communities work together. It states [p 61] that “local authorities will be encouraged to support communities in tourism development”. The tourism and business community in Cavan has played a leading role in the development of the county to date, and is well positioned to serve as a driver of economic development into the future.

2.2 The Visitor Experience – and a Sense of Place

In recent years, considerable research has been carried out in Ireland and overseas to better understand what it is that visitors are looking for when they consider a holiday break in Ireland. It is clear from this research that, with some exceptions,

tourists generally do not consider visiting a destination because of a particular hotel or a particular coach/tour operator. The new tourism policy document summed this up as follows:

‘Tourists do not choose between competing accommodation operators, tour operators, or transport providers, in the first instance. Customers choose a destination. The quality of the tourism offering, including natural scenery, culture, and visitor attractions and events, are all contributors to the overall attractiveness of the destination. Therefore, the effective combination of Ireland’s people and place are key to our tourism success. [p14].’

The reference to “Ireland’s people and place” is particularly noteworthy, and is at the heart of contemporary tourism planning in Ireland. It is clear that visitors to Ireland are looking for unique Irish experiences. In this regard, the word “experience” is deliberately used. Increasingly, tourists – as consumers – consider accommodation as a commodity. While there are exceptions in the form of destination resorts, hotel accommodation is considered to be much the same everywhere and will not serve to differentiate one destination from another. It is seldom exceptional and therefore will seldom serve as a differentiator in the minds of consumers. If it does not serve as a differentiator, then the destination will not “stand out” in the mind of the consumer.

Experiences, on the other hand, are considered by tourists to be unique and authentic activities that they can only encounter and engage in at a particular location, and that are strongly connected to the people and the sense of place at that location. As one national tourism board put it, “a tourism product is what you buy, but a tourism experience is what you remember”.¹

2.3 Things to See and Do

It has been observed that, as an industry, tourism is comprised of two distinct components – that is “day time” tourism

[10.00 to 19.00 hours] and “evening tourism” [19.00 to 10.00 hours]. Ireland has traditionally had particular strengths in evening tourism, which is dominated by the hospitality sector, and by the accommodation, food and drink sub-sectors in particular. Given traditional organisational and trade association structures in Irish tourism, these sub-sectors have typically been well organised and have possessed the resources to protect and promote their particular business interests.

By contrast, those involved in day time tourism, typically the smaller businesses providing access to things to see and do, have tended to be less well organised in terms of formal trade associations, and so perhaps have lacked a degree of influence in the evolution of tourism policy. Yet doing things, seeing things, and (increasingly) getting involved and active in things [experiences], is exactly why visitors come to Ireland. These are the factors that convert a vague interest in Ireland into a firm booking. These are also the unique factors that allow Ireland to stand out and distinguish itself in the noisy international tourism market place.

As noted in Section 2.2, conventional accommodation cannot serve as a differentiating factor prompting consumers to choose one destination over another. This is why in People, Place, and Policy – Growing Tourism to 2025, reference is made to “visitor services that provide competitive advantage to Ireland”. As the elements of the evening time tourism economy become more homogenised and commoditised, the potentially stronger and differentiating elements of the day time tourism economy come to the fore and represent a more compelling source of sustainable competitive advantage. This is where Cavan should look to find its unique source of tourism competitive advantage.

2.4 PESTEL Analysis

A PESTEL Analysis is a useful tool for evaluating the external environment that will influence the implementation of a

development plan or project. It focuses attention on key Political, Economic, Socio-cultural, Technological, Environmental and Legal trends and factors. Table 2.1 summarises a PESTEL analysis for Cavan. It is not intended to be an exhaustive list of factors but rather a flagging of key considerations.

The factors highlighted in Table 2.1 show that the environment within which the tourism development plan for Cavan will be implemented is changing in many respects. A number of the factors, including Brexit, continuing technological development and evolution in consumer preferences, will need to be considered carefully and sufficient flexibility built in to project concepts to accommodate change. Other factors are more predictable – the regulatory environment, variable weather and established opportunities, such as the Grants Scheme for Large Tourism Projects.

Cavan's position as a border county is an asset in developing the Cavan character and voice more strongly in a crowded 'Ireland's Ancient East', a promotional umbrella for 17 counties. Cross-border tourism is important for Cavan but, in the short-term at least, there are risks of a drop in demand arising from Brexit and a weaker Sterling. Indeed, the number of British visitors to Ireland during the first quarter of 2017 was down by 6.5% on the same period of 2016, and Oxford Economics have projected a drop of almost 4% for the year as a whole. In the medium term, some consideration needs to be given to how visitors to the Island traverse between the Northern and Southern counties and how this can be best managed to promote visiting both Northern Ireland and the Republic of Ireland as an added advantage to this part of the country.

Table 2.1: County Cavan PESTEL

DIMENSION	FACTOR	RISKS/BENEFITS
Political	<ul style="list-style-type: none"> ▶ Local Government Act 2014 ▶ National Planning Framework: Ireland 2040 ▶ Good inter-county and cross-border relationships. 	<ul style="list-style-type: none"> - Expanded responsibilities for Local Authorities - Diverting growth away from Dublin - Opportunities for partnership promotions.
Economic	<ul style="list-style-type: none"> ▶ Continuing national economic growth ▶ Brexit ▶ Improvements in public expenditure: current & capital ▶ Fáilte Ireland's Grant Scheme for Large Tourism Projects 2016-2021. 	<ul style="list-style-type: none"> - Rising consumer demand; more domestic holidays - Potential drop in demand from UK; transport/trade concerns. - Funding opportunities - Support for tourism product development.
Socio-cultural	<ul style="list-style-type: none"> ▶ Demand for experiences rather than products ▶ Demand by employers for higher skills ▶ Key role of local community in destination development, for arts, culture and tourism. 	<ul style="list-style-type: none"> - Shift from infrastructure to unique experience development - Need to improve local skills base - Active local engagement underpins engagement by visitors.
Technological	<ul style="list-style-type: none"> ▶ Tourism now depends heavily on information and communications technology. ▶ Development in visitor attraction and marketing technologies. 	<ul style="list-style-type: none"> - Availability of high-speed broadband throughout the County is a priority. - Need to catch up and exploit these technologies to grow business.
Environmental	<ul style="list-style-type: none"> ▶ Continued growth in importance of natural and built environment ▶ Growing emphasis on sustainable transport ▶ Bad-weather is an issue. 	<ul style="list-style-type: none"> - Essential area for growth in both residents and visitors. - Greater priority to pedestrians and cyclists. - Can attractions be weather-proofed?
Legal	<ul style="list-style-type: none"> ▶ Regulatory environment has become more burdensome ▶ Litigious environment. 	<ul style="list-style-type: none"> - Facilitate tourism business start-ups - Risk of health & safety becoming the dominant concern with a negative impact on new experience development.

2.5 Conclusions

While all of the points raised in the PESTEL and throughout this section are important, several key factors are of particular relevance in the framing of a new tourism development plan for County Cavan:

- ▶ The broader environment in which the tourism development plan will be rolled out is a positive one, with good support from agencies at national and local level, and strong growth in overseas tourism.
- ▶ There is now a good understanding of visitor needs and, in particular, on the importance of developing tourism experiences rather than products. This will inform the direction of the new Plan.
- ▶ There are a number of funding sources available from which Cavan tourism can hope to seek support, including national and cross-border funding initiatives.
- ▶ Cavan's border position is a strength, in that it has led to the establishment of good cross-border and cross-county relationships that can be used in further developing tourism in the county.
- ▶ However, its border position has also resulted in a reliance on the Northern Irish and British markets - which leaves it particularly vulnerable to a potential drop in demand from these markets following Brexit; indeed, a drop is already being felt.

3. MARKET DEMAND

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No business or tourism destination works in isolation from the influences of the environment within which they operate, as outlined in the PESTEL analysis. These environmental factors also influence the way in which tourists will view a destination, how they interact with it and the likelihood of their spending time there.

While the broader context has already been considered in Section 2, this Section explores the specifics of tourism demand - looking, in particular, at the areas of 'best fit' between what consumers want and what Cavan has to offer as a tourism destination. The conclusions of this market demand analysis are presented in Section 3.4.

3.1 National Tourism Trends

Overseas tourism to Ireland has been experiencing strong growth in recent years, following a period of considerable contraction during the recent Recession - a period that saw a number of tourism businesses struggle and/or close, and from

which many rural areas are only starting to emerge. The most recent Fáilte Ireland estimates show overall growth of 13% in overseas tourism to Ireland in 2015 (see Table 3.1), with the Central Statistics Office reporting further growth of 9% to 8.4 million visitors in 2016 (excluding day trips).² While domestic tourism has not been growing at the same pace, it is as important as the overseas market, accounting for an estimated 9.2 million trips in 2016. (See Appendix 5 for a more detailed table of source markets).

Among overseas markets, Britain is the most significant individual market, accounting for 42% of overseas visitors. Given the uncertainty with regard to currency and economic climate as a result of Brexit, this is cause for concern for tourism at a national level and has been identified by national and representative tourism agencies as warranting additional attention to price competitiveness and the need for market diversification.

Table 3.1: Overseas Tourism to Ireland, 2012-2015

DIMENSION	2012	2013	2014	2015	% CHANGE '15/'14
Britain	2,722	2,870	3,007	3,346	+11.3%
North America	940	1,039	1,146	1,294	+12.9%
Mainland Europe	2,247	2,346	2,490	2,880	+15.7%
Other Areas	378	431	462	516	+11.7%
Total Overseas	6,286	6,686	7,105	8,036	+13.1%
Northern Ireland	1,299	1,572	1,708	1,492	-12.6%
Domestic Trips	8,291	8,413	8,991	9,125	+1.5%

Source: *Tourism Facts 2015, Fáilte Ireland, October 2016*

Of the overseas visitors who come to Ireland, roughly only half are visiting primarily for a holiday. Significant proportions are visiting friends and relatives [29%] or on business [16%].

Generally, most overseas visitors engage with 'passive' pursuits rather than active

ones, as can be seen in Table 3.2, and are most interested in visiting sites of cultural and historic interest. These include castles/houses, museums, interpretive centres and gardens. Of the active pursuits, walking/hiking is by far the most popular and has been increasing in popularity in recent years.

Table 3.2: Overseas Tourists' Participation in Activities*

ATTRACTION	OVERSEAS VISITORS, %	DOMESTIC HOLIDAYMAKERS, %
Visit Cultural/Historical Sites**	61	26
Hiking/Walking	21	23
Water-based Activities	n.a.	18
Cycling	4	7
Golfing	2	7
Fishing	2	4
Equestrian	<1	1

* 2014 data. **Visits to houses/castles only. Source: Fáilte Ireland

3.2 Tourist Profile and Market Segmentation

The tourism agencies, Fáilte Ireland and Tourism Ireland, take a segmentation approach to the marketing of Ireland. Research has identified the consumers in Ireland's main markets who are most likely to be interested in Ireland and the strategic approach adopted by the agencies is to use the limited marketing resources available to target those groups.

For the international markets of Britain, France, Germany and the USA, the 'best prospect' consumers are characterised as the Culturally Curious, the Great Escapers and the Social Energisers. In the domestic market, they are categorised as Connected Families, the Footloose Socialisers and Indulgent Romantics.

Each segment has its own preferences, not only in terms of travel but also in terms of

media usage and how they plan holidays. This information will help shape marketing activities for the relevant segments at a later stage. However, not all these segments are a good match for what Cavan as a destination has to offer. For example, the 'Social Energiser' overseas segment is primarily drawn to urban locations. A full description of each segment is included in Appendix 5 and the target segments for Cavan are identified in Section 3.4.

3.3 Cavan's Competitive Positioning

The key determinants of tourism performance are visitor volume and spend. Tourism is a commercial industry and it is therefore properly measured on the basis of the level of economic activity it generates. In simple terms, this is the product of visitor numbers and their expenditure.

This, in turn, determines the number of jobs the industry creates, and allows us to understand its impact in sustaining employment and communities around the country. In this regard, Fáilte Ireland notes that every €1 million of tourist expenditure helps to support 29 tourism jobs, and that every 1,000 additional tourists help support 14 tourism jobs¹. The Department of Jobs, Enterprise and Innovation sets out a series of practical goals to enable growth in the tourism sector in the 2017 Action Plan for Jobs including focusing supports that stimulate growth and maximise capacity for tourism businesses within the Ireland's Ancient East brand. Therefore, in the commentary below, tourism performance in Cavan is considered against the key criteria of visitor numbers and spend.

County Cavan compares favourably with surrounding counties and other parts of the North West. In 2015, Cavan attracted 144,000 overseas visitors and 234,000 domestic trips (shared with Leitrim), recording higher visitor numbers and revenue than nearby County Meath, home of several top visitor attractions (Tayto Park, Hill of Tara and Brú na Bóinne) - see Table 3.3.

The attraction of the coast is evident when looking at the statistics, as both Donegal and Sligo have the highest levels of demand among the counties listed in Table 3.3. At a national level, this is also clear, with coastal counties performing best. Cavan ranks 15th in terms of overseas tourism revenue at a national level, with only two inland counties performing better - Kildare and Tipperary (see Appendix 7 for a more detailed review of Cavan's comparative performance).

It is also interesting to note that the proportions of domestic and overseas tourism are not the same for each county. With more than half of all visitors to Cavan and Leitrim being domestic tourists, there is a need to pay particular attention to the preferences of the domestic market in developing the destination while also seeking to increase the proportion of overseas visitors.

The source of overseas business is also not identical for each county. Table 3.1 gave an overview of the distribution of overseas visitors to Ireland by source market. Figure 2 gives a summary of this same information specifically for Cavan,

Table 3.3: Tourism in Cavan & Nearby Counties, 2015 [see Appendix 7 for more detail]

COUNTY	OVERSEAS (000S)	OVERSEAS REVENUE (€M)	DOMESTIC (000S)	DOMESTIC REVENUE (€M)	OVERSEAS/DOMESTIC VISITOR % RATIO
Donegal**	289	83	314	75.7	48/52
Sligo**	186	51	263	61.2	41/59
Cavan**	144	50	234*	39.5*	38/62
Meath	134	44	208	23.6	39/61
Westmeath	116	36	209	28.2	36/64
Monaghan**	65	25	142*	24.3*	31/69
Leitrim**	57	15	-	-	
Longford	30	8	160*	28.2*	16/84

Source: Fáilte Ireland

* Cavan & Leitrim, Monaghan & Louth, and Longford & Roscommon are considered jointly in domestic tourism statistics as county level data are only published above a threshold of 150,000 trips.

** Counties in the North West tourism region.

and this highlights the high dependency on the British market - a cause for concern given Brexit and the associated weakening of Sterling, which is damaging Ireland's competitiveness in Britain. By comparison, 46% of Sligo's overseas tourists are from Mainland Europe, as are 44% of Donegal's - suggesting that there may be an opportunity for Cavan, particularly in the west of the County, to attract some of this market by offering experiences that synergise with the Wild Atlantic Way.

Cavan County Council's own research provides more detailed feedback on the origin of visitors to the County, based on a sample of tourism businesses. While the sample sizes are relatively small, the figures are still useful as they illustrate the importance of the Northern Irish and British markets - as shown in Figure 3.

Figure 2: Source of Overseas Tourists to Cavan

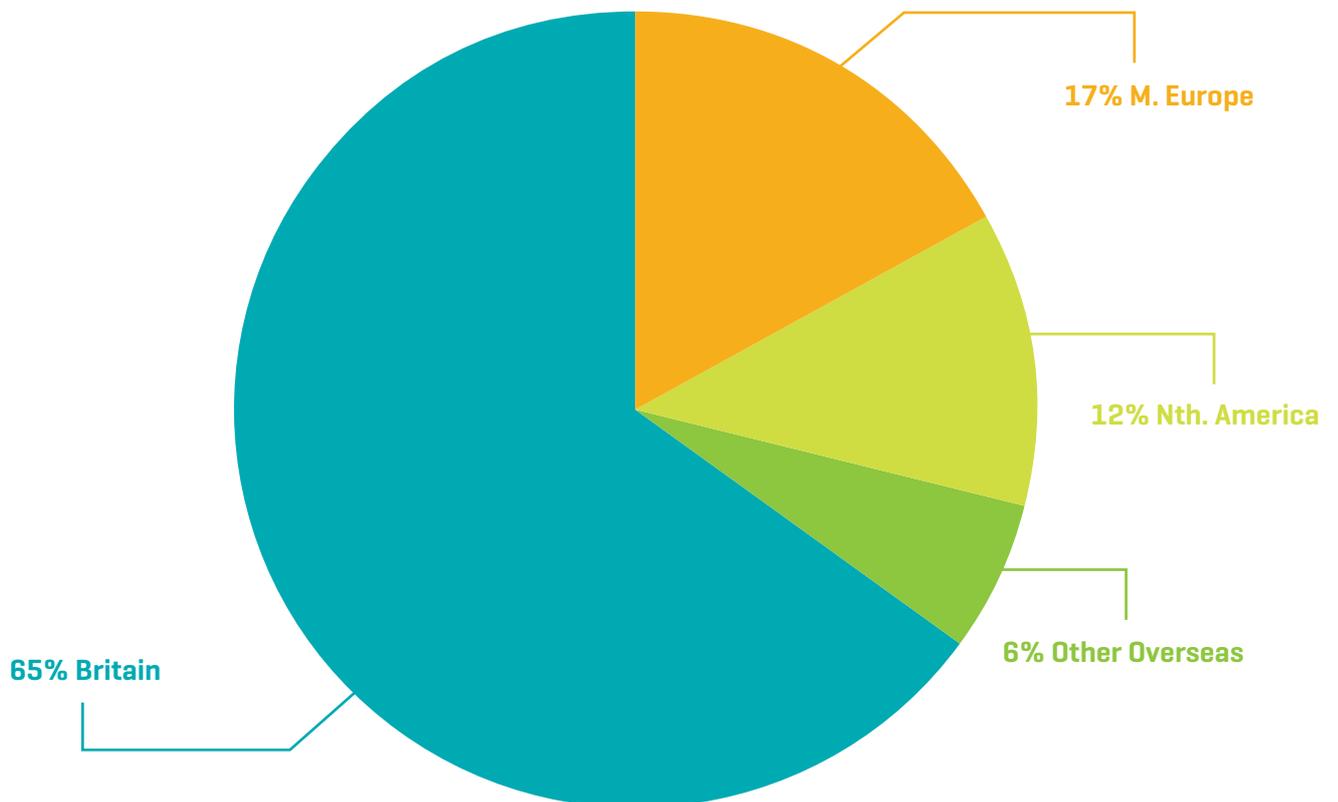
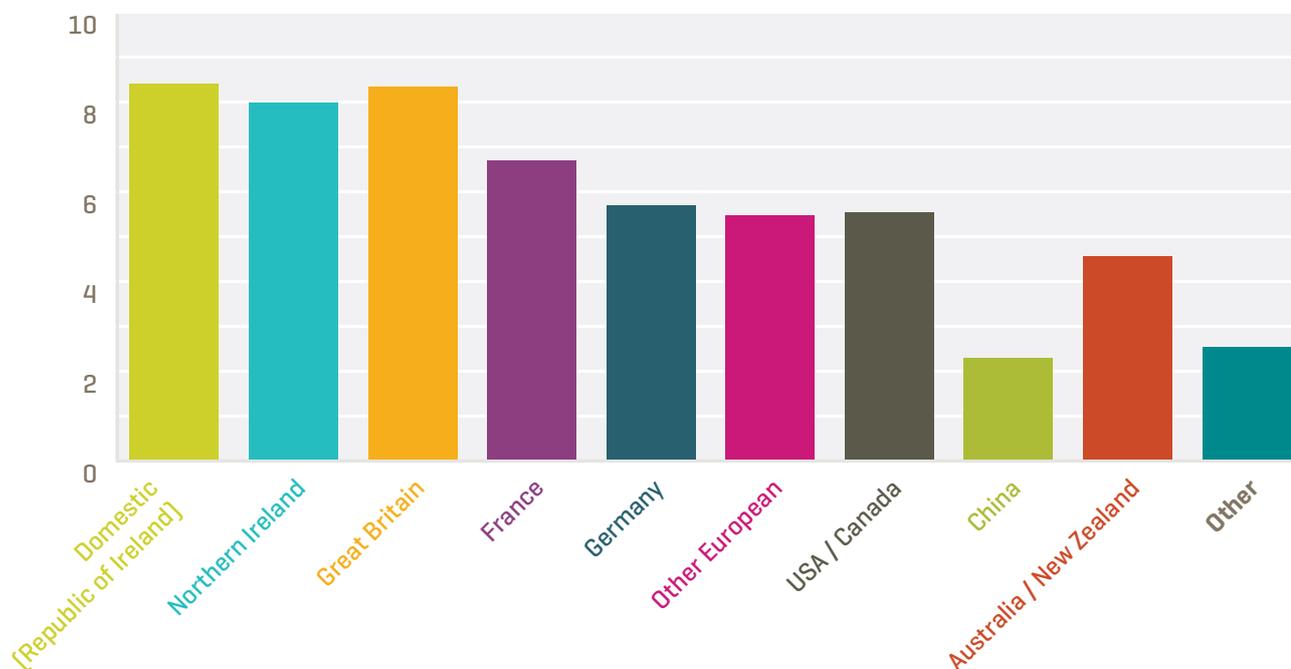


Figure 3: Ranking of Importance of Source Markets for Cavan

Respondents were asked to rank in order of importance the source country of visitors to their properties



Source: Cavan County Council Survey of Tourist Accommodation in Cavan, 2015

Other key characteristics of tourism in Cavan, highlighted in County Council research, include the following.

- ▶ The relative popularity of Visiting Friends and Relatives (VFR), weddings and angling as reasons for visiting [see Appendix 6]. The importance of VFR as a motivator for travel is borne out by Fáilte Ireland research, with a third of overseas tourists - and 38% of domestic visitors - to the North West travelling to visit family and friends.
- ▶ The popularity of short breaks (1-2 nights) as well as week-long holidays [Appendix 6].

And, more generally, the following are some additional characteristics identified for the

broader North-West region¹.

- ▶ One-fifth of overseas visitors arrive by sea from Britain.
- ▶ Among overseas tourists, the second half of the year is busier than the first, with July/August accounting for 37% of business, September for 12% and October-December for 20%. The domestic market has a more even spread with the first, second and fourth quarters accounting for approximately one-fifth of business each.

3.4 Conclusions

In conclusion, the following key points may be noted regarding market demand for Cavan and segments offering best prospects for growth.

- 1] Based on its strengths and market opportunities, Cavan is in a position to target five of the six 'best prospect' consumer segments identified by the tourism agencies: the Culturally Curious and Great Escapers (Overseas Markets); Connected Families, Footloose Socialisers and Indulgent Romantics (domestic market).
- 2] The majority of visitors are interested in passive rather than active pursuits, with over 60% of overseas visitors visiting cultural sites. Walking is the most popular active pursuit, with over one-fifth of all visitors including walking/hiking in their holiday.
- 3] Cavan is currently ranked 4th among the 11 inland counties in terms of overseas visitors, and 3rd in terms of revenue earned from overseas tourism. It also attracts more tourists than any of its neighbours.
- 4] Cavan relies particularly on the British and Northern Irish markets, leaving it vulnerable to the uncertain currency and economic climate following Brexit.

St. Kilian's Heritage Centre



Drumlane Abbey



4. SUPPLY SIDE REVIEW

4. SUPPLY SIDE REVIEW

When analysing market supply, there are many aspects to consider and this Section reviews the key factors, including physical location as well as the businesses that comprise the tourism industry in the County.

4.1 Location and Access

Location is a key factor in tourism and the accessibility of a destination, its attractiveness and the features of the surrounding area are key determinants in visitor motivation and, therefore, demand.

As we saw previously, tourism demand is highest in the coastal regions of Ireland, with the result that inland destinations, such as Cavan, generally have to try harder to attain reasonable levels of demand.

In addition, there is a number of other factors that impact on tourist access to Cavan:

- ▶ motorway access only stretches part of the distance from Dublin to Cavan.
- ▶ there is no train service.
- ▶ it's not on the way to tourism 'hot spots'.

- ▶ it has different 'affinities' due to geography (east/west distances).

However, it is within comfortable driving distance of a number of urban centres, as indicated in Table 4.1.

From a marketing perspective, it is interesting to note in Table 4.1 that parts of the County are within easy distance of a number of popular tourism spots, providing opportunities for bundling and cross-promotion. The west of the County is within an hour's drive of Sligo's Mullaghmore Head, a Signature Discovery Point on the WAW, while the eastern part of the County is close to major attractions in County Meath.

In addition to general access to the County, universal site access is also an important factor as being perceived as 'open for business' and welcoming customers with diverse needs. Cavan has a strong legacy for making public buildings and visitor experiences universally accessible.

Table 4.1: Distance from Key Gateways and Tourism Nodes to Locations in Cavan

POPULATION CENTRES / KEY ATTRACTIONS	VIRGINIA	CAVAN	BALLYCONNELL	BLACKLION
Dublin Population - 1.9 million	91km - 1 hr	119km - 1hr 25mins	144km - 1hr 40mins	172km - 2hrs 5mins
Belfast Population - 596,000	152km - 1hr 55mins	160km - 2hrs	147km - 1hr 45mins	153km - 1hr 50mins
Galway Population - 79,500	171km - 2hrs 20mins	167km - 2hrs 10mins	184km - 2hrs 30mins	163km - 2hrs 40mins
Mullaghmore Head Signature Discovery Point	141km - 2hrs	113km - 1hr 40mins	94km - 1hr 25mins	59km -55mins
Brú na Bóinne	57km - 50mins	87km - 1hr 15mins	111km - 1hr 35mins	140km - 1hr 55mins

4.2 Tourism Infrastructure and Product Base

4.2.1 Accommodation

Cavan has almost 1,600 hotel beds and a reasonable supply of self-catering accommodation. However, despite attracting more visitors, it has less capacity than either Meath or Westmeath, which may be an issue for the future as demand

grows, particularly in the group tourism market.

The lack of hostel-type accommodation is also notable, given the suitability of Cavan for outdoor activities and the fact that there is a number of outdoor activity businesses in the County.

Table 4.2: Accommodation Capacity in Cavan

TYPE	PREMISES	ROOMS	BEDS
5*	-	-	-
4*	5	574	1,206
3*	3	91	171
2*	6	98	218
Cavan Hotels Total	14	763	1,595
<i>Meath Hotels Total</i>	18	1,117	2,614
<i>Westmeath Hotels Total</i>	16	1,061	2,299
<i>Sligo Hotels Total</i>	14	1,041	2,680
Guesthouses	6	62	133
B&Bs	18	67	162
Rented	46		263
Caravan/Camping	1	20 [pitches]	80

Source: Fáilte Ireland

4.2.2 Outdoor Activities

The tourism offering in Cavan, as elsewhere in Ireland, is composed of both primary and secondary 'product'. From the perspective of natural heritage, Cavan is richly endowed, with natural landscape, rivers and lakes. All of these provide a setting that facilitates and encourages outdoor activities, of which there are many available in the County. The following is not an exhaustive list of all activities available but it does illustrate the abundance of what's on offer.

Land-based activities:

- ▶ Walking: independent and guided options; signed and mapped routes, both looped and long distance.
- ▶ Cycling: independent and guided options; signed and mapped routes, both looped and long distance.
- ▶ Outdoor adventure
- ▶ Equestrian
- ▶ Golf
- ▶ Forest parks, including Dún A Rí, Deerpark, Killykeen & Castle Lake, Bailieborough

Water-based activities:

- ▶ Angling
- ▶ Cruising
- ▶ Kayaking/canoeing/water-skiing
- ▶ Guided lake tours.

Remembering that walking/hiking is the most popular active pursuit among overseas visitors, and is also popular with the domestic market, along with water-based activities, it is favourable that both are available in the County. However, they are still only appeal to a minority of visitors as the main reason for a visit and are therefore best integrated as part of an overall holiday. They are an important part of a holiday for several of the main consumer segments identified, particularly for the

- ▶ Great Escapers (overseas visitors)
- ▶ Connected Families (domestic)
- ▶ Footloose Socialisers (domestic).

4.2.3 Heritage / Culture

While Cavan does not, as yet, have visitor attractions that rank in the top national listings, it nevertheless has a number that are well-regarded as well as some that could attract larger visitor numbers with further development. These include a variety of historic sites, some of which have been rated highly on Tripadvisor, notably:

- ▶ Cavan Burren Park
- ▶ Cavan County Museum
- ▶ St. Kilian's Heritage Centre.

Castle Saunderson also warrants a mention as having significant potential for the future. Following investment by Fáilte Ireland, the historic house and lands are a popular walking amenity. The scale and layout of the site highlight its potential for development as a destination for seasonal events, festivals and outdoor activities. Other promising sites include Moneygashel and Clough Oughter.

The history and heritage presented by these sites mean that the county has the ability to deliver themed offerings, particularly in two areas identified as pillars on which Ireland's Ancient East rests: Ancient Ireland and Early Christian Ireland. These assets allow Cavan to target an important consumer segment, the

Culturally Curious (overseas)

The majority of these heritage sites have little or no interpretation and animation, and some are difficult to both find and access (e.g. Clough Oughter). This is an area requiring attention. Apart from attractions in Cavan itself, the following top attractions are only a short drive away and could easily be integrated into a Cavan-based holiday.

- ▶ Tayto Park, 765,000 visitors
- ▶ Hill of Tara, 160,000 visitors
- ▶ Bru na Boinne, 150,125 visitors¹.

4.2.4 Other Tourism Assets

In addition to the core aspects of the tourism product - places to stay and things to do - Cavan has a variety of other tourism-relevant experiences. The following is a list of the most significant of these:

- ▶ Landscape / scenery - a basic requirement for the significant independent touring market.
- ▶ Genealogy - an important, though niche, market.
- ▶ Arts and Festivals - Cavan has a number of festivals that play an important role in attracting additional tourists and in animating the county.
- ▶ Food - Cavan has a particular strength and reputation in this area, with renowned chefs and cookery schools.
- ▶ Spas/luxury accommodation.
- ▶ Driving Routes
- ▶ Children's Activities.

These additional experiences can

be integrated in a variety of ways for the four consumer segments previously identified [i.e. Great Escapers, Connected Families, Footloose Socialisers and Culturally Curious] but the food and spa/ luxury accommodation also means Cavan is in a position to target a fifth segment, the

Romantic Indulgents [domestic]

Although not a physical product, local and regional stories - both legends and histories - are a valuable asset in tourism terms if they are woven into the fabric of an area through animation, guiding, interpretation and promotional material. In addition, the focus of Fáilte Ireland's Ancient East proposition on the importance of storytelling offers an opportunity to avail of regional supports to develop this aspect of the 'product'.

4.3 Geographical Characteristics

East and West Cavan have naturally distinguishing characteristics. Built heritage and cultural storytelling are strong characteristics of the East, magnified by easy access to and from the Boyne Valley and popular sites such as Brú na Bóinne and Trim Castle. The West of the County is characterised by a landscape which is more complex, offering a concentrated natural heritage experience, as is currently the case at Cavan Burren Park. The West also benefits from proximity to popular coastal areas of Sligo and South West Donegal. In a tourism context, the differences in character between East and West Cavan affect their respective market orientation and development priorities. This may be taken into account in development planning and implementation at Municipal District level. These Districts are illustrated in Figure 4 with Cavan-Belburbet representing the West of the County, and the other two [Ballyjamesduff and Bailieborough-Cootehill] representing the East.

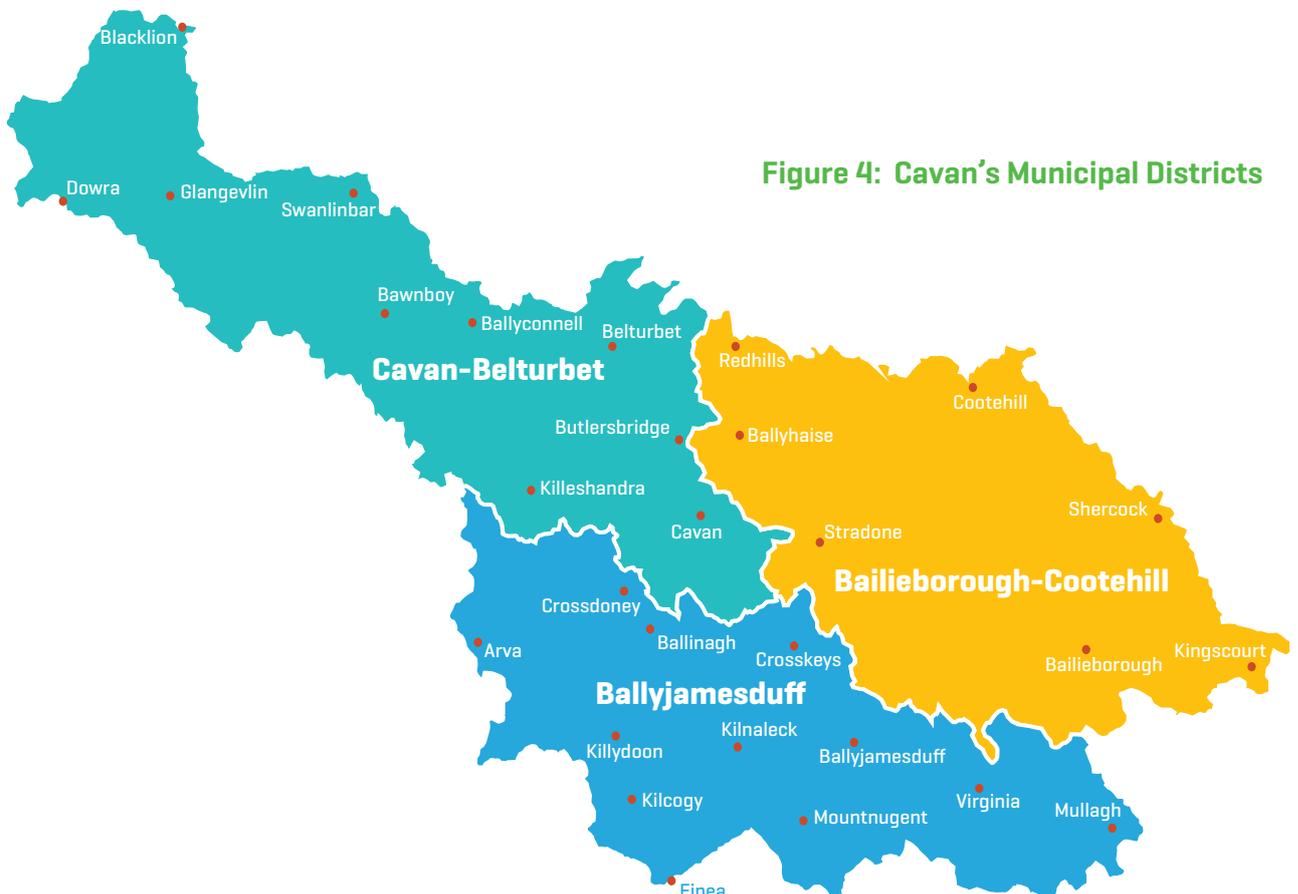


Figure 4: Cavan's Municipal Districts



WWI Trench Experience
Cavan County Museum

4.4 Sector Characteristics

4.4.1 Tourism Sector Characteristics

The tourism industry itself is the most crucial component in the development of a tourism destination. It is the individual businesses that are at the forefront of promoting and delivering the tourism experiences that visitors are seeking. While national tourism agencies can raise awareness of Ireland as a destination and provide promotional platforms, and while government and local authorities are responsible for important factors such as signage, public realm and infrastructure, it is the tourism operators who interact directly with visitors.

With regard to the tourism sector in Cavan, there are some characteristics that are relevant to note:

- ▶ it consists mainly of small businesses separated across a wide geography.
- ▶ there are some larger destination

resorts who have helped raise awareness of Cavan.

- ▶ there are also a number of public figures who have helped raise awareness of Cavan.
- ▶ there are a number of innovative, professional operators and products.
- ▶ there is a lack of integration/networking among operators.
- ▶ there is some continued expectation that angling will return to former levels of demand.

4.4.2 Cavan Tourism Trade Perspectives

The programme of consultations, which included two workshops with members of Cavan’s tourism trade, produced a great deal of useful input to the Plan as well as a deeper understanding of the context. The selected comments in Table 4.3 reflect some of the key points highlighted by the trade and how these have influenced the team’s thinking in preparing this Plan. A fuller summary of the feedback from the consultations is provided in Appendix 1, and details of the output of the workshops are provided in Appendix 3.

Table 4.3: Trade Comments

WHAT WE HEARD	WHAT WE UNDERSTOOD
What is on offer is not always apparent.	There is a visibility and awareness issue.
There are underdeveloped resources, natural and built.	Investment is needed to bring resources to a standard they can be accessed and enjoyed.
The trade are engaged at different levels, some active, some quite passive.	Supports need to be made available to engage the trade and to hold them accountable to their role in growing tourism in Cavan.
The Plan needs to take into account of the diversity of Cavan from east to west.	There are distinct characteristics across the county which, if treated correctly, can make more of the Cavan story for visitors.
Tourism needs to be recognised as relevant to every aspect of the County’s economic success.	Investment, financial and otherwise, has a return for all areas of the County.

4.5 SWOT and Conclusions

Arising from the review of the market environment and the supply side, a clear picture emerges of Cavan’s particular strengths and weaknesses, as well as the

opportunities it can avail of and threats it needs to consider. These are presented in Table 4.4 and are integrated into the Strategic Framework presented in Section 5.

Table 4.4: SWOT Analysis of Cavan Tourism

STRENGTHS	OPPORTUNITIES
<ul style="list-style-type: none"> ▶ Landscape and natural heritage ▶ Food and food-related producers/services ▶ Outdoor activities ▶ People and local culture ▶ Cross-border collaboration. ▶ Universal access 	<ul style="list-style-type: none"> ▶ Strong growth in tourism at a national level ▶ Built heritage ▶ Lakes ▶ Resort hotels ▶ Celebrity chefs and associated restaurants/schools ▶ A [small] number of innovative operators/products.
WEAKNESSES	THREATS
<ul style="list-style-type: none"> ▶ Not on a main tourism route that would ensure passing traffic ▶ Tourism and cultural offerings can be hard to access – Cavan’s offering is not explicit ▶ Lack of operator integration/networking ▶ Lack of budget accommodation to support outdoor activities ▶ No ‘top’ attraction that would put Cavan on the map. ▶ Limited hotel capacity for tour groups and to support long-term growth. 	<ul style="list-style-type: none"> ▶ Brexit: Cavan relies particularly on the British and Northern Irish markets, leaving it vulnerable to the uncertain currency and economic climate following Brexit. ▶ Intensifying competition from other destinations in Ireland, and overseas.

The following are further conclusions arising from the supply side review:

- 1] Cavan has a good supply of natural and built heritage which is currently under-developed.
- 2] There are naturally occurring East – West characteristics which can be advantageous in development planning and implementation as well as in packaging what Cavan has to offer to the different markets without creating artificial zones.
- 3] Although Cavan’s geographical location is not particularly favourable from a tourism perspective, it is well-positioned to co-operate across county (and country) boundaries to create integrated

experiences that would synergise not only with Ireland’s Ancient East but also with the Wild Atlantic Way. County boundaries have little meaning for tourists, and stronger hooks may be found in partnerships with neighbouring counties on both sides of the border.

- 4] The trade would benefit from organisation and direction on how best to work as an integrated or unified sector as well enhancing individual capacity.
- 5] Angling is still an important, though niche, source of tourism business, as is the VFR market (and weddings in particular).
- 6] Other experiences/products worth further development include: genealogy, arts/crafts, driving routes, children’s activities, festivals, corporate/business programmes (conference and incentive markets).

5. STRATEGIC FRAMEWORK

5. STRATEGIC FRAMEWORK

5.1 The Cavan Proposition

The basis for proposition development is to understand what makes a product or experience different in a consumer's mind – or what has the potential to make it different. In other words, we need to identify;

What makes Cavan different?

As Ireland is a small tourism destination, in an international context, much of what it has to offer is similar regardless of where in the country a visitor goes. This is the basis for positioning Ireland globally on the basis of people, pace and place. However, there are key features of Cavan worth focusing on in particular, including:

- ▶ its unspoilt and undiscovered nature, within easy reach of Dublin, Belfast and the North West, providing an opportunity to easily 'get away from it all';
- ▶ its varied landscapes, with lakes and forests, fertile lowlands, mountains and the outstanding geopark landscape, all of which can be experienced in one holiday;
- ▶ the clustering of built and natural heritage;
- ▶ its genuinely welcoming and friendly people;
- ▶ its significant food product, with a unique spectrum of suppliers and destination dining offerings;
- ▶ its quality accommodation;
- ▶ its convenience with regard to other island experiences in the North West including Fermanagh Lakelands and midland family destinations in Longford, Roscommon and Meath.

Consumers are motivated by a variety of factors in choosing a travel destination.

Some of these factors are emotional ones – the need to spend time with loved ones or the desire to take time out of a busy schedule. Other factors are more practical, such as the availability of suitable accommodation and a variety of things to do, or the driving distance. In developing the Cavan tourism proposition, therefore, a key question is;

Why would visitors come to Cavan?

The answer lies in the following proposition:

- **Practical:** easy drive; convenient trip on the way to somewhere else; offers what they want (good food, good accommodation, things to do).
- **Emotional:** slow, real, authentic, provides the opportunity to de-stress, connect with loved ones, remember what is important in life.
- **Curiosity:** undiscovered experiences, sites and landscapes made easy by packaging (DIY/pre-packaged), signage (downloadable trails, signed routes, etc.) and promotion.
- **Specific interests:** outdoor activities (esp. walking, angling, watersports), food.

5.2 The Strategic Framework

Drawing on the elements of Cavan's proposition outlined above, the strategic approach to tourism development in the County can be stated as follows:

- ▶ Position Cavan as a nurturing, nourishing destination.
- ▶ Play to its strengths of natural

heritage, outdoor activities and food by developing these to a level of excellence.

- ▶ Enhance the marketing potential of Cavan’s people by empowering the County’s tourism trade.
- ▶ Use east/west differences as strengths, linking across county borders to maximise opportunities.

This strategic approach can be expressed through a delivery framework structured on three pillars. These pillars support the planning, implementation and monitoring of the proposed tourism development initiatives, and connect them to each other.

1] **Destination Development:** This pillar includes product development projects that position Cavan as a tourism destination that can be enjoyed by the County’s target markets.

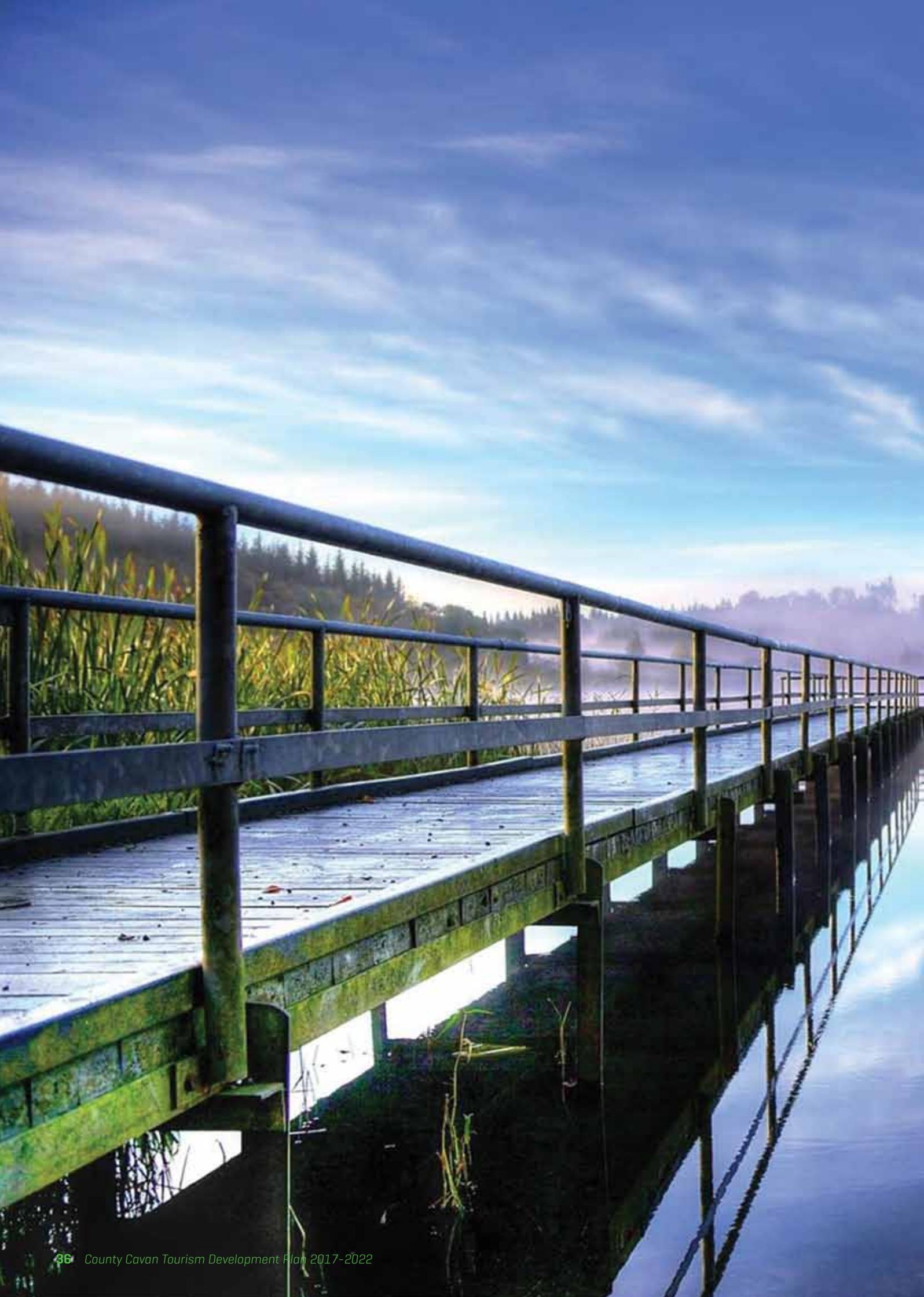
2] **Trade Empowerment:** This pillar includes steps to build capacity within the tourism trade in Cavan in order to empower the trade to take ownership of their critical role in the development and sustaining of tourism in Cavan.

3] **Positioning & Marketing:** This pillar involves defining Cavan to, and communicating with, target consumers in key markets through initiatives and activities that support national tourism campaigns, while also using an expanded THIS IS CAVAN! brand identity.

Figure 5 provides an overview of this Strategic Framework. This is followed by an outline of each Pillar, along with a summary of the Strategic Priorities for each one.

Figure 5: Overview of Strategic Development Framework for Cavan Tourism









Calf House Dolmen, Cavan Burren Park



5.3 Strategic Pillar 1: Destination Development

This pillar seeks primarily to develop the overall destination of Cavan with the active participation of stakeholders, by focusing limited resources primarily on key areas, and by encouraging community involvement. The priorities for destination development are listed in Table 5.1 and elaborated in the detailed Action Plan in Section 7.

Destination development plans and actions should be integrated with the existing objectives and policies of the following agencies and programmes:

- ▶ **Cavan County Council:** the Council has made considerable efforts to plan and invest in areas which the County can perform well. These include natural heritage, with the preparation of the Cavan Burren Park Expansion and Development Plan, the Cavan County Museum Development Plan, the Cavan Diaspora Engagement Strategy 2017 - 2021 and the Cavan Food Strategy 2017 - 2021.
- ▶ **PEACE IV:** which recognises Cavan’s competitive advantage including its geographical proximity to the Northern Ireland. There are aspects of the Cavan story which could not be told anywhere else in Ireland’s Ancient East; these provide unique ‘hooks’ for the Cavan brand.
- ▶ **Cavan Local Economic and Community Plan 2016 – 2021:** in which objectives 6.1 and 6.2 recognise actions and priorities in the development of food, tourism products and tourism marketing.
- ▶ **LEADER 2014 - 2020:** supports rural tourism initiatives, including accommodation, and sets out criteria for co-operative projects for which Cavan is ideally placed.
- ▶ **Inland Fisheries Ireland:** funding has already been agreed for a number of projects in Cavan and others are under review; in addition, this Plan notes the need to work more closely with IFI on angling promotion and support for angling media visits.
- ▶ **Waterways Ireland:** developments specifically in connection with the Shannon-Erne Blueway and the Ulster Canal Greenway.
- ▶ **Fáilte Ireland’s Grant Scheme for Large Tourism Projects:** which offers support for projects intended to enhance the visitor experience, which are economically productive and which are in line with the new tourism brands - Ireland’s Ancient East in the case of Cavan. Additionally, Cavan County Council will continue to work with Fáilte Ireland as other geographically lead brands emerge to maximise best possible positioning for the County.

Table 5.1: Summary of Strategic Priorities for Destination Development

PRIORITIES	RATIONALE
1] Audit and review the Cavan County Museum experience, and develop a plan to enhance the exhibition experience to achieve destination status.	The County Museum is already well-reviewed by visitors and has a wealth of material to keep visitors entertained, but the presentation requires reimagining if it is to continue to attract and satisfy more consumers
2] Explore expansion and development opportunities for Cavan Burren Park as a key site.experiences.	Cavan Burren Park has much greater potential to become a signature visitor destination for Cavan and extend dwell time in the area.

PRIORITIES	RATIONALE
3] Develop a concept for Killykeen as a destination forest park along the lines of Lough Key Forest Park.	Cavan is missing a signature destination, especially for families: Killykeen has real potential for development as a family leisure destination.
4] Better define the Geopark designation so there is a clearer understanding of the necklace of offerings within it. Bring definition to entry/exit points, mark out the experiences.	The Geopark is one of Cavan's highlights and has considerable potential to attract and stimulate a greater number of visitors if it is made more visible and better understood.
5] Review Castle Saunderson, in the context of this Plan, for its potential as a visitor destination that offers a range of experiences beyond walking.	Castle Saunderson has the potential to deliver destination-level tourism experiences including outdoor, cultural and dining activities as well as festivals and events.
6] Maximise Cavan's unique border location.	Cavan can increase its visibility and variety of tourism experiences through product and market initiatives with suitable operators across the border.
7] Develop lake / forest experiences - that can be marketed as reviving style experiences that nourish and restore.	There is much in the natural resources of Cavan that could be developed as year round experiences.
8] Develop templates for a town and village renewal scheme.	Making links with existing community groups, connecting with LEADER and LEO to create a framework for renewal in public realm, street frontages and seasonal activities.
9] Create a framework for new and existing events/cultural activities in Cavan.	Recent investments from Department of Arts, Heritage and Gaeltacht create a more fertile environment to develop a more visible platform.
10] Complete an audit of signage for accuracy and consistency.	Using the framework provided by the Municipal Districts to compile baseline information for a signage strategy.
11] Improve access to key lakes and forests, working with key partners (IFI, LEADER) to deliver approved projects and continuing to seek support for projects already identified but not supported as yet.	A range of requirements have been identified to improve the angling and outdoor activity experiences. Some of these have received approval for funding but others still require support.
12] Commit to strategic actions for Cavan as a food destination, including packaging with outdoor activities and natural heritage; development of high-quality local 'pop up' food outlets; liaising with outputs from the Cavan Food Strategy; and making a business case for the development of Taste of Cavan into a broader festival-style event.	Cavan has already established itself on the food radar with a number of recognised 'celebrity' chefs and destination restaurants. This is a reputation it can build on by integrating and developing more of its dining and food-related operators and experiences.

5.4 Strategic Pillar 2: Trade Development

This strategic pillar seeks to empower and enable the industry to be effective, knowledgeable business managers.

From the workshops and the consultation process, as well as from the market review, it is clear that the tourism trade in Cavan constitutes a diverse group, comprising a mix of experienced, older trade and newer market entrants as well as a number of innovative businesses. Therefore, there is not necessarily a single approach to supporting trade in the County that will work for all.

However, it is imperative that the tourism trade is empowered and enabled to attract and satisfy customers. In practical terms,

this means that the Tourism Officer and County Council have the role of ensuring, through mentoring, facilitation and leadership, that tourism operators have the necessary knowledge, skills and connections to operate in a competitive environment. In other words, the role of the Council and other supporting agencies is to help the trade to help itself. In shouldering these responsibilities, the Council can draw on the substantial resources available - both in terms of existing guidance and toolkits and in terms of agencies offering relevant business training [see also Appendix 9]. An overview of the strategic priorities for trade development is included in Table 5.2 and further elaborated in the detailed Action Plan in Section 7.

Table 5.2: Summary of Strategic Priorities for Trade Development

PRIORITIES	RATIONALE
1) Create a Cavan Business Tourism Network to provide familiarisation trips, knowledge-sharing forums and co-operative marketing activities.	Creating connections between tourism operators allows for a sharing of 'know how' and facilitates co-operative development and marketing.
2) Training/mentoring with regard to consumer needs and how these can be met in Cavan.	The trade are the direct interface with visitors and it is essential they are provided with whatever support is available to make sure these interactions yield results for their businesses.
3) Enabling fund for operators - market test new offerings and provide seed funding for suitable projects.	More innovative industry requires more opportunities to develop, showcase and promote their products.
4) Create a 'Cavan Champions' programme.	Local knowledge has been a key part of tourism in Cavan and this can be encouraged and given a more visible role by creating a programme that supports it [similar to the Dublin Champions Programme].
5) Create a community-engagement programme.	Review opportunities to link in with existing community initiatives to create sustained engagement and ownership
6) Consider the creation of a Cavan Tourism Company.	Improve sector organisation and knowledge, and provide for more effective marketing of County Cavan as a tourist destination.

5.5 Strategic Pillar 3: Positioning & Marketing

This strategic pillar seeks to position Cavan as an appealing and accessible holiday destination for the five target segments whose needs it can best meet

- the Culturally Curious, Great Escapers, Connected Families, Footloose Socialisers and Indulgent Romantics (see Table 5.3).

Table 5.3: Cavan’s Target Segments and Motivations for Visiting

MARKET SEGMENT	WHAT WOULD ATTRACT THEM TO CAVAN
<p>1] The ‘Culturally Curious’ [overseas]: These are travellers in the over-45 age group taking a holiday with their partner. They are out to broaden their minds and expand their experience by exploring new landscapes, history and culture.</p>	<p>Cavan provides an authentic, friendly and natural experience with opportunities for walking, cultural discovery and good food, along with quality accommodation.</p>
<p>2] The ‘Great Escapers’ [overseas]: These visitors are on holiday to take time out and to experience nature at close range. They tend to be younger and are specifically interested in rural holidays.</p>	<p>Cavan offers a wealth of opportunities for shared outdoor adventure for all ages, along with suitable self-catering accommodation and a nurturing environment.</p>
<p>3] Connected Families [urban Northern Ireland and domestic, primarily Dublin, Belfast and Derry]: These families are looking for opportunities to spend time together through shared experiences. This segment accounts for 23% of the domestic market.</p>	<p>As with the overseas ‘Escapers’, Cavan can offer this segment a wealth of opportunities for shared outdoor adventure for all ages, along with suitable self-catering accommodation and a nurturing environment. For the Dublin market in particular, the fact that it is within easy driving distance is a positive factor.</p>
<p>4] ‘Footloose Socialisers’ [domestic]: These are travellers in their late forties, well educated, who enjoy getting away and spending time with like-minded people (e.g. rugby matches, hill walking, golf). They account for 15% of the domestic market.</p>	<p>The availability of destination resorts combined with golf, walking and good food, within easy driving distance, will appeal to Footloose Socialisers in Dublin particularly.</p>
<p>5] Indulgent Romantics [domestic]: Couples who want to spend time reconnecting and are particularly interested in the more luxurious end of the market. This segment accounts for 14% of the domestic market.</p>	<p>The availability of destination resorts combined with spa experiences and good food, all in a nurturing environment within easy driving distance, will appeal to Indulgent Romantics in Dublin particularly.</p>

In summary, the marketing strategy for the County should:

- ▶ position Cavan as a nurturing, nourishing destination;
- ▶ play to its strengths of nature, heritage, outdoor activities, and food by developing these to a level of excellence;
- ▶ integrate with the national promotional brand of Ireland’s Ancient East;
- ▶ flex the existing brand of This is Cavan! to ensure it can adequately capture the rich diversity of the County;
- ▶ provide suitable promotional platforms for the trade;
- ▶ enhance the marketing potential of Cavan’s people by empowering the local tourism trade to offer a variety of segment-targeted experiences;
- ▶ use east/west differences as strengths, linking across county borders to maximise opportunities.

In addition, Cavan will be promoted to specific outdoor niche activity markets, including angling, cruising, walking and outdoor adventure, with promotional activity synchronising with that of Inland Fisheries Ireland and Waterways Ireland.

To fully ‘unlock’ Cavan, consumers must initially be aware of what it has to offer

and then to be in a position to buy and experience it. This relies on a number of factors, including:

- ▶ the ability of individual operators to market themselves in a manner that will attract a response from consumers;
- ▶ the availability of well-priced offers tailored to the interests of the target market segments;
- ▶ the availability of experiences that appeal to the core needs of consumers;
- ▶ easy purchase/booking facilities.

The role of the national tourism agencies is limited with regard to how far they are able to market individual counties for a variety of reasons. Firstly, they are not product ‘owners’ and therefore are not in a position to actively negotiate and sell. Secondly, they are limited in terms of both financial and staff resources. They do, however, have a key role in supporting, facilitating and leading the marketing of Ireland as a tourism destination.

An overview of the strategic priorities for positioning and marketing Cavan tourism is included in Table 5.4 and further elaborated in the detailed Action Plan in Section 7.

Table 5.4: Summary of Strategic Priorities for Positioning & Marketing

PRIORITIES	RATIONALE
<p>1] Focus on the key markets of Northern Ireland, Britain, France, Germany, the USA and the domestic market.</p>	<p>These markets currently provide the greatest opportunity for Ireland as a whole and are likely to continue to do so for Cavan in the medium term.</p>
<p>2] Focus on five key segments:</p> <ul style="list-style-type: none"> - overseas markets: the Culturally Curious, Great Escapers, - domestic market: Connected Families, Footloose Socialisers and Romantic Indulgents. 	<p>Cavan can best meet the needs of these segments, flexing its natural and cultural assets for the first four in particular, and destination resorts and food for the fifth.</p>

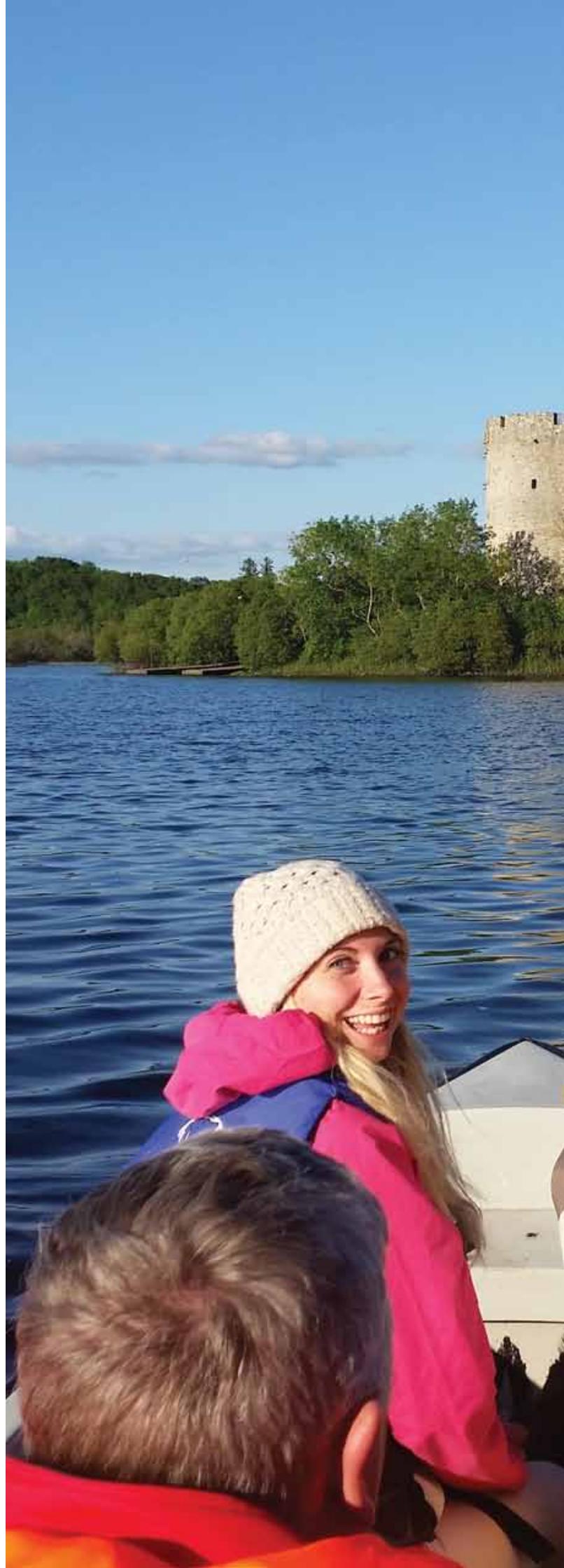
PRIORITIES	RATIONALE
3] Develop clearer messages for Cavan and review how best to put forward each aspect of the Cavan proposition within 'This Is Cavan!' without diluting its strength as being bold, energised and surprising, e.g. <i>Cavan - Ireland's nurturing soul; Cavan - Ireland's home of real food.</i>	'This is Cavan' provides a simple but effective umbrella brand under which a number of more targeted messages can be conveyed while not losing the sense of place.
4] For the overseas market in particular, frame all Cavan 'offerings' within the wider Ireland's Ancient East by developing a number of core experiences that bring to life Ancient Ireland and Early Christian Ireland.	Cavan is located within the geography being promoted as Ireland's Ancient East by tourism agencies, and it has the capacity to deliver on two key strands of this proposition.
5] Maximise linkages to the Wild Atlantic Way and any future Fáilte Ireland brand propositions relating to County Cavan.	Businesses in the west of the County already receive visitors who are holidaying on the WAW and there is an opportunity to deliberately develop this market by creating synergistic experiences.
6] Develop holiday experiences and offers that meet consumer needs.	Visitors respond to destinations that offer a range of integrated products and experiences that are focussed on their needs.
7] Ensure website remains a core marketing tool, continually updating and refreshing content and appearance.	All target segments are internet users and it provides the most cost-effective and flexible tool for communications and promotions.
8] Flag/identify core products according to type of experience so that consumers can easily find accommodation with waterfront/water access, on a walking trail, etc.	Create more integrated experiences for visitors by enabling them to bundle the right type of accommodation with their preferred activities, whether formally or informally.
9] Primary marketing channels: internet and social media; publicity, special events and competitions; networking and direct sales.	Most target segments are social media and internet users, and most are heavily influenced by word of mouth; therefore, it makes most sense to focus on these cost-effective channels.
10] Secondary marketing channels: limited advertising (specific offers); trade and consumer fairs; other consumer promotions.	Advertising can play a key part in tactical marketing and fairs/promotions provide an opportunity to raise awareness of tourism experiences in Cavan as well as allowing trade to sell directly to potential consumers.
11] Continue and strengthen the Cavan tourism operators survey.	The availability of relevant and timely qualitative and quantitative information on visitor behaviours and attitudes is essential to effective resource allocation and satisfied customers.

5.6 Measurement

It is essential that those involved with tourism in Cavan have the necessary information and evidence they need to guide future plans and investment decisions. While national agencies, such as the CSO and Fáilte Ireland, gather data on tourism volume and behaviours, this information is not always available at county level nor is it sufficiently up to date to inform quick adjustments to plans in order to respond to continuous market changes. Cavan County Council already has a valuable and effective measurement tool in place with its annual trade survey and it is vital that this is continued and strengthened, ensuring that as great a proportion of the tourism industry is included as possible and that concerted efforts are made to ensure a very high response rate.

The ability to gather information that relates to the volume and characteristics of the Northern Irish market is particularly valuable as it is a very important market for Cavan and one for which county level data are not available through any other mechanism.

Within this Plan, each action listed in the Action Plan has an associated Key Performance Indicator against which its progress can be measured. The continuation of the existing tourism survey is also included as an action in its own right under the Destination Development Pillar.







6. STRATEGIC IMPLEMENTATION

- PARTNERSHIPS, RESOURCING & CRITICAL SUCCESS FACTORS

6. STRATEGIC IMPLEMENTATION - PARTNERSHIPS, RESOURCING & CRITICAL SUCCESS FACTORS

6.1 Implementation

The successful implementation of this Tourism Development Plan will depend on the organisational framework for delivery, effective partnerships among the principal interests, and the resources made available. Figure 6 represents strategy implementation as an interactive process, where forward-looking activity on the right hand side is routinely accompanied by performance review and assessment of outcomes on the left [based on a management information system that draws on identified key performance indicators].

Stakeholder inter-dependency is an important part of delivering a tourism strategy at the destination level, as illustrated by Figure 7. The yellow tiles in the mosaic represent actions that can be undertaken by the national tourism authorities. Some of the green tiles represent actions that can be undertaken by the local authority but many of them represent actions that can only be undertaken by the business and community sectors. Cavan County Council cannot, in isolation, deliver a successful tourism strategy but it can play an essential role in co-ordinating and linking the various interests and stakeholders.

Figure 6: Tourism Strategy Development - Interconnections

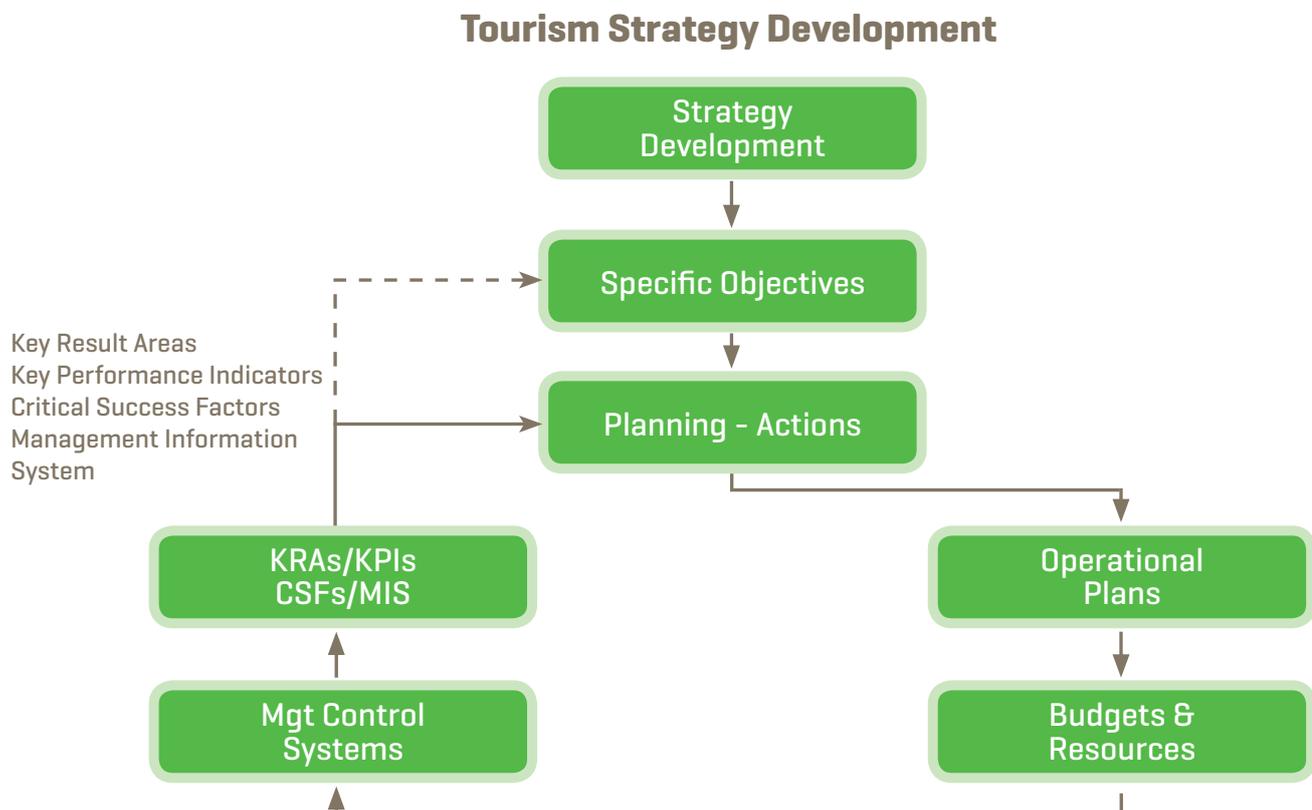
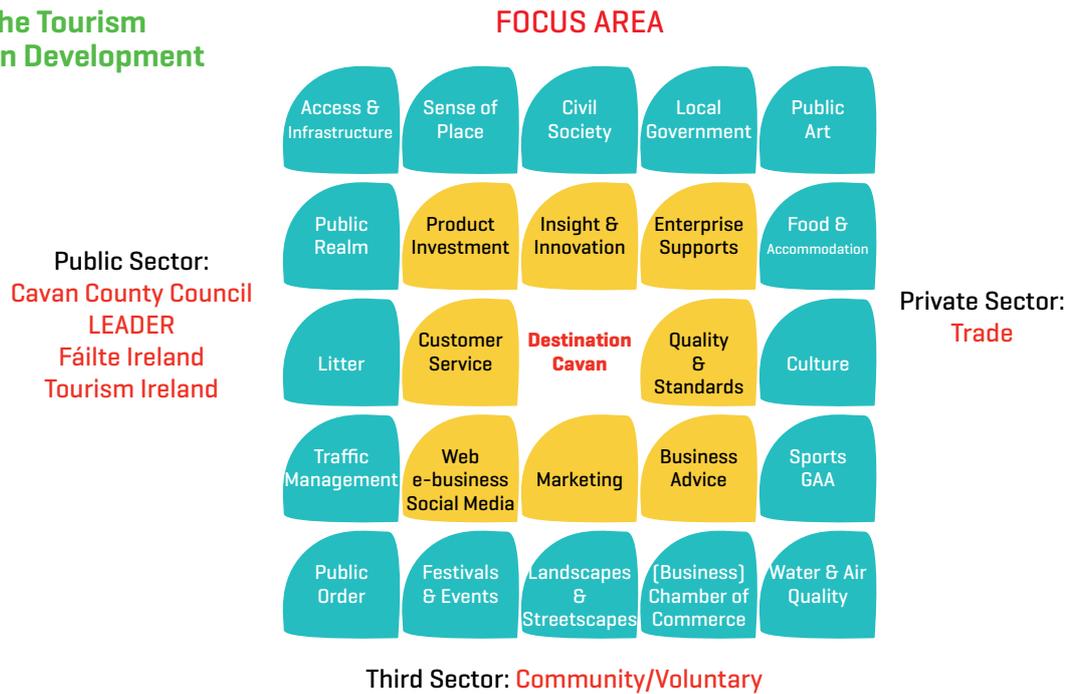


Figure 7: The Tourism Destination Development 'Mosaic'



Creating a fertile environment for growth goes far beyond the tourism sector. There are interdependencies between all stakeholders in delivering a strong foundation for Cavan Tourism to grow. The 'mosaic' in Figure 7 illustrates how the wider stakeholder groups contribute to tourism in Cavan as a whole. With partnership and collaboration around an agreed set of actions and goals, as laid out in the Action Plan, preferential conditions are created to support sales. These are then actively undertaken by the members of the trade who are best placed to sell themselves and each other.

6.2 Partnerships and Resources

Successful development requires initiative and leadership. Cavan County Council commissioned this Tourism Development Plan as the first step in taking tourism and the tourism industry in Cavan along a growth path over the coming five years. The Council has a vital contribution to make in enabling this development, most notably in relation to infrastructural development, public realm enhancement in towns and villages, and environmental and landscape protection. However, many of the projects in the Action Plan detailed in Section 7 will have to be implemented by other stakeholders - most notably the tourism trade itself, but also through partnerships

between stakeholders and with the support of funding agencies. The principal sources of funding, other than private sector investment, currently available for tourism projects are the following:

- ▶ **Fáilte Ireland Grants:** Cavan County Council has had some success in securing funding from Fáilte Ireland to enhance access and interpretation at Castle Saunderson, under a grants scheme for Ireland's Ancient East. This grants scheme is now closed, but a much larger scheme - the Grants Scheme for Large Tourism Projects - is now in operation with a budget of around €66 million [see Table 6.1]. Other elements of the overall programme include a substantial budget for projects to be implemented with the OPW, Coillte and the National Parks & Wildlife Service, and a budget of €15 million for area-based tourism development strategies and small grants [a scheme for which has yet to be announced]. This Plan includes projects which could be the subject of future grant applications to Fáilte Ireland. Further detailing will be required in line with grant scheme criteria and destination development planning.

Table 6.1: Distribution of Funding Under the Tourism Capital Grant Programme, 2016-2022

DELIVERY CHANNEL	ESTIMATED ALLOCATION (€M)
Grants Scheme for Large Tourism Projects	65.7
Strategic Partnerships [with OPW, National Parks and Coillte]	40.0
Experience Development Plans*	15.0
Direct Investment [initiatives led by Fáilte Ireland]	5.0
Total	125.7

* area-based tourism development strategies and small grants.

- ▶ **LEADER:** the Rural Development [LEADER] Programme 2014-2020 has a total budget of €250 million of which €33 million has been allocated to tourism. The scheme is administered through 28 Local Action Groups, which include Breffni Integrated Ltd., Ballinagh Road, Corlurgan, Cavan. [See note on LEADER in Section 5.3.]
- ▶ **Local Enterprise Offices (LEOs)** support small-scale enterprise development and generally have a small budget available for tourism. Cavan LEO is located at the Cavan Innovation & Technology Centre.
- ▶ **PEACE IV 2014-2020:** although the PEACE IV programme does not specifically mention tourism, a number of its objectives address areas which, potentially, could have a benefit for tourism development, including capital development for shared spaces, Local Authority shared spaces projects and regional level projects.

6.3 Implementation Framework

6.3.1 Introduction

The framework put in place to lead the management, development and marketing of a destination is one of the major factors influencing its progress in tourism. The absence of an effective organisational framework inhibits development. As in other counties, there are many

different bodies with a role in tourism in Cavan. These include:

- ▶ Cavan County Council
- ▶ Breffni Integrated Ltd.
- ▶ Coillte
- ▶ Inland Fisheries Ireland
- ▶ Waterways Ireland
- ▶ Fáilte Ireland
- ▶ Cavan Heritage Forum
- ▶ Marble Arch Caves UNESCO Global Geopark
- ▶ Office of Public Works
- ▶ Cavan Chamber of Commerce
- ▶ Tourism businesses in Co. Cavan.
- ▶ Development Associations

6.3.2 Experience Elsewhere

Looking elsewhere, local tourism bodies exist in other counties in Ireland, and in other countries in the European Union. The general conclusions that may be drawn from their experience are:

- ▶ cities and sub-national geographic entities take responsibility for marketing themselves by establishing tourism promotion organisations.
- ▶ in the absence of national and/or regional tourist boards that operate visitor services [information offices, reservations etc.], these are combined with the marketing functions in one organisation.

- ▶ even when there is only one organisation covering all functions, increasing emphasis is being placed on marketing.
- ▶ local tourism promotion organisations are usually partnerships between the public and private sectors, and obtain their funding from a variety of sources including grants, subsidies, industry contributions, sponsorship and commercial activities.
- ▶ marketing activities are largely funded by industry contributions; the organisations only engage in marketing activities that are supported by the trade.
- ▶ overseas marketing activities are co-ordinated with wider regional and national agencies and initiatives.

6.3.3 Proposed Organisation Structure: Cavan Tourism

Taking into account the above points, it is proposed that the most effective organisational option for Cavan would be a formalized structure in the form of a not-for-profit company limited by guarantee. This company would be established as an industry-led body for tourism marketing and development planning. Its members would comprise all individuals, companies, public bodies and other organisations involved in the tourism sector in the County who will support the objectives of the company and contribute to a membership subscription.

The company, which may be called Cavan Tourism for the purposes of this plan, could trade under whatever name or brand is preferred by its members. It would be established with the following objectives, which may be further elaborated by the members:

- ▶ to promote Cavan as a tourist destination, both on a stand-alone basis and in conjunction

with neighbouring counties and with Ireland's Ancient East.

- ▶ to identify and promote solutions to tourism development needs [products, services, infrastructure etc.]
- ▶ to promote the generation of employment both directly in tourism and indirectly elsewhere in the economy as a result of increased revenue from tourism.
- ▶ to coordinate the activities of tourism interests in Cavan who promote Cavan as a destination.
- ▶ to facilitate networking and information exchange among members
- ▶ to initiate a tourism awareness campaign in Cavan
- ▶ to liaise with tourism marketing and development agencies at local, regional and national levels.

The company option provides a formal structure, with explicitly defined objectives and rules of operation. It is an easy structure to operate, although modest administrative and legal charges would be incurred in setting it up and complying with company law regarding annual audits, filing returns in the Companies Registration Office, etc. It is a suitable structure for contracting with other parties applying for grants, and for employing people, should the need arise.

When establishing the Company, the following points should be taken into account:

- ▶ The ***This is Cavan!*** Website and related marketing activities should be brought into the new structure, to ensure that there is a single body in operation.
- ▶ The organisation should effectively re-establish the Cavan Forum. It is essential that the tourism industry should take

ownership of this organisation - indeed the starting point should be to convene a Forum and ask participants whether a new structure should be established.

- ▶ The active participation of the main public bodies and development agencies in the County, led by Cavan County Council, will be essential. The initiative to establish the organisation will have to come from them and they will need to support it with available resources. Each of the agencies should have an ex officio position on the organisation’s council / board.

6.3.4 Structure

It is proposed that Cavan Tourism be organised and structured as shown in the Figure 8 chart below:

The elements of the structure may be described as follows:

- ▶ **Cavan Tourism Forum**
As described in Section 6.3.3, the industry should meet in an annual Forum which should review progress, make recommendations regarding

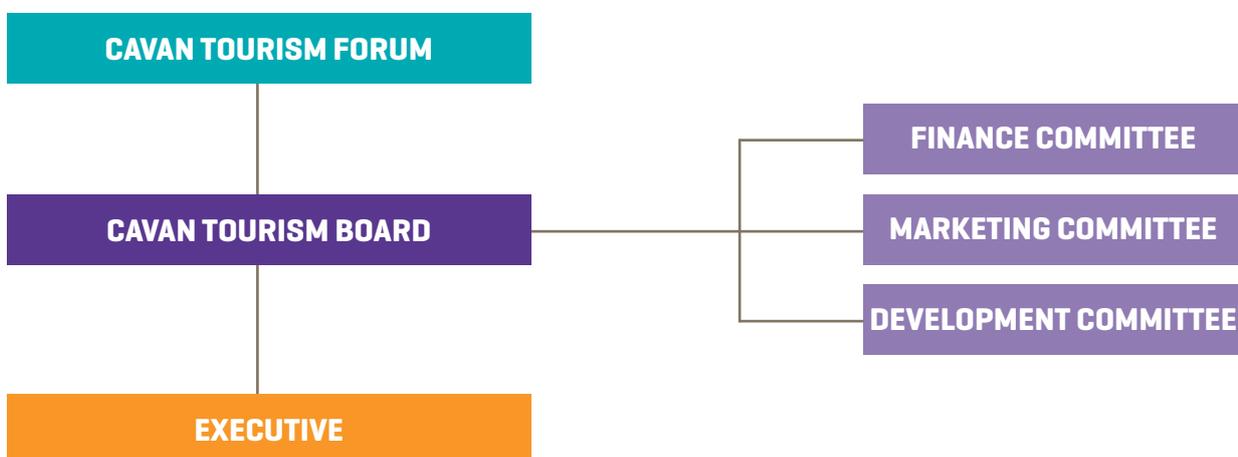
the future, and elect directors to the Board (other than ex-officio members). Only those participants who are paid-up members of Cavan Tourism would be eligible to vote and stand for election. The Forum would therefore effectively act as the General Meeting of the company.

- ▶ **Board of Cavan Tourism**
The board of directors of the company would have overall responsibility for the governance and direction of the company, including its strategy, activities, staffing and finances. The membership of the board should be broadly based, with emphasis on relevant knowledge, skills, experience and influence. Key bodies should be represented.

Large boards are unwieldy and not conducive to fast and effective decision-making. A board of 10-12 members should be adequate. More people can be directly involved through the proposed committee structure - see below.

- ▶ **Board Committees**
In order to work efficiently, and to

Figure 8: Proposed Organisation Structure



spread the work load, the board should have 2 or 3 main standing committees - finance, marketing and development. [Other committees may be established by the board as it sees fit].

- ▶ **The Marketing Committee**
would concentrate on the principal activity of the company i.e. promoting Cavan as a tourist destination.
- ▶ **The Development Committee**
would focus on identifying product development needs and promoting their implementation by appropriate stakeholders.
- ▶ **The Finance Committee**
would have responsibility for fund-raising; it is very important that this function be handled by the committee and not devolved to the executive since it would absorb far too much of the latter's time. However, the executive would be able to help this committee with mailings etc.

Effectively, the business of the company would be run through the three committees and implemented on day-to-day basis by the executive. The committees should be established by the board, but it is not necessary that the committees be comprised solely of board members. Non-board members could also be invited to participate in order to enhance the skills and experience available.

Recognising that the board and committee members will be contributing their time and energy on a voluntary basis, the workload should be spread as widely as possible. Furthermore, the committees should only meet when

they have specific business to attend to - meetings should not be held simply for routine purposes.

- ▶ **Executive**
The Executive should comprise a manager and an assistant. If funds permit, a second assistant may be added so that one covers marketing and the other administration. The manager should be an experienced tourism marketing professional capable of motivating the industry and securing their support. [The present Tourism Officer with Cavan County Council would be ideal for this position but, if taking up the post, should remain an employee of the Council.] The manager's principal function will be to draw up and implement marketing plans for the County. The key tasks for the manager will include:
 - ▶ preparing and implementing detailed marketing action plans
 - ▶ organisation and implementation of trade and consumer promotions
 - ▶ organisation of familiarization trips for the trade and media
 - ▶ management of promotional literature production
 - ▶ organisation of advertising campaigns
 - ▶ maintenance of frequent contact with the industry
 - ▶ developing marketing networks at county, regional and national levels
 - ▶ development and promotion of product packages
 - ▶ negotiation with suppliers and buyers
 - ▶ budgeting
 - ▶ reporting to marketing committee and board of directors.

The manager should be supported by an assistant who will assist with the implementation of marketing activities and with the administration of the Company.

6.4 Funding

The first challenge to Cavan Tourism will be to increase the flow of funds into marketing with a view to creating a worthwhile budget. The company should seek to bring the funds up to at least €200,000 per year. The experience of county tourism bodies elsewhere indicates that this target will be a challenge to achieve and that additional 'benefit-in-kind' support, such as rent and overhead subsidies, will be required. A summary breakdown of this budget is provided in Table 6.1. The potential sources of funding include the following:

- (i) **Tourism Industry:** all promotional activities should be co-funded by the industry, and only those activities which the industry is prepared to co-fund should be undertaken.

There are several options for raising funds from the industry, including membership subscriptions, a levy, voluntary contributions and payment for participation in specific activities. Our recommended approach, based on experience elsewhere, is a combination of membership subscriptions and payment for participation in activities. Subscriptions should be set at affordable levels and structured in accordance with the scale of enterprise. The subscription income will provide a stable contribution to essential operations. In addition to this, the participants in individual promotional initiatives should contribute directly to the cost of these promotions.

- (ii) **Other commercial beneficiaries of tourism:** a level of contribution by the retail, banking and other services sectors to the promotion of Cavan should be developed. At the moment, there is no adequate mechanism for ensuring that these sectors contribute more to marketing other

than increasing the allocation from rates. Specific, relevant promotions involving these sectors could also be organised. Fund-raising activities, such as golf classics, have proven to be a very effective mechanism for raising funds in other counties. Sponsorship and advertising in promotional brochures and tourist guides would also be potential means of generating revenue from these sectors.

- (iii) **Sponsorship:** there may be potential to generate sponsorship from major companies in County Cavan; this sponsorship could be allied to specific initiatives and publications, including the tourism awareness programme, and would be of value to those companies who market goods and services to tourists.

- (iv) **County Council:** it is important that the County Council continues to support the promotion of the County. Experience elsewhere has shown that Council contributions provide an important base on which to attract grant support from other sources. This contribution could be structured in accordance with the level of inflow from other sources - in particular, the primary responsibility for funding marketing initiatives should be retained by the industry and not transferred to the local authorities. The key element for the Council will be payment of salaries. It may be appropriate for the County Council to provide part of its contribution on a 'value' basis through logistical and overhead support [office space etc.].

- (v) **Grant Support:** maximum use should be made of any available sources of grant finance. These include Fáilte Ireland and the other sources listed in Section 6.2.

Overall, the distribution of funding a budget of €200,000, inclusive of salaries, could be structured as follows:

Table 6.2: Proposed Annual Funding of Cavan Tourism (€000's)

ITEM	€
Tourism industry [subs.]	25
Fundraising / sponsorship	25
Local authority	100*
Activities	20
Grants	30
Total	200

* includes staff costs.

If additional funding above these targets can be secured from grants or other sources, it would greatly enhance the operation of the company, particularly with regard to the employment and remuneration of staff.

On the basis of the marketing strategy and plan set out in Chapter 5, the annual budget might be allocated as shown in Table 6.3.

Table 6.3: Indicative Annual Budget for Cavan Tourism

ITEM	€
Promotional Collateral	30
Trade & Consumer Fairs	10
Marketing & Advertising	40
Promotional Events & Awareness	15
Wages & Salaries	85
Office overheads & travel	20
Total	200

6.5 Critical Success Factors

Embarking on the process of tourism development presents an opportunity for Cavan tourism to focus on its strengths and to position itself in a visible and attractive way in the marketplace. There is much to be proud of in the County and by directing energy and resources towards some key priorities, as outlined in the Plan, Cavan can reap the rewards that sustainable tourism has to offer a primarily rural destination.

As noted already, a wide variety of stakeholders are involved in delivering a memorable and high-quality tourism experience for visitors. In this environment, effective management of the implementation of this plan, including co-ordination of the principal stakeholders, is the most important critical success factor. The active participation of the funding partners identified in Section 6.2 is also a crucial factor in delivering success.

In implementing the Plan, the questions outlined in Table 6.4 should act as a touchstone for activities and initiatives, placing emphasis on the characteristics for success that will underpin delivery. Where the answer to any of them is negative, it will highlight an area that requires additional attention.

CHECK LIST

- 1) Is Cavan open for business?
- 2) Is it packaged/bundled to maximise the experience?
- 3) Is it offering unique/authentic experiences?
- 4) Is it price competitive?
- 5) Does it offer high quality?
- 6) Is it digital savvy and visible in the digital media?
- 7) Does it have champions and leaders?
- 8) Is it working/selling?

Cavan Burren Park, Blacklion

Welcome To Cavan Burren Park

7. ACTION PLAN

7. ACTION PLAN

At the outset of this Plan it was identified that clarity was required regarding why consumers would come to Cavan [i.e. how could Cavan best position itself], where limited County Council resources could best be focussed, how to more actively engage trade and how best to roll out a strategic direction for Cavan Tourism over a five year period. Specifically, Cavan is seeking to increase the economic return on tourism by 15%-20% over the next five years.

In addressing these, the Plan has identified key Cavan strengths and weaknesses, consumer needs, areas of opportunity and what actions are required to unlock these. In addition, input has been sought from a range of stakeholders, including trade and agencies.

This Section outlines a detailed set of actions, by Strategic Pillar, that are intended to give effect to the development strategy and address all aspects of growing tourism in Cavan. The actions reflect inter-related marketing, infrastructural and organisational requirements.

The actions are set within a five-year timeline, during which the overall goal is to increase the economic return on tourism in Cavan by 15% - 20%. As a working document, the Plan will be further shaped by Cavan County Council in terms of available resources and influenced by the energy and enthusiasm of the partners.

The indicative budgets for the actions are estimated on a preliminary basis only, and may be subject to change when detailed briefs are scoped out and tenders received.

Table 6.3: Indicative Annual Budget for Cavan Tourism

STRATEGIC PILLAR & FOCUS AREA	LINE ITEM	LEAD PARTNER	KEY DEPENDENCIES	INDICATIVE BUDGET € / POTENTIAL SOURCE OF FUNDING	TIME LINE	KEY PERFORMANCE INDICATORS
1. DESTINATION DEVELOPMENT	1.1 Cavan Burren: Within the broader context of the Geopark, create a sharper focus on the Cavan Burren Park experience by defining entry/exit points, improving interpretation, testing new 'products' and putting in place a marketing plan.	Coillte/ Cavan County Council	Fermanagh & Omagh D.C./Fáilte Ireland	€100k-150k	Q2 Q3 - 2017 Q1/Q2 - 2018	Completion of plan. Development underway in 2018.
	1.2 County Museum: Commission inventory audit, review and upgrade plan to develop the Museum to destination level.	Cavan County Council	Museum/Fáilte Ireland	€25k-30k for audit, review & plan. Budget for upgrade dependent on plan.	Q3/Q4 2017. 2018 for development works.	Completion of plan. Development underway in 2018.
	1.3 Killykeen: Invest in feasibility / scoping for Killykeen as a major year-round leisure destination.	Coillte/ Cavan County Council/ Private Interests	Future Fáilte Ireland capital grant/Tourism Trade/Department of Heritage	€20k-€30k	Q1 2018	Completion of review.
	1.4 Castle Saunderson: Develop a plan, in line with the ecologically themed development, to maximise access for the leisure market and offer future opportunities for the events and cultural operators.	Coillte/ Cavan County Council	Scouting Ireland/ Fáilte Ireland	€10k-€15k	Q1 2018	Completion of plan. Development underway in 2018.
	1.5 Geopark: Clarify experiences within the UNESCO Geopark designation, creating a set of sites with improved signage and refresh the overall branding.	Cavan County Council	Fermanagh & Omagh D.C./Fáilte Ireland	€100k-€150k, including Cavan Burren.	Q3/Q4 - 2017 Q1/Q2 - 2018	Completion of audit, review & plan. Completion of upgrade.

STRATEGIC PILLAR & FOCUS AREA	LINE ITEM	LEAD PARTNER	KEY DEPENDENCIES	INDICATIVE BUDGET € / POTENTIAL SOURCE OF FUNDING	TIME LINE	KEY PERFORMANCE INDICATORS
1. DESTINATION DEVELOPMENT (cont.)	1.6 Castle Saunderson: Seek expressions of interest for visitor services such as café, market garden shop etc.	Cavan County Council	Fáilte Ireland/ Tourism Trade/ Scouting Ireland	-	Q4 2017	Plans in place for tourism season 2018
	1.7 Cavan County Museum / Killykeen / Castle Saunderson: Develop a plan for seasonal platforms for local producers and food creators and cross referencing the initiatives with Cavan Food Strategy.	Cavan County Council/ PPN	Representatives from Cavan food sector	€10k-€15k	Q1 2018	Completion of plan Platforms in place for tourism season 2018
	1.8a Lakes & Forests: Improve base-line infrastructure needed to allow operators to develop reviving family and ecologically-themed experience at sites such as Dun a Ri Forest Park. This would include making available enabling funds from existing district resources for local operators.	Coillte/ Cavan County Council	Fáilte Ireland Cavan Tourism Trade	€20k-€40k enabling fund, on the basis of a plan.	2018	Completion of review and plan Take-up by industry
	1.8b Lakes & Forests: Review the potential of Castle Lake, Bailieborough, Deepark Forest, Virginia for leisure development. Prepare a strategic development plan with Coillte to systematically improve all sites.	Cavan County Council/ Coillte	Cavan Tourism Trade	In response to requirements. To be determined as part of the review	Q1 2018 - Delivery throughout 2018 /2019	Sites more suitable for promotion/ visitor numbers increase
	1.9 Heritage: Review opportunities for heritage funds to be made available to improve sites relating to conservation designations and link to the themes of IAE.	Cavan County Council	Heritage Council	-	Q4 2017	Completion of review

1. DESTINATION DEVELOPMENT (cont.)	1.10 Food: Invest in infrastructure that supports recognised and emerging chefs to be present outside of the restaurants through 'pop up' stands at key outdoor sites.	Cavan County Council	LEADER	€30k-40k	Q4 2017 - Q3 2018	Agreement on approach reached by mid 2018. Initiatives in place by end of Q3 2018
	1.11 Food: Develop the business case for the Taste of Cavan brand to extend to a tourism-led festival-style event, linking into IAE for themes to create the marketing platform for the festival.	Cavan County Council	LEADER	€12k-€15k	Q1 2018	Completion of business case
	1.12 Lakes: Audit select 'signature' lakes that are important for leisure activities for existing infrastructure (access, pathways, facilities and signage); agree improvement scheme. Enhance the angling experience at Hollybank, Killykeen and Sillan.	Cavan County Council	IFI	Audit and plan: €35-€40k Works: €50k-€60k	Q2 2018	Completion of plan Commencement of works
	1.13 Angling: Extending improvements for angling. Council will continue to work with IFI on projects at Putiaghagh Lough, Bun Lake and Nadrageel.	Cavan County Council	IFI	Already budgeted	Ongoing	
	1.14 Angling: Continue to seek support for additional improvements not yet funded across all sites.	Cavan County Council	IFI	-	Ongoing	
	1.15 Towns / Villages: Commission the development of a template for town and village renewal schemes.	Cavan County Council	TBC	€25-€30k	Q4 2017	Completion of template
1.16 Ireland's Ancient East: Continue to develop storylines & interpretation and roll-out new IAE signage and sites.	Cavan County Council	Fáilte Ireland	Fáilte Ireland	Ongoing		

STRATEGIC PILLAR & FOCUS AREA	LINE ITEM	LEAD PARTNER	KEY DEPENDENCIES	INDICATIVE BUDGET € / POTENTIAL SOURCE OF FUNDING	TIME LINE	KEY PERFORMANCE INDICATORS
1. DESTINATION DEVELOPMENT [cont.]	1.17 Ireland's Ancient East: Develop story strands unique to Cavan's border county character and linked to IAE.	Cavan County Council	Peace IV / Fáilte Ireland	Peace IV / Fáilte Ireland	Ongoing	
	1.18 Cavan Town Hall: Continue with development work at Town Hall as arts hub.	Cavan County Council	Dept. CHG/ Arts Council	Peace IV/Fáilte Ireland	Ongoing	
	1.19 Greenways: To support the ongoing development of <ul style="list-style-type: none"> Navan – Kingscourt – Meath Drumod– Ballinamore – Belturbet – Cavan Sligo Leitrim and Northern Counties Railway Greenway (SLNCR) 	Cavan/ Meath/ Leitrim/ Sligo County Council	-	Already budgeted	Ongoing	
	1.20 Community Engagement: Linking with towns/villages renewal scheme, develop a programme which actively encourages greater knowledge and participation in tourism by the broader community (e.g. <i>This is Your Cavan</i>)	Cavan County Council	Dept. of CHG	€5k	Q1 2018	Introduction of programme
	1.21 Establish a working group to set up a vehicle for sustained trade & sector engagement / initiatives, i.e. Cavan Tourism Company.	Cavan County Council	Tourism trade and development agencies	-	Q1 2018	Establishment of working group. Establishment of Company by Q3 2018.
	1.22 Undertake audit of signage for accuracy and consistency.	Cavan County Council	-	-	Q1 2018	Completion of audit

1. DESTINATION DEVELOPMENT (cont.)	1.23 Tourism survey: Continue, and strengthen by expanding current database of participants and ensuring maximum returns.	Cavan County Council	-	-	Ongoing	Quarterly review
	1.24 Review and Integrate Programme of Events/Festivals - Taste of Cavan, Heritage Week, Culture Night, Geopark events, walking festivals, angling festivals - to assess gaps, weaknesses, opportunities for greater promotion and utilisation of new facilities [e.g. Cavan Town Hall, Castle Saunderson].	Cavan County Council	Trade partners	€5k	Q4 2017	Completion of review
	1.25 Creative Ireland: Review the Cavan Culture and Creativity Plan and ensure integration/promotion of activities with IAE and broader tourism plan.	Cavan County Council	Arts Office / Heritage Officer/ Culture Team	-	Q4 2017	Completion of review
	1.26 Blueways - Continue to work on agreed infrastructural programme with Waterways Ireland, linking to broader Cavan product of outdoor activities, food and culture.	Cavan County Council	Waterways Ireland	-	Ongoing	
	1.27 Walking - develop an integrated route and marketing strategy to include the Cavan Way, Looped Walking Routes, Killeshandra, canal walk Ballyconnell and others included the review and re packaging of ancient pilgrims' walks.	Cavan County Council	Tourism trade	€15k	Q3 2018	Completion of strategy
	1.28 Infrastructural Development: Review all infrastructural development above and integrate into ongoing implementation plan.	Cavan Tourism	All agency and trade partners	-	Q4 2018 - Q1 2019	Completion of review

STRATEGIC PILLAR & FOCUS AREA	LINE ITEM	LEAD PARTNER	KEY DEPENDENCIES	INDICATIVE BUDGET € / POTENTIAL SOURCE OF FUNDING	TIME LINE	KEY PERFORMANCE INDICATORS
2. TRADE DEVELOPMENT	2.1 Create a Cavan Business Tourism Network.	Cavan County Council	LEO, Cavan Tourism Trade	-	Q3 2018	Creation of network
	2.2 Annual Cavan Tourism Workshop.	Cavan Tourism	Cavan County Council	€5k-€10k	Q4 2018	First workshop held
	2.3 Arrange trade familiarisation programme, either ongoing or bi-annual.	Cavan Tourism	Tourism trade	-	TBC	
	2.4 Arrange local tourism networking evenings (3 per year), inviting trade from across the county/national borders.	Cavan Tourism	Cavan County Council	-	Ongoing	
	2.5 Encourage greater take-up by tourism operators of existing mentoring, training and voucher schemes.	Cavan Tourism	LEO/Cavan County Council	-	Ongoing	
	2.6 Establish an enabling fund for operators so that new offerings can be tested and seed funding is available for projects that are in line with the Plan.	Cavan County Council	Cavan Tourism/ Tourism Trade/ LEO	€100k-€150k; grants of €20k-€50k	Q2 2018	Establishment of fund; take up by industry
	2.7 Create a 'Cavan Champions' programme, following the template piloted by the Dublin Champions Programme.	Cavan Tourism	Cavan County Council & business community	€10k-€15k	Q2 2018	Engagement in programme

STRATEGIC PILLAR & FOCUS AREA	LINE ITEM	LEAD PARTNER	KEY DEPENDENCIES	INDICATIVE BUDGET € / POTENTIAL SOURCE OF FUNDING	TIME LINE	KEY PERFORMANCE INDICATORS
3. POSITIONING & MARKETING	3.1 Brand: Develop clearer messages for Cavan and review how best to put forward each aspect of the Cavan proposition within 'This Is Cavan!' without diluting its strength as being bold, energised and surprising, e.g. Cavan – Ireland's nurturing soul, Cavan – Ireland's home of real food, Cavan – the real family holiday.	Cavan Tourism	Cavan County Council	€15k	Q1 2018	Completion of additional development
	3.2 Ireland's Ancient East: Develop a number of core experiences that bring to life Ancient Ireland and Early Christian Ireland.	Cavan Tourism	Heritage Officer	-	Q1 2018	Experiences developed
	3.3 Bundling: Work with trade to further develop and promote bundles suggested as part of the trade workshops.	Cavan Tourism	Cavan Tourism Trade	-	Off-season	Bundles actively sold
	3.4 Website: Arrange to manage the following: SEO (search engine optimisation); ongoing content development; online reputation management, especially via social media; development of two annual events. This is Cavan online competitions to generate shareable content and as PR opportunity; trade participation in social media campaigns; Cavan presence in niche online clubs, forums and listings for angling, cruising and walking.	Cavan Tourism	Cavan Tourism Trade/Cavan County Council	-	Q3 2017	Arrangements in place
	3.5 Website: Audit accommodation to develop additional 'flags' for online listings that link with key outdoor facilities/activities: lakeshore, by walking route, boat & slipway/pontoon.	Cavan Tourism	Accommodation Providers	-	Q1 2018	Completion of audit and 'flags' in place

STRATEGIC PILLAR & FOCUS AREA	LINE ITEM	LEAD PARTNER	KEY DEPENDENCIES	INDICATIVE BUDGET € / POTENTIAL SOURCE OF FUNDING	TIME LINE	KEY PERFORMANCE INDICATORS
3. POSITIONING & MARKETING	3.6 Social Media: Develop regular campaign of imagery and stories to feed existing opportunities (e.g. Tourism Ireland's Share our Stories) and as snackable, shareable content on Pinterest, Instagram, Facebook and Youtube. Focus on IAE themes and experiences that fit target segments (e.g. family, outdoor escape, heritage, food, luxury).	Online Manager (Cavan County Council or other)	Cavan Tourism Trade	-	Q3 / Q4 2017	Completion of audit and 'flags' in place
	3.7 Promotions: Facilitate trade participation at key consumer promotions - National Angling Show, BBC Good Food Show Belfast, Virginia show, Dublin & Belfast Shopping Centre Promotion.	Cavan County Council	Cavan Tourism Trade	-	Ongoing	Click-through and engagement with stories/images
	3.8 Publicity & P.R.: Agree publicity programme to accompany key strategy developments and major festivals/ events, either via a shared staff resource or by hiring in the service. Programme should be agreed in advance and clearly branded (This is Cavan for a domestic audience, IAE connection for overseas). Encourage and facilitate regular media visits from target markets, including specialist media trips via IFI.	Cavan County Council	Cavan Tourism Trade	-	Ongoing	Feedback captured through post-event questionnaires Positive articles published in media that fits target audiences. Number of media trips hosted.

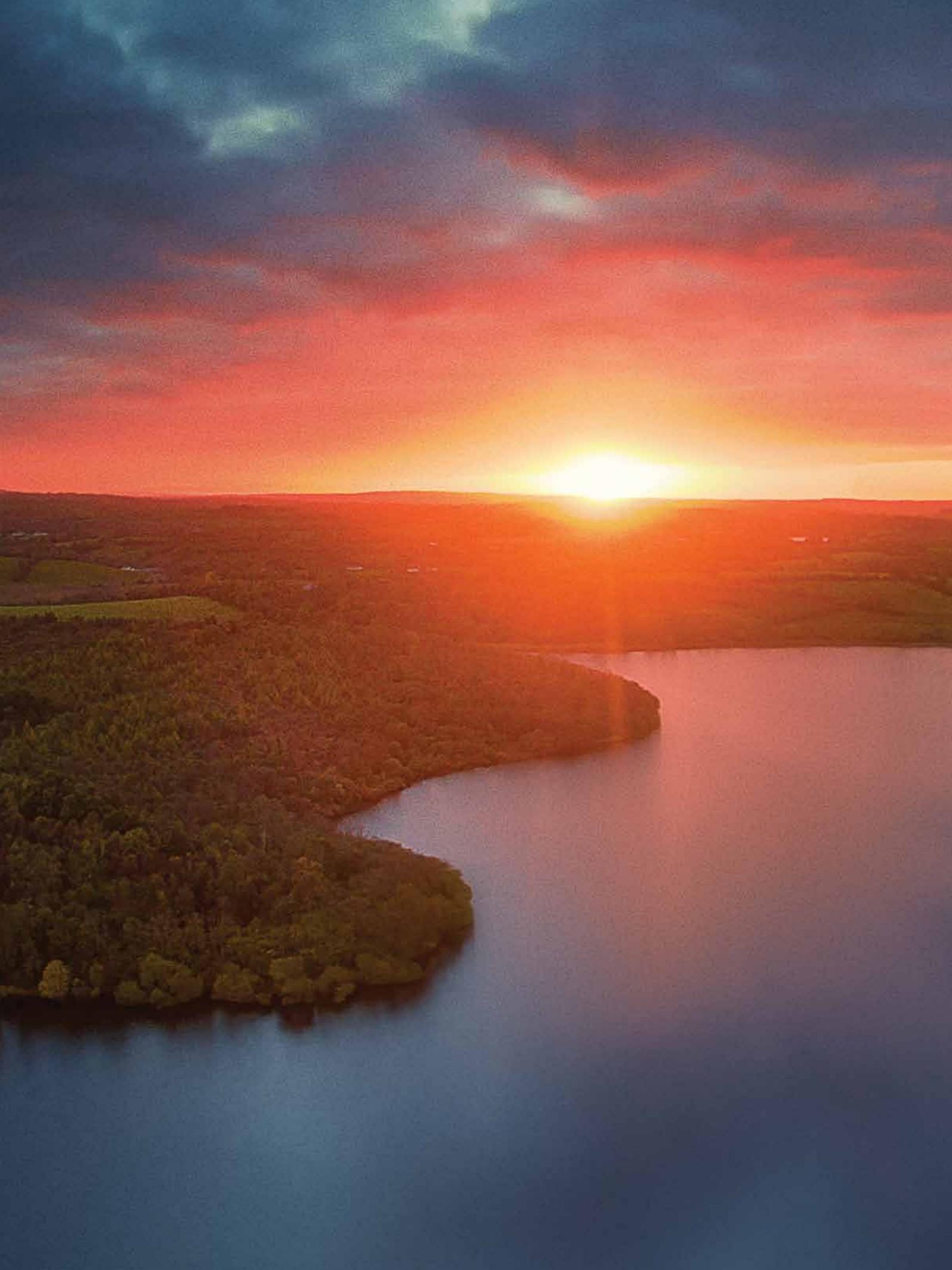
3. POSITIONING & MARKETING	3.9 Advertising: Cavan advertorial in national media with supporting trade ads; Angling Times; Senior Times; family media (e.g. Rollercoaster, Primary Times).	Cavan Tourism	Cavan Tourism Trade	-	Ongoing as per calendar of promotions	Feedback from trade participating in supporting ads.
	3.10 B2B: Meitheal; ITOA Workshop; incoming tour operator familiarisation visits; local business contacts esp. Cavan town; ezine for local trade.	Cavan Tourism	Cavan Tourism Trade	-	Ongoing as per calendar of promotions	Feedback from trade partners
	3.11 Print Collateral: Review what is working and what is not – develop an integrated collateral plan to meet specific markets and to suit specific activities.	Cavan Tourism	-	-	Q4 2017	Completion of review













8. APPENDICES

8. APPENDICES

APPENDIX 1: CONSULTATION FEEDBACK

A broad consultation was undertaken as part of the project. Given the fact that this is the first time a Plan has been developed for the entire County, it was important to encourage all relevant parties to input into the process. The consultation process included two industry workshops and a considerable number of face-to-face and telephone interviews with operators, industry representatives and agencies. While some issues were raised that related specifically to individual operators, there was broad consensus around particular areas, as outlined below.

- ▶ What is on offer in Cavan is not always apparent - it truly does surprise visitors when they spend time in the County which has an eclectic mix of products
- ▶ It has a wealth of ancient historic sites and important biodiversity.
- ▶ Cavan needs a big attraction/event that puts it on the map.
- ▶ There is a good programme of arts events and festivals but these are not integrated into a strategic plan nor realising their full potential.
- ▶ There is great reliance on local knowledge when it comes to recommendations for things that visitors can do and see.
- ▶ There are many underdeveloped resources, natural and built, that have significant potential if access and interpretation are improved.
- ▶ The trade is engaged at different levels, some very active, some quite passive. It doesn't always make the most of what is on the doorstep in terms of attractions, activities and natural resources.
- ▶ The Plan needs to take into account the diversity of Cavan from east to west. The

County has differing tourism experiences and affinities at either end, with one linking more naturally with tourism across the border into Northern Ireland, Donegal and Sligo, while the other connects more naturally with Meath and Dublin.

- ▶ As a result, there is a sense that Cavan is not fully in Ireland's Ancient East, and many operators confirm that they receive business from visitors travelling to/from the Wild Atlantic Way.
- ▶ The 'kingdom of Breifne' still offers some potential as a theme or story that can be brought to life for visitors.
- ▶ Tourism needs to be recognised as relevant to every aspect of the County's economic success.
- ▶ There is a lack of daytime and early evening dining at certain times and places.
- ▶ There are lots of lakes but they're mostly not usable from a tourism perspective.
- ▶ There is a lack of hostel-style/alternative accommodation for outdoor activities.
- ▶ Both Inland Fisheries Ireland and Waterways Ireland are involved in Cavan to varying degrees.

This feedback highlights a number of key opportunities and areas that need to be addressed:

- ▶ While people are pleasantly surprised when they visit Cavan, there is a need to place it more clearly on the tourism 'radar' for potential visitors.
- ▶ Cavan can use its location to its advantage by co-operating with key destinations and products across the County borders, offering some experiences that synergise with Ireland's Ancient East while others may be more attractive to consumers drawn to the Wild Atlantic Way.
- ▶ Better use can be made of existing resources, including natural, cultural and culinary.

- ▶ The reliance on local knowledge points to an opportunity for a ‘Cavan Champions’ type programme but also indicates that a more mainstream approach to tourism information sharing is required.

APPENDIX 2: MYSTERY SHOP

An essential part of evaluating what County Cavan has to offer is experiencing it first hand and a mystery shop was another important part of the research conducted in preparing this plan. The main overall findings that emerged from this exercise are as follows:

- ▶ Towns need a ‘heart’ - feedback and evidence suggests towns are not as vibrant as they were pre-recession.
- ▶ Public realm enhancement could improve this a lot.
- ▶ Signage - better consistency and accuracy is required.
- ▶ A lot of what Cavan has to offer feels hidden.
- ▶ Daytime and Mon-Wed dining options are limited.
- ▶ There is a relaxed pace and genuine friendliness throughout the County.
- ▶ Food is a leading strength but needs to be put out front.

APPENDIX 3: SUMMARY OF TRADE WORKSHOP FEEDBACK

[Trade Workshops at Slieve Russell Hotel, Ballyconnell, and Hotel Kilmore, Cavan, 15th/16th November 2016]

A3.1 Main Feedback and Suggestions

- ▶ Cavan needs a ‘big’ visitor attraction/site - something that puts it on the map. There was broad agreement that an outdoor forest adventure/leisure centre at Killykeen might work. Lough Key was mentioned as an example.
- ▶ Cavan also has the **potential to develop as an arts hub** - similar to Galway - with a rolling calendar of

events. It was suggested that the County Council might take a more strategic role in this regard, starting with a good seasonal spread of attractive arts events and festivals, and building them over time. The Fleadh [which nurtured the arts scene in Cavan] was mentioned as a good example of how the communities and agencies could work together to deliver an event that appealed across all market segments and ages - and this model could work for other events.

- ▶ A new Belturbet-Dromod Greenway was mentioned.
- ▶ A perceived lack of inter-agency linkages was criticised - Coillte / Waterways Ireland / Inland Fisheries Ireland / County Council.
- ▶ There is a shortage of tour group accommodation in Cavan hotels.
- ▶ Is there scope to use old, empty buildings for **pop-up arts and crafts shops** during the summer?
- ▶ Could there be a **weekly ‘what’s on’ ezine** - similar to that in Fermanagh?
- ▶ Sligo was mentioned as having introduced a slight rates increase to provide a sponsorship/funding source for tourism.
- ▶ There was general consensus on what are Cavan’s strengths/highlights but not on the weaknesses [see A3.3 below].
- ▶ There appears to be a great reliance on **local knowledge** when it comes to ‘what to see/do’ in Cavan. Operators all have their own favourite landscape/ scenic spots which they recommend to visitors. **[Opportunity for ‘local ambassador’ scheme and more networking of trade]**
- ▶ What Cavan has to offer is surprisingly **eclectic** [e.g. it has one of only two barn churches in the country, a Buddhist centre, MacNean House Restaurant in Blacklion, an open prison near Blacklion that repurposes old bikes, etc.], with a good entrepreneurial spirit.
- ▶ The opportunity to ‘bring back’ the **Kingdom of Breifne** as a brand/ marketing tool was mentioned - a

unifying proposition that would cross borders and also connect with Ireland's Ancient East in particular.

- ▶ Opportunity for a **tourist information point on the N3** was mentioned.
- ▶ There is an opportunity to take a more strategic look at the calendar of events to ensure an even spread throughout the year.
- ▶ Can anything be done with the airfield at Mount Nugent?

A3.2 Highlights/Strengths

- ▶ The friendliness and helpfulness of the people - people are the common thread through everything (music, food, accommodation, activities).
- ▶ Pubs
- ▶ Landscape: mountains, lakes, landscape topography (e.g. post glacial). Some specific locations were mentioned that would only be known by a local.
- ▶ Outdoor activities: water-based, adventure, walking, angling, equestrian, golf.
- ▶ Dining
- ▶ Spas
- ▶ Music
- ▶ Location (easy access from North and South) - also opportunity to catch visitors who are accessing the Wild Atlantic Way via Donegal or Northern Ireland (catch them on their way up or down) - **can link to both Ireland's Ancient East (IAE) and the Wild Atlantic Way (WAW)**.
- ▶ Good hotels
- ▶ Good quality tourism product
- ▶ Megalithic tombs - Cavan Burren Park itself has over 200 pre-historic sites/monuments]
- ▶ A biodiversity not found elsewhere
- ▶ Opportunity to utilise products/services in **neighbouring counties**, e.g. Meath, Fermanagh, Belfast Airport, WAW, etc.
- ▶ Cavan Burren Park and Marble Arch Caves Geopark were mentioned frequently.
- ▶ Cavan County Museum.
- ▶ Cavan Library for genealogy - is there an opportunity to target the **diaspora**?

- ▶ The boardwalk in the Cuilcagh Mountains.
- ▶ The Bawnboy Workhouse (but needs development)
- ▶ MacNean House & Restaurant, Blacklion
- ▶ Jampa Ling Tibetan Buddhist retreat centre, Bawnboy
- ▶ Killykeen and Dún A Rí Forest Parks
- ▶ Outdoor activities - water and land based.
- ▶ Lakes and mountains for touring and sightseeing, although lakes are not that 'tourable'.
- ▶ Traditional music
- ▶ Friendliness of the people and local services in towns
- ▶ The pace of life
- ▶ General health/fitness/wellbeing
- ▶ Heritage - Christian and Pre-Christian
- ▶ Events - specifically the Fleadh and A Taste of Cavan
- ▶ Business conferences and wedding business - particularly Cavan town.
- ▶ **Musicians**: Dead Can Dance, The Stripes, Aine Cahill, Philip Doherty
- ▶ Proximity to Dublin.

A3.3 Weaknesses/Issues

- ▶ Strong views that east and west Cavan offer different experiences, and that marketing Cavan as one proposition doesn't do justice to this.
- ▶ There was general agreement that general awareness of Cavan is low nationally and internationally, and that this needs attention in particular, especially through greater web presence (discoverireland.ie and Ireland.com in particular) and attendance at trade & consumer shows.
- ▶ There is not enough community involvement in events - though this is also a strength in certain cases.
- ▶ **Lack of community engagement with the Geopark**, although the Geopark does 'reach out' to the communities.
- ▶ Concern that information offices in Fermanagh apparently are no longer willing to stock Cavan brochures.
- ▶ There is a shortage of alternative accommodation, e.g. hostels, camping/

glamping. **Can this be provided some other way or a glamping site be encouraged through an existing operator (has been done by historic houses in UK leasing out land)?**

- ▶ Public transport to and within Cavan is an issue
- ▶ There are difficulties with access to the mountains.
- ▶ Infrastructure at lakes is underdeveloped.
- ▶ Cavan is the ‘forgotten county’ at national level.
- ▶ Agri policy and County Council road maintenance policy are not connected with tourism and biodiversity and are damaging Cavan’s core asset - the outdoors. Area Aid, in particular, is responsible for hedges being cleared and replaced with wire fences.
- ▶ Joined-up thinking is lacking at agency level.
- ▶ Ireland’s Ancient East has limited touring routes through/in Cavan.
- ▶ Resourcing/staffing of Cavan tourism is limited.
- ▶ Litter is an issue.
- ▶ There is **a lack of café-type dining - daytime, early evening.**
- ▶ There is a lack of quality family dining.
- ▶ Smaller sites and locations are poorly represented [specifically in west Cavan]
- ▶ Signage is still an issue at local level
- ▶ The lack of Cavan day trips is an opportunity for a local bus operator.
- ▶ Sea access from the UK is an issue - timing, cost, rail/port connections in the UK.
- ▶ The industry is concerned that the workshop will be the last they hear of the strategy - there will be no feedback to them.
- ▶ Continuing decline in British anglers for a variety of reasons.
- ▶ Lack of promotion by national/international agencies.
- ▶ Lack of access to lakes and lack of lake development. There are 365 lakes but, without access, they are not usable by visitors.
- ▶ Lough Muckno [Monaghan] and Inniscarra [Cork] mentioned as ‘good

examples’ of angling experiences.

- ▶ Annalee River a hidden fishing gem but access an issue.
- ▶ Restrictive access to countryside.
- ▶ Fisheries policy on pike culling.
- ▶ More events needed - particularly Cavan town.
- ▶ Cavan needs a ‘biggie’ to raise awareness - no-one knows what there is!
- ▶ Lack of funding for angling and the arts.
- ▶ The Blueway stops in Belturbet
- ▶ Broadband is an issue
- ▶ Lack of local transport in rural areas [including taxis] - opportunity for Uber?
- ▶ Lack of connection to IAE [except for some]
- ▶ Business extremely seasonal - off-season and mid-week slumps need to be addressed.
- ▶ Lack of alternative accommodation [campsites, hostels]
- ▶ No inside venue in Cavan town for older tour groups that may not be able to spend hours walking around but would like something along the lines of an AV presentation and lunch [the museum has this but is in the wrong location].
- ▶ Lack of walks - Coillte sites aren’t suitable as you can’t always be sure the trees will be there!

APPENDIX 4: COMPARATOR REVIEW

While evaluating the demand and supply side of the market for tourism in Cavan provides a solid basis for proposing where it can best position itself for consumers, and what it needs to do in order to attract and satisfy visitors, it can also be useful to explore what other destinations with similar characteristics do. And although there are other counties in Ireland that can be considered to offer a similar core experience to Cavan, they still operate within the same environment and therefore we have selected three destinations outside of Ireland for review. These are The Nordics, which we have grouped

together as they share similar characteristics, The Lake District in England, and Stonehammer Geopark in Canada. The following is a summary overview of relevant points for each of these.

A4.1 The Nordic Countries

The Nordic countries of Denmark, Sweden, Norway and Finland all share a particular characteristic that is highly relevant in the context of Cavan - they maximise the use of the outdoors for recreation. Despite the harsher winters the more northern countries experience, they have invested considerable resources and innovation in packaging nature-based experiences for tourism in a number of ways that Cavan could adopt.

- ▶ They make full use of their lakes, clearly promoting self-catering that has lake frontage and access to the water. Interested visitors can select their accommodation based on its proximity to the lake side and rental houses often have equipment and facilities that enable visitors to use the water [e.g. row boats, kayaks, fishing rods, small jettys].
- ▶ The outdoors isn't seen as just a

good weather option - it is 'flexed' differently, depending on the season. In the summer, the bright evenings are used as a 'hook' to encourage visitors to make more use of the natural resources of water, forest and countryside. But at colder, darker times of the year, saunas, good food and an opportunity to share nurturing time with friends/family ('hygge') are promoted as part of the experience alongside outdoor winter activities.

- ▶ The outdoors is also offered in different ways to different consumer groups - individuals, couples, groups of friends and families.
- ▶ And the Nordics invest considerably in recreational facilities, including high quality, waymarked cycle routes.

A4.2 The Lake District, England

The Lake District National Park in England has a well-established reputation as a destination for walking, in particular, as well as other soft outdoor activities - cycling, angling and water-based pursuits - although it has introduced more extreme

COUNTRYSIDE MAGIC IN A FINNISH WINTER COTTAGE

To truly experience Finland, you have to get out of the city. That is why Finns head to their cottages both winter and summer, and so should you! In the summer these Finnish hideouts are an oasis of relaxation, sauna and swimming. The winter brings its own unique activities such as skiing, ice-swimming, sledding - all in the beautiful background of a blanket of snow and ice as far as the eye can see.

There is a reason why on average every fifth household in Finland has some kind of a cottage. There you can really have it all. Relax, breathe in the peace and silence and enjoy the company of family or friends. On the other hand you can fill in a sunny winter's day with laughter of tumbling in the snow and doing different sports. The best thing is that you can adjust the winter activities to suit the age and interest of those traveling with you.

Organize your own day trips in the local area, across the frozen lake on skis or snowshoes. For more speed and adventure go on an organized snowmobile tour or a husky safari suitable for the whole family. End the day in the relaxing heat of the sauna with the northern lights blazing outside.



SILENCE, PLEASE

In the rush and crush of modern life, the rarities are what we value most, such as space, quiet and time. The space to breathe, a time to dream... you can find these treasures in Finland, where the lakes are many and the people are few.

SILENCE, PLEASE →

sports as well. As an area predominantly known for its inland tourism experiences, it is characterised by small villages, lakes and gentle countryside and provides a relevant comparison with Cavan. And as a mature tourism destination, it offers some learnings that Cavan can take on board:

- ▶ It has a shared vision for the entire District and projects are agreed at a District level in support of this vision. In 2006, a Partnership was formed with representatives from 25 public, private, community and voluntary organisations to agree the vision, which forms the basis for collective working.
- ▶ As a National Park, it maintains this shared vision in the face of new developments, e.g. integration of new areas.
- ▶ As a National Park, it has a number of active volunteer programmes that allow for greater community participation and awareness. These include a variety of individual volunteer opportunities, ranging from maintenance to archaeology, as well as corporate volunteering and junior ranger programmes.
- ▶ There are also a number of local user forums, e.g. the Windermere Lake User Forum, where relevant issues can be raised by those using the land and water in the area.



GULLSPÅNG, WEST SWEDEN

In 1933 the forests in Sweden are filled with mushrooms of all sorts. The right of public access allows people to roam the woods in search of their favourite mushroom.



THE VISION FOR THE LAKE DISTRICT NATIONAL PARK 2006-2030

Agreed by the Lake District National Park Partnership 4 May 2006

The Lake District Park will be an inspirational example of sustainable development in action.

A place where its prosperous economy, world class visitor experiences and vibrant communities come together to sustain the spectacular landscape, its wildlife and cultural heritage.

Local people, visitors, and the many organisations working in the National Park or have a contribution to make to it, must be united in achieving this.

What will it actually look like?

The 4 key elements of the Vision will act as one and we will see:

A prosperous economy - Businesses will locate in the National Park because they value the quality of opportunity, environment and lifestyle it offers - many will draw on a strong connection to the landscape. Entrepreneurial spirit will be nurtured across all sectors and traditional industries maintained to ensure a diverse economy.

Vibrant communities - People successfully living, working and relaxing within upland, valley and lakeside places where distinctive local character is maintained and celebrated.

A spectacular landscape, its wildlife and cultural heritage - A landscape which provides an irreplaceable source of inspiration, whose benefits to people and wildlife are valued and improved. A landscape whose natural and cultural resources are assets to be managed and used wisely for future generations.

A4.3 Stonehammer Geopark, New Brunswick, Canada

While there are a number of designated Geoparks internationally, not all have developed the tourism opportunity presented by the status. However, Stonehammer Geopark in New Brunswick, Canada - and North America's first Geopark - is one that appears to have done so. It has also won an award from the Tourism Industry Association of Canada as Innovator of the Year. It positions itself as being

'primarily about geology but also about people, society and culture'

As such, it is an interesting and relevant example as to how Cavan can maximise the opportunities that Cavan Burren Park represents.

- ▶ It has given considerable attention to developing a broad range of activities that appeal to a variety of consumers.
- ▶ The Park identifies **a number of 'geosites' within the area, each with their own unique features** and supporting facilities (e.g. trails, picnic benches, visitor information).
- ▶ It uses the opportunity presented by having an urban area (St. John's) within the Geopark by **directly engaging tourism providers** but **highlighting only those that support the Park.**
- ▶ It operates a 'Friends' programme to **encourage community involvement** and **generate additional revenue.**

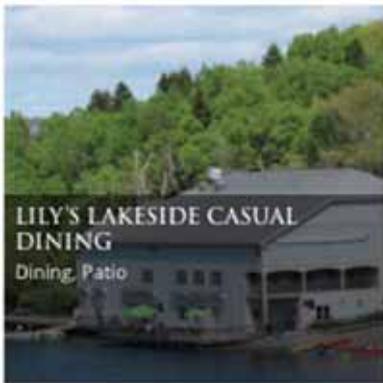
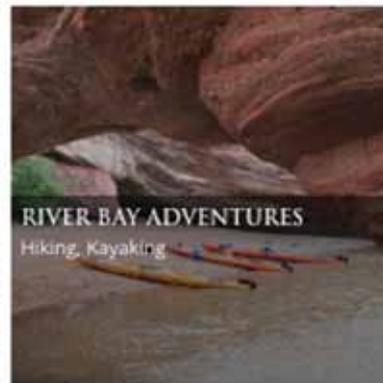
Restaurants who support Stonehammer UNESCO Global Geopark:

Happinez Wine Bar - one of the region's most celebrated wine bars, offering a wide variety of wine by the glass and bottle

Lily's Lakeside Casual - casual dining by a brick fireplace or on the lakeside patio in the heart of Rockwood Park

Saint John Ale House - progressive pub food with a local twist on the waterfront along with the best beer selection in the province

Taco Pica - Authentic Mexican, Guatemalan & Spanish cuisine in a laid back atmosphere.



STONEHAMMER *friends* CIRCLE

Neogene \$125 Annual Gift	Permian \$250 Annual Gift	Devonian \$500 Annual Gift	Cambrian \$1000 Annual Gift
			
Listing in Annual Report			
E-newsletter w/ Special Offers			
Neogene Jessica Doyle Print			
X			
X			
X			
Become a Neogene Friend	Become a Permian Friend	Become a Devonian Friend	Become a Cambrian Friend

A4.4 Some Irish 'Good Practice' Examples

Within Ireland, there are a number of areas that offer good examples for live learning.

- ▶ The Burren, for the 'sense of place' it creates for visitors through signage and community projects. This is relevant specifically to Cavan Burren Park and the need to create a greater sense of being in the Park for touring visitors.
- ▶ West Cork, again for the 'sense of place' but this time through the Fuchsia branding and community buy-in that is evident throughout the area. Few visitors would pass through the area without being aware of West Cork as a distinct destination.
- ▶ Lough Boora, Offaly, is an excellent example of maximising a bog and forest as an amenity that now attracts considerable visitor numbers (over 100,000) and services the local community.
- ▶ Lough Key Forest Park (which attracts over 70,000 visitors) offers an example of a solid working model between Roscommon County Council, Coillte, Fáilte Ireland and a private operator. It is a useful model in the context of Killykeen or, potentially, Castle Saunderson.

APPENDIX 5: NATIONAL TOURISM STATISTICS & MARKET SEGMENTS

A5.1 Some Irish 'Good Practice' Examples

TYPE	2012	2013	2014	2015	% CHANGE '15/'14
Britain	2,722	2,870	3,007	3,346	+11.3%
North America	940	1,039	1,146	1,294	+12.9%
USA	833	924	1,005	1,129	+12.3%
Canada	107	115	140	165	+17.9%
Mainland Europe	2,247	2,346	2,490	2,880	+15.7%
France	384	409	420	471	+12.1%
Germany	437	466	535	609	+13.8%
Italy	240	226	246	304	+23.6%
Spain	239	249	274	322	+17.5%
Netherlands	137	148	151	174	+15.2%
Norway/Sweden/Denmark	160	173	165	188	+13.9%
Other Areas	378	431	462	516	+11.7%
Australia/New Zealand/Other Oceania	158	192	191	205	+7.3%
Total Overseas	6,286	6,686	7,105	8,036	+13.1%
Northern Ireland	1,299	1,572	1,708	1,492	-12.6%
Domestic Trips	8,291	8,413	8,991	9,125	+1.5%

A5.2 Overview of Target Consumer Segments

OVERSEAS MARKETS

- ▶ **“Culturally Curious”**: Travellers in the over-45 age group taking a holiday with their partner. They are out to broaden their minds and expand their experience by exploring new landscapes, history and culture. They are not interested in a superficial engagement but expect an authentic, engaging, cultural experience.
- ▶ **“Great Escapers”**: These tend to be younger - some with young families - and are specifically interested in rural holidays. Great Escapers are on holiday to take time out with loved ones and to experience nature at close range.

- ▶ **“Social Energisers”**: Younger visitors who like to holiday in groups or as couples. Friends or colleagues looking for an exciting trip to a new and vibrant destination.¹ They are mainly interested in urban short breaks.

IRELAND

- ▶ **“Connected Families”**: These families are looking for opportunities to spend time together through shared experiences. This segment accounts for 23% of the domestic market.
- ▶ **“Footloose Socialisers”**: These are travellers in their late forties, well educated, who enjoy getting away and spending time with like-minded people [e.g. rugby matches, hill walking, golf]. They account for 15% of the domestic market.

- ▶ “Indulgent Romantics”: Couples, broadly aged 45-64, who want to spend time reconnecting and are particularly interested in the more indulgent end of the market - new

cities, shopping, spontaneous weekend breaks, good dining. This segment accounts for 14% of domestic market.

APPENDIX 6: ADDITIONAL DATA FROM CAVAN COUNTY COUNCIL RESEARCH

Figure A6.1: Main Reason for Visiting Cavan, 2015

Q7 Please indicate your guests’ stated reasons for staying in your property in 2015? (where 1 is most frequent reason given and 12 is the least frequent)

Answered: 40 Skipped: 5

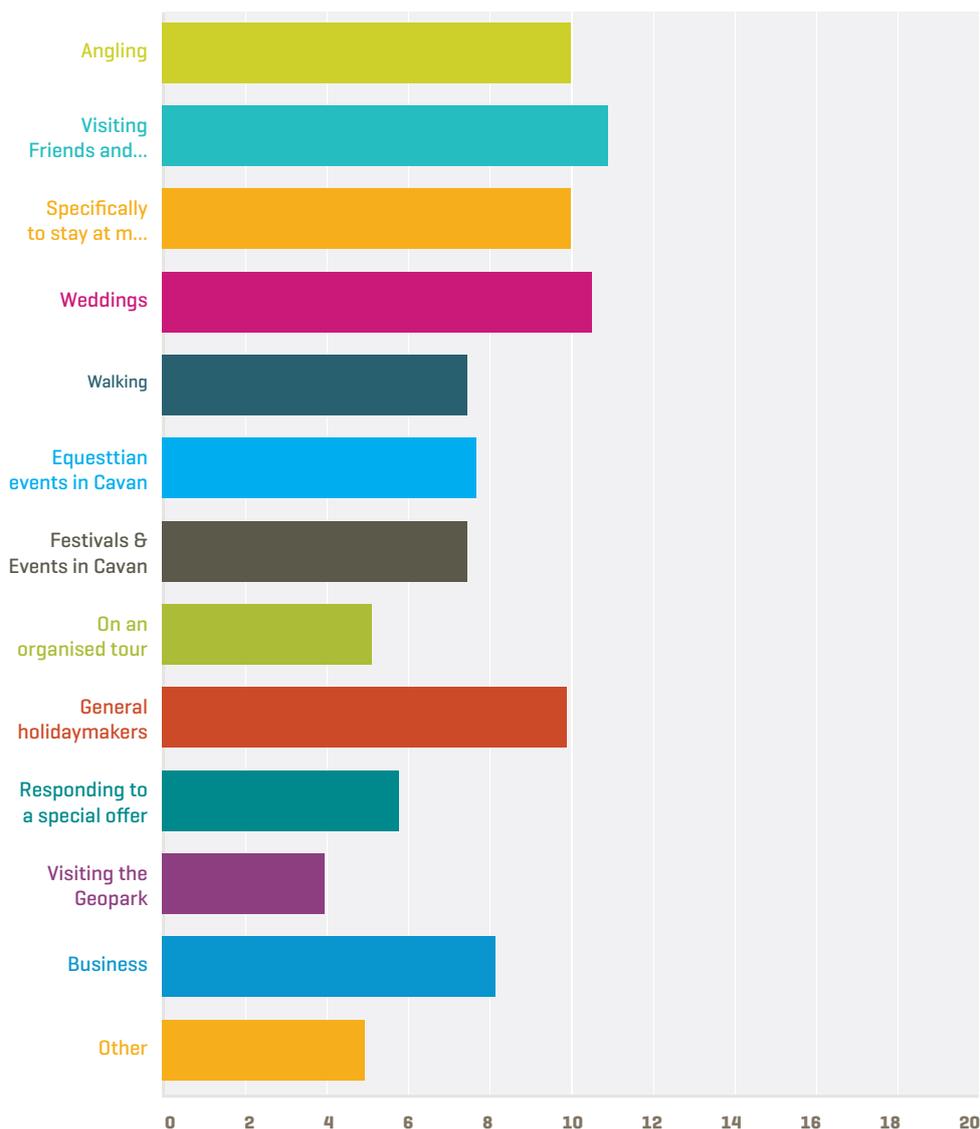
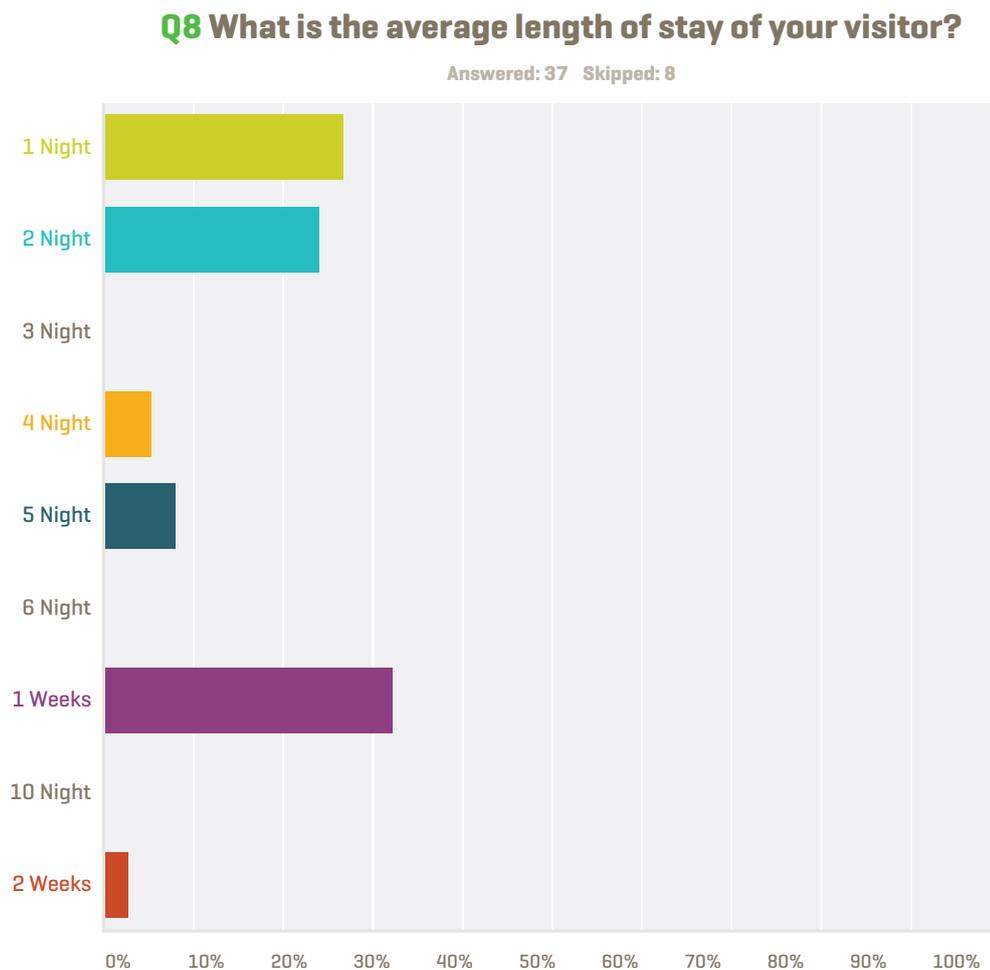


Figure A6.2: Visitor Length of Stay, 2015



APPENDIX 7: COMPARATIVE ASSESSMENT OF CAVAN’S TOURISM PERFORMANCE

A7.1 Overseas

Table A7.1 overleaf presents some data on Cavan’s tourism performance within the context of all counties in Ireland. Dublin and Cork are clear leaders, and both serve as significant gateways into Ireland. Their tourism performance at county level is unduly skewed by this arrival activity [some 85% of all international visitors to Ireland arrive through Dublin Airport]. In comparative tourism terms, Cork, but most especially Dublin, are statistical outliers.

An immediately notable point about the data in Table A7.1 is the clustering pattern evident between inland and coastal counties. Coastal counties dominate in the upper half of the distribution while inland

counties tend to dominate in the bottom half. This suggests that, on balance, visitors to Ireland have a certain bias for a coastal tourism experience [at least for some part of their trip]. This observation is pertinent to an understanding of Cavan’s tourism performance.

For example, in terms of overseas visitor numbers in 2015, Cavan is ranked 16th out of the full set of 26 counties. The inland counties positioned higher than Cavan are Kilkenny, Tipperary and Kildare - the former two benefit from major tourism attractors and the latter from proximity to Dublin.

In terms of overseas tourism revenue, Cavan also put in a relatively strong performance in 2015. With earnings of €50 million, it is ranked 13th out of the 24 member comparator set.

In terms of tourism metrics, revenue is a more significant measure of performance than visitor numbers. Although the two metrics tend to correlate relatively well, the revenue metric represents real spend in Cavan as opposed to the volume of people that visited the County. The latter measure is often a more prominent focus of attention, although it is evident that simply growing numbers may not

necessarily grow spend. Cavan's earnings performance - which is slightly ahead of its performance in terms of volume - is therefore encouraging.

A7.2 Domestic

Cavan's performance in the domestic market is presented in Table A7.2 overleaf. The data are not strictly comparable

Table A7.1: County Distribution of Overseas Visitors by Volume and Value in 2015

	COUNTY	ATTRIBUTE	VOLUME (000)		COUNTY	ATTRIBUTE	VALUE (€M)
1.	Dublin	Coastal	4,938	1.	Dublin	Coastal	1,726
2.	Cork	Coastal	1,449	2.	Cork	Coastal	558
3.	Galway	Coastal	1,354	3.	Galway	Coastal	475
4.	Kerry	Coastal	1,026	4.	Kerry	Coastal	234
5.	Clare	Coastal	597	5.	Clare	Coastal	212
6.	Limerick	Coastal	537	6.	Limerick	Coastal	127
7.	Mayo	Coastal	302	7.	Mayo	Inland	89
8.	Donegal	Coastal	289	8.	Donegal	Coastal	83
9.	Wicklow	Coastal	248	9.	Wicklow	Coastal	82
10.	Kilkenny	Inland	267	10.	Kilkenny	Coastal	80
11.	Waterford	Coastal	263	11.	Waterford	Coastal	75
12.	Wexford	Coastal	221	12.	Wexford	Inland	66
13.	Kildare	Inland	214	13.	Kildare	Coastal	65
14.	Sligo	Coastal	186	14.	Sligo	Coastal	51
15.	Tipperary	Inland	184	15.	Tipperary	Inland	50
16.	Cavan	Inland	144	16.	Cavan	Inland	45
17.	Meath	Coastal	134	17.	Meath	Coastal	44
18.	Louth	Coastal	125	18.	Louth	Coastal	36
19.	Westmeath	Inland	116	19.	Westmeath	Inland	36
20.	Carlow	Inland	62	20.	Carlow	Inland	32
21.	Monaghan	Inland	65	21.	Monaghan	Inland	25
22.	Laois	Inland	57	22.	Laois	Inland	20
23.	Leitrim	Coastal	57	23.	Leitrim	Inland	18
24.	Roscommon	Inland	50	24.	Roscommon	Coastal	15
25.	Offaly	Inland	48	25.	Offaly	Inland	14
26.	Longford	Inland	30	26.	Longford	Inland	8

Source: Regional Tourism 2015, Fáilte Ireland, Oct. 2016

because of the clustering of a number of counties. In terms of inland/coastal preferences, the domestic consumer market appears to behave very much the

same as the overseas one. Cavan and Leitrim are counted together which makes accurate comparison with individual counties difficult.

**Table A7.2: Domestic Travel by Irish Residents
Number of Trips (000s) by Main County Visited in 2015**

	COUNTY	ATTRIBUTE	VOLUME (000)
1.	Dublin	Coastal	1,599
2.	Cork	Coastal	967
3.	Galway	Coastal	895
4.	Kerry	Coastal	779
5.	Wexford	Coastal	679
6.	Mayo	Coastal	463
7.	Clare	Coastal	410
8.	Wicklow	Coastal	315
9.	Donegal	Coastal	314
10.	Kildare & Carlow	Inland	306
11.	Waterford	Coastal	285
12.	Sligo	Coastal	263
13.	Limerick	Coastal	257
14.	Cavan & Leitrim	Coastal /Inland	234
15.	Kilkenny	Inland	228
16.	Tipperary	Inland	217
17.	Westmeath	Inland	209
18.	Meath	Coastal	208
19.	Laois & Offaly	Inland	193
20.	Roscommon & Longford	Inland	160
21.	Louth & Monaghan	Inland	142
	Total		7,354

Source: Regional Tourism 2015, Fáilte Ireland, Oct. 2016

A8. DRAFT TOURISM COMPANY MEMBERSHIP PACKAGE

[To be refined and developed]

A8.1 Overview

Cavan Tourism offers a range of trade support and County marketing activities that present the County's tourism products and activities to target consumers in Ireland and overseas. Tourism and tourism-related businesses can benefit from these directly by becoming a Member of Cavan Tourism, thereby supporting all of us involved in developing Cavan as a top tourism destination.

There are a number of different membership levels available, tailored to suit differing needs as well as availability of time and other resources. There is also an opportunity for non-tourism businesses to participate by becoming a Friend. The pricing of the different categories of membership should be decided by the board of Cavan Tourism.

A8.2 Cavan Tourism - Basic Marketing Membership

This package is for those who want to be included in Cavan Tourism's basic marketing platforms but don't have the need or resources to be more actively involved in other activities.

By opting for a Basic Marketing Membership, your business will benefit from the following activities undertaken by Cavan Tourism.

- ▶ A listing with contact details in relevant annual publications [e.g. County guide].
- ▶ A listing on the website with photograph, brief description, contact details and a link to one business website.
- ▶ An invitation to the annual tourism conference.
- ▶ Inclusion on journalist itineraries, as relevant.
- ▶ Inclusion on tour operator familiarisation trips, as relevant.

- ▶ Receive regular Cavan Tourism newsletters and bulletins.
- ▶ An opportunity to participate in mentoring and training (excluding networking and trade familiarisation programmes, which are included in the Active Participation Membership).

A8.3 Cavan Tourism - Active Participation Membership

This package is for those who would like the opportunity to more actively take part in Cavan Tourism's year-round promotions in Ireland and overseas. By choosing to be an Active Participation Member, your business will benefit from the following activities undertaken by Cavan Tourism.

- ▶ All the benefits of the Basic Marketing Membership.
- ▶ Invitations to participate in networking events and Cavan trade familiarisation programmes.
- ▶ Invitations to participate in planned promotions in Ireland and overseas [subject to additional, though subsidised, participation fees].
- ▶ Inclusion in rolling gallery of images on the relevant landing pages of the website, e.g. 'Experience', 'Stay'.
- ▶ Inclusion in direct marketing campaigns to consumers, e.g. e-zines.

A8.4 Cavan Tourism - Full Membership

This package is for those who are keen to be full participants in the direction in which Cavan Tourism takes and who are in a position to respond to ad-hoc opportunities that need a swift response. By choosing to be a Full Member, your business will benefit from the following activities undertaken by Cavan Tourism.

Benefits:

- ▶ All the benefits of the Active Participation Membership.
- ▶ Invitations to co-operate in short-term/seasonal bundles.
- ▶ Invitations to participate in responsive marketing activities, e.g. opportunistic promotions that capitalise on unexpected publicity, weather/currency changes, etc., and other unplanned

activities that require a quick turnaround.

- ▶ Inclusion in the gallery of images presented on the main page of the website.

A8.5 Friend of Cavan Tourism

This is a special category for non-tourism businesses that recognise the value tourism brings to the county as a whole and wish to lend their support to the marketing of the County as a tourism destination. In return for support, Friends will participate in a rolling banner ad campaign on the Cavan Tourism website and receive regular Cavan Tourism newsletters and bulletins.

A9. FÁILTE IRELAND RESOURCES

Guidelines for animation of heritage sites Sharing Our Stories by Fáilte Ireland, available on the website at http://www.failteireland.ie/FailteIreland/media/WebsiteStructure/Documents/2_Develop_Your_Business/3_Marketing_Toolkit/5_Cultural_Tourism/Heritage_Interpretation_Manual.pdf?ext=.pdf

And interpretation exercises are to be found here: http://www.failteireland.ie/FailteIreland/media/WebsiteStructure/Documents/2_Develop_Your_Business/3_Marketing_Toolkit/5_Cultural_Tourism/Heritage_Interpretation_Exercises.pdf?ext=.pdf

Guidelines for maximising the tourism potential of an historic town. http://www.failteireland.ie/FailteIreland/media/WebsiteStructure/Documents/2_Develop_Your_Business/3_Marketing_Toolkit/5_Cultural_Tourism/Historic-Towns-In-Ireland-with-link-1.pdf?ext=.pdf

Visitor Survey for Towns. [http://www.failteireland.ie/Utility/Publications-\(1\)/2_Develop_Your_Business/3_Marketing_Toolkit/5_Cultural_Tourism/Historic-Towns-in-Ireland-Questionnaire.aspx](http://www.failteireland.ie/Utility/Publications-(1)/2_Develop_Your_Business/3_Marketing_Toolkit/5_Cultural_Tourism/Historic-Towns-in-Ireland-Questionnaire.aspx)

Advice on Marketing Overseas.
For country profiles, advice on distribution channels, developing relationships and key

contacts see this section of the Fáilte Ireland website: <http://www.failteireland.ie/International-sales/Sell-to-overseas-markets.aspx>

Advice on Marketing in Ireland
For guidance on knowing your Irish customer and promoting your business in Ireland: <http://www.failteireland.ie/Domestic-sales.aspx>

Advice for Online Marketing
<http://www.failteireland.ie/Market-Your-Business-Online.aspx>

Listing of Overseas Buyers
Full details of overseas operators who attended Meitheal 2015, along with profile information, can be downloaded here: http://www.failteireland.ie/FailteIreland/media/WebsiteStructure/Documents/2_Develop_Your_Business/3_Marketing_Toolkit/9_International_Sales_Toolkit/Overseas-Buyers_2015.pdf

Toolkit for Promoting a Business in Ireland's Ancient East
<http://www.failteireland.ie/Ireland-s-Ancient-East.aspx>

A guide to services available to tourism operators through Local Enterprise Offices
<http://www.failteireland.ie/Supports/Local-Enterprise-Office-Supports.aspx>

