



An Chomhairle Oidhreachta
The Heritage Council



Monaghan Collaborative Town Centre Health Check Report 2019

Introduction

Monaghan is a historical town of notable architectural and civic character with its striking unconventional triangular branching from the town centre in to a series of urban spaces of different character.

Monaghan is the county town and performs important administrative, employment and retailing functions serving the economic and community needs of a large hinterland which also extends to Northern Ireland.

The town offers a wide range of day and evening activities including Rossmore Park, Rossmore Golf club, theatre, leisure centre, Museum, library, boutique shops, quality restaurants and festivals.

In September 2016, Monaghan was selected to participate in the Heritage Council, RGDATA and Partners' National Pilot Town Centre Health Check (TCHC) Training Programme (2016-2018). The Department of Culture, Heritage and the Gaeltacht (DCHG), the Department of Rural and Community Development (DRCD) and the Department of Housing, Planning and Local Government (DHPLG) are also key partners. The key aim of the Pilot TCHC Training Programme is to:

“Establish a co-ordinated National Town Centre Health Check (TCHC) Training Programme and TCHC Baseline (2016) involving and engaging the private, public and civic sectors in a representative selection of Irish towns in order to raise awareness, understanding and appreciation of the critical role that historic town centres play and the impact they have on overall socio-economic, environmental and cultural growth and development....” (Source: Agreed Project Charter for Pilot TCHC Training Programme 2016. For further information on the Pilot TCHC Training Programme, please contact Alison Harvey, Heritage Council.)

The key findings from Monaghan's Town Centre Health Check and baseline will inform plans and strategies in relation to the following:

- Arts, Heritage and Culture
- Commerce/eCommerce and Enterprise
- Cultural Tourism, e.g. music, food, etc.
- Public Realm, e.g. historic streetscapes, parks and public spaces
- Living in the Town Centre
- Strategic Planning and Place-Making





Historic Evolution

Monaghan is a historical town of notable architectural and civic character. The town derives its name from the anglicisation of “Muineachain”, meaning “hilly place” or “bushy place”. Monaghan Town owes part of its development to the plantation period (early 17th century), although the area was occupied for over 100 years prior to that. The earliest references to Monaghan are from the fourteenth century, when the McMahon family established their primary residence on a crannog on Convent Lake.

Monaghan Town developed many of its characteristics during the Ulster plantation. The central Market Square, or Diamond, with the principal centres of administration, religious buildings and commerce were common in Mid-Ulster towns. Monaghan grew commercially through the development of the road and rail network and flourished in the 18th, 19th and early 20th centuries as a centre for linen and agricultural production.

The historic street pattern is evidenced today in the four historic squares, connected by the main streets, radiating from the central space, the Diamond, including Dublin Street, Glaslough Street and Market Street. Adjoining the Diamond is Church Square with land mark structures, St. Patrick’s Church and the Courthouse. To the west is Market Square, and the Market House located within the space. At the opposite end of the town is Old Cross Square under which the Ulster Canal runs which is the location of an ancient market cross.



Collaborative Team

Representatives of Monaghan County Council, Monaghan Town Team and University College Dublin with ongoing support provided by the Heritage Council's National 'Pilot' TCHC Coordinator, formed the Monaghan TCHC steering group and engaged in a collaborative process to achieve the goals set out by the National Pilot Town Centre Health Check briefing documents. The TCHC research focused on a number of key areas:

- Shoppers' behaviours and attitudes
- Business owners' perceptions of the town centre
- Footfall in the historic town centre
- Land use in the historic town centre
- Availability of parking spaces



Survey Methodology

Following the recommended 15-step methodology as set out in the 'Pilot' TCHC training programme, UCD students from the second year BA Planning, Geography and Environment programme conducted a land use survey.

The land use survey examined the use of the ground floor of the town centre floor space. The town centre survey area included The Diamond, Dublin Street, Glaslough Street, Mill Street, Church Square, Market Street, Park Street, Hill Street, Market Road, Dawson Street, North Road, High Street, Plantation, Old Cross Square, Broad Road and the shopping centre.

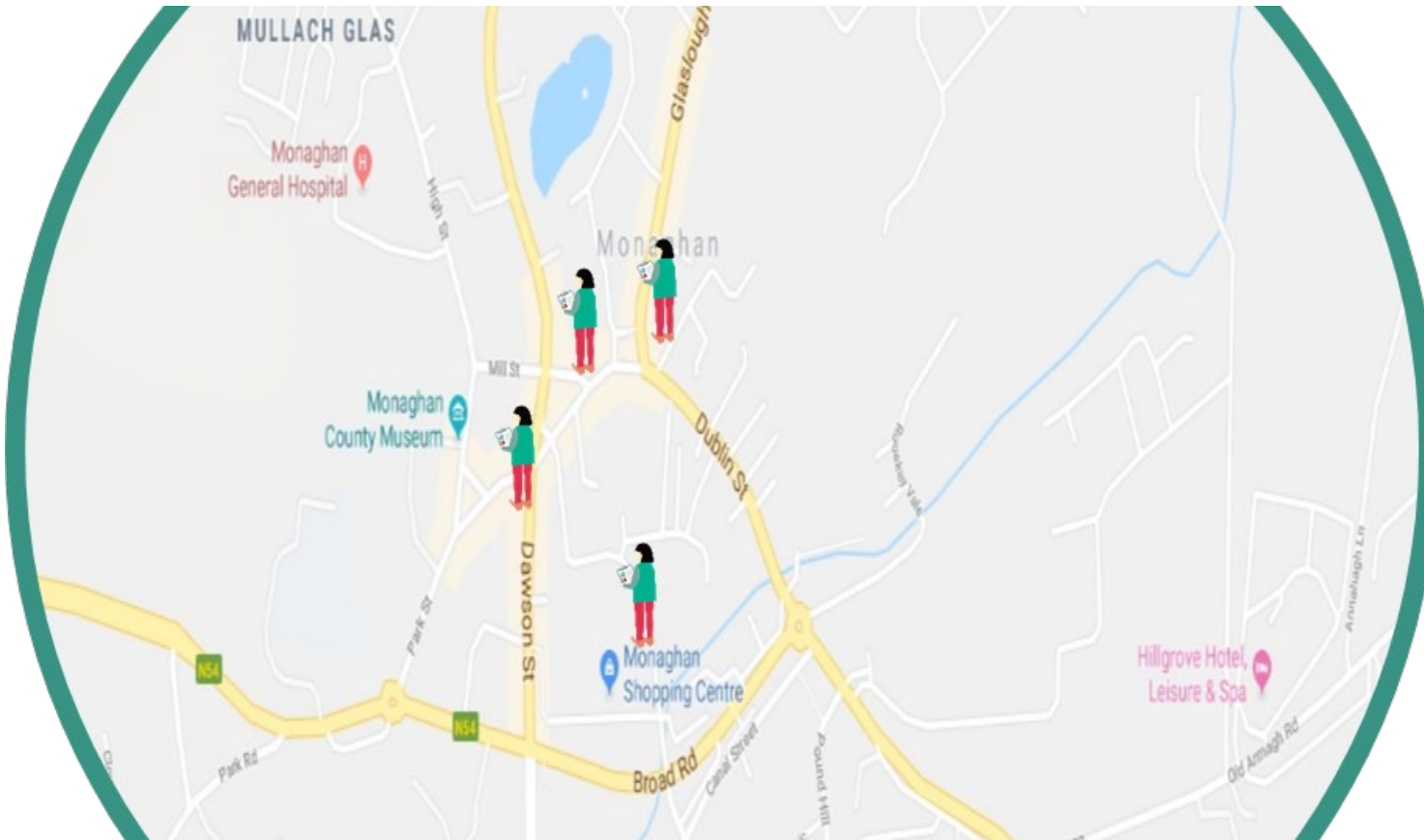
The survey was conducted on 5th November 2016 and units were classified according to their use using the GOAD classification of Land Use. It also examined the number of vacant units in the Town centre. The land use findings were also validated by Monaghan County Council. A further land use survey was carried out in November 2018.

A user/shopper survey was carried out in November 2018. Existing retailer surveys carried out as part of the review of the County Monaghan Retail Development Strategy 2016 and the Monaghan Town Parking Strategy 2017 have been incorporated into the Town Centre Health Check.

Pedestrian footfall counters were installed at five town centre locations in December 2015. They are located at specific points at Glaslough Street, Dublin Street, Dawson Street, Park Street and Church Square.

Data on commercial property rents in the town centre has been provided by local estate agents.

Garda crime statistics data has also been incorporated and can be used to identify issues and potential resolutions.



Town centre user / shopper surveys

The aim of the user/shopper survey was to examine the views of the town centre user on a range of issues.

A total survey sample of 408 face to face surveys were undertaken at 4 town centre locations in November 2018.

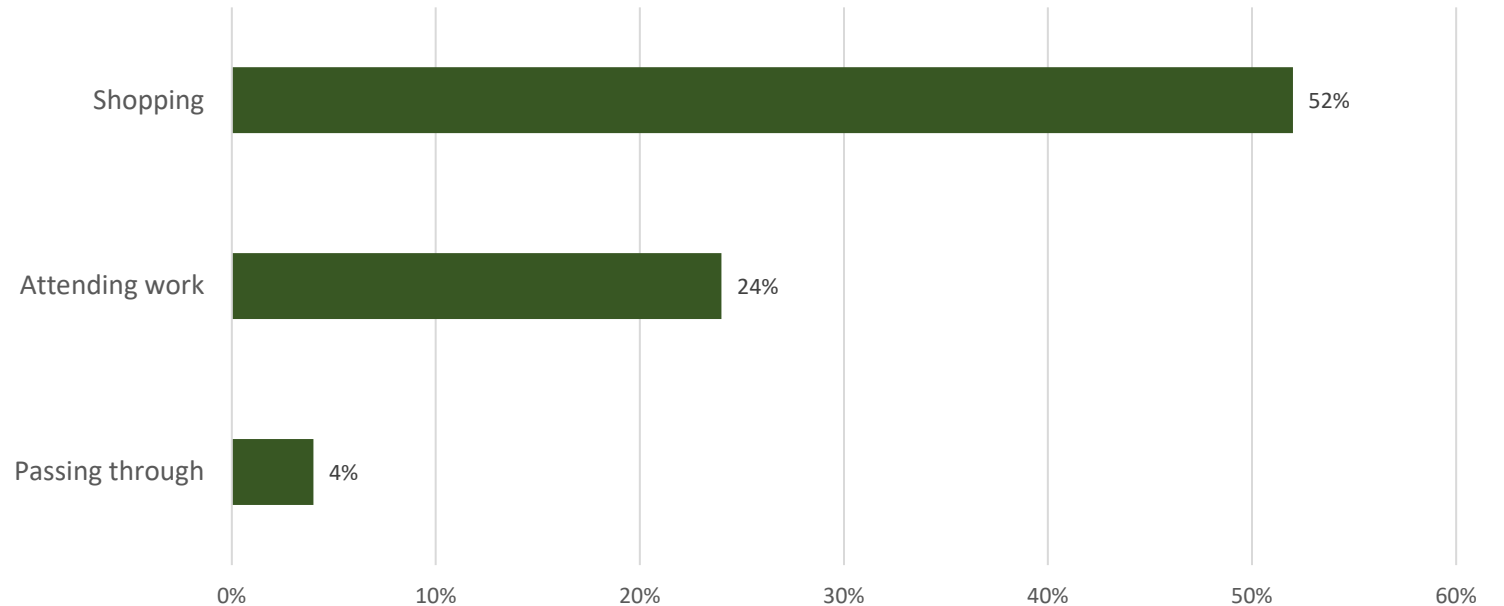
The surveys were commissioned by the Heritage Council and carried out by Red C Research & Marketing Ltd.



Main Reason for Visiting Monaghan Town Centre

Shopping is by far the most common reason why shoppers use Monaghan the town centre, with more than half saying this is the main reason they use the town centre.

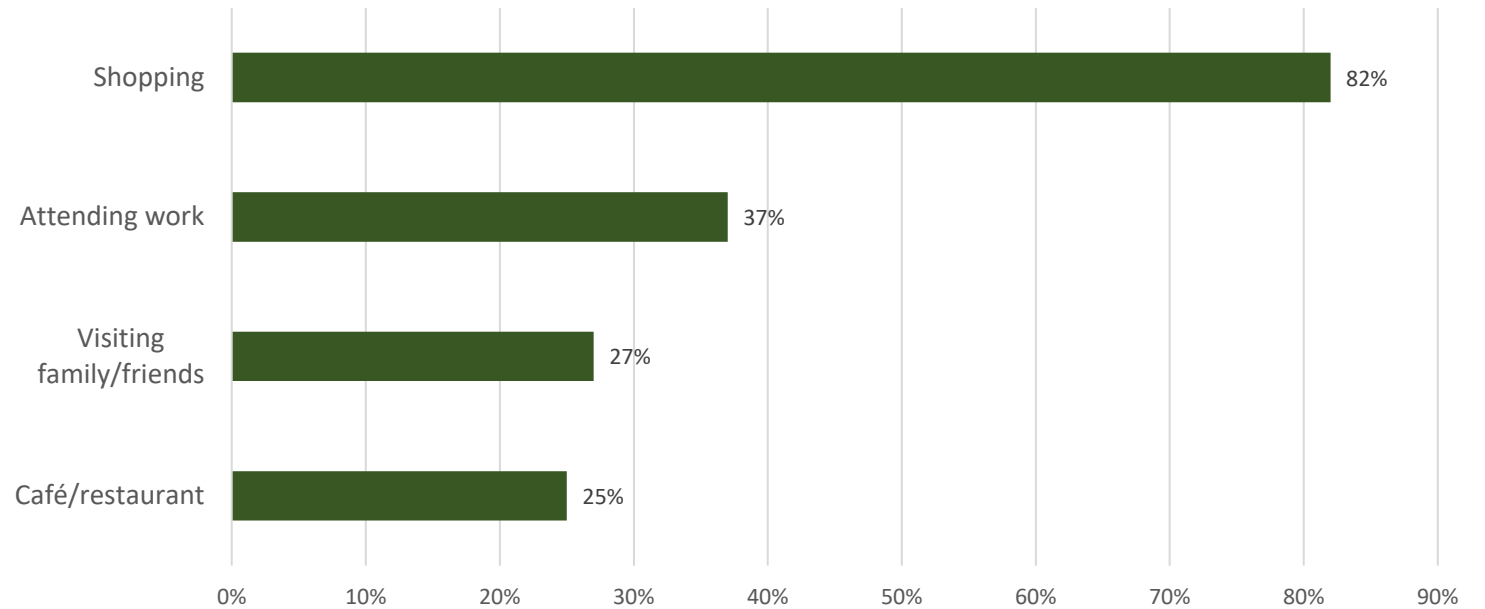
Interesting to note that a quarter of town users say attending work was their main reason for using the town generally.





Main reason and other reason for visiting Monaghan Town centre combined

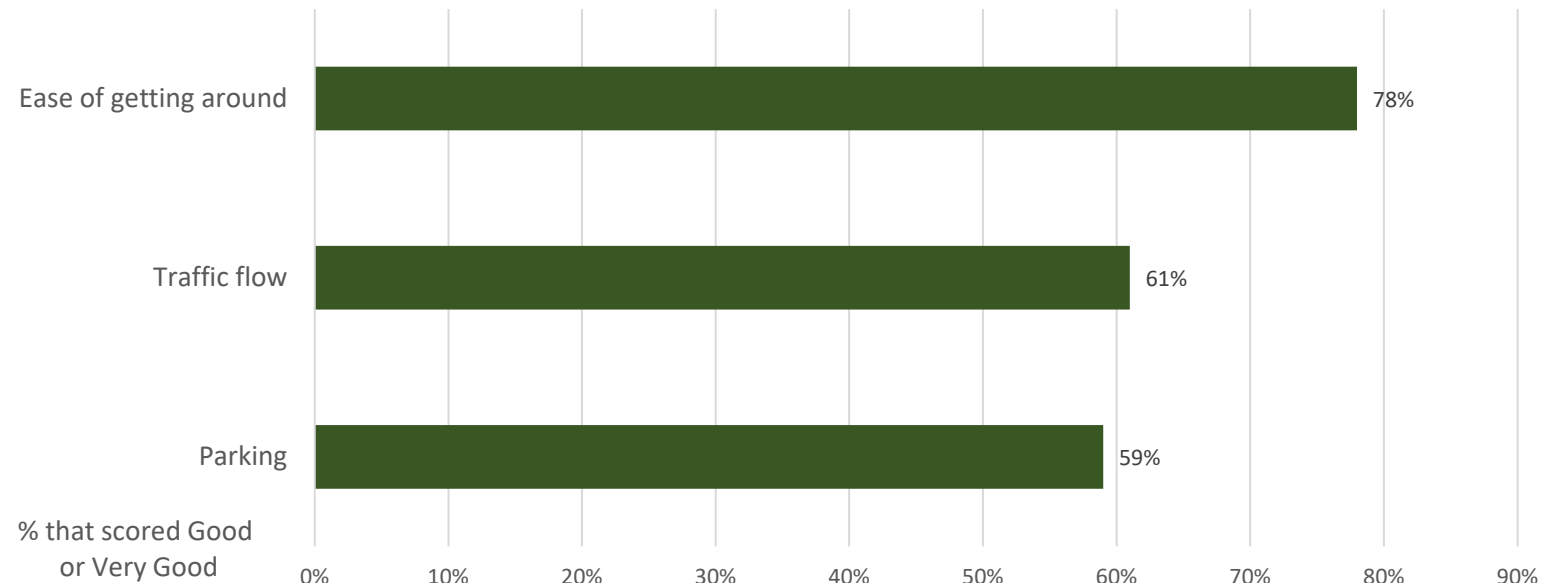
Beyond shopping and attending work, the next most common reasons are visiting a friend or family member or going to a café/restaurant.



User opinion of
Monaghan
Town centre
-
Traffic and Ease
of Access

Access to the town does not appear to be a big issue for town users, with almost 4 in 5 rating the ease of getting around as good or very good.

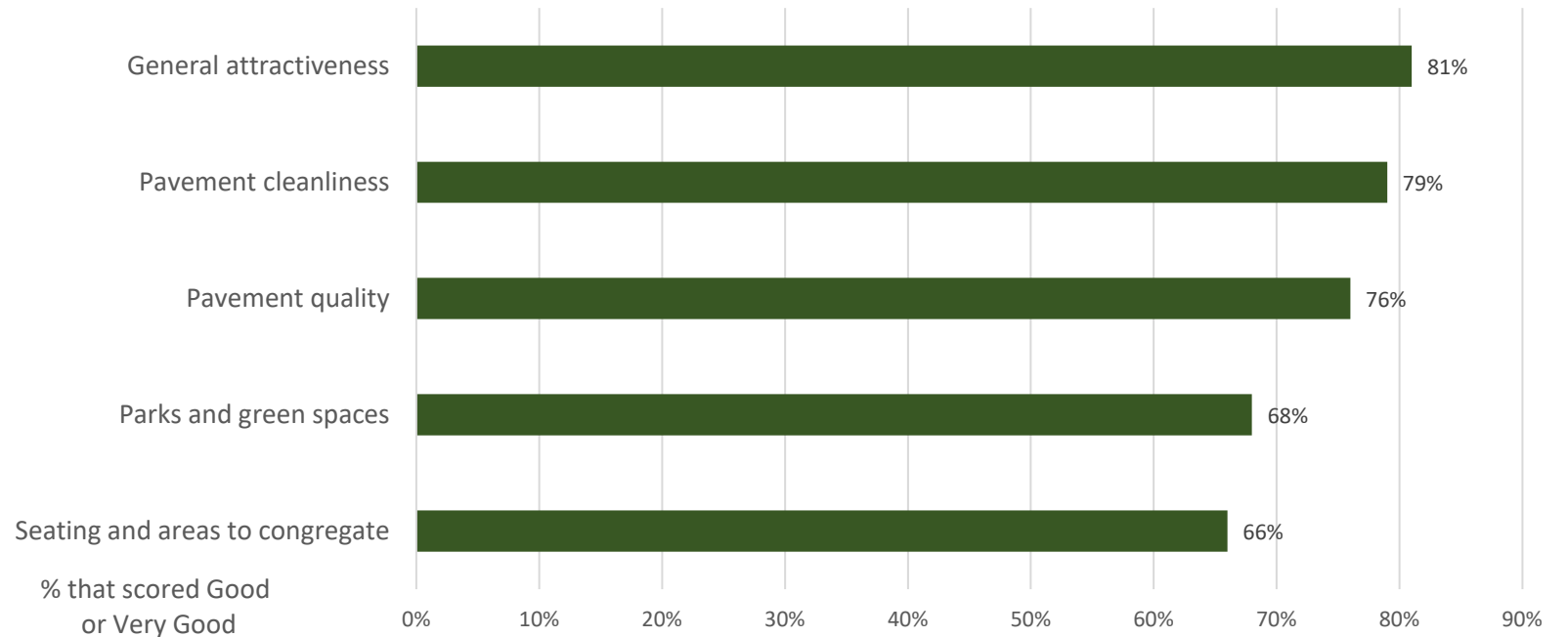
3 in 5 also rate the traffic flow and parking positively but notable that when prompted about these specific aspects of access, the ratings are lower.



User opinion of Monaghan Town centre - Attractiveness

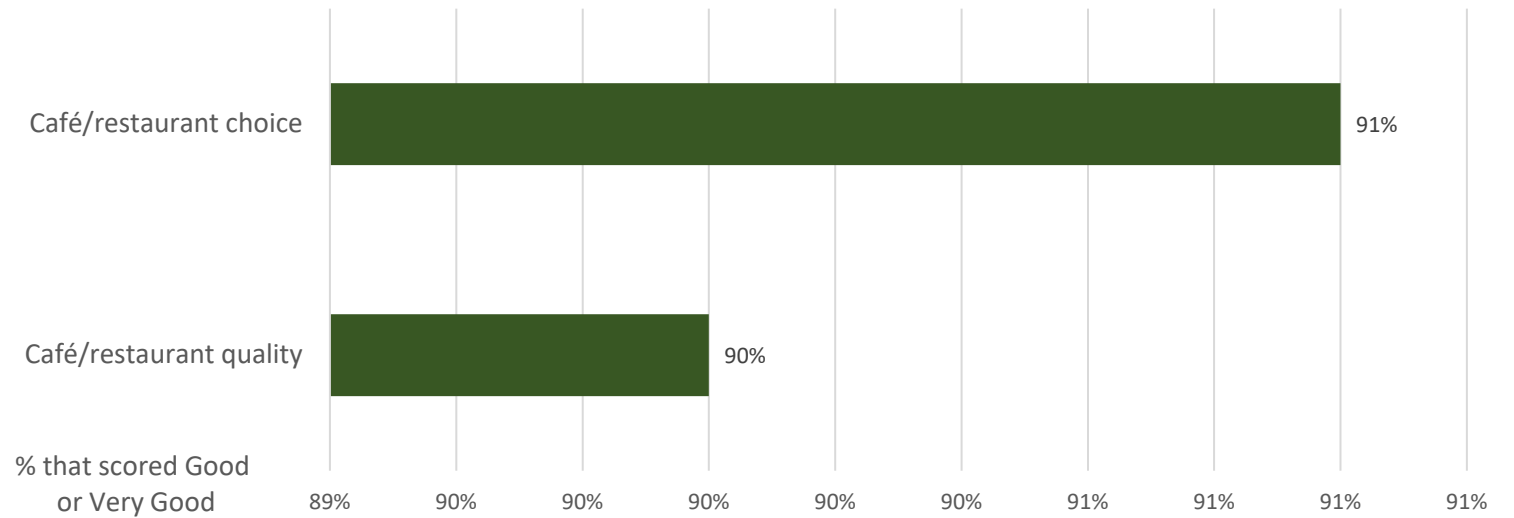
Monaghan scores very well for general attractiveness of the town as well as on pavement cleanliness and quality with approximately 4 in 5 being satisfied.

While a majority also rate the parks, green space and seating as good or very good, again it is notable that ratings for these are not as strong as they are for attractiveness generally.



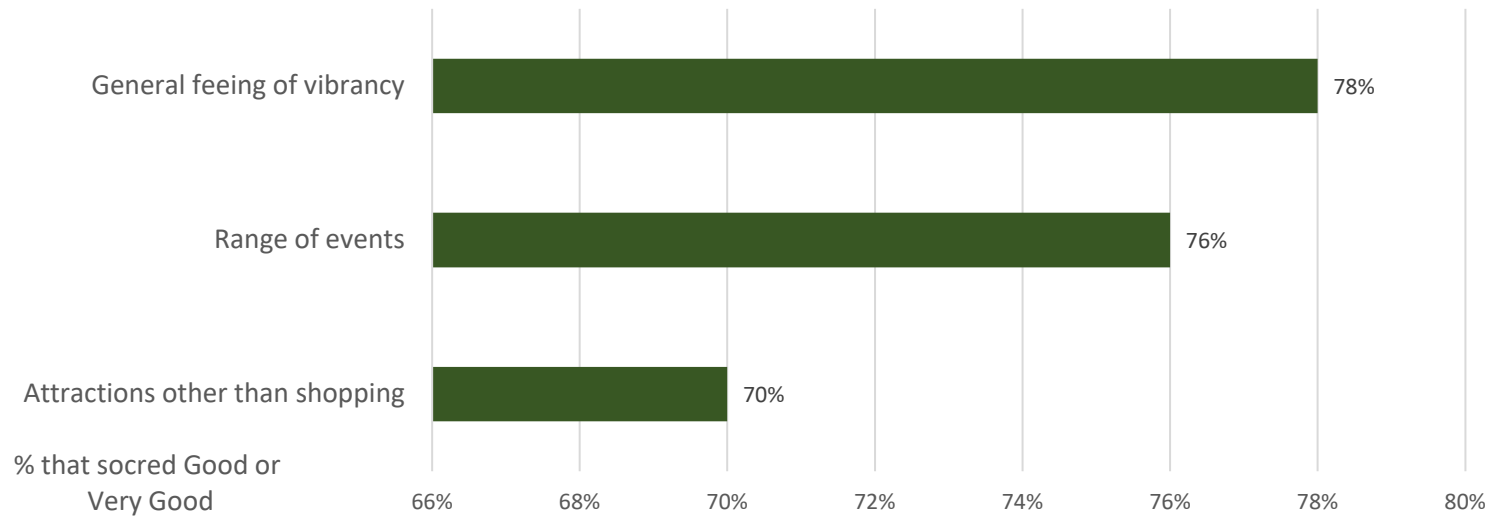
User opinion of
Monaghan
Town centre
-
Cafés,
restaurants

The overwhelming majority of town centre users are satisfied with the quality and choice of restaurants and cafes in Monaghan town centre, with 9 in 10 rating these as good or very good.



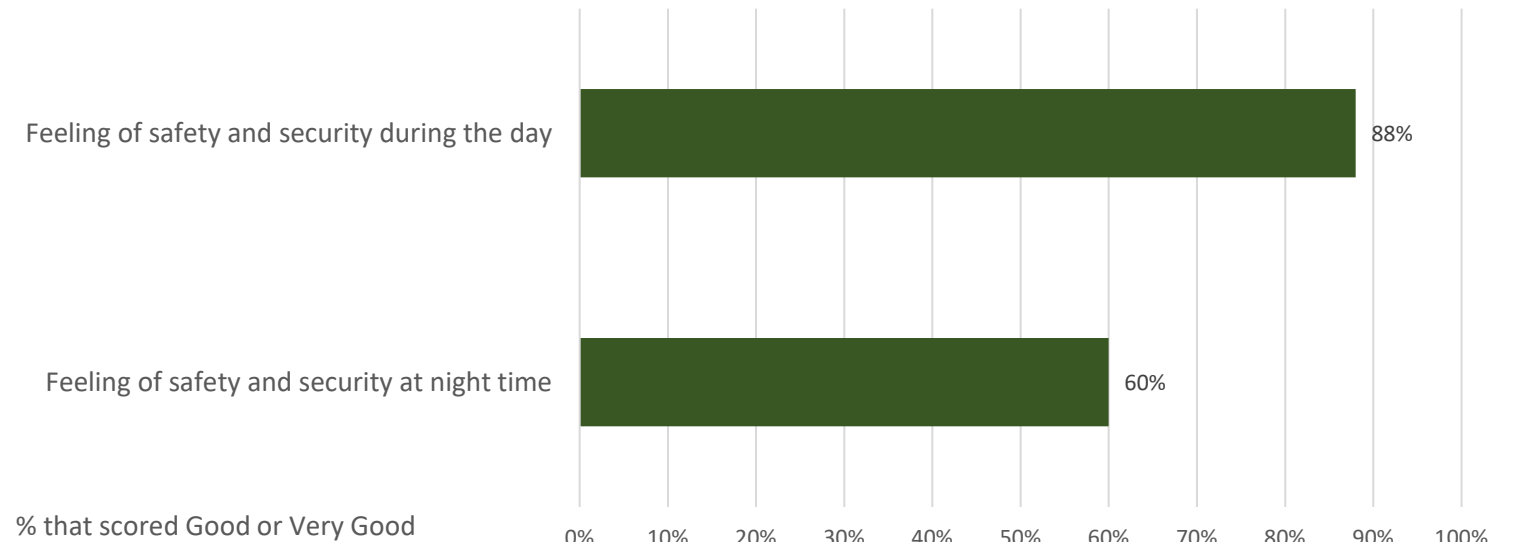
User opinion of
Monaghan
Town centre
-
Aspects of
Tourism

On tourism related aspects, over three quarters of town centre users are satisfied with Monaghan town centre's general vibrancy and range of events, while 7 in 10 are satisfied with the attractions other than shopping.



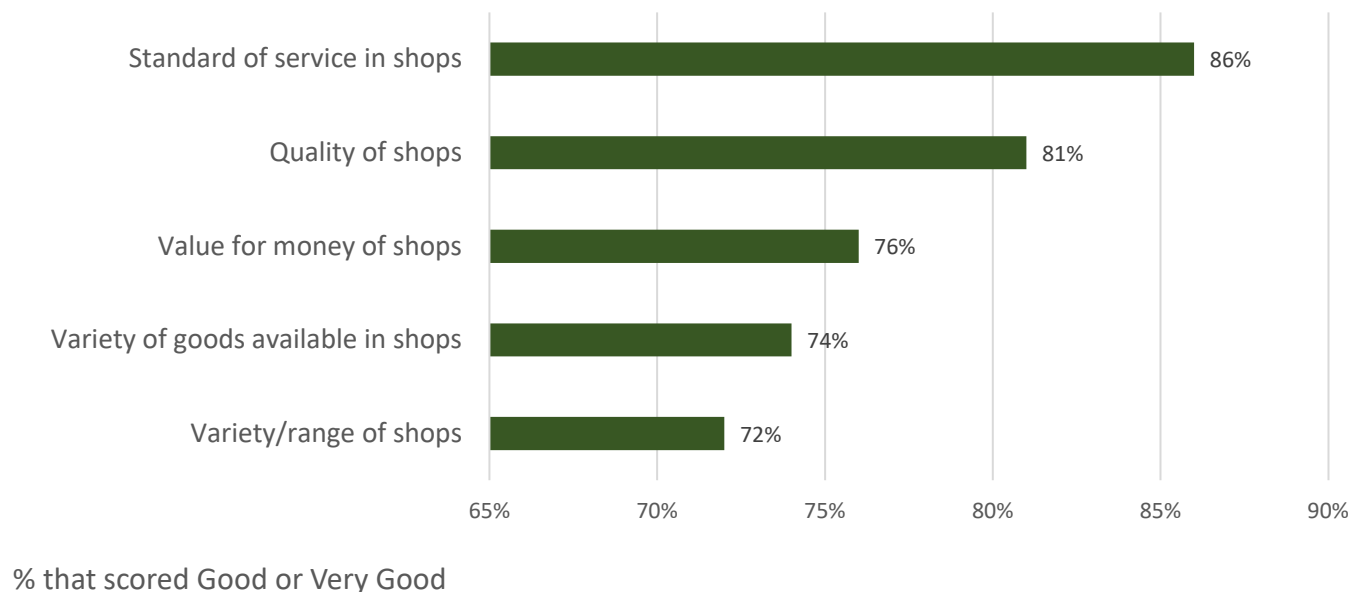
User opinion of Monaghan Town centre - Security

While a majority rate their feelings of safety and security in the town centre as good or very good at both day and night, the gap between the two is significant. This suggests that the security arrangements at night in the town centre is an area that can definitely be improved.



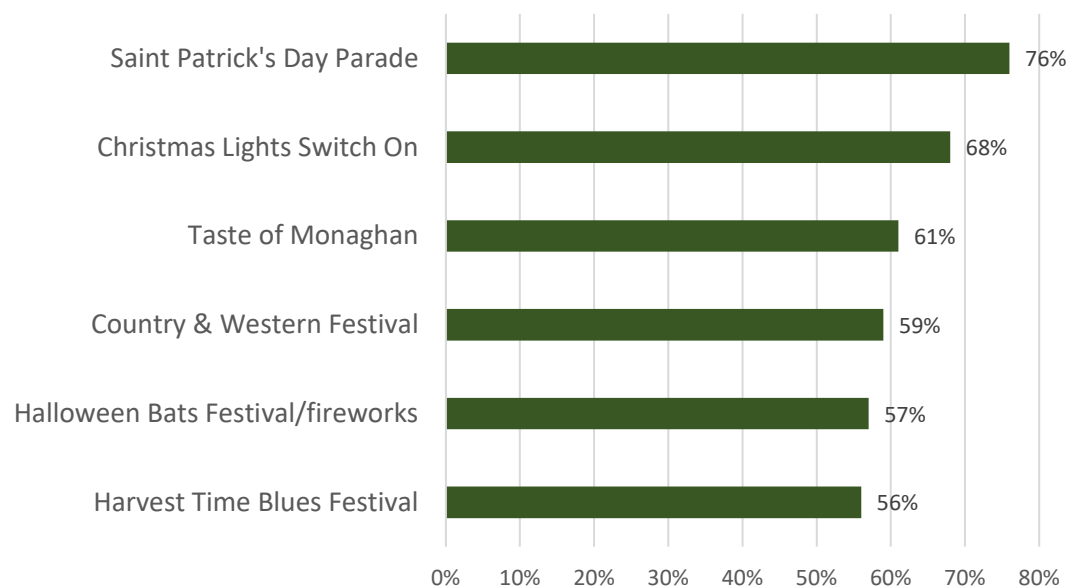
User opinion of
Monaghan
Town centre
-
Satisfaction
with Monaghan
Town centre
shopping

Particularly positive in the context of it being the primary reason people use Monaghan Town Centre, we see very high levels of satisfaction for shopping related aspects, in particular the standard of service and quality of the shops.



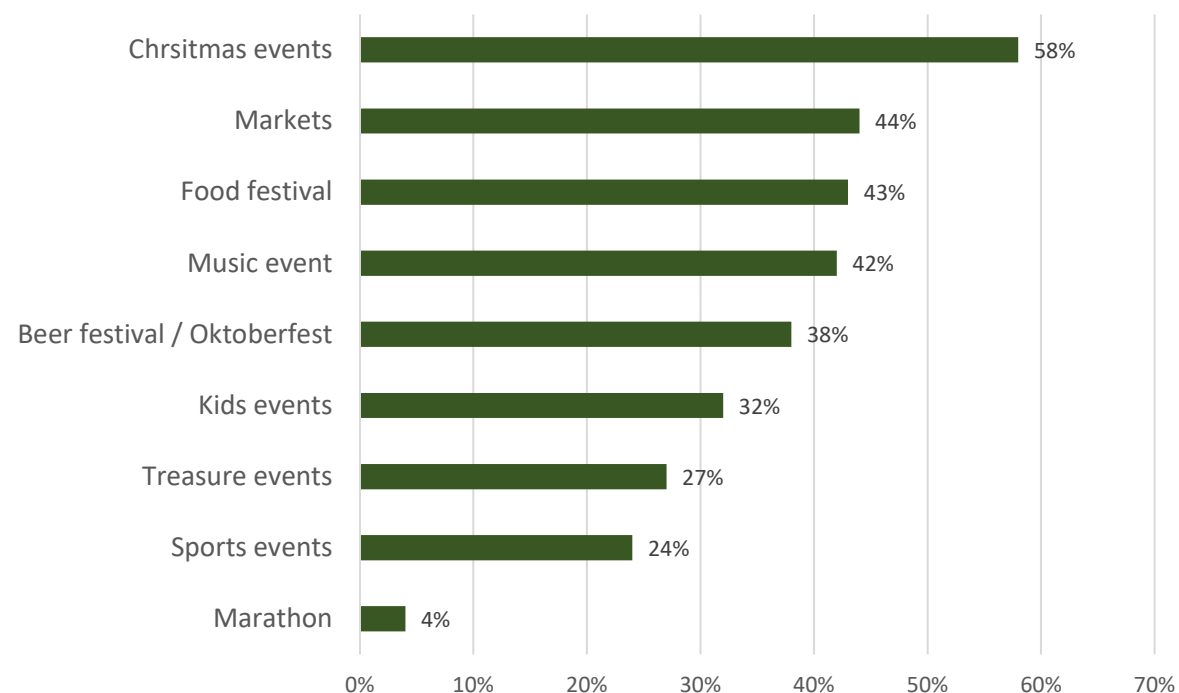
User opinion of Monaghan Town centre - Events

Of the public events visited in the past year, the St. Patrick's Day Parade is the most popular, followed by the Christmas Lights switch on.

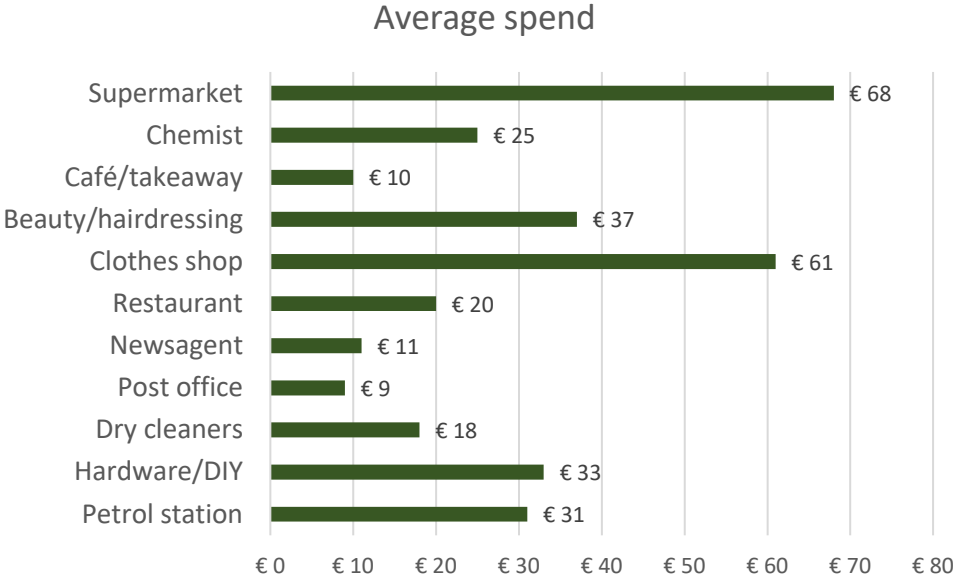
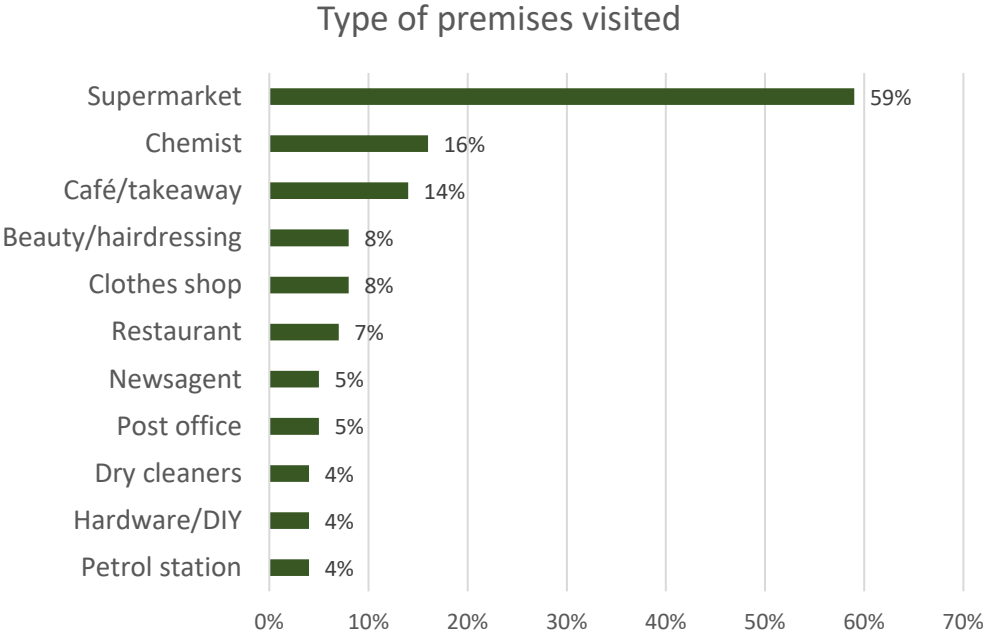


User opinion of Monaghan Town centre - Future events

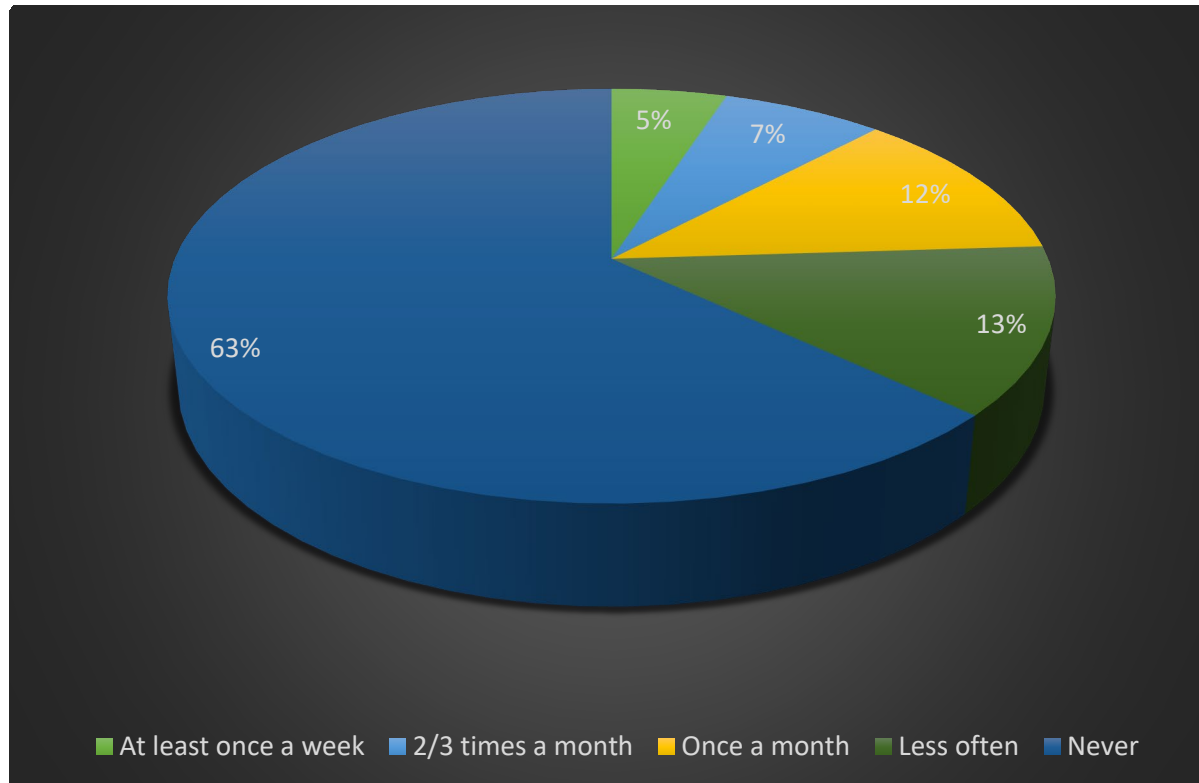
It is interesting to see the demand for a wider range of events in the town centre, ranging from Christmas events, markets to sporting and events for kids.



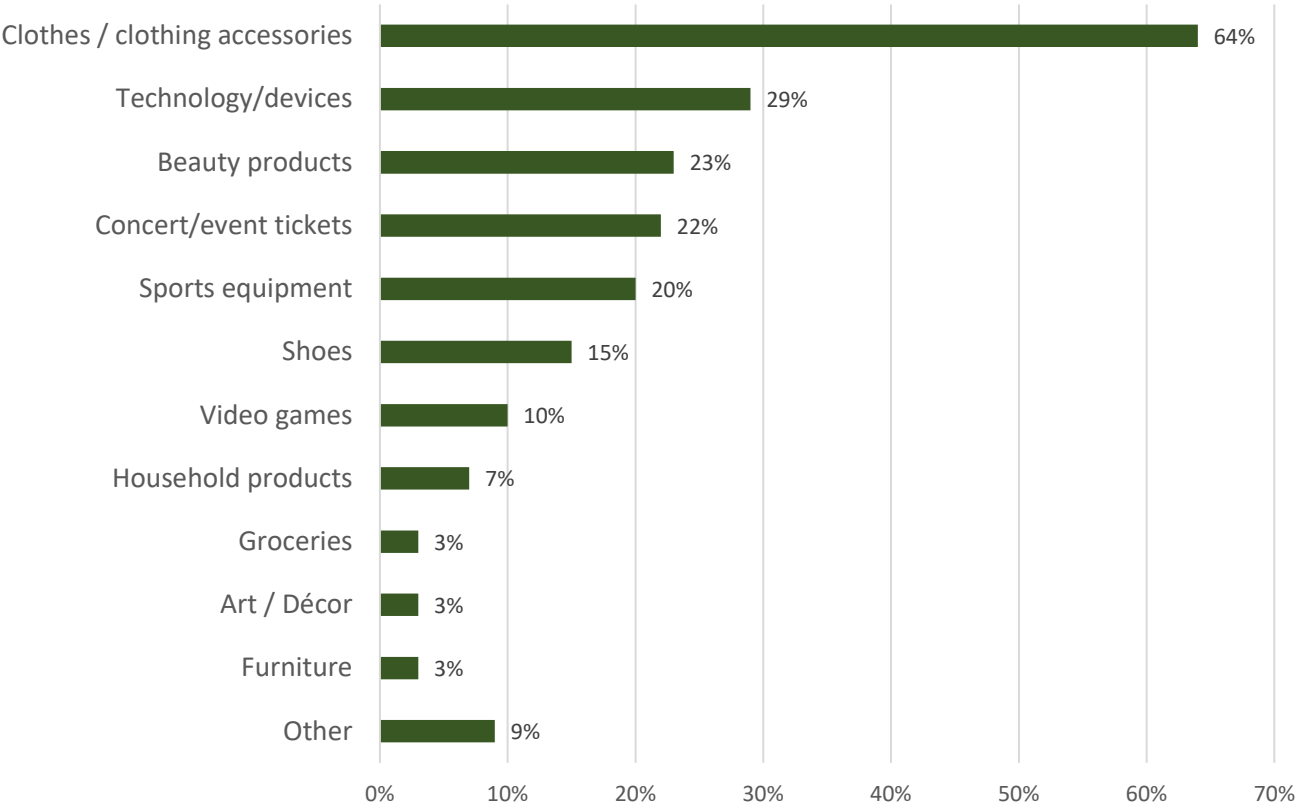
User opinion of
Monaghan
Town centre
-
Premises
visited and
average spend



Positive to see in the context of potential competition for local retailers, two thirds of Monaghan Town centre users say they never shop online while among the 36% who do, two thirds of these shop either just once a month or less often.

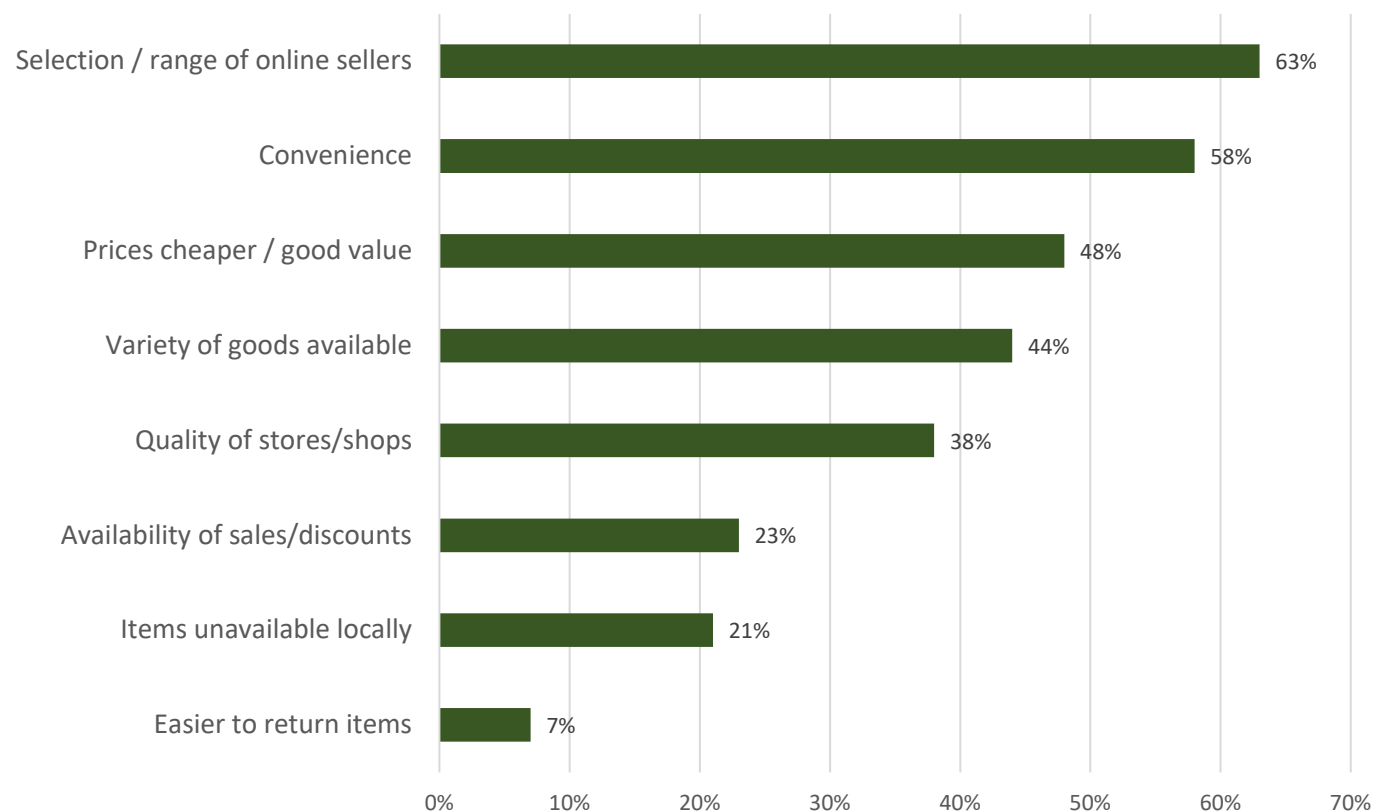


Clothes and clothing accessories are the most common item bought online, with 64% of Monaghan town centre users who shop online saying this is the main good they buy online.



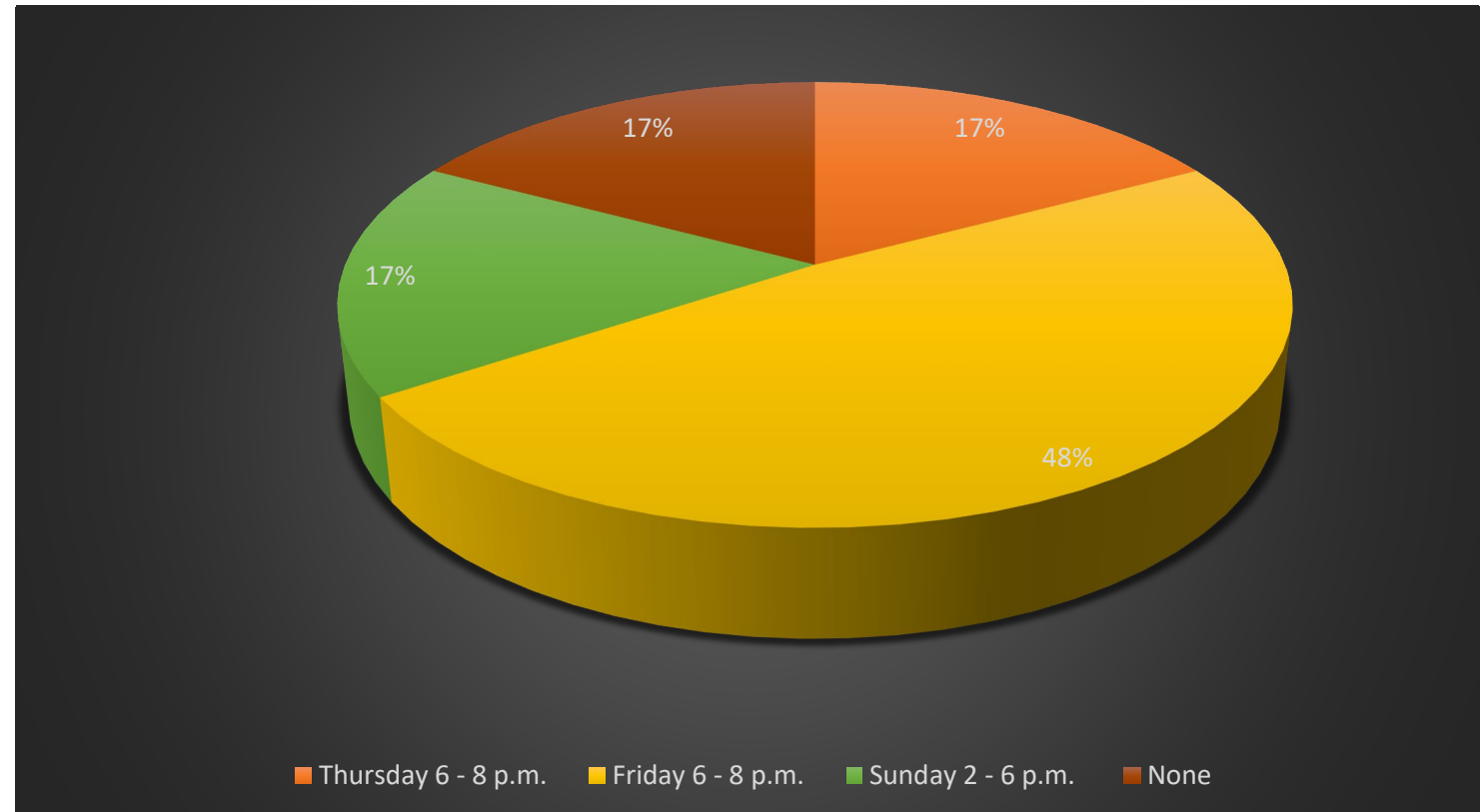
User opinion
of Monaghan
Town centre
-
Reasons for
buying online

The main reason for choosing to shop online generally is the selection of stores, with over 6 in 10 citing this as a benefit of online. The next biggest factor is convenience followed by cheaper prices and variety of goods available.

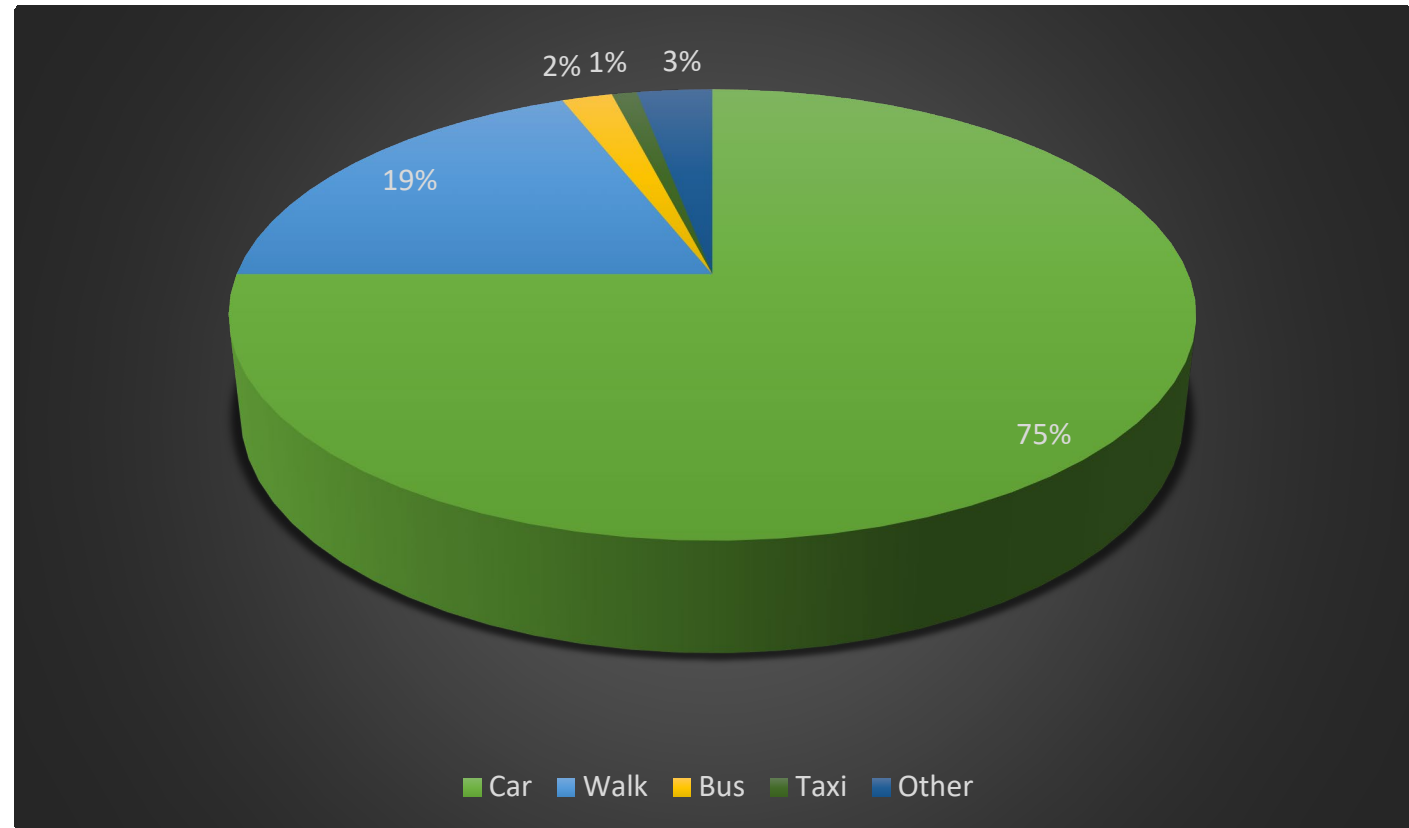


User opinion of
Monaghan
Town centre
-
Alternative
shopping hours

There is a strong demand for additional opening hours, with Friday evenings the most popular with shoppers, followed equally Thursday evenings and Sunday afternoons.



An overwhelming majority (three quarters) of town centre users travel by car, with 1 in 5 travel on foot, highlighting that it is very small numbers indeed that are using any other form of transport.



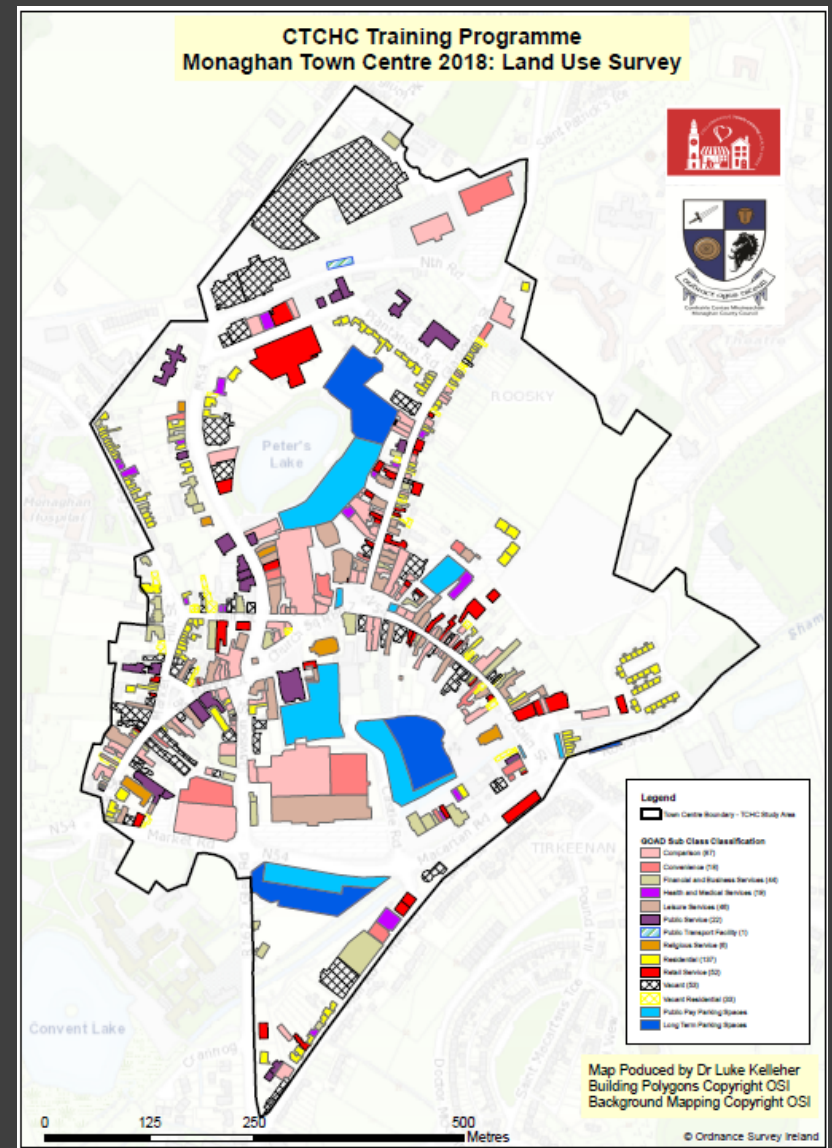
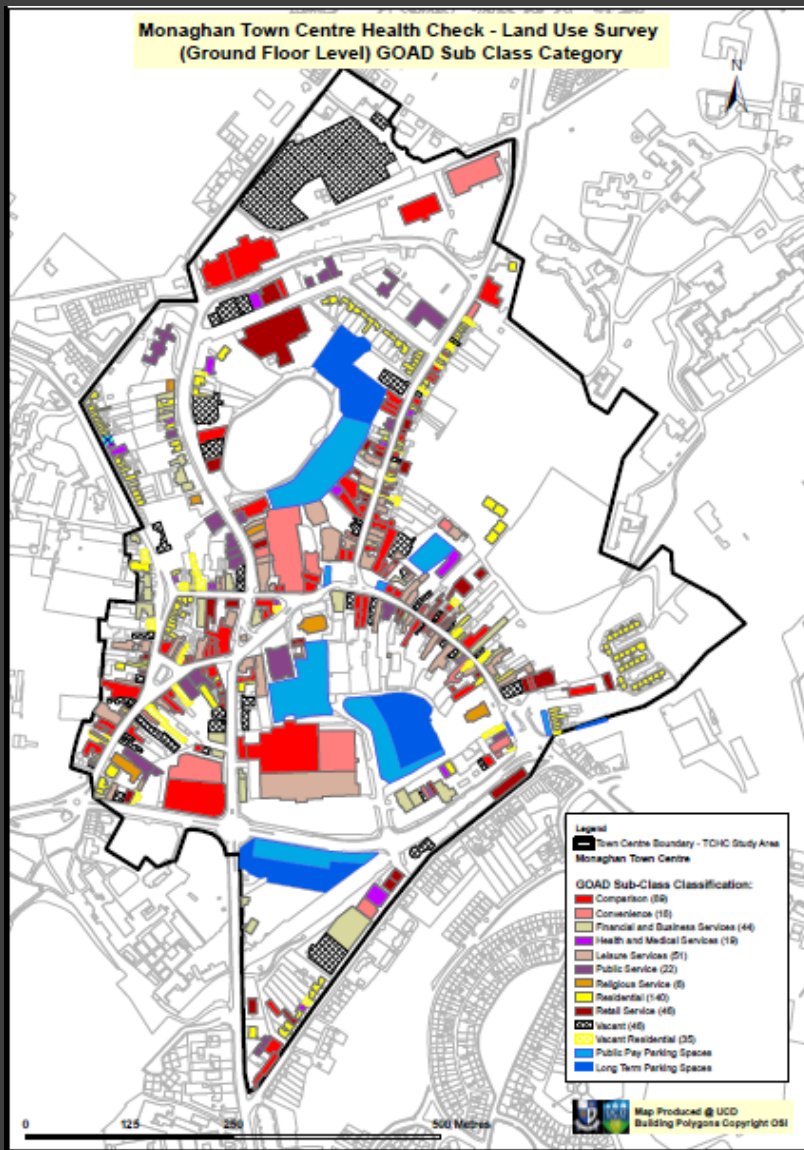
Survey of Land Use

Land use surveys were carried out in November 2016 and in November 2018. The data provides a breakdown of the numbers of units per land use category and the percentage of each land use.

There were changes in the vacant retail convenience and comparison rate rising from 21% in 2016 to 25.5% in 2018, while the retail service rate fell from 7.4% to 5.6%.

The residential vacancy rate fell slightly from 20% to 19.8%.

Land use classification	Nov 2016	Nov 2018
Residential	27%	26.4%
Comparison	17.2%	16.8%
Leisure services	9.8%	8.9%
Vacant other	8.9%	10.4%
Retail service	8.7%	10.0%
Financial and business services	8.5%	8.5%
Vacant residential	6.9%	6.2%
Public services	4.2%	4.2%
Health and medical services	3.9%	3.7%
Convenience	3.5%	3.5%
Religious service	1.2%	1.2%
Public transport facility	0.2%	0.2%



Land use classification maps 2016 and 2018



Survey of Parking

According to the Monaghan Town Parking Strategy 2017, there is currently adequate parking facilities in the town.

There are:

- 440 on-street public parking spaces,
- 1,107 off-street parking spaces, and
- 380 off-street private spaces.

Options have been identified in the Parking Strategy to meet future car parking demands for the next 10 years.

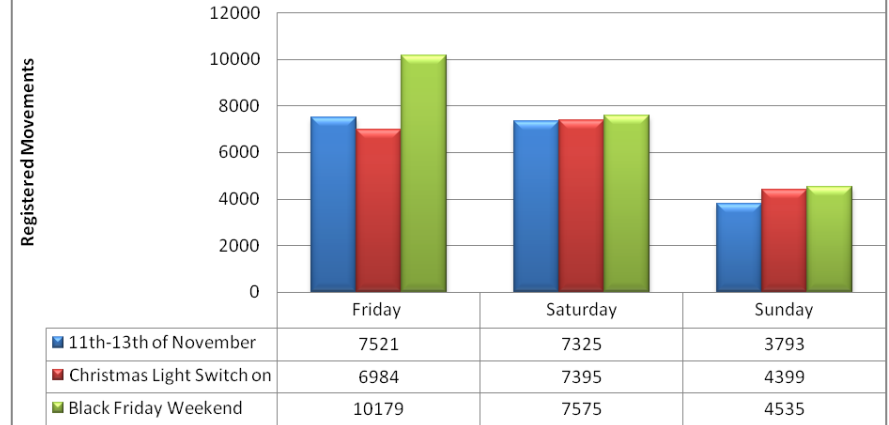
Survey of Footfall in Monaghan

The footfall counter data does not represent the total footfall within the town, however, it gives a good indication of pedestrian traffic on the selected streets and the possibility of getting a real indication of activity on each of the streets.

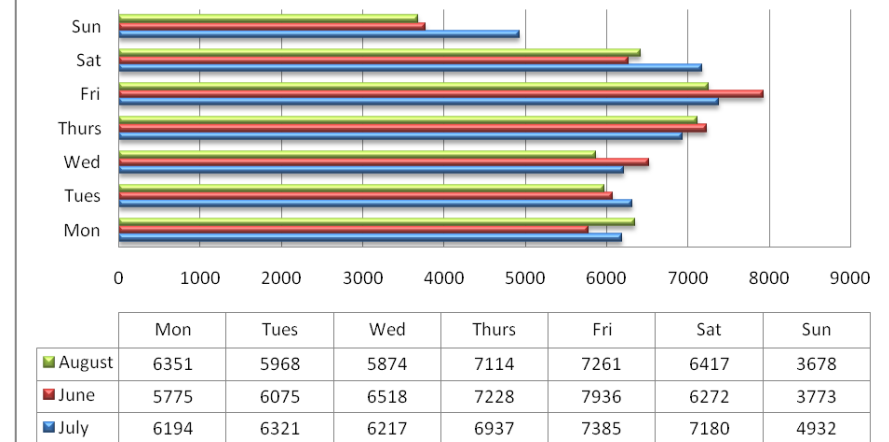
Synching people counting data to key business metrics such as point of sale information can correlate trends between footfall and revenue. For instance, there might be a time of day when stores are busy, but sales conversions are low. Retailers in particular will find this calculation invaluable, because it indicates opportunities that are being lost during those periods – possibly due to a low level of staffing, leaving consumers feeling frustrated, or queuing for a long period of time.

It is important to note the emerging patterns that are appearing and the impact weather has on footfall within the town. This information can build year on year and provide a platform to grow reliable measurable data into the future.

Weekend Comparisons November

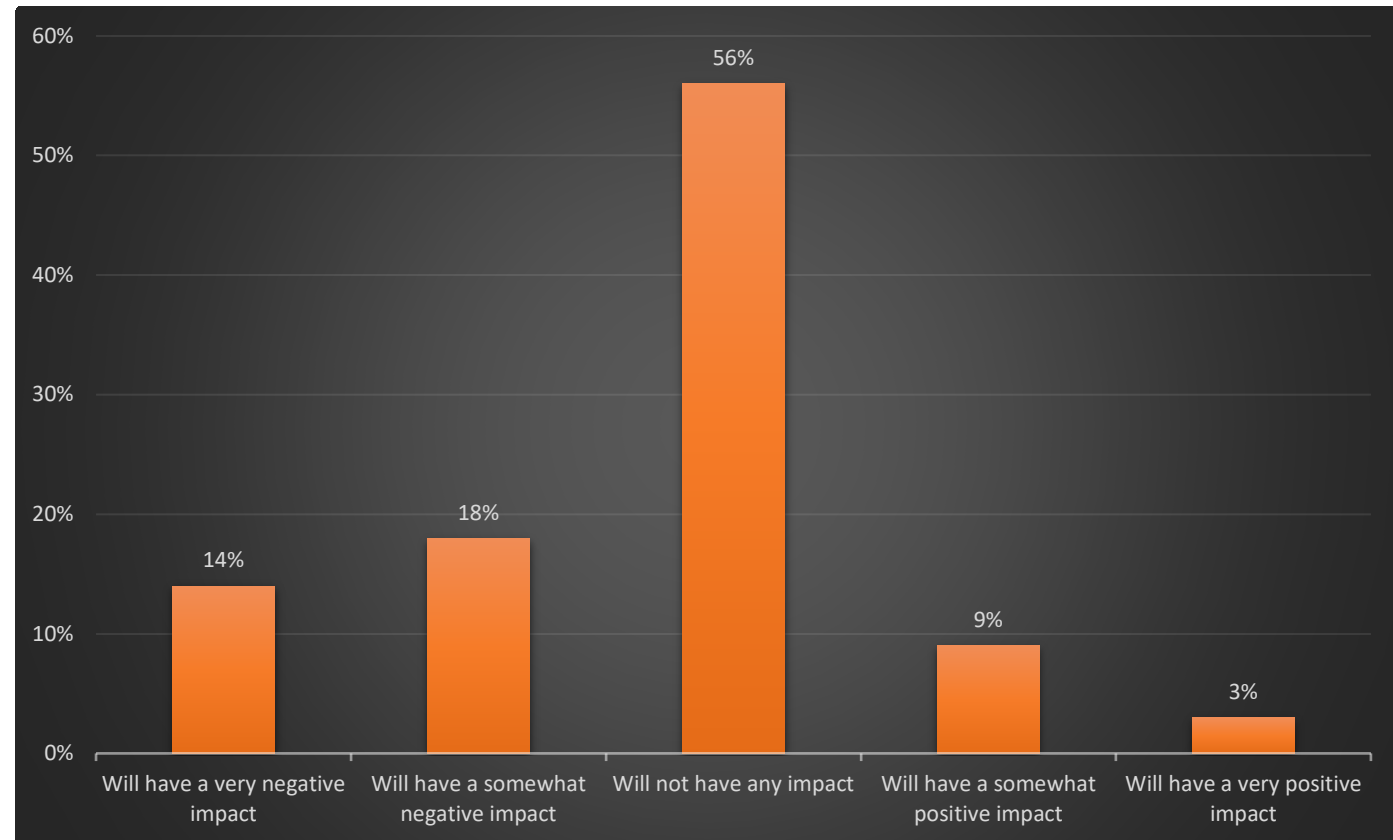


Average Daily Footfall by month



While the numbers anticipating a negative impact grow to almost a third when town centre users are asked what they think will happen when Brexit actually takes effect, notable that a majority still believe it won't have any impact on the town. As a comparison, 63% of Dundalk Town Centre Users anticipate a negative impact in that town.

User opinion of Monaghan Town centre - BREXIT impact





Constraints of the pilot TCHC

The 'pilot' TCHC provided some essential baseline data. However, there were limitations to the overall project. The required data collection was very time-consuming, and completing the full data collection requirement was beyond the time resources available from the University College Dublin students. The proximity from Dublin to Monaghan was also a factor in this. Elements, for example, customer and retailer surveys could not be completed.

Where possible, Monaghan County Council relied on other resources for data collection, including the Town Team members to provide data on rental yields, crime, footfall activity. Some consumer analysis and parking data was provided from the Town Parking Strategy.

The project was unable to deliver sufficient data on shopper behaviour. The Heritage Council, therefore, commissioned user/shopper surveys.



Key Considerations and Opportunities for Monaghan

Monaghan has benefited from recent investments in the town, with projects such as the ERDF funded Hubs towns initiative delivering physical streetscape enhancements in 2010 and INTERREG funded Monaghan Town Greenway, a 4.5 km walk/cycle path and funding approval to connect the Greenway to Middletown, Armagh. Further projects will soon commence with recent funding announcements for the PEACE Campus and the regeneration of Dublin Street.

The Monaghan Town Team is to the forefront of generating activity and has recently been recognised with the URBACT 'Good Practice' Award.

Monaghan people's resilience and positive community action allows them to strive against its challenges, whether that be its Border location, currency differentials, recession and the most recent advent of BREXIT.

Monaghan Tidy Towns has consistently improved their scores over the last few years (score of 302 in 2015, 309 in 2016, 316 in 2017 and 323 in 2018).

Opportunities for town centre redevelopment and re-engaging the community in the town centre come with the Dublin Street Regeneration Plan to create a new vibrant and sustainable quarter in Monaghan. This is also complimented by the local authority's pro-active stance on addressing dereliction in the town centre.

The National Planning Framework (NPF) 2040 also supports the revitalisation of the historic county town. The Heritage Council— RGDATA National Pilot TCHC training programme has been a catalyst for bringing key stakeholders together to ensure a vibrant future for the historic town of Monaghan and to enhance the quality of life for citizens and visitors. In order to create a vibrant town centre - a comprehensive retail, cultural and community hub - a collaborative effort is required to initiate and implement a Town Centre Renewal Action Plan.

PART I KEY ATTRIBUTES OF A SUCCESSFUL TOWN CENTRE



A Framework for Town Centre Renewal, Department of Jobs, Enterprise Ireland and Innovation Retail Consortium Forum 2017

The Framework for Town Centre Renewal (Department of Jobs, Enterprise and Innovation, 2017) sets out a practical step-by-step plan which will be applied by the Monaghan Town Centre stakeholders to enhance the town. This action plan, underpinned by the National Planning Framework, will develop a sense of place, heritage, identity; it will enhance the town centre experience, encompassing quality design; and create a sense of vibrancy (including a night-time economy and a schedule of town centre activities and events).

If you would like to get involved in the renewal of the town centre of Monaghan, please contact:

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