

Co. Monaghan
Tourism Strategy
2015- 2020

Contents

Introduction	5#
Context of the Tourism Sector in Co Monaghan	6#
Table 1.1 Overseas visitors (000s) by County in the Years 2011 - 2013	7#
Table 1.2: Overseas Visitors revenue (€mn) by County in the Years 2011 - 2013	8#
Overseas Visitors (000s)	9#
Overseas Revenue (€mn)	9#
Table 1.3: Domestic Visitors by County in the Years 2010 - 2013	10#
Table 1.4: Domestic Visitors Revenue (Mn) by County in the Years 2010 – 2013	11#
Table 1.6 Estimated Overnight Trips, Nights and Spend taken by overnight visitors from GB, RoI and Overseas in NI by County, 2011-2013	13#
Changing Role in Tourism for Local Authorities	14#
Methodology for Tourism	15#
Strategy 2015-2020	15#
Review of National Tourism Policy for Ireland	16#
Fáilte Ireland's Growth Strategy	18#
Overview of Monaghan County Development Plan 2013 – 2019	20#
Overview of Tourism Unit within Monaghan County Council	21#
Tourism Projects Previously Developed	22#
Review of Progress against County Monaghan Economic Strategy 2010-2014	24#
Tourism & Amenities Business Leaders Forum Action Plan 2010 - 2014	25#
The Tourism Product in Co Monaghan	28#
Heritage	28#
Genealogy	29#
Festivals & Events	29#
Angling	30#
Visitor Attractions	30#
Equestrian	31#
Walking & Cycling	31#
The Arts	31#
Crafts	32#
Golf	32#
Adventure/Activity	32#

Entertainment, Shopping, Food and Drink	33#
Family Fun	33#
Accommodation	34#
Co Monaghan Fáilte Ireland approved Accommodation 2015	34#
Survey Findings	35#
Reason for visit	36#
Source of Referrals	37#
Principal Methods of Marketing Used	38#
Market Segments targeted	39#
Top three tourism Products in the county	40#
Top three weaknesses of Monaghan as a tourism destination	41#
Quality of existing tourism product and infrastructure	42#
Products most needed to attract visitors	42#
What makes Monaghan different to other counties?	43#
Product Development	44#
Tourism Promotion	44#
Trade Engagement	44#
SWOT Analysis	46#
Strengths	46#
Weaknesses	46#
Opportunities	47#
Threats	47#
Key Priorities for 2015 – 2020	48#
Product Development	49#
Focus on the development of the key Amenity sites and on Walking & Cycling Trails	49#
Continue to lobby for and work on the Re-Opening of the Ulster Canal	49#
Assist Festivals and events to increase numbers and deliver bednights	50#
Develop the potential of Heritage Tourism	50#
Promotional Activity	51#
Develop a central border area 'destination' with Monaghan at its centre	51#
Increase on-line presence and engage with Social Media	51#
Improve Tourism Signage & Interpretation and Improve Tourist Office (Visitor Servicing)	52#
Develop County Brand	52#
Engagement with stakeholders	53#
Develop packages and encourage cross-selling	53#

3#
4#
4#
4#
4#
5#
5#
5#
5#
5#
6#
6#
7#
7#
7#
8#
8#
9#
0#
4 4 4 5 5 5 6 6 7 7 8 8 9

Co. Monaghan Tourism Strategy 2015- 2020

Introduction

Between 2007 and 2013, the tourism industry in Ireland changed dramatically with the impact of the recession and the effect this had on people's disposable income and their ability to afford holidays. The tourism sector faced many challenges and visitor numbers from 2008 were extremely volatile with Fáilte Ireland recording major decreases in visitor numbers and visitor revenue for each of the regions during this period. Nationally, visitor numbers dropped from a high of 7.7 million in 2007 to a low of 5.9 million in 2010 with a corresponding drop in visitor revenue from €4.9 billion to €4.2 billion. By 2013, this had gradually improved and tourism businesses are generally more optimistic about the potential for growth in future years. Overseas Visitors numbers for 2013 have recently been published and these show a welcome increase in overseas visitor numbers at both a national and at a county level.

Co Monaghan, with its extensive natural resources and the quality of its rural landscape, is well placed to take advantage of this upturn in the tourism sector. These advantages, combined with its attractive towns and cultural heritage, provide a significant opportunity for the development of tourism. It is important to note here that tourism's contribution is not confined to directly generating employment, economic activity and exports. It also contributes by encouraging social inclusion and access to the labour market.

Monaghan County Council has developed this tourism strategy, in consultation with the tourism trade, key stakeholders and with the public with a view to identifying tourism opportunities and proposals which may have the potential to be implemented over the 2015 -2020 period, subject to the usual statutory consents and viability assessments. The proposals outlined in this document are not intended to be exhaustive, and it is anticipated that further proposals will come forward over the next five year period.

The overall objective of the Co Monaghan Tourism Strategy 2015 – 2020 is **to guide the development, inward investment and marketing of the county during the period outlined.**

Context of the Tourism Sector in Co Monaghan

Nationally, Failte Ireland is responsible for the production of tourism statistics. The majority of tourism reports produced (e.g. Accommodation Occupancy, Cultural Product Usage among Overseas Visitors, Activity Product Usage among Overseas Visitors, Tourism Barometers etc) focus on the national statistics and there is little data available for Co Monaghan on a stand-alone basis. The exception to this are the Regional Tourism Performance and the Domestic Tourism Performance reports that Failte Ireland produces annually.

Statistics for Co Monaghan in 2012 show that 46,000 overseas visitors were recorded generating a total of €11m in revenue. It is interesting to compare this performance to other counties within the border region. For the same period, Cavan recorded 80,000 visitors (€22m), Leitrim 29,000 (€10m), Sligo 129,000 (€30m), Louth 92,000 (€30m) and Meath 122,000 (€44m). A more detailed analysis of these overseas numbers reveals the important fact that the UK market is a key market for the county with 32,000 of these 46,000 visitors coming from the UK and generating €8m of the €11m revenue.

The Gathering initiative in 2013 had a significant impact on overseas numbers and whilst this alone cannot account for the increase in overseas visitors to County Monaghan in 2013 at 58,000, the difference is fairly significant. The tables below show the most recent statistics for overseas visitors by county and the corresponding revenue generated by these visitors.

 TABLE 1.1 Overseas visitors (000s) by County in the Years 2011 - 2013

Total Overseas Trips	2011	2012	2013
Dublin	3,739	3,641	3,998
Cork	1,102	1,228	1,228
Galway	938	968	1,028
Kerry	829	826	877
Clare	441	445	485
Limerick	375	391	420
Wexford	180	229	229
Waterford	206	225	225
Mayo	268	245	218
Kilkenny	214	211	207
Wicklow	204	191	204
Donegal	205	174	199
Kildare	143	139	168
Sligo	167	129	133
Meath	130	122	122
Tipperary (South)	114	124	117
Cavan	91	80	111
Louth	104	92	108
Westmeath	94	81	95
Carlow	58	69	68
Monaghan	49	46	58
Laois	38	37	52
Tipperary (North)	51	51	51
Leitrim	31	29	39
Roscommon	46	42	35
Offaly (East)	38	31	28
Longford	24	20	22
Offaly (West)	10	11	9

[•] Total visits are less than the sum of visits to the counties because overseas visitors can visit more than one county.

[•] Data is based on three-year rolling averages.

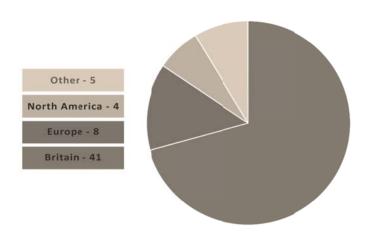
TABLE 1.2: Overseas Visitors revenue (€mn) by County in the Years 2011 - 2013

Total Overseas Revenue	2011	2012	2013
Dublin	1,107	1,267	1,401
Cork	408	399	433
Galway	317	253	308
Kerry	177	164	183
Limerick	140	116	135
Clare	92	86	94
Wicklow	58	50	70
Donegal	51	40	63
Mayo	79	67	60
Wexford	39	65	60
Kildare	44	36	52
Waterford	39	55	49
Sligo	47	30	44
Louth	33	30	43
Westmeath	36	32	43
Meath	47	44	39
Cavan	23	22	36
Tipperary (South)	38	39	34
Kilkenny	27	36	30
Carlow	26	37	30
Monaghan	13	11	19
Tipperary (North)	16	17	19
Laois	11	11	19
Offaly (East)	14	12	15
Leitrim	11	10	14
Roscommon	20	19	13
Longford	7	6	6
Offaly (West)	3	3	2

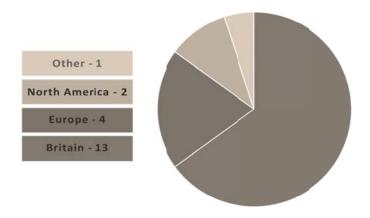
Data is based on three-year rolling averages.

A more detailed breakdown of the 2013 overseas figures for Co Monaghan shows a heavy reliance on British tourists, with the British market accounting for over 70% of the overseas visitors to the County in 2013 and over 68% of the overseas revenue. This has long been a characteristic of the tourism economy in the county.

OVERSEAS VISITORS (000s)



OVERSEAS REVENUE (€MN)



In terms of Domestic Visitors the statistics for Co Monaghan are disappointingly low.

The table below shows a breakdown per county;

TABLE 1.3: DOMESTIC VISITORS BY COUNTY IN THE YEARS 2010 - 2013

Number of trips (000s) by main county visited, 2010 – 2013

	2011	2012	2013
Total Domestic Trips	7169	7031	7111
Dublin	1279	1392	1344
Cork	837	793	740
Galway	686	651	739
Kerry	656	610	671
Wexford	547	481	455
Mayo	348	342	373
Clare	376	340	294
Donegal	272	245	269
Waterford	335	254	242
Westmeath, Roscommon & Longford	215	302	226
Limerick	172	169	208
Kilkenny	149	159	204
Kildare & Carlow	210	196	198
Wicklow	205	213	194
Cavan & Leitrim	161	178	192
Sligo	193	189	182
Tipperary	144	152	155
Meath	158	149	150
Laois and Offaly	124	118	146
Louth and Monaghan	104	100	129

Data is published at county level above a threshold of 150,000 trips for most recent year. Data is amalgamated below this threshold.

Source: Central Statistics Office Household Travel Survey

TABLE 1.4: DOMESTIC VISITORS REVENUE (MN) BY COUNTY IN THE YEARS 2010 - 2013

	2011	2012	2013
Dublin	194	217	195
Kerry	165	158	187
Galway	134	138	148
Cork	184	162	138
Wexford	129	95	107
Mayo	84	79	94
Clare	93	80	82
Donegal	73	61	64
Waterford	72	61	49
Sligo	37	34	39
Westmeath, Roscommon, Longford	29	37	37
Wicklow	41	34	35
Cavan & Leitrim	27	30	35
Limerick	26	24	31
Kilkenny	22	29	29
Kildare & Carlow	29	29	24
Tipperary	22	24	21
Laois & Offaly	16	16	20
Meath	21	23	19
Louth & Monaghan	17	15	18
Total Domestic Expediture (€million)	1415.9	1345.4	1373.2

Source: Fáilte Ireland's own estimates based on CSO Household Travel Survey

It is clear from the above that Tourism in Monaghan still operates off a low base and that the need to grow visitor numbers continues to be a priority. There are clearly issues in attracting the domestic market and this will require continuous and concentrated work on the part of Monaghan County Council, Fáilte Ireland and the tourism trade.

For the purpose of providing a comparison with neighbouring counties in Northern Ireland, we have included the statistics provided by the Tourism Statistics Branch of the Northern Ireland Statistics & Research Agency in Tables 1.5 and 1.6.

Table 1.5: Estimated Overnight Trips, Nights and Spend taken by NI residents in NI by County, 2011-2013

Year	County	Trips (000s)	Nights (000s)	Spend (£m)
	Antrim	881	1,631	75
	Armagh	83	133	9
	Down	531	1,753	34
2011	Fermanagh	236	477	31
20	Derry/Londonderry	238	590	23
	Tyrone	66	114	5
	Total	2,036	4,698	178
	Antrim	968	1,729	96
	Armagh	88	148	9
	Down	459	966	46
2012	Fermanagh	180	326	16
20	Derry/Londonderry	210	554	22
	Tyrone	112	183	12
	Total	2,018	3,906	201
	Antrim	939	2,072	94
	Armagh	92	191	3
	Down	454	1,123	34
2013	Fermanagh	196	551	30
2	Derry/Londonderry	183	391	19
	Tyrone	117	249	12
	Total	1,980	4,577	192

Source:

Continuous Household Survey (CHS).

Notes:

All estimates are based on sample surveys and therefore have an associated degree of sampling error. Estimates are subject to change.

Spend is the sum of average spend per person.

TABLE 1.6 ESTIMATED OVERNIGHT TRIPS, NIGHTS AND SPEND TAKEN BY OVERNIGHT VISITORS FROM GB, ROI AND OVERSEAS IN NI BY COUNTY, 2011-2013

Year	County	Trips (000s)	Nights (000s)	Spend (£m)		
	Antrim	1,158	5,605	288		
	Armagh	141	596	24		
	Down	340	1,587	71		
2011	Fermanagh	80	388	19		
20	Derry/Londonderry	206	1,296	43		
	Tyrone	105	520	17		
	Total	2,030	9,992	463		
	Antrim	1,189	5,553	313		
	Armagh	93	342	13		
	Down	377	1,927	78		
2012	Fermanagh	83	355	16		
20	Derry/Londonderry	249	1,193	49		
	Tyrone	100	515	18		
	Total	2,090	9,885	488		
	Antrim	1,234	5,136	302		
	Armagh	98	538	19		
	Down	409	1,903	81		
2013	Fermanagh	85	367	25		
70	Derry/Londonderry	260	1,343	63		
	Tyrone	129	624	42		
	Total	2,215	9,910	531		
	Sources:					
	Northern Ireland Passenger Survey, NISRA					
	Survey of Overseas Travellers, Fáilte Ireland					
	Household Travel Survey, Central Statistics Office					
	Notes:					
		eys and therefore have ar	associated degree of	sampling error.		
	All estimates are based on sample surveys and therefore have an associated degree of sampling error. Estimates are subject to change					
	Spend is based on average spend per ni	ight				

It is clear from these statistics that there is enormous potential on our doorstep and that Monaghan could attract a growing share of this market by working closely with our nearest neighbours in counties Armagh, Tyrone and Fermanagh. This key issue will be reflected in the priorities section further on in the document.

Changing Role in Tourism for Local Authorities

Local Authorities have long recognised the important contribution of tourism. Specifically, local authorities have been active in aspects of tourism such as the organisation and funding of events and the development of tourism infrastructure (recreation and amenity facilities). The Government's 'Action Programme for Effective Local Government — Putting People First' envisages the local government system performing an enhanced role in relation to economic development in partnership with relevant government departments and agencies. In essence, this means that local authorities will lead the management of their respective tourism destination and the development of the tourism experience in their areas. A key consideration for local authorities is that tourism destinations do not necessarily align with administrative boundaries and it is therefore important that local authorities act in co-operation with one another in managing and developing destinations.

Small-scale tourism enterprises have generally been outside the support measures provided by Enterprise Ireland. With the roll-out of the Local Enterprise Offices (LEOs), based in local authorities, as the replacement for the City and County Enterprise Boards, and the proposed transfer of management of Local Action Groups to local authorities, there is potential for the funding of start-up and developing tourism enterprises to be aligned with the key tourism objectives of local authorities. Clearly, the private sector has a very important role to play in developing Co Monaghan's tourism product, and the LEO will be well placed to assist in this regard.

This enhanced role for local authorities will of course be very challenging as many local authorities are in a difficult financial position, and they face a range of demands on their resources. These resources have been further stretched in Co Monaghan by the withdrawal of Fáilte Ireland from the operation of the tourist office and this service is now being provided by Monaghan County Council. Notwithstanding this, Monaghan, as a border county, can access cross-border funding and Monaghan County Council will continue to make every effort to access such funding for tourism projects in conjunction with our cross-borders partners.

In 2013, the Gathering initiative provided a foundation for a more structured role for local authorities in tourism and a recognition of the potential of the community and not-for-profit sector as facilitators of tourism activity, particularly festivals and events. The Community Tourism Initiative for the Diaspora, a joint partnership between Fáilte Ireland, IPB Insurance and the 34 local authorities was launched in 2014 and will provide an annual fund (administered through the local authorities) from 2014-2016 to support local community-based events and festivals

Methodology for Tourism Strategy 2015-2020

This document presents an assessment of the tourism opportunities for County Monaghan for the 2015-2020 period.

The plan examines existing tourism plans, reviews the product on the ground and highlights works carried out to date. Below is a summary of the approach that was taken in the drawing up of this strategy:

- Review of Draft National Tourism Plan
- Review of Fáilte Ireland Growth Strategy
- Review of Monaghan County Development Plan 2013 2019
- Overview of Tourism Unit within Monaghan County Council
- Review progress against Tourism actions in the Economic Strategy & Implementation Plan for County Monaghan 2010-2014
- Examine the current tourism product in the county to determine key challenges and identify potential opportunities
- Review Survey submissions (See below)
- Draw up SWOT Analysis on basis of survey submissions
- Identify key priorities and corresponding actions on basis of survey submissions
- Identify potential sources of funding

The strategy is also based on a consultation programme which included the following:

- Meetings with key stakeholders (Fáilte Ireland, Inland Fisheries Ireland, Cavan Monaghan LEADER, local trade etc)
- Discussions with Municipal District Co-ordinators
- Public consultation through on-line survey (109 completed submissions)

The key objective throughout the whole process was to reach a consensus on how best Co Monaghan might position itself in the coming years so as to maximize the economic benefits to be derived from tourism. In addition to delivering key Local Authority projects, the Tourism Unit will continue to act in a facilitation role, through advising and signposting project promoters to appropriate sources of professional advice and guidance to potential sources of funding.

Review of National Tourism Policy for Ireland

Three years ago, the emphasis was on stabilisation and recovery, not only in tourism, but across all sectors. Now that the tourism sector has stabilised and to all appearances, is in recovery, the Government has mapped out a long term vision for the sector. This vision is set out in detail in *'People, Place and Policy - Growing Tourism to 2025'* which has recently been published.

The overall tourism goal is that:

® By 2025, revenue from overseas visitors, excluding carrier receipts, will increase to €5 billion in real terms.

Clearly, the national tourism policy objective is to maximize the services export revenue of the sector, and therefore, the focus of this policy document is centered on Ireland achieving its full potential as a destination for **overseas tourism**.

In order to achieve the revenue growth target, the policy document agrees:

- O To ensure that Ireland is successfully promoted overseas and our visitor expectations are met, the marketing of Ireland as a visitor destination will aim to generate a balance of visitors from both mature and developing markets; our heritage assets will be protected, and any public investment in tourism will be based on evidenced needs
- O That Ireland's tourism industry will have the capacity and capability to meet the changing needs of visitors, underpinned by a clear framework for the development of human capital in the industry
- O That there will be a clear understanding of the responsibilities and expectations of Government, State agencies, Local Authorities, the tourism industry and other stakeholders in the development of our tourism industry, with an enhanced role for Local Authorities and recognition of the contribution of communities to tourism

The difficulty that Monaghan, and many counties face, is that overseas promotion of Ireland tends to focus on key destinations such as the Wild Atlantic Way, Dublin Plus and Ireland's Ancient East. The document clearly states the view that marketing of individual counties overseas is largely ineffectual due to the lack of familiarity with the names or locations of Irish counties among potential overseas visitors. Being peripheral to the 'destination' areas mentioned above, is a major disadvantage in terms of overseas promotion and Monaghan, together with many other counties that are also

peripheral to the above destinations, will need to lobby very hard for the development of a new destination that will help to attract overseas visitors to the border area.

This issue regarding overseas promotion of key destinations will also have an impact on counties such as Monaghan in terms of accessing State supports for future tourism development. The Policy document clearly states that future investment supports will be shaped to integrate closely with overall destination development frameworks and that this may result in regional variations in priority areas for support.

However, on a positive note, it is clear from the document that the tourism agencies will continue to explore opportunities for new propositions in other areas or segments in the future and this will need to be a key focus for Co Monaghan and its neighbours (both North and South).

Fáilte Ireland's Growth Strategy

From a strategic perspective one of Fáilte Ireland's key objectives is to 'build sustainable international sales', driving accelerated growth from key overseas markets where high value customers that stay longer and spend more are there to be won. Fáilte Ireland is also committed to supporting and developing domestic sales and in an attempt to deliver on both these objectives, a new approach to identifying and defining best prospect customers has been put in place. This has resulted in new global and domestic segmentation models which provide unique insights about the key consumer segments; their motivations, the kinds of experiences they will buy, associated market differentiators and the key channel intermediaries they use.

From a global perspective, three segments have been prioritised as:

- 1. Culturally Curious
- 2. Social Energisers
- 3. Great Escapers

Culturally Curious tend to be slightly older, are very independently minded and are interested in places of historic and cultural interest. **Social Energisers** tend to be young, looking for new experiences and excitement. **Great Escapers** are all about getting away from it all, renewing family bonds and spending time together in a beautiful place.

On a domestic front, three segments have been prioritised as:

- Connected Families
- 2. Footloose Socialisers
- 3. Indulgent Romantics

Connected Families are made up of families with young children. Their core motivation is to spend quality time together and grow as a family. **Footloose Socialisers** tend to travel as groups of friends and their motivation is to share experiences with people who are of the same mindset. **Indulgent Romantics** are made up of couples that are seeking a romantic getaway through which they can reconnect while enjoying wonderful surroundings.

Clearly, any future tourism promotions for Co Monaghan will need to be aligned to this strategy which will assist the tourism trade in Monaghan to target and influence best prospect customers more effectively, and in doing so drive revenue growth and sector performance.

Overview of Monaghan County Development Plan 2013 – 2019

The Monaghan County Development Plan 2013 – 2019 (incorporating the Development Plans for the towns of Monaghan, Carrickmacross, Castleblayney, Clones and Ballybay) sets out an overall strategy for the proper planning and sustainable development of County Monaghan. The plan provides an outlook and vision for the future development of the county and it is important that any proposed new tourism developments fit within this vision. Key policy objectives for Tourism in the Plan include:

- Optimise the current opportunities to develop rural tourism attractions/facilities provided by the National Rural Development Programme and EU funding opportunities.
- O Drive the production of a 5-year action-led Tourism Development Plan. Focus tourism development efforts on developing a small number of key projects such as Lough Muckno Leisure Park, Ulster Canal, enhanced water sports.
- O Encourage clustering and packaging of products to increase linkages within and reduce leakage from, the local economy.
- O Encourage the improvement of access, signage/interpretation and tourist information facilities.
- Encourage and support festivals as a method of attracting visitors.
- O Support the incubation of new tourism, recreation and activity businesses where gaps occur and within clusters/hubs.
- Establish Lough Muckno as a major international venue for angling competitions and festivals.
- O Continue to actively promote Co Monaghan using both existing and newly developing technologies.

Overview of Tourism Unit within Monaghan County Council

The principal functions of the Tourism Unit are:

- 1. to raise customer awareness of the Monaghan area as a tourism destination through the production of promotional materials such as brochures, website, social media sites etc
- 2. to provide visitor information (through the operation of the Tourist Office on a seasonal basis)
- 3. to develop and contribute towards the development of the county's tourism product.

A key focus of the Tourist Unit in the past number of years has been the delivery of cross-border funded projects and these are listed below. The tourism unit is based within the Planning and Economic Development section of the council. The unit is headed by the Tourism Officer who reports to the Director of Services and currently comprises two staff members and an intern on the Gateway initiative.

The tourism unit seeks to reflect the Council's mission statement which is to 'maximise and drive economic, community and cultural development within our county and provide high quality sustainable public services and infrastructure.' The unit strives to do this by identifying and implementing best practice policy for tourism development and marketing. This work is done in conjunction with stakeholders and interested parties that include:

- Accommodation providers, activity and attraction providers
- Festival and event organisers
- Restaurants
- Voluntary and community groups with tourism interests
- State/Semi-state bodies such as Fáilte Ireland, Coillte Outdoors, Inland Fisheries Ireland etc
- Funders such as Special European Union Programmes Body, LEADER, etc
- Other councils in the border area and cross-border organisations such as ICBAN (Irish Central Border Area Network) and EBR (East Border Region)

As Monaghan is a relatively small county and mindful of the fact that visitors don't recognise county boundaries, Monaghan County Council tourism staff often work closely with neighbouring counties on both sides of the border, both to promote the wider area and to attract tourism development funding as part of regional cross-border partnerships such as EBR (East Border Region) and ICBAN (Irish Central Border Area Network). In addition, the council is involved with specific cross-border partnerships such as CASA (Castleblayney-South Armagh) in conjunction with Newry & Mourne District Council, CEEP (Clones Erne East Partnership) with Fermanagh District Council and BRP (Blackwater Regional Partnership) with Armagh City and District Council and Dungannon & South Tyrone Borough Council).

By actively participating in these partnerships and aggressively sourcing funding, Monaghan County Council has had some success in securing cross-border funding for a range of tourism projects over

the past 8 years. The table below lists the tourism funding that Monaghan County Council has sourced during the last 8 years to develop and promote Co Monaghan's tourism product.

TOURISM PROJECTS PREVIOUSLY DEVELOPED

		SLY DEVELOPED	
Funding Stream	Date Awarded	Amount received	Outcomes of project
Newry/Castleblayn ey Linkage INTERREG IIIA	2006-2008	€293,851 (Between Monaghan Co Co and Newry & Mourne District Council)	 Support for Cross-border festivals Fishing stands & floating jetty at Gas Lake Angling stand at Milltown Lake
EBR Tourism Programme INTERREG IIIA	2004-2007	£1.9M (of which £250K for Monaghan)	 Lough Mor Walkway, Ballybay - £50K Bath Ave, CMX - £50K Holywood Lake - £50K Tourist Office at Leisure Centre - £50K County Museum - £40K Visitor Servicing £10K
EBR - Promoting Pride in our Rural Villages INTERREG IIIA	2006-2008	£616,599 (of which £96,875 for Monaghan County Council)	 Lisanisk Walkway, CMX - €25.5K St Peter's Lake fountain, Monaghan - €28.5K Ring Fort, Clones - €26.25K Mindszenty Park, C'blayney - €18.75K
EBR – Borderlands Heritage Tourism Project INTERREG IIIA	2006-2008	£90,000	 Audit of Heritage sites Production of 'Borderlands' Tourism Brochure Marketing of Heritage product across 5 Councils
EBR – Tourism Marketing Programme PEACE II – 5.2	2007-2008	£730,000 for all 10 East Border Region councils	 Delivery of a series of tourism marketing campaigns for EBR region into UK market in conjunction with Ferry and Air Carriers
CASA (Castleblayney- South Armagh) Project INTERREG IVA	2011 - 2014	£1.3M (of which £519,519 for Lough Muckno and £373,523 for Ballybay Enterprise Centre)	 Playground at Lough Muckno Roads upgrade and angling access improvements at Lough Muckno Enterprise Centre in Ballybay Joint Marketing for projects

Clones Erne East Blackwater (CEEB) Project INTERREG IVA	2011-2014	€1.6m (of which approx €1M for Monaghan County Council and €250K for Ulster Canal Stores Building	 Playpark and car park at Cara St Enhancement work at Cara St Interpretative signage at 7 Heritage sites in Clones 13 Double angling stands at 6 lakes in Clones Catchment Upgrade of Canal Stores Funding for Project Co-Ordinator Delivery of Training programme Marketing Brochures, videos and photo library
EBR Main Tourism	2012 - 2015	£2.72m (of which	Barry McGuigan Pk Upgrade - £81,573
Plan		£222,648 was for	Creevy Lake Angling Facilities - £31,374
INTERREG IVA		Monaghan County	Dartrey Park Walking Trails - £84,059
		Council)	 Ballybay Trails - £12,821
			 Errigal Truagh Interpretation - £12,821
Sharing Our Space	2011 - 2014	£3.3m (of which	 Adventure Playpark at Lough Muckno for
PEACE III		approx £215K was for Monaghan)	older children
National	2007	€465K	Series of events on site
Development Plan	2007	€405K	Road widening at Wildlife CentreMonaghan Town Trail
2007 – 2013 Tourism			Clones Town Trail
Capital Investment			Angling works at Drumsnat, Croavoo,
Programme – Infrastructure Fund.			Gortnawinney, Drumate, Milltown, River
			 Lough Muckno Water Ski Disabled Toilets and Changing Rooms
			Signage along Monaghan Way
			Gallows Hill, CMX
			•
National Development Plan	2008	€356K	 Lough Major Angling infrastructure €155K
2007 – 2013 Tourism Capital Investment Programme – Infrastructure Fund.			 Floating Pontoon at Ballybay Wetlands Centre €201K

Additional tourism related projects were also delivered by other sections of Monaghan County Council and these included:

The Monaghan Greenway Community & Enterprise Section

Monaghan Leisure Centre Water Services

Review of Progress against County Monaghan Economic Strategy 2010-2014

This new Strategy will build on the progress already achieved as a result of the Economic Strategy & Implementation Plan for County Monaghan 2010 – 2014 which was developed by the Economic Development Sub-Committee of the Monaghan County Development Board. 103 potential actions/brainstormed ideas were identified across 6 thematic areas after a series of workshops involving 40 key stakeholders from the Business sector and senior personnel from relevant state agencies and the Local Authority. The thematic areas were as follows: IT, Tourism & Amenities, Industry, Food, Retail & Services, and Education & Training.

In total there were fifteen tourism actions and these were prioritised by the Tourism & Amenities Business Leaders Forum (BLF) – a group of tourism industry stakeholders who assisted in the implementation and delivery of the actions.

The main focus of the Tourism & Amenities BLF was on the following actions:

- Marketing of County Monaghan as a tourism destination and as a place to live and retire.
 Educational awareness of Monaghan Location and what it has to offer both on a National and Local level
- O Development of amenity infrastructure including public parks, fishing, tourism attractions, investment in public areas to improve landscaping
- Optimise the current opportunities to develop rural tourism attractions/facilities provided by the National Rural Development Programme and EU funding programmes

The full list of Tourism & Amenities actions are outlined below and progress is tracked against each action.

TOURISM & AMENITIES BUSINESS LEADERS FORUM ACTION PLAN 2010 - 2014

Actions	Support	Update
Market County Monaghan – as a tourism centre and as a place to live and retire. Educational awareness of Monaghan Location and what it has to offer both on a National and Local level	MCC CDB	 New 'Explore Monaghan' guide published Calendar of Events for the county produced iPhone and Android App developed and updated www.monaghantourism.com website updated Facebook page updated daily (doubling of 'likes' in 2014)
Develop joint marketing activities with neighbouring counties, especially crossborder contacts	MCC CDB	 CASA (Castleblayney/South Armagh) brochure completed 3 CASA promotional videos completed (Family Fun, Over 50s, Angling videos) CASA photo library produced CEEB (Clones Erne East Blackwater) general tourist brochure completed CEEB angling brochure completed 4 CEEB video podcasts produced (Family Fun, Heritage, Angling, Over 50s) CEEB Photo Library produced
Develop themed breaks/packages	MCC/CDB Failte Ireland North West MID/CEB	 Progress made in terms of angling breaks. Other themes still to be worked up.
Develop common festivals brand for festivals/events and share promotional and information activities	MCC CDB Fáilte Ireland North West MID CEB	Print Calendar of Events for Co Monaghan produced in 2013 and 2014 On-Line Calendar of Events developed and updated on www.monaghantourism.com Events uploaded on Monaghan Tourism App
Promote Adventure activity centre/Team Building/ECO school tours	CEB CDB	 Some small progress at Tanagh Outdoor Education Centre with a small number of Chinese students on an Adventure/Language skills programme
Develop amenity infrastructure – including public parks, fishing, tourism attractions, investment in public areas to improve landscaping.	MCC CEB CDB Failte Ireland North West MID	 3 walking trails in Dartrey Forest completed Creevy Lake angling facility and car park upgrade completed Barry McGuigan Park amenity – completed 26 Fishing stands on 6 lakes in Clones – completed

Develop amenities in Monaghan's Urban Centres: Monaghan, Carrickmacross, Castleblayney, Clones, Ballybay and prepare local town development plans	MCC CDB	 Playground and Amenity Park developed in Clones Ulster Canal Stores in Clones upgraded Greenway Walk/Cycle Path developed along the old Ulster Canal route in Monaghan Town. Further plans to extend this development. Adventure Playground developed at Lough Muckno Angling facilities and walkways developed at Black Island, White Island and Concra Wood (Lough Muckno)
Develop key festivals as attractions for tourists	MCC CDB Failte Ireland North West MID CEB	 42 festivals in Co Monaghan funded under The Gathering 2013. New Community Diaspora Initiative announced for 2014 – 2016 to fund festivals which have the potential to attract overseas visitors. 17 festivals funded in 2014. Provision of admin support by MCC staff to Taste of Monaghan Festival 2014 and to Autumn Angling Festival.
Use existing twinning arrangements which can be of benefit to Monaghan	MCC CDB CEB MID	 Good progress and relationships further strengthened as a result of events organised to celebrate The Gathering in 2013. Particular mention should be made to the Prince Edward Island and Miramichi connections (Canada), Marseillon (France)-Castleblayney, Tydavnet- Geel, Ballybay-Osterhofen, Carrickmacross- Carhaix connections.
Improve participation in arts at a community level within the county Research, design and deliver a community arts programme	MCC/CDB Failte Ireland North West MID/ CEB	Not progressed
Reduce/minimise local authority business rates	MCC	 This was deemed to be beyond the remit of the group. Notwithstanding this, it is the case that there has been no rate increase since 2007 and there was a reduction in 2013/2014.
Examine the possibility to export the cultural aspect of County Monaghan.	MCC, CDB Fáilte Ireland NorthWest MID	Not progressed

Lobby for the completion of key roads infrastructure in County Monaghan and in particular adjacent to the County's Towns	MCC	Substantial progress made on N2/A5 route
Optimise the current opportunities to develop rural tourism attractions/facilities provided by the	CDB	 Submissions made by MCC to Cavan Monaghan LEADER
National Rural Development Programme and EU funding programmes	North West MID CEB	 2 applications successful - Barry McGuigan Park upgrade and Lough Muckno Car park. However, only one (Barry McGuigan Park upgrade) actually received funding.

The Tourism Product in Co Monaghan

Below is an overview of the tourism product in the County. This overview is included to provide an insight into the existing product on the ground and to assist in the identification of gaps in provision and opportunities for development.

Heritage

The heritage product in the county is rich but may be perceived as being underexploited in terms of its tourism potential. The responses in the tourism survey certainly seemed to indicate this.

Going back to earliest times, there are remnants of several pre-Christian monuments dotted around Monaghan. Both Neolithic (Edergole Court Tomb) and Megalithic (Lisnadarragh Wedge Tombs) structures provide evidence of Monaghan's first settlers and remnants of the Black Pig's Dyke, an earthen bank structure, thought to have been a defence against cattle raids, shows Monaghan's Iron Age past.

The historic town of Clones developed in tandem with the arrival of Christianity when a monastery was founded here by St Tighernach in the 6th Century and Clones has several heritage sites of interest including the High Cross, Wee Abbey and Round Tower. The Vikings were invaders in the 10-11th century period while a later era Norman motte-and-bailey stands at Donaghmoyne.

Town trails in Carrickmacross, Monaghan and Clones highlight their built heritage and industrial developments, including the Ulster Canal. There are several historic houses dotted around the county and whilst two of these operate as historic/specialised B&Bs, the others are not generally open to the public.

There is no OPW (Office of Public Works) site in Co Monaghan open to the public and several of our most interesting monuments are located on private property so access is an issue. This may be seen as a disadvantage but could also be viewed as an opportunity in terms of developing/formalising permissive access where appropriate.

In a few notable cases (e.g. St Peter's Church in Laragh and the Temple and Monument at Dartrey), the community/voluntary sector has been proactive in working in co-operation with the council and the staff from the relevant government department to access funding for the preservation of the local built heritage. This type of collaboration provides a template for co-operation which could be used by other groups.

Genealogy

Monaghan County Council facilitates genealogical research by use of library records and in addition a personal service is also available. There is a staff resource – a Local History & Genealogical Services Contact person- who deals with genealogical queries by phone, email, or in person and statistics for 2012 and 2013 show a steady volume of queries. In addition, a guide to 'Tracing your Monaghan Ancestry' is available on the council website.

Further to this, there are a number of private individuals and community organisations who provide research on a fee-paying basis. For example, the Carrickmacross Workhouse, The Cassandra Hand Centre in Clones and the County Monaghan Fund deal with genealogical queries and there are also private individuals who provide research on a fee-paying basis.

Festivals & Events

There is a wide range of festivals and events in the county. A small number of these festivals have national or indeed international recognition and attract significant attendances and generate bed nights which is a key priority when attracting funding. However, the majority of the festivals/events in Co Monaghan attract local attendees or are aimed at niche target markets (e.g. angling festivals).

The Gathering 2013 resulted in an increase in the number of events/festivals in the county and a small number of new festivals which came on- stream at that time, were expanded in 2014, and have plans to develop further in future years.

These key festivals, both existing and new, need to be supported as they can be significant generators of visitor numbers and revenue. Such festivals would include the Monaghan Rhythm & Blues Festival, Monaghan Country Music Festival, Muckno Mania (including Muckno Autumn Angling Festival), Clones Film Festival, Patrick Kavanagh Weekend, Carrickmacross Arts Festival etc.

The Community Tourism Initiative for the Diaspora which was launched in 2014 will provide an annual fund (administered through the local authorities) for the years 2015 and 2016 to support local community-based events and festivals and this provides an opportunity for both existing and new festival organisers. Festivals such as the Irish Bog-Snorkelling Championships, Canal Capers, Féile Patrick Byrne, Carrickroe Welcome Home Festival, Taste of Monaghan and Laragh Harvest Celebration all benefitted from this funding in 2014.

It will also be important to encourage more established events to share their expertise with developing events in order to maximise the overall effectiveness of this sector to Co Monaghan.

Angling

Co Monaghan has a multitude of lakes and rivers and so is a renowned angling area for Coarse, Pike and Game anglers. The main angling centers in the county are Ballybay, Carrickmacross, Castleblayney, Clones and Monaghan but there are also a number of smaller towns and villages that are used as bases by anglers. Substantial investment in the angling product in the recent past (through funding secured by Monaghan County Council from Fáilte Ireland and INTERREG IVA) has greatly improved facilities and access and has led to an upsurge in the angling numbers in the county in 2013 and 2014. Lough Muckno, in particular has become a key angling venue and has hosted several matches, leagues, national opens, team matches and headline international events, drawing the cream of the UK and European anglers. Developments such as this have created an opportunity for Co Monaghan to attract major European and international competitions.

In order to reverse the trend towards Holland, Belgium and France as the destination of choice for anglers, it will be important to build on this momentum and to re-establish Monaghan as a premier destination for anglers. Angling interests have put forward plans for further development at Lough Muckno and Lough Egish and another submission raised the possibility of developing a Carp fishery in the county which would be operated on a commercial basis. The importance of introducing bye-laws to establish a Catch and Release policy at Lough Muckno was also highlighted.

Another priority will be to assist the relevant State agencies in preserving the quality of the water and putting measures in place to protect these waters against the spread of invasive species and illegal fishing. This issue of poaching was mentioned in a number of submissions.

Visitor Attractions

Co Monaghan has a small number of visitor attractions – some of which are unique to the county such as The Patrick Kavanagh Centre in Inniskeen, the Carrickmacross Lace Gallery and the Clones Lace Exhibition in the Canal Stores in Clones. The County Museum is an award-winning museum but expansion in its existing location is not possible. Other attractions, such as the Wildlife and Heritage Centre in Clontibret, the Wetlands Centre in Ballybay and Swallow Studios in Annyalla demonstrate the uniqueness of the visitor attraction product in Co Monaghan.

The downside is that they are without exception small facilities and none feature on the Failte Ireland list of Ireland's Top Visitor Attractions. In fact, only one visitor attraction in the North West Region (Glenveagh Park in Co Donegal) features in the 2013 list of top fee-paying attractions in the country. This has always been a challenge for the country and will continue to be so until the issue is addressed. Parks such as Rossmore Forest Park and Lough Muckno have strong footfall figures but investment is required in the amenities to bring the facilities up to the standard expected.

There are plans in place to develop further the facilities at the Lace Gallery, Patrick Kavanagh Centre, Carrickmacross Workhouse and the County Museum and again, substantial funding needs to be sourced if these plans are to come to fruition

Equestrian

There are three AIRE approved equestrian centres in Co Monaghan, Cloncaw Equestrian Centre in Glaslough, Mullaghmore Equestrian Centre in Tydavnet and The Equestrian Centre at Castle Leslie. All of the facilities are of a very high standard and Castle Leslie also has accommodation and dining facilities on-site. Some effort has been made in the past to develop a long distance horse-riding route in the North Monaghan area. There are 2 other non-AIRE approved equestrian centres in the county, in Carrickmacross and in Lough Egish and it is clear that this is a strong product for the county.

Walking & Cycling

The walking and cycling product in Monaghan has improved in the recent past with the development of the Ulster Canal Greenway in Monaghan Town and the provision of walking trails in Dartrey Forest (Rockcorry) and enhancements at Bellamont Forest (near Cootehill). The looped trails in Knockatallon are very scenic and well signed and cater for both walkers and cyclists and the walking loop around Emy Lough is very popular. Lough Muckno in Castleblayney is also a popular walking venue and whilst Rossmore Forest Park has several trails (one cycle trail) with plenty of potential, the walks there require investment in terms of signage improvements and resurfacing works.

The Monaghan Way is a National Way-marked route which runs from Clontibret to Inniskeen but as a long linear route it requires walkers to plan in advance and several walkers take the option of walking certain sections only. Finally, the Kingfisher Cycle trail has a small section that runs through Monaghan in the Clones area. A number of submissions in the Tourism Survey stressed the importance of developing more walking and cycling trails throughout the county and thus this will feature strongly in the Key Priorities section.

The Arts

Co Monaghan has two excellent theatres, the Garage in Monaghan Town and Iontas in Castleblayney both of which are equipped to cater for a wide range of theatrical and arts productions. The Market House also runs a year-round programme of exhibitions, together with a year-round rehearsal facility for arts groups from the county. The Carrickmacross Workhouse is beginning to develop itself as an Arts space and has great potential.

The Tyrone Guthrie Centre is an all-island residential space for Artists and is funded by both Arts Councils of Ireland. Whilst it is primarily an artists' retreat and is not viewed as a county Arts or Tourism facility, it is nonetheless, a great resource and attracts artists from around the world. It engages with, and assists other Arts practitioners and county Arts projects. The County Monaghan Library and the library network run several arts and literary events throughout the year. The County Museum is also a regular contributor to Arts events in featuring exhibitions, workshops or performances.

Crafts

Co Monaghan is synonymous with lace as it is the home of Carrickmacross and Clones Lace and visitors can view samples of lace at the Carrickmacross Lace Gallery and the Ulster Canal Stores in Clones. Swallow Studios in Annyalla offers visitors the opportunity to view hand-weaving at close quarters and Busy Bee ceramics in Mullan Mill is a working pottery.

Golf

Co Monaghan is well served with 5 parkland golf courses. They are dispersed throughout the county in Clones, Monaghan, Carrickmacross (2) and Castleblayney. The Nuremore Golf Club is attached to the Nuremore Hotel and can thus cater to groups and overnighters. None of the other 4 has accommodation on site but liaise with local hoteliers/accommodation providers to cater for visitors wishing to overnight in the area. The Concra Wood Golf and Country Club has hosted the European Pro-Am Championship for the past number of years and this has been successful in raising awareness of the quality of this course and of the overall product in Monaghan.

Adventure/Activity

This sector is particularly strong in Co Monaghan and there is a good range of quality facilities offering a diverse choice of activities.

Rally School Ireland is a unique product in the North of the county with a purpose built tarmac rally stage and viewing tower and attracts both the general tourist and corporate visitors. Lough Muckno is host to a range of different activities including canoeing, orienteering, banana-boating, wake-boarding, walking and angling. The Lough Muckno Water-ski & Wake-boarding Club and the Muckno Adventure Centre both operate from here. At the time of writing, there are plans in place to develop a Wake-cabling facility at Lough Muckno and this would be a very welcome addition to the adventure product in Co Monaghan. In addition, the possibility of developing an obstacle course and a zip-lining course at Lough Muckno is also being explored.

Activity providers such as AWOL Paintball, Lough Mourne Clay Shooting and Irish Country Quads offer a further range of activities and the Tanagh Outdoor Education Centre caters for individuals and groups alike and uses Dartrey Forest and the Dromore River system for many of its programmes. The Cavan-Monaghan Education & Training Board owns a site in Dartrey Forest and has plans to develop this site to extend its activity offering through the Tanagh Outdoor Centre. The new Peace Link facility in Clones is a state of the art sports centre and is a welcome addition to the activity product in the county.

The development of themed packages featured strongly in the tourism submissions and there are certainly opportunities here. The lack of cheaper accommodation options (hostels, Caravan & Camping sites) in the county for groups participating in the above activities was also highlighted in the submissions.

In terms of gaps in provision, the lack of an all-weather, year-round flagship facility, catering for the needs of the family market has been highlighted again in this survey. Given that Monaghan has a growing profile as a destination catering for visitors interested in (adventure) activities, a significant scale project capable of adding to the county's activity/adventure product portfolio would be particularly welcome, subject to the usual viability assessments and planning considerations.

Entertainment, Shopping, Food and Drink

In terms of night-time entertainment, many overseas visitors seek to attend traditional sessions in local pubs. Whilst traditional sessions do take place in pubs across the county – many of these are on an ad-hoc basis and the visitor experience in the past has been a case of 'pot luck'. An objective now would be to identify pubs that agree to run sessions on a regular basis and are tourist friendly, to pull this information together and make it accessible to visitors. This may assist in attracting visitors to stay overnight in the county.

The retail sector nationally has been through several extremely difficult years and the number of vacant shops across the county is testament to this. This issue of dereliction was mentioned in several of the submissions. Nevertheless, shopping, although not seen as a primary tourism product, can be used as part of a package to attract visitors as there are many boutiques, interiors/furniture shops, antique shops etc in towns and villages throughout the county.

Food producers are a strong sector in terms of economic development in Monaghan. With regard to food as a tourism 'product', Monaghan still has a long way to go in developing this niche. However, the restaurant sector scored high levels of satisfaction in the Tourism Survey so this may be an opportunity to encourage accommodation and other tourism providers to work more closely with restaurants in the future.

Family Fun

Several of the activity providers in the county cater to young children and families. In addition, facilities such as Monaghan Leisure Complex, GR8 Entertainment, Sam More Open Farm and Planet Kidz are family/children oriented. Most of the walking and cycling trails in the county are family friendly and playgrounds such as those located in Lough Muckno and in the Town Park in Clones are also key family attractions. The importance of the family market to tourism providers is evidenced in the survey and there is room for improvement in this area in terms of product development and also in terms of identifying new and unique experiences which can then be packaged together for this market.

Accommodation

The accommodation base in Monaghan is quite low in comparison to other counties in the Border region. Below is a breakdown by category of accredited accommodation providers in the county in 2015.

Co Monaghan Fáilte Ireland approved Accommodation 2015

	Premises	Rooms	Beds
Hotels	8	330	736
Guesthouses	3	41	85
B & Bs	8	35	81
Historic House	1	6	6
s/c	11 (33 units)		
TOTAL	31	412	908

Several respondents in the survey highlighted the lack of budget accommodation in the county in terms of Caravan & Camping facilities, Hostels and Aire de Service type facilities (which cater for camper vans) and there may be development opportunities here, particularly for the private sector. At the time of writing, the Municipal District of Carrickmacross-Castleblayney had plans to establish Aire de Services spaces in Carrickmacross Town which would be a welcome addition to the county.

Survey Findings

This section details the information sought and responses gained as a result of the Tourism Survey which was conducted in November 2014. The survey was advertised in the local paper, on the council website, on the Monaghan Tourism facebook page and a link to the questionnaire was emailed directly to the following databases:

- O Monaghan County Councillors & staff
- Tourism accommodation providers
- Other Tourism providers
- Festival and Events Organisers
- Community Organisations

In all, one hundred and nine completed and valid submissions were received. A full breakdown of the survey responses can be found in the Appendix. Below is a summary of the key findings of the survey.

Reason for visit

Visiting Friends & Relatives registered highest under Reason for Visit and this demonstrates the importance of the Diaspora to Monaghan. In terms of Specific Activity, angling featured very strongly in this category with practically all the responses making reference to this activity. Festivals/Events also featured strongly and show that festivals can be a strong attractor of visitors in a county which is relatively short on Visitor Attractions.

4. Please indicate (in general percentage terms) the Reason for Visit given by your visitors				
Answer Options	Response Percent	Response Count		
Visiting Friends & Relatives	70.6%	24		
Holiday	58.8%	20		
Specific Activity (e.g. angling, golf etc)	58.8%	20		
Festivals /Events	55.9%	19		
Wedding	32.4%	11		
Genealogy	29.4%	10		
Corporate/Incentive	23.5%	8		
Other (Please specify)	29.4%	10		

Source of Referrals

The fact that Word of Mouth is cited as the primary source of referrals is a positive sign for tourism businesses in Monaghan. It shows that each respondent is providing a good service in relation to their business and customers are happy to recommend them. That the second most important source of referrals is providers' websites indicates the importance of maintaining an effective web presence. This combined with the high number of referrals from social media sites demonstrates the need for integrated social media tourism marketing and there may be a requirement for training and mentoring in this field. Just under half of the respondents cited the Tourist Office/Co Tourism website as a source of referrals. This is quite positive but there is significant room for improvement in terms of both these issues and these will be addressed in the Key Priorities section.

Answer Options	Response Percent	Response Count
Word of Mouth	87.5%	28
Your Own Website	78.1%	25
Social Media Sites	71.9%	23
Tourist Office/County Tourism Website	46.9%	15
Other Reservation System	21.9%	7
Tourism Operators/Agents	18.8%	6
Festival Offices/Co-Ordinators	18.8%	6
Other (Please specify)	12.5%	4

Principal Methods of Marketing Used

Websites scored highest here (76.5%) followed closely by Social Media sites (73.5%) and these results again demonstrate the importance of websites and social media as effective marketing tools. The fact that brochures still feature quite prominently (44.1%) is interesting and shows that there is still a section of the market that seeks printed materials.

Answer Options	Response Percent	Response Count
Website	76.5%	26
Social Media (eg. Facebook, Twitter)	73.5%	25
Word of Mouth	70.6%	24
Brochure	44.1%	15
Direct Marketing	20.6%	7
Press Advertising	20.6%	7
Online Ads/Web Advertising	14.7%	5
TV/Radio Advertising	11.8%	4
Deal Sites	8.8%	3
	answered question	3

Market Segments targeted

At 67.6% the Family market is a very significant one for providers and there is certainly room for improvement in this area in terms of product development and also in terms of promotion, particularly from a packaging point of view. A number of responses in the tourism survey highlighted the importance of collaboration among providers and encouraging an increased level of networking and co-operation will need to be a key priority. In addition, Special Interest visitors (anglers, golfers and walkers – 64.7%) also featured prominently here. The high level of Day Visitors (55.9%) can be viewed as an opportunity with the focus being on encouraging them to stay overnight in the area. Increased networking and co-operation among providers will greatly assist in this regard.

7. What market segments does your own marketing effort primarily target?			
Answer Options	Response Percent	Response Count	
Families	67.6%	23	
Special Interest (Anglers, golfers, walkers)	64.7%	22	
Day Visitors	55.9%	19	
Corporate/Incentive	32.4%	11	
Hen/Stag Parties	23.5%	8	
Other	17.6%	6	

A number of questions were designed to determine perceptions in terms of key strengths and weaknesses of the tourism product in the county and these yielded some interesting results.

Top three tourism Products in the county

The responses to this question were individually analysed. The approach then taken was to group the responses as analysis showed a marked similarity in terms of opinions, with certain tourism providers, activities, locations, or issues appearing again and again. Angling and festivals featured very strongly here, as did facilities such as Castle Leslie, Lough Muckno and The Patrick Kavanagh Centre. The table below shows the 'products' which featured most often in the responses.

8. What, in your opinion are the top three tourism products in Co Monaghan?			
Answer Options	Response Percent	Response Count	
1.	100.0%	104	
2.	97.1%	101	
3.	88.5%	92	
	answered question	104	

Angling Tourism	44	
Castle Leslie	29	
Arts, music and cultural/heritage events, Sports & festivals	25	
Lough Muckno	23	
Kavanagh Centre Inniskeen	19	
Golfing	13	
Walks/hill walking/cycling	13	
Lakes	9	
Drumlin landscape/sites of interest	9	
Rossmore Park	8	

Top three weaknesses of Monaghan as a tourism destination

A similar approach was taken to the above and again there was a lot of similar responses in terms of Co Monaghan's weaknesses as a tourism destination and these were grouped accordingly. Poor promotion and marketing, lack of a flagship attraction, few national/international events, inland location, poor signage and derelict sites were mentioned over and over again.

9. What do you consider to be Co Monaghan's main weaknesses as a tourism destination?			
Answer Options	Response Percent	Response Count	
1.	99.0%	103	
2.	92.3%	96	
3.	67.3%	70	
	answered question		104

Poor Promotion & Marketing	65
No main Tourist Attraction	29
No National Events or enough Festivals/Events/family friendly activities	13
Inland Location	12
Bad Signage	10
Accommodation (Lack of and costly)	9
Lack of funding ie from Failte Ireland / Tourism Bodies	9
Derelict Sites (Hope Castle, Castleblayney Court House)	8
Transport (No Railway, bad bus service)	7
Lack of collaboration among industry stakeholders	7
No special offers packages by Hotels/Restaurants/Golf Clubs/tourism providers/fishing	7

Quality of existing tourism product and infrastructure

In order to highlight those which fared best in this question, the responses for Very Good and Good were added together. Environment/Scenery with 79 out of 109 responses in these grades came out on top, followed by Restaurants (66), Festivals/Events (62) and Angling (61).

At the other end of the scale, the responses for Poor and Very Poor were then added together and those faring worst in the survey were Visitor Information Services (50), Shopping (44), Signage/Interpretation (41), Visitor Attractions (32) and Heritage Sites (31).

Products most needed to attract visitors

Festivals scored highest in this question, with the Ulster Canal, promotion of existing attractions, angling and Lough Muckno/Hope Castle all receiving several mentions.

10. What, in your opinion, are the top three tourism prothe county in 2015-2020?	oducts most needed in Monaghan t	to attract more visitors	s to
Answer Options	Response Percent	Response Count	
1.	100.0%	99	
2.	87.9%	87	
3.	71.7%	71	
	answered question		99

A similar approach was taken to the above and again there was a lot of similar responses and these were grouped accordingly.

Festivals	15
Ulster Canal	12
Promote Existing Attractions	11
Fishing/Angling	10
Lough Muckno/Hope Castle	7
Hotel Package Deals	6
Walking/Hiking Routes	6
Activities for children/teenagers	5
Development of Cultural Tourism	5
Theme Park	5
Rossmore Park	5

What makes Monaghan different to other counties?

Landscape (drumlins/lakes) featured strongly here, closely followed by location in terms of proximity to Dublin and Belfast, the people and the heritage. In fact, these key themes occur again and again in the submissions.

16. What, in your opinion, makes Co Monaghan different to other destinations in Ireland?		
Answer Options	Response Count	
	80	
	answered question	80
	skipped question	29

	No. Times Mentioned
Landscape/Drumlins/Lakes	34
Location/Border/Proximity to Belfast and Dublin	24
The People	20
History/Heritage	10

A number of questions were designed to elicit a response as to what particular tourism projects (product development, promotion, trade engagement) Monaghan County Council and tourism support agencies should focus on over the coming years.

Product Development

Whilst this document reflects the tourism strategy for the county, it is the case that Monaghan County Council will be directly involved in developing resources in its ownership (or State, Semi-State Ownership) so it was necessary to identify key Public Sector/Council projects on which the Tourism Unit will concentrate for development. One of the survey questions was designed to particularly address this issue and the below are the top 5 priority projects in this category as per the results of the Tourism Survey:

- 1. Developing more Walking/Cycling Trails
- 2. Re-opening the Ulster Canal
- 3. Developing & Supporting Festivals & Events
- 4. Enhancing facilities at Lough Muckno
- 5. Developing Rossmore Forest Park

Tourism Promotion

Similarly, one question sought to identify key areas of tourism promotion that the Tourism Unit and tourism agencies should concentrate on. The top 3 priorities in terms of Tourism Promotion are thus:

- 1. Engage with Social Media
- 2. Tourist Office Provision
- 3. Provision of Signage/Interpretation

Trade Engagement

One question sought to identify key areas of tourism trade engagement that the Tourism Unit and tourism agencies should concentrate on. The top 3 priorities in terms of Tourism Trade Engagement are thus:

- Development of themed packages
- 2. Establishment of links with providers in other counties
- Provision of Information on funding opportunities

The recurring themes of packages and networking/industry collaboration featured strongly again here and these will need to be key priorities going forward.

Finally, there were a number of questions which were open-ended and invited people to submit a specific idea/proposal/issue.

The responses here were very wide-ranging and covered dereliction, road surfaces, signage etc.

Some specific development proposals such as a National Diaspora Centre, a Monaghan Genealogy Research Centre, Border Museum, commercial carp fishery were mentioned as well as promotional projects such as a 'Made in Monaghan' brand and building on our 'twinning' links.

Some individuals and community/voluntary groups mentioned specific project proposals during consultations with the Tourism Officer and it is likely that a percentage of these will be worked up and submitted for funding, with the individual or group acting as project promoter. The Council's role and the role of the other tourism support agencies will be to advise on funding opportunities, and to assist at application and delivery stage.

SWOT Analysis

The responses from the Tourism Survey were used in drawing up the SWOT Analysis below. Space did not allow for all the individual responses to be included so the strengths, weaknesses, opportunities and threats which featured most strongly are recorded in the SWOT Analysis.

Strengths

Key Attractions such as

Castle Leslie, Concra Wood, Patrick Kavanagh Centre, Rally School

Key Amenities such as

Rossmore Forest Park, Lough Muckno, Bragan Mountain

Drumlin landscape/lakes
The people/hospitality

A wealth of History/Heritage

Strategic location between Belfast & Dublin

Strong Angling Product

Good range of Festivals/events

Strong and varied Outdoor Pursuits product

Golf

Carrickmacross Lace

Workhouse Carrickmacross

Monaghan County Museum

Weaknesses

Poor promotion

No major tourist attraction

Inland County

Poor signage and interpretation

Derelict sites

Poor public transport links

Few packages

Lack of collaboration among industry stakeholders

Lack of family friendly activities

No vistas or big geographical attractions

Weak Retail sector

Underdeveloped natural attractions (Rossmore, Muckno, Castleshane Park)

Limited quality accommodation and no budget accommodation

Unimpressive towns & villages

Opportunities

Develop key attractions such as Lough Muckno, Rossmore, Ulster Canal, Sliabh Beagh Increase level of networking between industry stakeholders
Establish stakeholder co-ordinated packages
Develop county brand
Tackle dereliction issue
Exploit new funding opportunities
Develop walking and cycling product
Promote county more extensively

Threats

Competing destinations
Not 'feature' destination for Tourism Ireland or Fáilte Ireland
Possible knock-on effect of above in terms of future funding opportunities
Negative publicity relating to political issues
Negative image of border area
High level of day visitors (low overnights)
Lack of awareness of Co Monaghan
Insufficient cross-selling and networking among trade providers

Key Priorities for 2015 – 2020

Taking all the above into consideration, this section of the document now seeks to use the results of the consultation to help provide guidance in terms of tourism priorities for the period 2015- 2020.

A primary issue for any county that wishes to attract more tourists is how to entice people to visit and how to stand out in a very competitive marketplace. It is important to bear in mind that customers choose a destination based on the quality of the tourism offering, including natural scenery, culture, visitor attractions, activities, events and of course, the people and the welcome.

In this Tourism Strategy document, the priorities have been divided into three sections, namely:

- Product Development
- Promotional Activity
- Engagement with Stakeholders

Product Development

FOCUS ON THE DEVELOPMENT OF THE KEY AMENITY SITES AND ON WALKING & CYCLING TRAILS

A clear message has been given to Monaghan County Council and tourism agencies in the Tourism Strategy. The key sites of Lough Muckno, Rossmore Forest Park and Sliabh Beagh are extremely important natural resources in Monaghan. These all offer huge potential but require significant investment to develop the facilities to a standard capable of attracting visitors at a level which will have an economic impact on the county. Monaghan County Council, Coillte and landowners are key drivers of these projects but it is acknowledged that the development of these important recreational resources will require a co-ordinated multi-agency approach with the involvement of all statutory and voluntary/community sector stakeholders to ensure their long-term environmental and financial sustainability. There may be opportunities for funding for one or more of these projects under the cross-border/EU programmes which will start to become available later in 2015.

A strong tourism priority arising from the survey is also the development of walking and cycling trails. To some extent, this action is tied up with the development of Rossmore, Sliabh Beagh and Muckno, as these sites together with the Ulster Canal Greenway all offer opportunities for the development of new walking and cycling trails. Key issues in terms of walks development are landownership, access arrangements and public liability and these issues will need to be addressed in advance of a project proposal. The maintenance of trails is an on-going cost to a project and this also needs to be taken into account as it will have a significant impact on future budgets. Potential also exists for the development of a Blueway between Cootehill and the Ballybay Wetlands Centre along the Dromore River.

CONTINUE TO LOBBY FOR AND WORK ON THE RE-OPENING OF THE ULSTER CANAL

The Ulster Canal was the one project which featured most strongly in the responses of the Tourism Survey. Its importance to Monaghan is widely acknowledged and if re-opened, the Canal could bring significant economic, environmental and social benefits to Co Monaghan, particularly to the towns and villages of Clones, Smithborough and Monaghan Town itself. Monaghan County Council has had some success in terms of developing the Ulster Canal Greenway in Monaghan Town for walkers and cyclists and continues to work with the relevant Departments and with Armagh City, Banbridge and Craigavon Borough Council and to liaise with landowners with a view to extending this Greenway further. However, the main priority according to the survey must remain the re-opening of the Canal as a waterway which will also provide development opportunities for the private sector.

ASSIST FESTIVALS AND EVENTS TO INCREASE NUMBERS AND DELIVER BED NIGHTS

The importance of festivals and events as key attractors for the county was highlighted by many. However, a large number of festivals in Monaghan are small in scale and this issue will need to be addressed. Furthermore, it is important to note that festivals are a valuable tourism asset only when they generate bed nights – high numbers of Day Visitors for an event do not generate a significant economic spin-off in the local area.

Clearly therefore, the priority will be to identify those festivals which have the potential to grow and to attract greater numbers of overnighters. This may not necessarily mean focusing on the larger festivals only. In some cases, specific activity/sports based events (e.g. angling competitions) may have low numbers of participants but may generate substantial bed nights as the majority of competitors are from overseas.

Increased linkages between festival organisers and accommodation providers will be important so that packages can be developed to assist in addressing this bed night issue.

The Council's Tourism section will be responsible for delivering the Community Tourism Diaspora initiative in 2015 and 2016. This funding is focused on those festivals which can attract overseas visitors to the county.

DEVELOP THE POTENTIAL OF HERITAGE TOURISM

The survey clearly demonstrates the view that Monaghan's cultural and heritage offering is underexploited in terms of its tourism potential. The county has a strong heritage 'product' with prehistoric monuments, Christian Heritage sites, Plantation towns and historic houses as well as a unique drumlin landscape and wildlife and nature sites. Access and interpretation were identified as key issues and these will need to be addressed at sites which are deemed suitable for such enhancements.

In addition to the above, facilities such as the Monaghan County Museum, the Carrickmacross Workhouse, Wildlife & Heritage Centre and the Patrick Kavanagh Centre are open to the public as Visitor Attractions and provide an insight into the history and culture of Co Monaghan. However, it is fair to say that some of these operators need to be supported and encouraged to upgrade and enhance their offering and to extend their operating hours so as to better accommodate visitor needs.

Promotional Activity

DEVELOP A CENTRAL BORDER AREA 'DESTINATION' WITH MONAGHAN AT ITS CENTRE

Consultations with key stakeholders confirmed the view that Monaghan is seen as a peripheral county and that not being an integral part of a Failte Ireland/Tourism Ireland 'destination' was having a very detrimental effect on the tourism industry in the county. This lack of recognition by the tourism agencies also came through strongly in the tourism survey.

A key priority therefore, is to work to develop the Central Border Area as a destination in its own right and to highlight the wealth of culture, heritage, landscape, attractions and activities that this area has to offer. The concept of developing a link from Carlingford to Sligo (to provide a link between Ireland's Ancient East and the Wild Atlantic Way) has been proposed and has gained a lot of support to date. This concept will need to be worked up to a level where it can be 'sold' to the tourism agencies and to funders. Any new destination will need 'buy-in' from Fáilte Ireland and Tourism Ireland if it is to have any chance of success.

INCREASE ON-LINE PRESENCE AND ENGAGE WITH SOCIAL MEDIA

The survey results highlight the importance of new and emerging technologies, both web and mobile based to promote and market Co Monaghan to visitors. Recent data indicates the rapid growth in ownership of smartphones and tablets and this has a knock-on effect in terms of the expectations of the more digitally aware visitor. The challenge for the tourism trade in the county is to convert our assets into marketable tourism products and tell our 'story' in new ways to match these expectations.

The importance of online marketing and social networking cannot be understated and social networking in particular offers a lot of potential because it is a low cost but highly effective marketing tool. Failte Ireland has over the last number of years provided training programmes to assist providers in this area and many now have facebook and twitter accounts. However, there is a need for a more integrated approach to social media tourism marketing at county level and this is a project that the Council could lead on.

In addition, the county tourism website www.monaghantourism.com needs to be updated and this will be an immediate priority for the Tourism Section.

IMPROVE TOURISM SIGNAGE & INTERPRETATION AND IMPROVE TOURIST OFFICE (VISITOR SERVICING)

The issue of poor signage and interpretation came up time and again in the survey responses so clearly this will be a priority for the Tourism Section and will require input from the council's Heritage and Community & Enterprise sections also. Amenity areas, lakes, rivers, historical sites etc fall within the remit of the Local Authority and in the first instance a county-wide audit would be required to identify what the signage requirements are. Every effort will be made to address these gaps in provision within the lifetime of this strategy.

It is important to note that providers which operate on a commercial basis are responsible for funding signage for their own premises and these signs are subject to Planning and to the rules and regulations of the National Roads Authority (NRA).

In 2011, Fáilte Ireland ceased to operate a seasonal Tourist Office in Co Monaghan and Monaghan County Council took on this additional task. The office was moved from the Leisure Centre on the Clones Road to The Market House in the town centre as this was considered to be more accessible to visitors. In addition, the County library in Clones and the branch library in Carrickmacross are used to provide tourist information and the library staff has been trained in this regard.

However, the Tourist Office in The Market House which operates from June to September does not have a permanent, stand-alone desk and area within the Market House where tourism literature can be prominently displayed. A key priority will be to formalise this arrangement in the Market House or to identify another civic building where the Tourist Office can be located.

DEVELOP COUNTY BRAND

The idea of a 'Monaghan brand' came up several times in the survey and perhaps ties in with the 'lack of profile' issue which was also a factor in the survey. In order to sell itself effectively, the county needs to identify its strengths and to build on these. The survey suggested that the landscape, people and heritage all make Monaghan unique and it would be important to convey these themes in future promotions/marketing collateral. These themes could be conveyed by use of videos, podcasts etc not solely through a 'brand' or logo.

Engagement with stakeholders

DEVELOP PACKAGES AND ENCOURAGE CROSS-SELLING

Cross-selling is extremely important to encourage visitors to stay longer in Monaghan, to increase the percentage of overnight stays and to assist in ensuring a better spread of visitors within the county. The lack of collaboration between tourism providers was identified as a major weakness in the survey and a key priority is to address this issue. Organising networking opportunities for tourism providers is a starting point and it will be important to ensure there is a mix of accommodation, activity, festival organisers etc at the meetings. Family packages and specialist activity packages (e.g. angling) have come through as important markets and may be looked at in the first instance.

Establishing links with providers in other counties also factored strongly in the survey results. Opportunities for packages also exist across county boundaries and on a cross-border basis.

PROVIDE INFORMATION ON FUNDING OPPORTUNITIES AND SUPPORT TO EXISTING TOURISM BUSINESSES OR POTENTIAL START-UPS

With the roll-out of the Local Enterprise Offices (LEOs), based in Local Authorities there is potential for the funding of start-up and developing tourism enterprises to be aligned with the key tourism objectives of Local Authorities. Clearly, the private sector has a very important role to play in developing Co Monaghan's tourism product, and the LEO will be well placed to assist in this regard.

In terms of gaps in provision, a few key product development opportunities have been highlighted in this consultation process. Whilst the public and voluntary sector in the county fund and manage the heritage, walking and angling aspects of the product in the main, the private sector are the primary providers of accommodation and specialist activities. An all-weather activity centre, targeting the family market is viewed as a particular priority. Budget accommodation is also a requirement and there is scope for the development of more specialist activities. The food sector in Monaghan is strong in terms of producers and if more of these facilities could become visitor oriented this would provide another 'experience' for the tourism industry to sell.

In addition, the new Rural Development Programme will re-open in 2015 and tourism will be an important sector in this programme. Several specific projects were highlighted during the consultations which led to this strategy document. These included proposals for Carrickmacross Workhouse, Monaghan County Museum, Patrick Kavanagh Centre, a Sport and Recreation facility at St Davnet's Complex, Wake-cabling at Lough Muckno, commercial Carp Fishery, zip-lining at Lough Muckno and Carrickmacross Market House.

The Tourism Unit can lead in the organisation of information events/workshops so that tourism providers are made aware of and kept informed of funding opportunities. Another key role will be in assisting providers and groups at application stage where appropriate.

Action Plan

This next section contains the Action Plan. It is fully expected that this plan will change, develop and be adapted on a continual basis. There are several different organisations (cross-border partners, other councils, Coillte etc) involved in the delivery of a number of these actions and the success of some will also be determined by the industry.

Priority 1.

Focus on the development of the key Amenity sites and on Walking & Cycling Trails				
Action	Delivery details	Partners	Year	Output
Work with Lough Muckno Development Committee to enhance facilities and develop Lough Muckno as a Flagship Tourism Amenity	Encourage and support appropriate private sector investment in new activity products based in Lough Muckno	MCC, Muckno Development Committee, Failte Ireland, Funding agencies	2015 – 2020	Engagement with private sector investors and 1 new commercial facility located on site (Subject to private sector interest)
	Develop Masterplan for park and indentify sources of funding for individual elements	MCC, Muckno Development Committee, local stakeholders, Coillte, Inland Fisheries Ireland	2017	Masterplan published
	Refurbish Gatelodges		2016	Gatelodges completed Park Management Office established
	Construct car park and public toilets to service visitors to the Adventure Playground		2017	Facilities completed and open to the public
	Develop Map for Lough Muckno Park		2016	Maps printed and available online. Panel located on-site with lay-out of Park
	Establish a Catch & Release policy in Lough Muckno and put water quality protection measures in place		2015 Onward	Relevant Bye-laws adopted Managed access sustained and improved Disinfection policies established to stop the spread of invasive species

Development of Rossmore Forest Park	Further develop and promote Lough Muckno as a Centre of Excellence for Angling Establish Partnership Arrangement with Coillte in relation to Rossmore and other	Coillte, MCC, local stakeholders	On-going 2015	Angling Familiarisation trips organised Additional angling pegs developed Memorandum of Understanding in place
	Coillte recreational sites in Co Monaghan Develop Masterplan for Rossmore in conjunction with Coillte and identify key elements of above Masterplan for which funding can be sourced for phased	Coillte, MCC, local stakeholders	2016	Masterplan published
	development Write funding application for specific project elements	MCC & Coillte	2017	Funding application submitted
	Oversee delivery of project	MCC & Coillte	2018 – 2020	Other new/enhanced facilities (TBD) in place
Further development of Sliabh Beagh	Identify walks which require upgrading works	MCC, local stakeholders	2017	Audit and priority list of walks to be upgraded
	Review Sliabh Beagh Management Plan and identify priority elements with a tourism focus, taking into consideration the fact that Sliabh Beagh is a Special Protection Area	MCC	2018	Priority list of tourism projects produced
Deliver Walking Trails in Ballybay	Implement East Border Region (EBR) project which is to develop walking trails in Ballybay and develop leaflets and effective signage for the trails	MCC, East Border Region	2015	3 walking loops developed with associated signage and promotional leaflets
Re-establish Kingfisher Cycle Trail	Upgrade route and improve signage on Clones loop of Kingfisher Trail.	MCC, Cavan, Donegal, Sligo, Leitrim Co Cos and Fermanagh District Council	2017	Cycle route improved and promoted.

Priority 2.

Con	tinue to lobby for an	d work on the Re-0	Opening o	f the Ulster Canal
Action Continue to lobby for the re-opening of the Ulster Canal	Delivery details Ensure that the restoration of the Ulster Canal is included in all regional and local strategic documents	Partners MCC, Waterways Ireland, Armagh City & District Council, Cavan Co Co	Year 2015- onward	Output On-going engagement with partners and relevant Government departments
Extend the Ulster Canal Greenway in partnership with relevant organisations	Progress the Ulster Canal Greenway project by identifying a route, liaising with landowners and seeking funding for route extension	MCC, Landowners, Waterways Ireland, Armagh City, Banbridge and Craigavon Borough Council	2015- 2020	Greenway extended
Consolidate existing works in Clones Erne East Area	Continue engagement with communities/volun tary groups involved in recent projects along line of the Canal to consolidate investment	MCC, Clones Development Society, tourism trade providers	On- going	Support provided in terms of mentoring, advice etc

Priority 3.

Assi	st Festivals and ever	nts to increase num	bers and	deliver bednights
Action Provide a high level of support to festivals with a potential to deliver substantial	Delivery details Provide administration and marketing support (Tourism Unit staff member) to key	Partners MCC, Festival organisers	Year 2015 onward	Output Min. 3 festivals supported annually
Continue to deliver Community Tourism Diaspora Funding Initiative 2014-2016	Advertise this festival funding programme, assess applications, administer grant aid and drawdown (subject to criteria	MCC, Failte Ireland, Irish Public Bodies (IPB) and festival organisers	2015 – 2016	Minimum 11 festivals grant aided each year through this initiative.
Develop print copies of annual Calendar of Events for Co Monaghan and develop and update on-line version	being met) Contact festival organisers, collate events dates for Calendar, print and distribute	MCC and festival organisers	Annual	Events Calendar printed and distributed each year On-line Calendar up-loaded each year
Provide on-going promotion for festivals through social-media	Drip-feed information on upcoming events through social media sites so that there is a constant flow of information on what's happening in the county	MCC, Failte Ireland, tourism trade and festival organsers	On- going	Up to date festival information easily accessible
Encourage all festivals in receipt of funding through MCC to follow 'Greening your Festival' Guidelines	Liaise with Environmental Officer and provide relevant information to groups	Tourism Unit, Environment Section and festival organisers in receipt of funding through MCC	Annual	Green principles adopted

Priority 4.

	Develop th	ne potential of Heri	tage Tour	ism
Action	Delivery details	Partners	Year	Output
Improve awareness of, access to (where appropriate) and interpretation at key heritage sites in the county	Prioritise sites and work in conjunction with Heritage Officer to deliver appropriate works and interpretation materials	Tourism Unit, Heritage Officer, Heritage Forum	2016 onward	Minimum 3 sites enhanced
Support the Patrick Kavanagh Centre to update and enhance its product offering	Provide administrative support and marketing advice to the Centre in terms of developing its key	MCC, Failte Ireland, Arts Council, Community Group, ICBAN	2015 – onward	Festival Attendees increased by 15% Regional Literary Trail brochure
	festivals and events Position the Centre as part of Regional Literary Trail Assist in the sourcing of funds to further develop the facility			produced
Develop and promote key heritage towns/villages as day trip destinations	Identify key heritage towns/villages/or sites which would require an App to tell their story. Source funding to deliver apps for priority sites	MCC and community groups/developm ent associations	2016	Priority projects identified Delivery of 2 apps over lifetime of plan
Establish and promote a 'First Point of Contact' for Genealogical enquiries		Tourism Unit, Library Services, Community Groups & Historical Societies providing Genealogical services, Professional Genealogists	2016	Contact agreed and promoted

Priority 5.

Develop o	a central border area	a 'destination	' with M	onaghan at its centre
Action	Delivery details	Partners	Year	Output
Work up 'Borderlands' destination which would be on a par with other key Tourism Ireland destinations such as the Wild Atlantic Way and Ireland's Ancient East	Undertake research to identify key heritage, literary, activity, attraction, accommodation sites along the central border area from Louth to Sligo	MCC, other councils in the central border area, tourism providers in the area, Failte Ireland, Tourism Ireland, ICBAN (Irish Central Border Area Network)	2015	List of key sites/attractions/activities etc developed across all participating councils. Key themes agreed.
	Develop 'concept' map to assist in the selling of the destination		2015	Concept Map produced
	Liaise with Failte Ireland, Tourism Ireland and other councils in the area to finalise proposal		2015- 2016	Agreement secured to progress the proposal
	Identify suitable sources of funding for the development of the area and indentify European Partners		2015 – 2016	Partners signed up
	Assist partners in writing funding application		2016	Application submitted
	Implement the project		2016 onward	Destination established and actively promoted

Priority 6.

li li	ncrease on-line pr	esence and engo	age with	Social Media
Action	Delivery details	Partners	Year	Output
Update web presence of county Monaghan website	Refresh and update information, design and lay-out of county tourism website	MCC Tourism Unit and trade providers	2015	Website upgraded with fresh images and more user-friendly lay-out/design
Develop Editorial Plan for on-going social media campaign for Monaghan	Plan content for website and social media. Ensure that there is a continuous flow of accurate, high quality information on the county and what is happening/coming up. Encourage trade to participate in campaign.	MCC Tourism Unit and trade providers	2015 and onward	Plan developed and implemented on on-going basis
Prepare and execute Public Relations Campaign	Generate positive press coverage for Monaghan. This will include bringing media/journalists into the county and encouraging feature articles on particular products/events etc.	MCC and trade stakeholders, Failte Ireland and Tourism Ireland	2015 and onward	Press coverage secured and minimum 1 familiarisation trip per year.
Encourage an increase in the availability of Wi-Fi for visitors	Work with tourism providers and Municipal Districts to provide improved access to Wi-Fi	MCC, key stakeholders		Increased Wi-Fi availability in key towns

Priority 7.

Improve 1	Tourism Signage &	& Interpretation	and Imp	prove Visitor Servicing
Action	Delivery details	Partners	Year	Output
Improve signage to sites of tourism interest, amenity areas etc	Undertake an audit of existing signage and identify requirements.	MCC	2015 and onward	Audit produced
Identify accessible Heritage/Archaeol ogical sites sites which require improved visitor Interpretation	Examine and cost the visitor interpretation requirements at these sites.		2016	Priority list of sites produced with associated costs
Improve Tourist Office in Monaghan Town	Establish Tourist Office in Monaghan Town with designated area for staff and literature.	MCC and Failte Ireland	2015	Prominent Tourist Office Space established, operating on a Seasonal basis
Establish Carrickmacross Civic Centre as designated Failte Ireland Visitor Servicing Point		MCC and Failte Ireland	2015	Registered on list of Failte Ireland approved Visitor Information Points and promoted by them accordingly
Ensure that up to date county promotional brochures are available in key attractions and civic buidlings		MCC	On going	Distribution system in place
Continue to review and rationalize the cost effectiveness, quality and need for visitor information print materials	Identify and fill gaps in visitor information through leaflets, brochures, maps etc	MCC	On going	Printed brochures produced
Engage with Failte Ireland in terms of exploiting Monaghan's inclusion in Ireland's Ancient East	Encourage Trade to tie in with this initiative	MCC, key stakeholders, Failte Ireland	On going	Specific signage provided at key sites and heritage packages developed

Priority 8.

Develop County Brand							
Action	Delivery details	Partners	Year	Output			
Re-develop brand/logo/profile for Monaghan to assist the county in raising its profile nationally and internationally	Undertake consultation to identify key selling points of Co Monaghan		2015	Marketing Campaign for Co Monaghan			

Priority 9.

Develop	networking among	g trade provider.	s and en	courage cross-selling
Action	Delivery details	Partners	Year	Output
Encourage networking among the tourism trade	Improve linkages between accommodation and attractions/activity and service providers by organising networking events.	MCC and trade providers	2015 onward	1 Networking event organized per annum
	Develop tourism products and packages that will appeal to domestic and overseas holidaymakers, both mainstream and niche.	MCC, Failte Ireland and trade providers	2015 – 2016	New packages established and promoted
	Encourage tourism providers to promote other attractions and activities in the county so that visitors will be induced to extend their stay.	MCC and trade providers	2015 onward	Increased level of cross-selling within tourism sector
Improve the 'evening and weekend' experience for the visitor in our main towns	Work up special offer promotions, initiatives etc to encourage increased crossborder trade and general visitors	Municipal Districts, Chambers of Commerce, MCC Tourism unit, Neighbouring councils in NI	2016	Traditional Music Trail collated

Priority 10.

Provide information on funding opportunities to existing tourism businesses, community groups or potential start-ups Action **Delivery details Partners** Year Output Inform trade of Organise a seminar Tourism Unit, As Min 1 seminar a year per annum funding to inform trade of LEO, LEADER funding in tandem with networking event opportunities opportunities company, program through the Local mes **Enterprise Office** open (LEO) and through the LEADER programme when it is finalized Provide on-going Tourism Unit, Sign-posting On Private investors supported advice and service to providers LEO, LEADER going support to tourism as to what financial company, private start-ups supports are investors available and relevant contacts for same. Work with LEO in devising suitable training and mentoring supports for the tourism industry.

Potential Sources of Funding

EU Funding Opportunities

The European Structural and Investment Funds (ESIF) are the key investment drivers at the EU level, providing EU financing to Operational Programmes (OPs). Several OPs are still in preparation at the time of writing and it is envisaged that this process will be completed in early 2015.

The programmes outlined below provide some opportunity for access for funding for tourism initiatives:

INTERREG VA (Cross-border Programmes)

INTERREG VB, (Transnational Co-Operation)

INTERREG Europe VC (Inter-Regional Co-Operation)

PEACE IV

European Agricultural Fund for Rural Development

Other Funding Opportunities

- Fáilte Ireland
- Community Tourism Diaspora Funding
- Monaghan County Council Community Development Fund
- Tourism SME support through the LEO

Summary overview

INTERREG VA

(Cross-border Co-Operation)

There is a limited scope for funding for tourism projects under this Programme as the key themes are Research & Innovation, Environment (Habitat, Species & Marine and Water Quality), Health and Sustainable Transport.

INTERREG VB

(Transnational Co-Operation)

There is a possibility of funding for tourism projects through the Atlantic Area Programme under the following measure:

Enhancing Biodiversity and the Natural and Cultural Assets

€39.4m

- Improving the protection of biodiversity & enhancing ecosystems services
- Enhancing Natural and Cultural assets to stimulate economic development

INTERREG EUROPE VC

(Inter-Regional Co-Operation)

INTERREG VC facilitates the exchange of experience between regions on four thematic objectives. There may be potential for tourism funding under the objective – *Environment and Resource Efficiency* – which specifically refers to the

Protection & development of natural and cultural heritage

PEACE IV

The Measure 'Shared Spaces and Services' provides an opportunity for certain tourism products which would include the development of amenity areas and parks. Actions to be supported under this measure include:

- Capital developments to create shared spaces both urban and rural
- Regeneration activities to ensure that publics spaces are welcoming to all and respectful of cultural identity
- Programming initiatives designed to facilitate maximum and sustained levels of shared usage within these shared spaces

European Agricultural Fund for Rural Development (LEADER)

EAFRD focuses on improving the competitiveness of the agricultural sector, promoting the sustainable management of natural resources and the environment in general, including climate action, as well as on supporting balanced approaches to the territorial development of rural economies and communities.

Measures of particular interest for tourism projects include:

- Basic services and village renewal in rural areas
- Co-operation

The LEADER Rural Development Programme 2014 – 2020 has a total budget of €7.6 million for County Monaghan. The 'Local Community Development Committee' will be the Local Action Group charged with overseeing this programme and it will be delivered by Monaghan Integrated Development Ltd. It is anticipated that the funding programme will be open to applications for tourism project proposals towards the beginning of 2016.

Fáilte Ireland

The Government's Medium Term Exchequer Framework 2012-2016 includes provision for significant investment in tourism product development. Almost all of the funding available in this period will be used to meet prior existing commitments, such as Dublin, the Kilkenny Medieval Mile and the Wild Atlantic Way, as well as a range of other investments.

It is the Government's stated intention to fund a further Tourism Capital Investment Programme in 2016 and the focus for the future will be to place support for capital investment within a framework of destination development. This means that the type of supports available in one part of the country may be significantly different to those in another as all future tourism capital programmes will be focused on developments within overall tourism frameworks. This could potentially be a major threat to tourism development in County Monaghan.

Community Tourism Diaspora Funding

This initiative is jointly funded by Fáilte Ireland, IPB Insurance and the local authorities and Monaghan County Council administered this at county level in 2014. It will also run in 2015 and 2016 and the objectives of the initiative are:

- To provide support in the form of small-scale funding incentives to community-based tourism events that have the capacity to carry through on the legacy of The Gathering 2013;
- To create a national network of local events with the capacity to deepen diaspora links and networks that have been developed or re-activated during The Gathering year;
- To foster the growth of strong county diaspora networks on the basis that diaspora relationships are rooted in 'people and place'.

The fund amounts to €32,223 per year.

Monaghan County Council Community & Environment Grants Scheme

Monaghan County Council provides a range of funding supports annually to support the development and upkeep of local communities by local communities. The following types of tourism projects have received support in the past:

- Public amenities and facilities
- Social and recreational facilities/opportunities
- Community festivals

Tourism SME support through Monaghan Local Enterprise Office (LEO)

Monaghan Local Enterprise Office provides a range of financial supports designed to assist with the establishment and/ or growth of small scale businesses. Training and mentoring programmes are also available. Eligible enterprises include those employing 10 or less full-time employees and satisfy certain criteria. Tourism enterprises aimed at overseas visitors are eligible to apply for grant aid.

Resources

The key priorities outlined above will require substantial resources in terms of time, staff and finance so that they can be implemented. The Tourism Unit within the council requires these resources to staff the seasonal Tourist Office, undertake trade engagement, develop promotional materials, work up key development projects, apply for funding and if successful, deliver these projects. The unit will also continue to play a key role in the co-ordination and delivery of tourism over the next five years, working closely with all stakeholders on the county as well as regionally, inter-regionally and nationally.

The Next Steps

Once this strategy has been adopted by Monaghan County Council, the Tourism Unit will begin work on the Action Plan to help deliver the key priorities in this strategy document.

This plan includes references to tourism issues that fall to some extent within the responsibilities of other sections of Monaghan County Council and/or other government departments and public bodies. Examples include the development of Rossmore Forest Park (in Coillte ownership), access to certain heritage/archaeological sites (Office of Public Works/National Monuments Office) and the promotion of Co Monaghan nationally and internationally (Failte Ireland and Tourism Ireland).

Clearly, the private sector also has an important role to play in developing Co Monaghan's tourism product and the Tourism Unit will endeavour to engage with other public bodies and the private sector to deliver the key tourism priorities for Co Monaghan.

Monitoring and Evaluation

There will be a periodic reporting process to record progress and if actions do not progress as anticipated, a review and corrective process will be undertaken where appropriate.

Appendix

Below is the full response to the Tourism Survey.

1. Are you involved in the Tourism Industry?					
Answer Options	Response Percent	Response Count			
Yes	36.7%	40			
No	63.3%	69			
	answered question	109			

Participants, who answered No, were directed to proceed to Question 8.

2. If you are a Tourism Provider, please indicate the nature of your business					
Answer Options	Response Percent	Response Count			
B & B	5.6%	2			
Hotel	5.6%	2			
Guesthouse	2.8%	1			
Self-Catering	16.7%	6			
Day Visitor Attraction	8.3%	3			
Equestrian	0.0%	0			
Golf	2.8%	1			
Leisure Centre	2.8%	1			
Activity/Adventure Centre	19.4%	7			
Pub/Restaurant/Coffee Shop	5.6%	2			
Festival/Event	16.7%	6			
Other	13.9%	5			
	answered question	36			

3. Please indicate (in general percentag	e terms) where your visitors originat	e from
Answer Options	Response Percent	Response Count
Domestic	94.1%	32
Northern Ireland	82.4%	28
UK	64.7%	22
Europe	73.5%	25
USA	61.8%	21
Other (Please Specify)	41.2%	14
	answered question	34

4. Please indicate (in general percentage terms) the Reason for Visit given by your visitors **Answer Options** Response Response Percent Count **Visiting Friends & Relatives** 70.6% 24 20 Holiday 58.8% Specific Activity (e.g. angling, golf etc) 58.8% 20 19 Festivals /Events 55.9% Wedding 32.4% 11 29.4% 10 Genealogy Corporate/Incentive 23.5% 8 Other (Please specify) 29.4% 10 34 answered question

5. Please indicate (in general percentage terms) the source of referrals for your business			
Answer Options	Response Percent	Response Count	
Word of Mouth	87.5%	28	
Your Own Website	78.1%	25	
Social Media Sites	71.9%	23	
Tourist Office/County Tourism Website	46.9%	15	
Other Reservation System	21.9%	7	
Tourism Operators/Agents	18.8%	6	
Festival Offices/Co-Ordinators	18.8%	6	
Other (Please specify)	12.5%	4	
	answered question	32	

6. What are your principal methods of marketing your business?			
Answer Options	Response Percent	Response Count	
Website	76.5%	26	
Social Media (eg. Facebook, Twitter)	73.5%	25	
Word of Mouth	70.6%	24	
Brochure	44.1%	15	
Direct Marketing	20.6%	7	
Press Advertising	20.6%	7	
Online Ads/Web Advertising	14.7%	5	
TV/Radio Advertising	11.8%	4	
Deal Sites	8.8%	3	
	answered question	34	

7. What market segments does your own marketing effort primarily target?			
Answer Options	Response	Response	
	Percent	Count	
Families	67.6%	23	
Special Interest (Anglers, golfers, walkers)	64.7%	22	
Day Visitors	55.9%	19	
Corporate/Incentive	32.4%	11	
Hen/Stag Parties	23.5%	8	
Other	17.6%	6	
	answered question	34	

8. What, in your opinion are the top three tourism products in Co Monaghan?		
Answer Options	Response Percent	Response Count
1.	100.0%	104
2.	97.1%	101
3.	88.5%	92
	answered question	104
	skipped question	5

Castle Leslie29Arts, music and cultural/heritage events, Sports & festivals25Lough Muckno23Kavanagh Centre Inniskeen19Golfing13Walks/hill walking/cycling13Lakes9Drumlin landscape/sites of interest9
Lough Muckno23Kavanagh Centre Inniskeen19Golfing13Walks/hill walking/cycling13Lakes9Drumlin landscape/sites of interest9
Kavanagh Centre Inniskeen19Golfing13Walks/hill walking/cycling13Lakes9Drumlin landscape/sites of interest9
Golfing13Walks/hill walking/cycling13Lakes9Drumlin landscape/sites of interest9
Walks/hill walking/cycling 13 Lakes 9 Drumlin landscape/sites of interest 9
Lakes 9 Drumlin landscape/sites of interest 9
Drumlin landscape/sites of interest 9
Rossmore Park 8
Harvest Time Blues Festival 7
Horse Riding 7
Bragan Mountain 6
Outdoor Pursuits/activities (Irish Country Quads mentioned) 6
History 5
Concra Wood Golf Course/bar/restaurant 5
its people and their hospitality 5
Ulster Canal 5
Rally School Ireland 5
Genealogy 5
Forests (Millenium Forest mentioned) 4
Good food 4
Carrickmacross Lace 3
Workhouse Carrickmacross 3
Parks 3
Cycling 3
good hotels/accommodation 3
well-developed GAA facilities 2
Location . Between Dublin and Belfast 2
Monaghan Leisure Complex 2
Country Music Festival 2
Sliabh beagh 2
Monaghan County Museum 2
History 2
Family Links 2
County Museum 1
Uplands 1
Pubs / music 1
literary festivals 1
County Monaghan 1
Ballybay wetlands 1
Muckno wakeboard club 1
Carrickmacross festival 1

Poetry	1
Patrick Byrne	1
Architecture	1
the people can talk and they have a great accent	1
Emy Lough	1
Parties	1
Rivers	1
Clones library	1
Environment	1
Inniskeen	1
weddings In good hotels	1
Flat Lake Festival	1
Standard of hospitality sector: Hotels, Pubs, Restaurants etc	1
Castle Shane Park	1
Tanagh out door activity centre	1
Night out Monaghan town	1
Taste Of Monaghan	1
Hedgerow character of the county	1
Pubs	1
Heritage Trails	1
Potential Irish Music powerhouse	1

Whilst there was a wide range of responses to this question, certain key projects or activities emerged strongly and these have been incorporated in the Strengths section of the SWOT Analysis.

These responses greatly assisted in identifying priorities for the Tourism Strategy.

9. What do you consider to be Co Monagle destination?	nan's main weaknesses as a to	ourism
Answer Options	Response Percent	Response Count
1.	99.0%	103
2.	92.3%	96
3.	67.3%	70
	answered question	104
	skipped question	5

A similar approach was taken to the above and again there was a lot of similar responses in terms of Co Monaghan's weaknesses as a tourism destination and these were grouped accordingly.

Poor Promotion & Marketing	65
No main Tourist Attraction	29
No National Events or enough Festivals/Events/family friendly activities (incl. for younger ppl)	13
Inland Location	12
Bad Signage	10
Accommodation (Lack of and costly)	9
Lack of funding ie from Failte Ireland / Tourism Bodies	9
Derelict Sites (Hope Castle, Castleblayney Court House)	8
Transport (No Railway, bad bus service)	7
Lack of collaboration among industry stakeholders	7
No special offers packages by Hotels/Restaurants/Golf Clubs/tourism providers/fishing	7
Roads / No motorway	6
Weak Retail Sector	6
Lack of recognition of what Monaghan has to offer	5
Lack of Walking / Cycling / Heritage Trails	5
Underdeveloped natural attractions (Rossmore, Knockatallon Mountains, Castleshane Park)	4
Tourist Office	4
Lack of Council & Representatives input to Tourism	4
Weather	4
Unimpressive towns and villages	4
Ulster Canal not re-opened	3
Lack of Spectacular Landscape	3
No Brand/Image	3
Litter/Dog Fouling	2
Lack of Irish culture and music tourism (what foreigners want)	2
No real Food industry	2
Expensive	2
Underdeveloped Resources/Not capitalising on resources available	2
Little support for tourist attractions/ Failte Ireland Support	2
Catering for & advertising for fishermen in light of all the lakes in county, making lakes more accessible to fishermen	2
Lack of outdoor play parks	1
Poachers	1
Closed shop units in towns	1
No Camper and Caravan Parks	1
No nationally recognised historical sites	1
Lack of Bike / Boat Hire	1
No service culture in restaurants/bars	1
Traffic congestion (road works)	1

More disabled access to lakes to include lakeside car access	1
Lack of medical facilities	1
Seen as a pass through to Northwest or east coast	1
Lack of training for providers for social media website etc	1
Broadband	1
Infrastructure	1
Parking free for first half hour	1
Its Dull	1
Reputation as a border county	1
Over reliant on short stay attractions	1
Racism	1
No Cinema	1

Again there was a wide range of perceived weaknesses identified. The most frequently cited weaknesses were incorporated into the Weaknesses section of the SWOT Analysis.

10. What, in your opinion, are the top three tourism attract more visitors to the county in 2015-2020?	products most needed in	Monaghan t	to
Answer Options	Response	Response	<u> </u>
	Percent	Count	
1.	100.0%	99	
2.	87.9%	87	
3.	71.7%	71	
	answered question		99
	skipped question		10

A similar approach was taken to the above and again there was a lot of similar responses and these were grouped accordingly.

Festivals	15
Ulster Canal	12
Promote Existing Attractions	11
Fishing/Angling	10
Lough Muckno/Hope Castle	7
Hotel Package Deals	6
Walking/Hiking Routes	6
Activities for children/teenagers	5
Development of Cultural Tourism	5
Theme Park	5
Rossmore Park	5
Advertise the County	5
Social Media/Website	5

Genealogy	3
Budget Accomodation/Hostels	2
Promote Monaghan Produce	2
History/Culture Trails	2
Tidy Town	2
Mountain Bike Trails	2
Canoe Trails	2
Water Policing	2
Tourist Information	2
More Playgrounds	2
Improved Transport	2
Cinema	2
Camping/Caravan Site	2
Watersport Activities	2
Fiddler of Oriel	1
Better Accessibility to lakes/rivers	1
Day Trips	1
Better Signage	1
Expanding Farmers Market	1
Encourage Diaspora Home to visit	1
Indoor Climbing Wall facility	1
Infrastructure	1
Museum/Art Gallery in South Monaghan	1
Broadband throughout County	1
Wet Weather Sports Facility	1
Info Booklets	1
Food Trail	1
International Competitions	1
Development of 'Green' Tourism	1

The most frequently cited items were incorporated into the Opportunities section of the SWOT Analysis.

11. Which aspects of Monaghan's Tourism product should Monaghan County Council and tourism support agencies focus on developing from 2015 - 2020?					
Answer Options Response Response Percent Count					
Re-Opening of the Ulster Canal 60.6% 66					
Enhancing facilities at Lough Muckno Leisure Park	50.5%	55			
Developing Rossmore Forest Park	48.6%	53			
Improving Angling Infrastructure	45.9%	50			

Developing more Walking/Cycling Trails	65.1%	71	
Developing & Supporting Festivals/Events	55.0%	60	
Improving Genealogy Services	33.9%	37	
Upgrading facilities/amenity areas on Bragan Mountai	n 39.4%	43	
Developing Food Trail	33.9%	37	
	answered question		109
skipped question			0

12. If you have a specific idea(s) for a Tourism Product Do in the list above, please specify here:	evelopment not mentioned
Answer Options	Response Count
	58
answered question	58
skipped question	51

A total of 58 responses were received and the below provides detail on these ideas. Some responses were duplicated so they were listed as one.

- 1. National Diaspora Centre-Cross Community Cross Border amenity
- 2. Heritage Trail including Old Graveyards
- 3. Theme Park
- 4. Genealogy Centre
- 5. Urban and Rural Heritage Trail
- 6. Outdoor Activity Centre at Dartrey Forest
- 7. Promote Tourism in Schools
- 8. Encourage Tidy Towns around County Monaghan
- 9. Reopen the Ulster Canal
- 10. Establish 'Made in Monaghan' Brand
- 11. Tourism Kiosk
- 12. Museum Focusing on the border region
- 13. Develop off-road cycle trails across drumlins
- 14. Develop Monaghan as a conference destination for NI business sector
- 15. Coin Operated telescopes in lookout tower in Bragan
- 16. Improved Building for Monaghan County Museum
- 17. 'Village Craic' trail- trail around Monaghan's villages
- 18. A safe play area at Peter's lake Monaghan town
- 19. Promotion of Sliabh Beagh Region
- 20. Provide flora and Fauna information on all cycle/walkways
- 21. Develop the old Railway building into a destination place for shopping/restaurant etc
- 22. Develop an Irish traditional cultural product
- 23. Development of Angling facilities
- 24. Reconstruction of Rossmore Castle

- 25. Improve the Dromore River System to prevent flooding and attract anglers
- 26. Promote Concerts in Clones St Tiernachs Park
- 27. Rahan's Lake- Make people understand the purpose of Crannogs
- 28. Develop the courthouse in Castleblayney as a music venue
- 29. Improved advertisement of County Monaghan
- 30. Promote package tours of Monaghan/getaway breaks
- 31. Continued restoration of Carrickmacross Workhouse
- 32. Brochures of Monaghan
- 33. Ulster Canal re-opened as a greenway
- 34. Encourage existing festivals- promote nationally
- 35. Host a marathon run
- 36. Build on twinning links already established between towns
- 37. Promote small towns and villages as well as the bigger towns of the county
- 38. Signage on motorways such as N2 to show Monaghan's attractions
- 39. Develop visitor centers to showcase the Patrick Kavanagh Centre/Carrickmacross lace
- 40. Include Monaghan in the Ulster Way

13. How would you rate the following aspects of the tourism product and infrastructure in Co Monaghan?

monagnam.							
Answer Options	Very Good	Good	Fair	Poor	Very Poor	Rating Average	Response Count
Visitor Attractions	3	28	46	22	10	3.07	109
Visitor Information Services	1	19	39	36	14	3.39	109
Choice of Activities (Golf, equestrian, watersports etc)	8	46	40	11	4	2.61	109
Festivals/Events	13	49	38	8	1	2.40	109
Environment/Scenery	30	49	22	7	1	2.08	109
Signage/Interpretation	1	20	47	31	10	3.27	109
Heritage Sites	4	20	54	22	9	3.11	109
Walking Routes/Trails	4	36	44	18	7	2.89	109
Angling Facilities	16	45	37	9	2	2.41	109
Shopping	2	27	36	35	9	3.20	109
Entertainment	1	35	49	20	4	2.92	109
Restaurants	15	51	29	8	6	2.44	109
			answered question		109		
			skipped (question	0		

In order to highlight those which fare best in the above results, the responses for Very Good and Good were added together. Environment/Scenery with 79 out of 109 responses in these grades came out on top, followed by Restaurants (66), Festivals/Events (62) and Angling (61).

At the other end of the scale, the responses for Poor and Very Poor were then added together and those faring worst in the survey were Visitor Information Services (50), Shopping (44), Signage/Interpretation (41), Visitor Attractions (32) and Heritage Sites (31).

14. What, in your opinion, are the key areas of Tourism Promotion that Monaghan County Council and tourism support agencies need to focus on in terms of marketing Co Monaghan between 2015 - 2020?

Answer Options	Response Percent	Response Count
Engagement with social media	81.0%	85
Development of Apps/podcasts and new ICT	44.8%	47
technologies		
Tourist Office Provision	57.1%	60
Provision of printed brochures/guides etc	42.9%	45
Development of Driving Routes	41.0%	43
Provision of Signage/Interpretation	55.2%	58
Representation at Trade/consumer shows	44.8%	47
	answered question	105
	skipped question	4

15. If you have a specific idea(s) for a Tourism Promotion Activity not mentioned in the list above, please specify here:

above, piease specify fiere.	
Answer Options	Response Count
	40
answered question	40
skipped question	69

There were a number of duplicate responses and these were merged together for reporting purposes.

- 1. Tourist office should have list of events e.g. places to go, events etc
- 2. Develop Archbishop homestead in north Monaghan into tourist attraction
- 3. Brochures/Guides
- 4. Use social media/websites
- 5. 'you're invited' initiative- attract locals back to their towns/villages through events
- 6. Promote Irish Festivals at Irish-based festivals abroad
- 7. Flora/Fauna Nature tours of Monaghan
- 8. Video made about Monaghan's attractions and shared on social media
- 9. Promote proximity to cities such as Belfast and Dublin
- 10. Monaghan Souvenirs
- 11. Monaghan Farming and Food Promotion
- 12. Taster day of Monaghan Tourism products
- 13. Large Scale Monaghan Christmas Market-Promoting local foods
- 14. International Fishing Event
- 15. Tourism Ambassador for various sectors such as sporting, genealogy
- 16. Overseas Advertising
- 17. Develop Package Deals
- 18. Promotion of Border Tours
- 19. Develop market for over 60s tours
- 20. Support from Failte Ireland promoting Monaghan Tourism
- 21. Develop Monaghan Arts Festival
- 22. Cycle Routes/Walking Routes/Horse Riding Routes
- 23. Swimming Pool for Carrickmacross
- 24. Patrick Kavanagh Centre developed into National Literary Park
- 25. Local Celebrity could promote County for example Tommy Bowe, Ardal O Hanlon

16. What, in your opinion, makes Co Monaghan differen	nt to other destinations in Ireland?
Answer Options	Response Count
	80
answered question	n 80
skipped question	n 29

	24
Landscape/Drumlins/Lakes	34
Location/Border/Proximity to Belfast and Dublin	24
The People	20
History/Heritage	10
Angling	4
Lough Muckno	4
Walking	3
Patrick Kavanagh	3
Golf	2
Castle Leslie	2
Sliabh Beagh	2
Concra Wood	2

17. For the future, what markets, in your view offer the best prospects for Co Monaghan?	
Answer Options	Response Count
	76
answered	question 76
skipped	question 33

Countries mentioned	
UK	17
USA	16
Europe	12
Northern Ireland	10
Ireland	7
Irish Diaspora	5
Germany	4
Canada	4
overseas markets,	2
France	2
China	2
Australia	1
Holland	1
Nordics	1
Asia	1
Scotland	1
Africa	1

Others		
Angling	12	
Touring groups/package holidays	11	
Festivals	6	
Food/ food markets	5	
Social Media	3	
Activity/Adventure	3	
Cycling & Walking	3	
Golf	2	
Genealogy	2	
Ulster Canal Development	1	
Iontas Theatre	1	
National TV & Radio	1	
Patrick Kavanagh Inniskeen	1	
Rally Driving	1	
Horse Riding	1	
Business	1	
Develop & Promote Bragan Mountains	1	
Events to promote Historical Sites	1	
Castle Leslie	1	
Concra Wood	1	
Develop Monaghan as a Music/Arts Venue (Like Galway	1	
Fest, Fleadh)		
Development of a Snow/Skiing Hill	1	
Boating	1	
Craft	1	
Music	1	
History	1	
Lakes	1	
Arts	1	
Develop Natural Amenities that are freely accessible	1	

It is no surprise that the UK market featured most strongly here and again the key market segments of angling and festivals also came through.

49
60
9
8
(
4
4
4
4
2
3
3
3
3
2
2
2
2
2
2
2
1
-
-
1
1
1
1
1
-
•
-
-

19. In terms of providing support to the tourism industry locally, which aspects of trade engagement should Monaghan County Council and tourism support agencies focus on between 2015 - 2020?

Answer Options	Response	Response
	Percent	Count
Establishment of Tourism Forum	54.4%	56
Development of themed packages	68.0%	70
Organisation of tourism specific training seminars	33.0%	34
Provision of Information on funding opportunities	55.3%	57
Organisation of Familiarisation Trips for trade	35.0%	36
Production of regular E-zine for trade	18.4%	19
Establishment of links with providers in other	60.2%	62
counties/on cross-border basis		
Organisation of Best Practice visits to key providers	37.9%	39
nationally		
Establishment of forum for specific product	21.4%	22
	answered question	103
	skipped question	6

20. If you have a specific idea(s) for Tourism Industry Engagement not mentioned in the list above, please specify here:

above, picuse specify fiere.		
Answer Options	Response Count	
	16	
answered question		16
skipped question		93

- 1. Annual event for stakeholders
- 2. Provide prize money for sporting events to attract sporting personalities
- 3. Short video highlighting Monaghan spread on social media
- 4. Made in Monaghan brand
- 5. Development of East/West Corridor running the length of Black Pig's Dyke
- 6. Monaghan County Clean up-Improve roads
- 7. Coach Holidays around Monaghan
- 8. Target USA with Monaghan "A hidden treasure"
- 9. Develop YouTube Videos showcasing Monaghan's Angling talent
- 10. Build on links with Twinned Countries

21. If you have a specific idea(s) for an action in the Topiece on it here:	ourism Strategy, please write a short
Answer Options	Response Count
	24
answered quest	ion 24
skipped quest	ion 85

1. Implementation of the Sliabh Beagh Management Plan
2. Develop a Monaghan Book Trail
3. Improve Town Infrastructure
4. Strengthen what is already developed
5. Continued development of Lough Muckno
6. Market County Monaghan using Social Media
7. Monaghan County Day Trips
8. Develop Monaghan Souvenirs and postcards
9. Develop Monaghan Genealogy Research Centre
10. Make the opening of the Ulster Canal a priority
11. Promote Monaghan Hotels for family holidays
12. Promote Cultural Tourism
13. Improved Tourism Facility needed
14. Ask Secondary School Children their opinion on improving tourism
15. Commercially Run Carp fishery to stop extinction
16. Boat Hire promotion on the lakes for hotel packages
17. Improved website for Monaghan Tourism
18. Traditional Craft Weekends/Heritage Trails
19. Promote Monaghan's Literary Culture
20. Use Monaghan Museum as a physical focal point for promotion of Monaghan

22. If you have a specific issue(s) that you would like to raise, please write a short piece on it here:		
Answer Options	Response Count	
	19	
answered question		19
skipped question		90

1. Identify existing tourism products available and combine to market together as packages 2. The Heritage/Tourism office needs to be aware of ownership issues attached to heritage buildings 3. Community Action clean up for towns/villages in the County 4. Improve marketing for the county including Bragan Bog 5. More support needed for festival promotion 6. Brochure including town parks, opening hours, nightlife 7. Improved road signage 8. Mobile Tourism offices in conjunction with greater online presence 9. Promote Cultural Tourism such as traditional Irish music 10. Improved road surface needed in Bragan Area 11. Enforcement of fishery laws 12. Encourage Family Package deals in hotels 13. Development of Courthouse and Hope Castle in Castleblayney 14. A school programme between the Navan centre and the Patrick Kavanagh Centre should be developed further.

16. Attractive, well manicured gardens could be beneficial in places such as Rossmore Park

15. Litter is an issue. Promote Tidy Towns