



Collaborative Town Centre Health Check Training Programme



Monaghan Town Centre Consumer Surveys July 2019

An Chomhairle Oidhreachta
The Heritage Council



An Roinn Cultúir,
Oidhreachta agus Gaeltachta
Department of Culture,
Heritage and the Gaeltacht



An Roinn Tithíochta,
Pleanála agus Rialtais Áitiúil
Department of Housing,
Planning and Local Government



An Roinn Forbartha
Tuaithe agus Pobail
Department of Rural and
Community Development



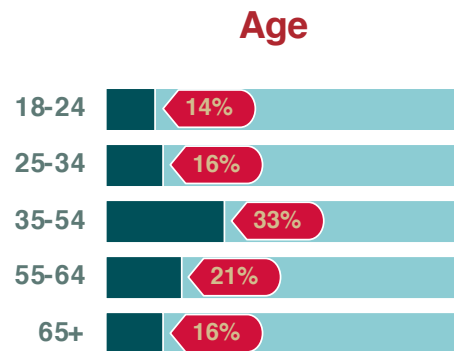
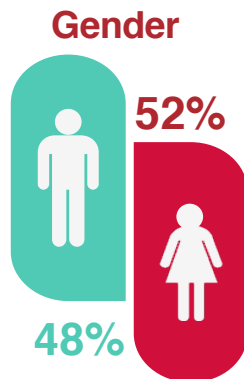
RGDATA
LOCAL SHOPS - LOCAL COMMUNITIES

REDC

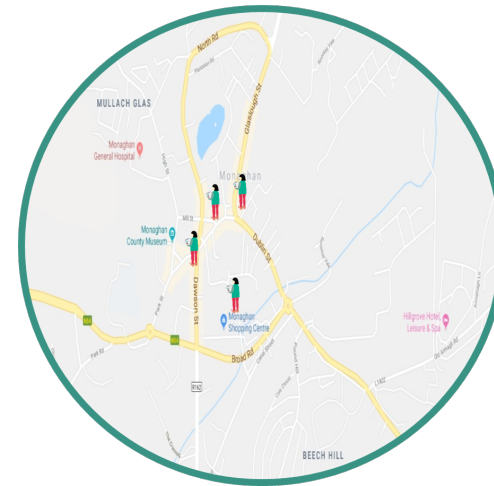


Ireland's Collaborative Town Centre Health Check Training Programme

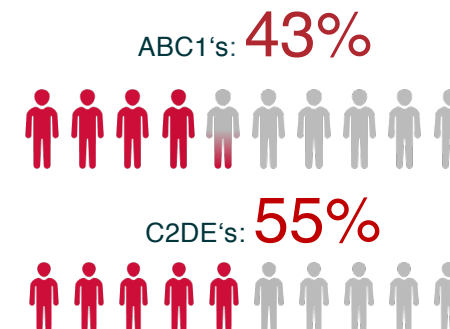
- / This research was conducted on behalf of the Heritage Council and Partners as part of the Collaborative Town Centre Health Check Training Programme.
- / This research was conducted on behalf of the Heritage Council and Partners as part of the Collaborative Town Centre Health Check Training Programme.
- / Fieldwork was conducted 12th October – 23rd November 2018.
- / The sample size was n = 408.



Fieldwork Locations



Social Class*



Summary of Key Findings - I

Reasons for Visiting Monaghan Town Centre

1. Shopping is the main factor driving usage of Monaghan town centre with 8 in 10 citing it as a reason. The next most commonly cited reasons are attending work and visiting friends or relatives. Attending work is also the main reason for using the town centre for just under 1 in 4.
2. Of those who use Monaghan town centre, the vast majority, over 9 in 10, visit once a week or more often. The biggest competitor towns for Monaghan town users are Dublin followed by Belfast and Armagh. Dundalk however gets a larger share of more frequent users, with 20% saying they go to Dundalk either once or 2/3 times a month.
3. Town users' favourite feature of the town is that it is compact and easy to get around. They also like the pubs, cafes and restaurants, and shops, important to see in the context of shopping being the number one reason people use the town centre. However, when asked directly if there is anything they dislike, the single biggest dislike is the lack of (modern) shops, followed by taking issue with the traffic and parking situations.

Monaghan Town Ratings

1. Accessibility does not appear to be a big issue, with 4 in 5 users of Monaghan town rating ease of access and getting around the town as good or very good. However, there is less consensus around the traffic and parking situation, with only 3 in 5 being satisfied for both of these metrics.
2. Over 4 in 5 users of Monaghan town centre, rate its general attractiveness as good or very good, with relatively similar numbers satisfied with pavement cleanliness and quality. While two thirds rate the parks/green space and seating areas as good or very good, these are the lowest scores in terms of the towns attractiveness, making them potential areas for improvement.
3. 9 in 10 town centre users are satisfied with the price, range and quality of cafes and restaurants, very positive to see in the context of 1 in 4 town users saying this is their reason for being there.
4. From a tourism perspective, we see high ratings among users for the general vibrancy of the town and the range of events taking place, with roughly 4 in 5 recording being satisfied.
5. Watch out is around perceptions of night time safety and security in the town, as while the majority still rate this as good or very good, the gap between this and day time security ratings is significant.

Summary of Key Findings - II

Retail in Monaghan Town Centre

1. We see high ratings among town users for shopping, in particular the standard of service. 4 in 5 rate the quality of shops as good or very good, 3 in 4 positively endorse value for money and 7 in 10 actually rate the range of shops as good or very good.
2. Over two thirds of shoppers using Monaghan town centre do so out of habit, however the town centre being easy to get around and the selection and quality of shops are also important factors.
3. By far the most common type of business visited while using Monaghan town centre is a supermarket, with 6 in 10 visiting one. 16% of users visit a chemist and 14% visit a café or takeaway, with clothes shops being where users have their highest average spend.
4. Of the options presented, the preferred time for extended hours for current users of Monaghan town centre to shop is Friday evening, with half preferring it over other options.
5. The dominant supermarket in Monaghan is SuperValu with other outlets lagging behind in terms of most often usage. The most used clothes outlets are Wilsons and Vera Moda, while the most utilised furniture and durables outlets are Upstairs Downstairs, Maurice Grahams and Albany Home Décor.
6. If they had the choice, just under two thirds of Monaghan Town Centre Users would like to see a Penneys in the town centre.

Online Shopping in Monaghan

1. Just over a third of Monaghan town users surveyed shop online, and among this group, a majority shop online either just once a month or less often.
2. Interestingly, 20% of Monaghan town users who shop online use “click and collect” services, suggesting that a proportion of their online shopping is with local retailers.
3. The most popular goods purchased online are clothing and clothing accessories with just under two thirds claiming clothes are the main thing they purchase online. The average spend on clothes/clothing accessories by these town users is just over €90. 85% of those who shop online are spending over €50.
4. Sports equipment is sought after online by about 1 in 5 users of Monaghan town centre, with Sports Direct the second most favourite website behind Amazon.
5. Amazon being the favourite website of Monaghan town users who shop online is perhaps unsurprising, given the main perceived benefit driving use of online shopping is the range of stores you can buy from, with 63% citing this. 58% mention it being handy, 48% like the cheapness and 44% are enticed by the variety of goods available.

Summary of Key Findings? - III

Public Events and Festivals

1. There is generally strong awareness and good conversion to actually visiting events in Monaghan town centre. 61% of those who use Monaghan town centre, visited the Christmas lights switch on within the last year while over a half visited the St Patrick's Day festival and 2 in 5 the Halloween Bats festival.
2. The most popular idea for future events among town users is to have more Christmas events with 6 in 10 saying they would like to see that. This is followed by markets, food festivals and music events.

Access & Parking

1. The dominant mode of transport for Monaghan town users is car with three quarters driving. Walking is the second most common with 1 in 5 walking in and negligible numbers using other means of transport.
2. 93% of those driving to Monaghan would rather use a surface level car park than on street parking while 88% of drivers paid for their parking on the day.

Brexit

1. Currently, the vast majority of Monaghan Town Centre Users say they have not noticed any difference in the town since the announcement of Brexit, with just 10% saying they have seen an increase in activity and a similar number a decrease.
2. When asked about the anticipated future impact of Brexit however, the level of negativity increases substantially with just under one in three believing it will have a negative impact on the town centre. Again it is notable however, that over half of town centre users believe it will not have any impact on the town.

1

Users of
Monaghan
Town Centre

2

Satisfaction
with
Monaghan
Town Centre

3

Monaghan
Town Centre
Shopping

4

Online
Shopping

5

Public Events
and Festivals

6

Access &
Parking

7

Brexit



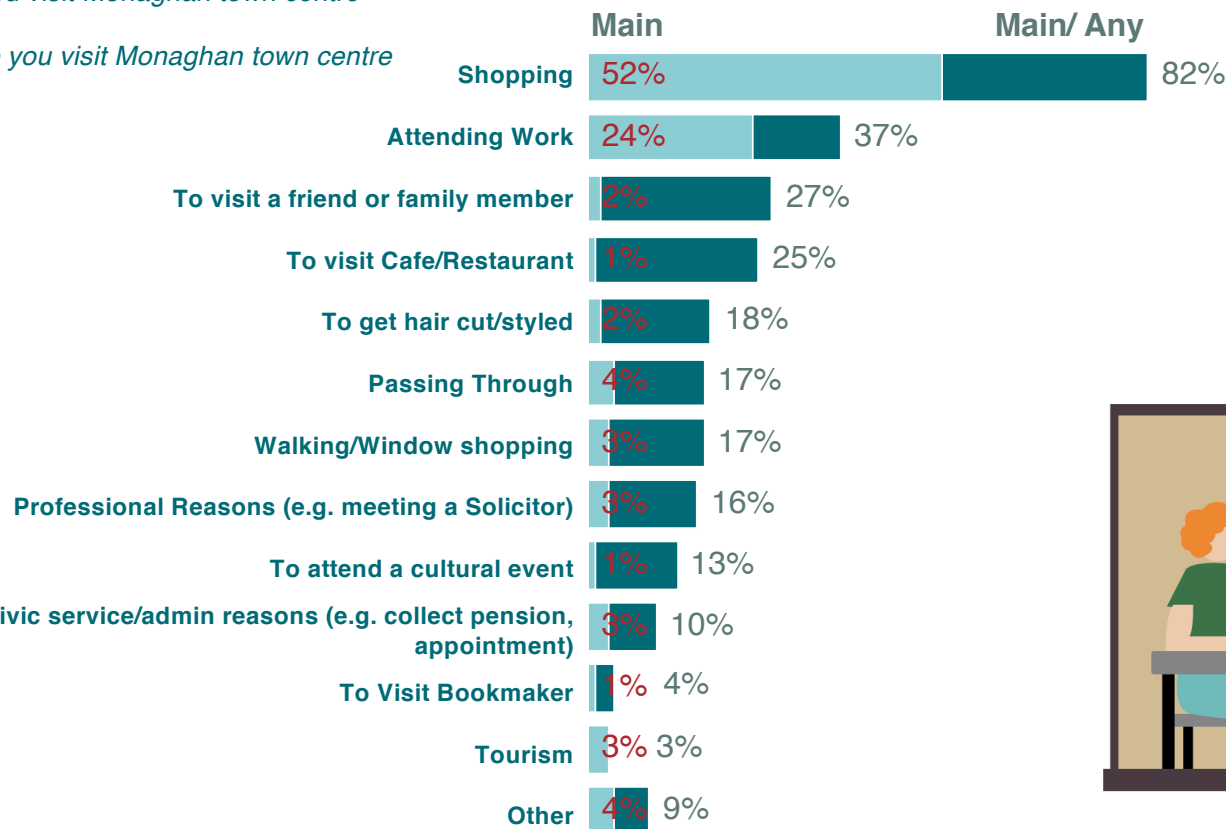
1. Users of Monaghan Town Centre

Reasons For Using Monaghan Town Centre?

(Base: All Users of Monaghan Town Centre; n=408)

Q.1a What is the **main** reason you visit Monaghan town centre generally?

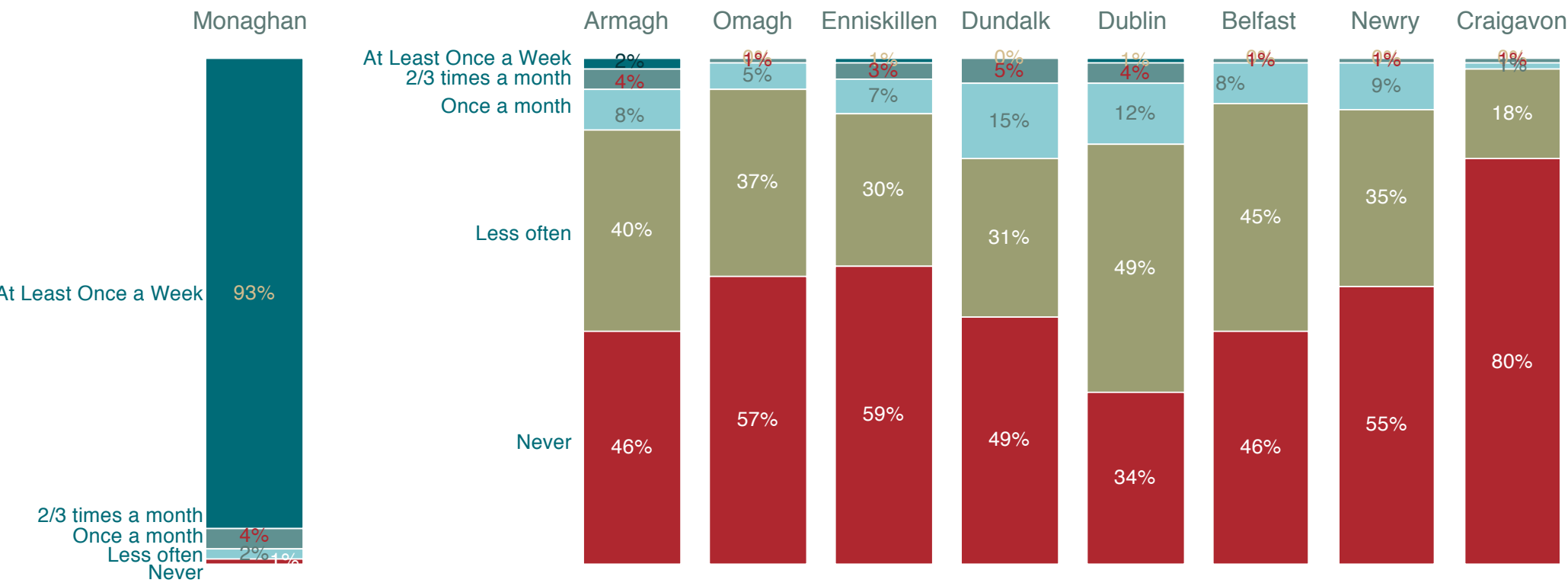
Q.1b And what **other** reasons do you visit Monaghan town centre generally?



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. Beyond the top two, the next most common reasons are visiting a friend or family member or going to a café/restaurant.

Frequency of Visiting Monaghan & Competing Towns

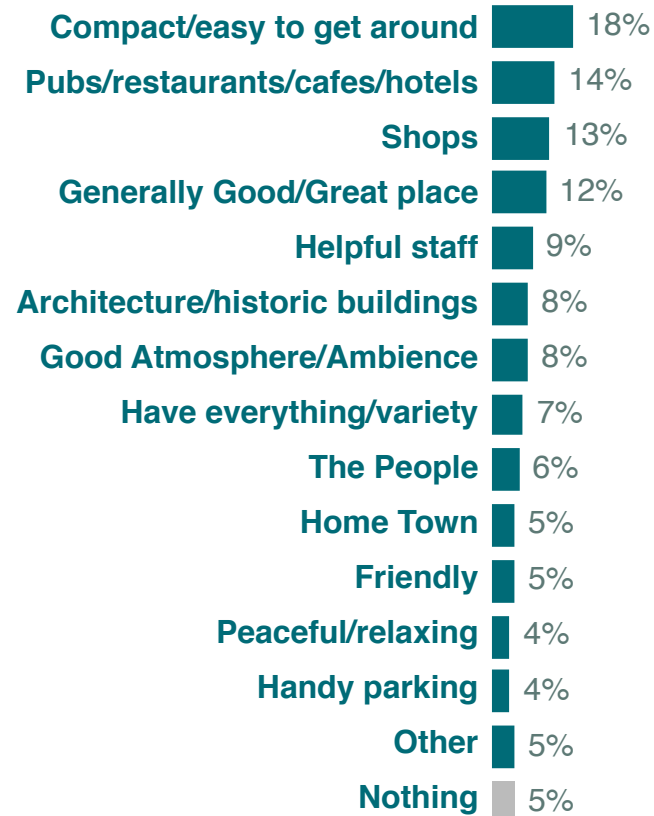
(Base: All Users of Monaghan Town Centre; n=408)



Positive to see that the vast majority of Monaghan town centre users visit at least once a week. Dublin is the most likely place for Monaghan town centre users to also visit, although the majority of those who do go to Dublin go just once a month. Dundalk is the biggest competitor in terms of frequent visitors with 20% of Monaghan Town Centre Users going there at least once a month.

What do People like about Monaghan Town Centre?

(Base: All Users of Monaghan Town Centre; n=408)



The biggest attraction of the town is that it's easy to get around. Keeping in mind that café's and restaurants are one of the most common reasons people use the town, positive to see that pubs etc. are also one of the most liked aspects. The shops also come out well top of mind and general perceptions of it being a great place are one of the main things people like about the town.

REDC

(Q.12)

What do People like about Monaghan Town Centre?

(Base: All Users of Monaghan Town Centre; n=408)

I can buy most of what I need, there a good variety of shops, a good number of the leading labels here

Great restaurants, good shops, helpful staff, quality hotels

Is easy to park and ease of getting to all the shops

Is nice and small and not too big from one end to another

It has a wide variety of shops, restaurants and cafes, nice hotels and B&Bs, good quality butchers and nice walks

Nice shops, plenty of variety, well stocked shops. A new shop has opened this week, we have nice restaurants, parking is cheap and we have a relaxed atmosphere.

Everything, I was born here. There have been dramatic improvements down the years.

I like it because it is a very progressive town great staff in the shops always very helpful beautiful cathedral

The architecture

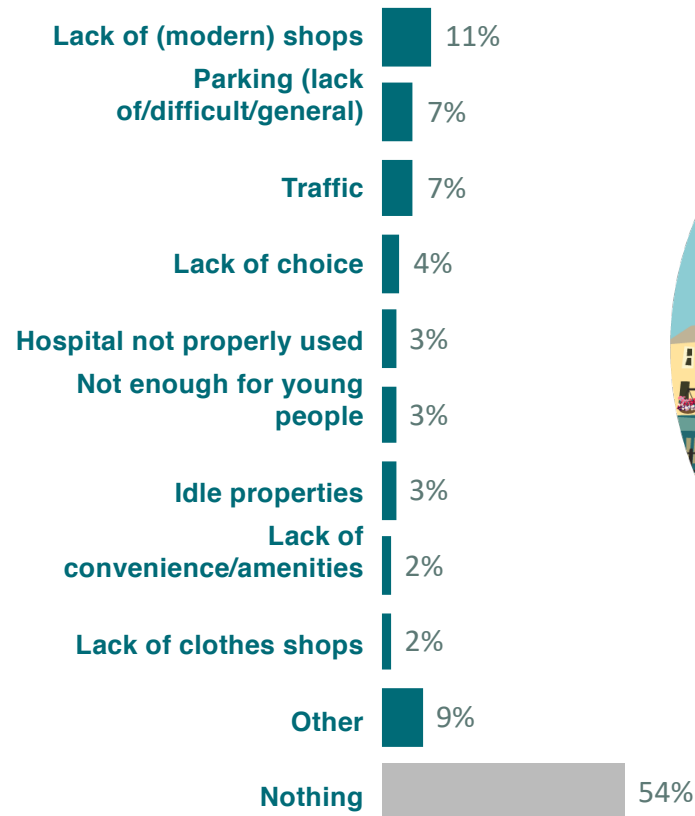
It's a nice town to shop in or to eat. Great choice of restaurants and cafes, not over congested with traffic

Nice atmosphere in the town

It's a very nice town, we have good supermarkets and friendly staff

What Do People dislike about Monaghan Town Centre?

(Base: All Users of Monaghan Town Centre; n=408)



The majority (54%) said they dislike nothing about Monaghan town centre. Of the reasons that were giving for disliking it, the lack of (modern) shops comes out top of mind for 1 in 10, with 7% citing each of parking and traffic.

What do People Dislike about Monaghan Town Centre?

(Base: All Users of Monaghan Town Centre; n=408)





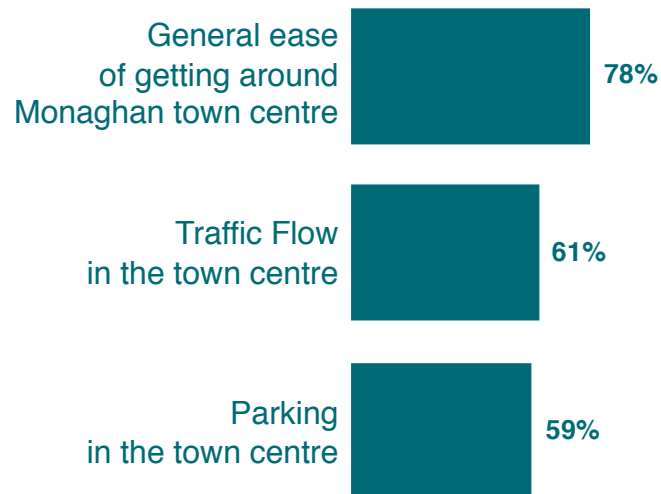
2. Satisfaction with Monaghan Town Centre

Satisfaction with Various Aspects of Monaghan Town Centre - I

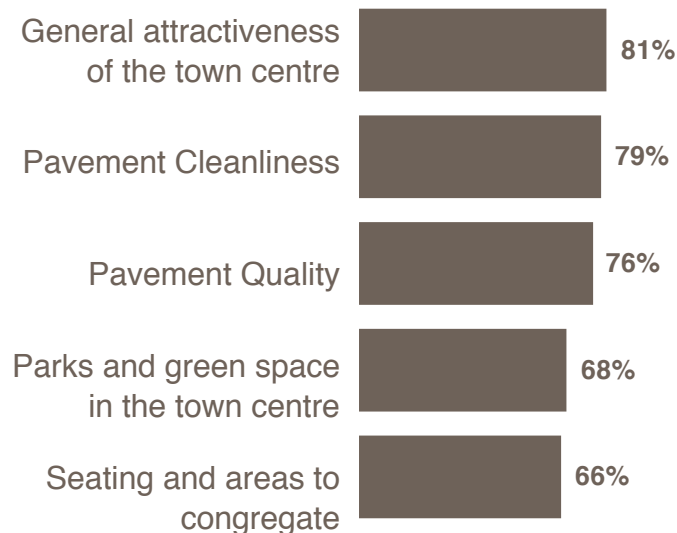
(Base: All Users of Monaghan Town Centre; n=408)

Q.17 I am now going to talk about the various aspects of Monaghan Town Centre. For each I want you to tell me how you would rate Monaghan Town Centre on that issue, using a 5 point scale where 5 is Very Good and 1 is Very poor.

Traffic & Ease of Access



Attractiveness



Café/Restaurant



Showing % That score 4 (Good) and 5 (Very Good)

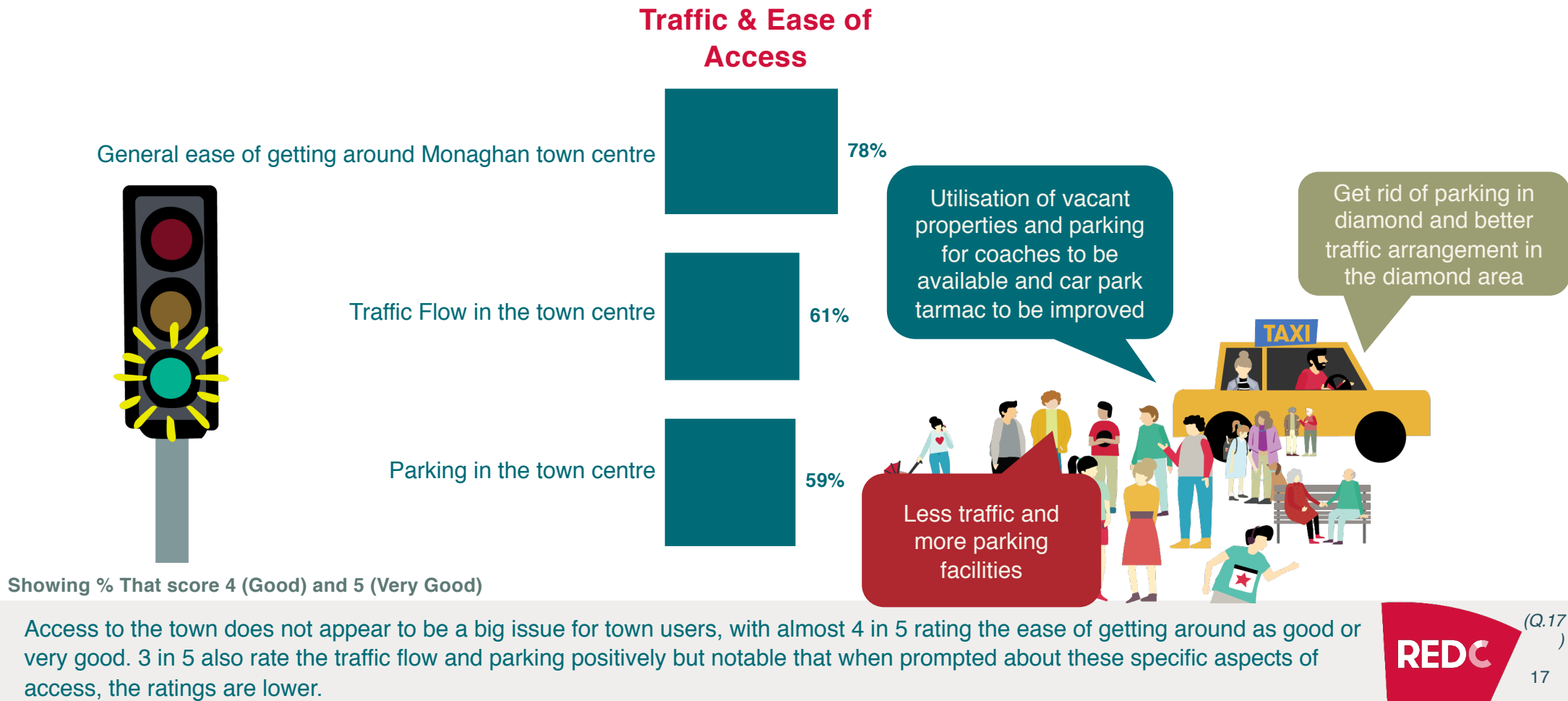
REDC

(Q.17)

Monaghan Town Centre Ratings – Traffic & Ease of Access

(Base: All Users of Monaghan Town Centre; n=408)

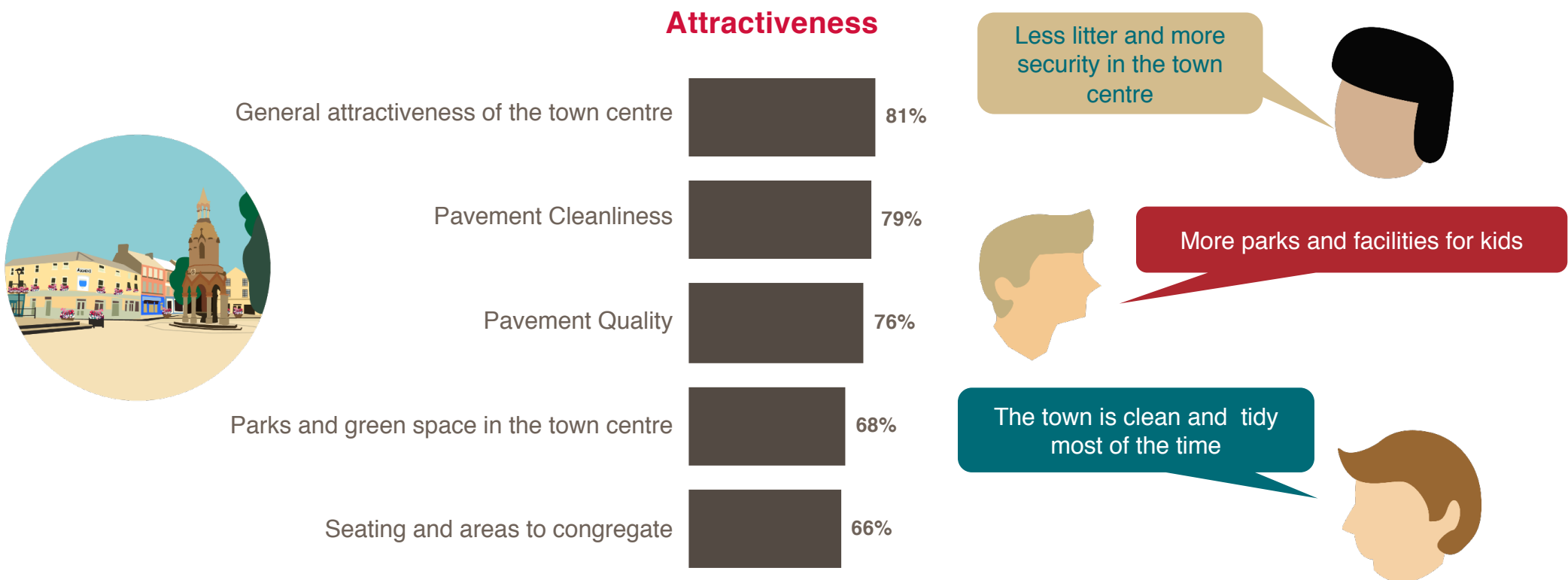
Q.17 I am now going to talk about the various aspects of Monaghan Town Centre. For each I want you to tell me how you would rate Monaghan Town Centre on that issue, using a 5 point scale where 5 is Very Good and 1 is Very poor.



Monaghan Town Centre Satisfaction - Attractiveness

(Base: All Users of Monaghan Town Centre; n=408)

Q.17 I am now going to talk about the various aspects of Monaghan Town Centre. For each I want you to tell me how you would rate Monaghan Town Centre on that issue, using a 5 point scale where 5 is Very Good and 1 is Very poor.



Showing % That score 4 (Good) and 5 (Very Good)

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.

Monaghan Town Centre Satisfaction - Café/Restaurant

(Base: All Users of Monaghan Town Centre; n=408)

Q.17 I am now going to talk about the various aspects of Monaghan Town Centre. For each I want you to tell me how you would rate Monaghan Town Centre on that issue, using a 5 point scale where 5 is Very Good and 1 is Very poor.



Showing % That score 4 (Good) and 5 (Very Good)

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.

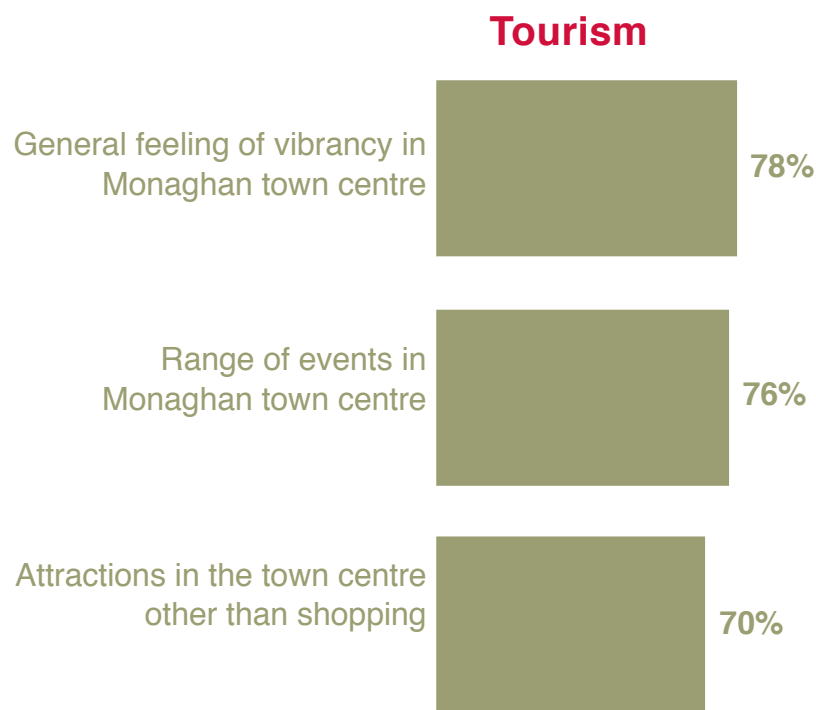
REDC

(Q.17)

Monaghan Town Centre Satisfaction - Tourism

(Base: All Users of Monaghan Town Centre; n=408)

Q.17 I am now going to talk about the various aspects of Monaghan Town Centre. For each I want you to tell me how you would rate Monaghan Town Centre on that issue, using a 5 point scale where 5 is Very Good and 1 is Very poor.



Good vibrant town, we got a new shop this week which creates more employment

It is a very nice town, has good social events and helpful staff in shops



Showing % That score 4 (Good) and 5 (Very Good)

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.

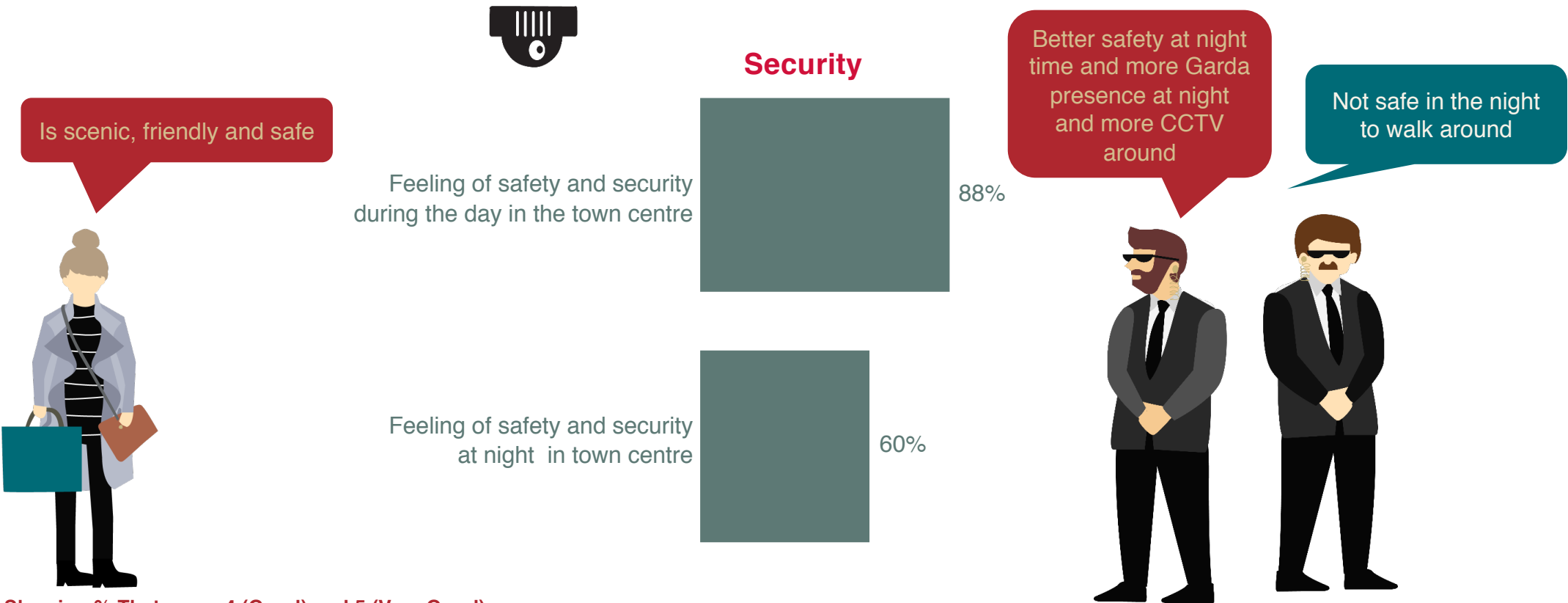
REDC

(Q.17)
20

Monaghan Town Centre Satisfaction – Security/ Safety

(Base: All Users of Monaghan Town Centre; n=408)

Q.17 I am now going to talk about the various aspects of Monaghan Town Centre. For each I want you to tell me how you would rate Monaghan Town Centre on that issue, using a 5 point scale where 5 is Very Good and 1 is Very poor.



Showing % That score 4 (Good) and 5 (Very Good)

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.

Monaghan Town Centre Satisfaction - Shopping

(Base: All Users of Monaghan Town Centre; n=408)

Q.17 I am now going to talk about the various aspects of Monaghan Town Centre. For each I want you to tell me how you would rate Monaghan Town Centre on that issue, using a 5 point scale where 5 is Very Good and 1 is Very poor.



Showing % That score 4 (Good) and 5 (Very Good)

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.



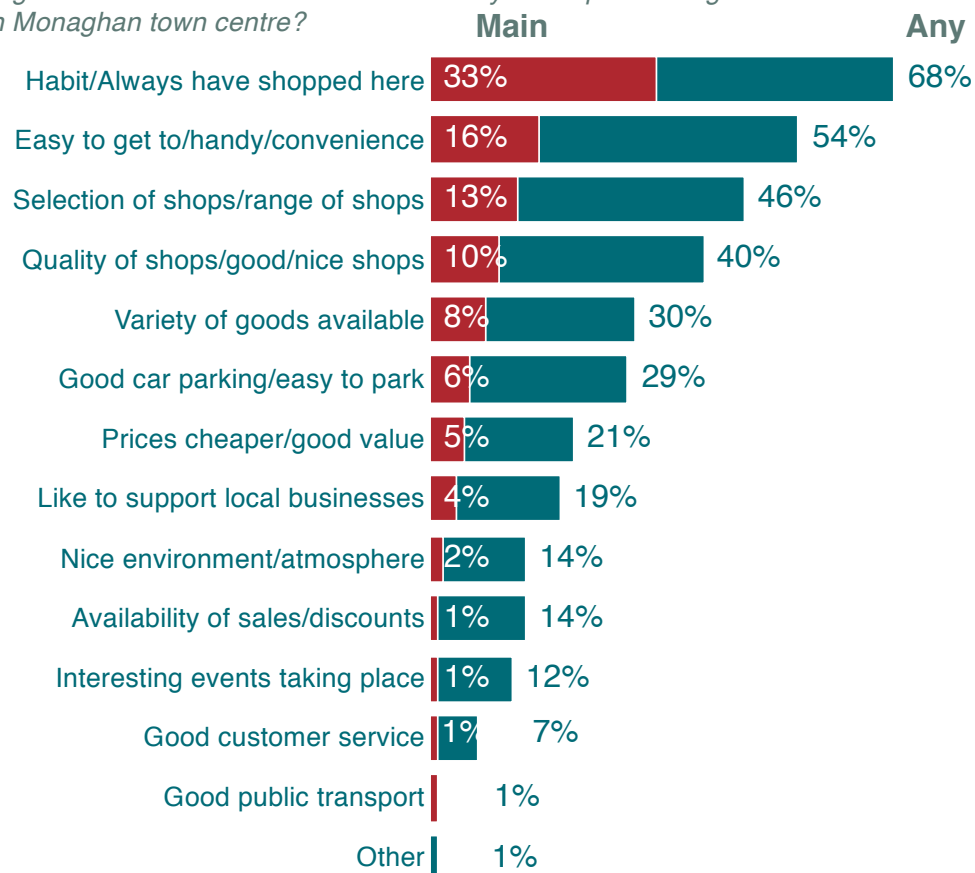
3. Monaghan Town Centre Shopping

Reasons Why People Shop in Monaghan Town Centre

(Base: All who shop in Monaghan Town Centre; n=336)

Q.2a Thinking specifically about the shopping environment what is the main reason you shop in Monaghan town centre?

Q.2b And what other reason do you shop in Monaghan town centre?



The main reason for shopping in Monaghan town centre is habit followed by being easy to get to and the selection of shops, both in terms of main and any reason cited.

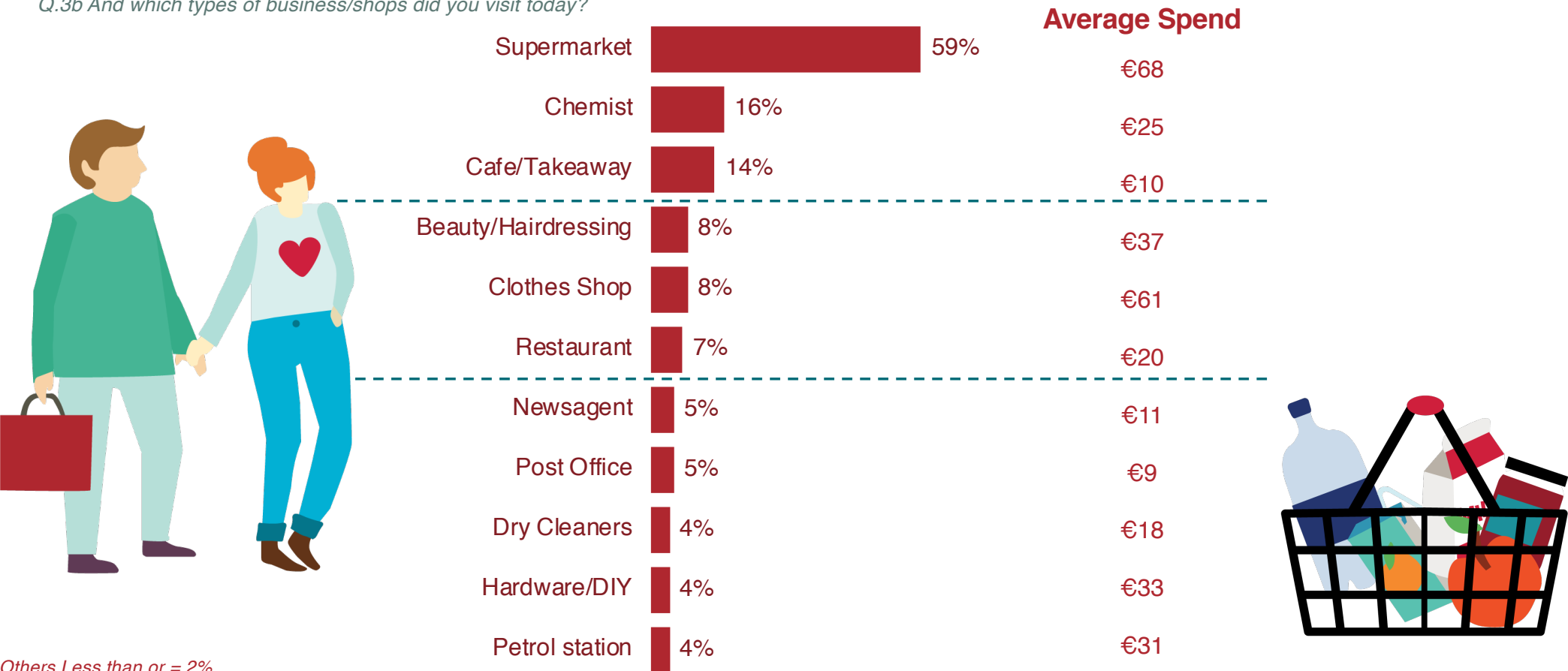
REDC

(Q.2a/b)

Business/Shops Visited Today

(Base: All who shop in Monaghan Town Centre Today; n=264)

Q.3b And which types of business/shops did you visit today?



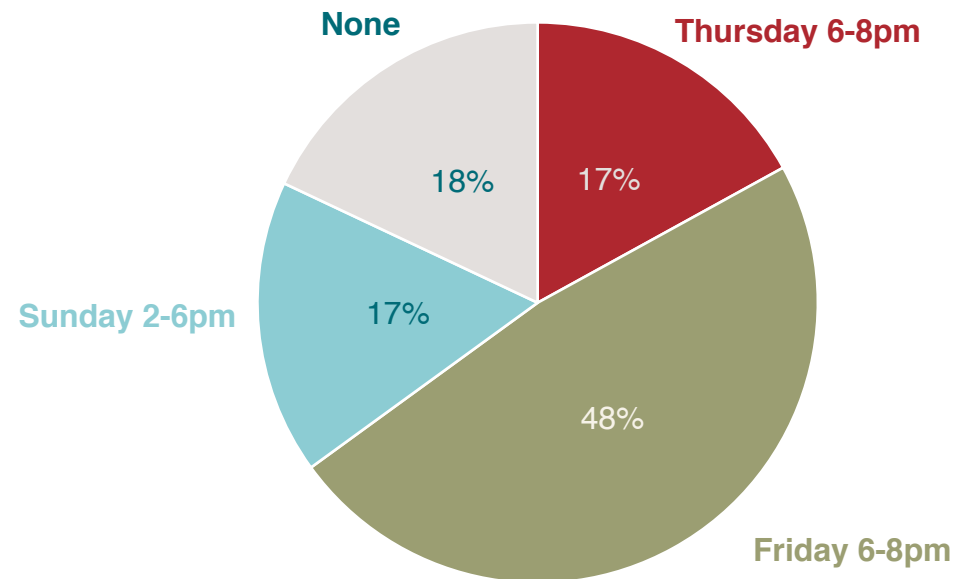
Others Less than or = 2%

6 in 10 users of Monaghan town centre come to visit a supermarket while roughly 15% come for the chemist and cafes/takeaways, making these the next most popular options. Supermarkets have the highest level of average spend, followed closely by Clothes Shops.

Alternative Shopping Hours

(Base: All Who Shop In Monaghan; n=405)

Q.4b Which of the following 'extended opening hours' options would you avail of most often if they were available in Monaghan?



When presented with various options for potential extended opening hours, just under half of Monaghan town centre users would prefer extended hours on a Friday evening, making this overwhelmingly the most popular option.

REDC

(Q.4b)

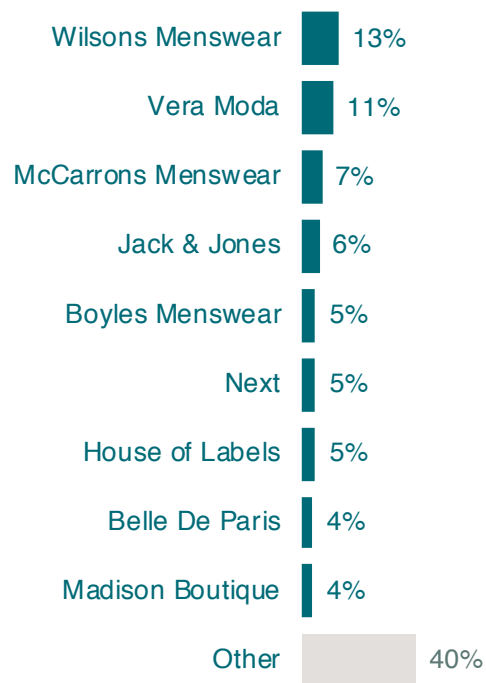
Shops Most Shopped At

(Base: All Who Shop In Monaghan; n=336)

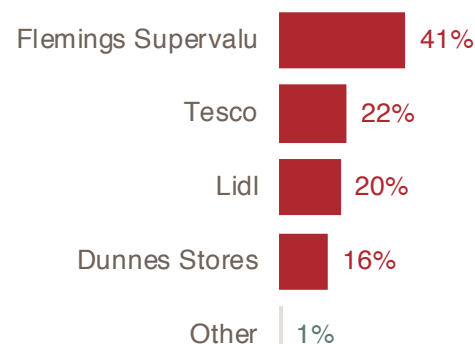
Q.10 When shopping in Monaghan Town Centre, please name the Store in which you do most of your shopping for the following goods?



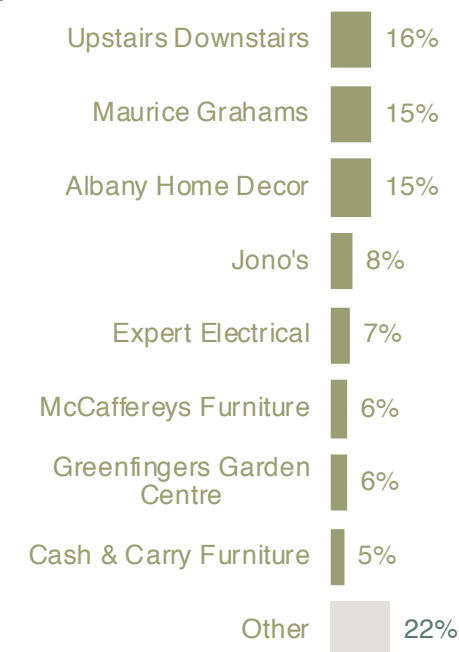
Clothes



Food Stuff



Furniture/Durables



The dominant supermarket in the town centre is SuperValu while the main clothes shops are Wilsons and Vera Moda. Upstairs Downstairs, Maurice Grahams and Albany Home Décor appear to share the lead in terms of furniture/durables.

REDC

(Q.10a/
b/c)

What Stores and Services Are Missing From Monaghan?

(Base: All Users of Monaghan Town Centre; n=408)



64% PENNEYS

28%

Woodie's

11%



37%



25%

SPORTS
DIRECT.COM

11%

Supermac's

35%

MARKS &
SPENCER

22%

home store
more

6%

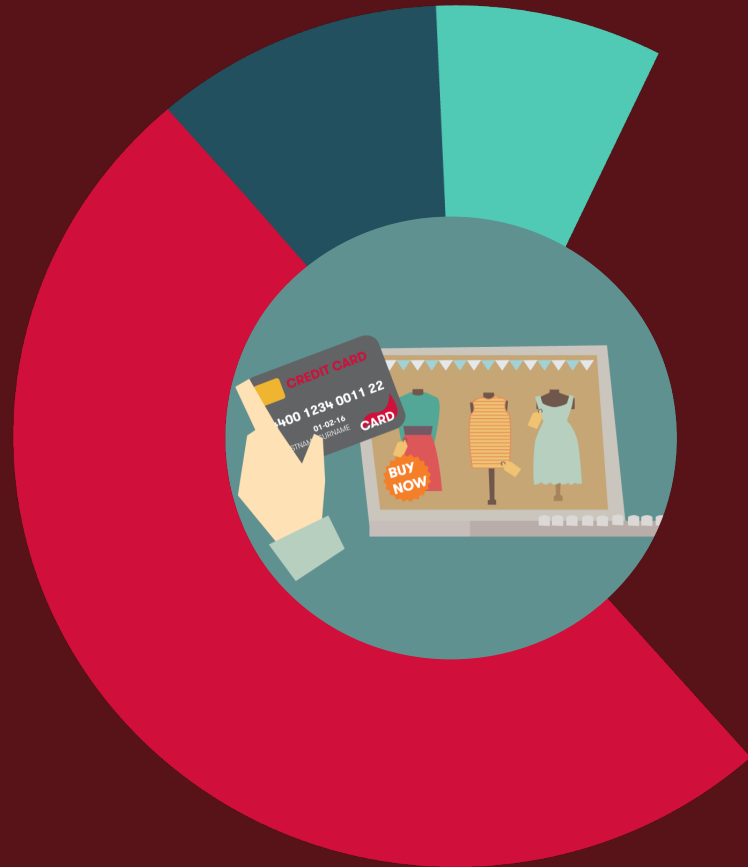
More
independent
retailers

Note: Answers are from prompted list

Town Centre users were presented with a list of potential stores that might be missing from Monaghan Town Centre. Of the options they were presented with, an overwhelming majority of just under two thirds would like to see a Penney's, making this by far the most popular option.

REDC

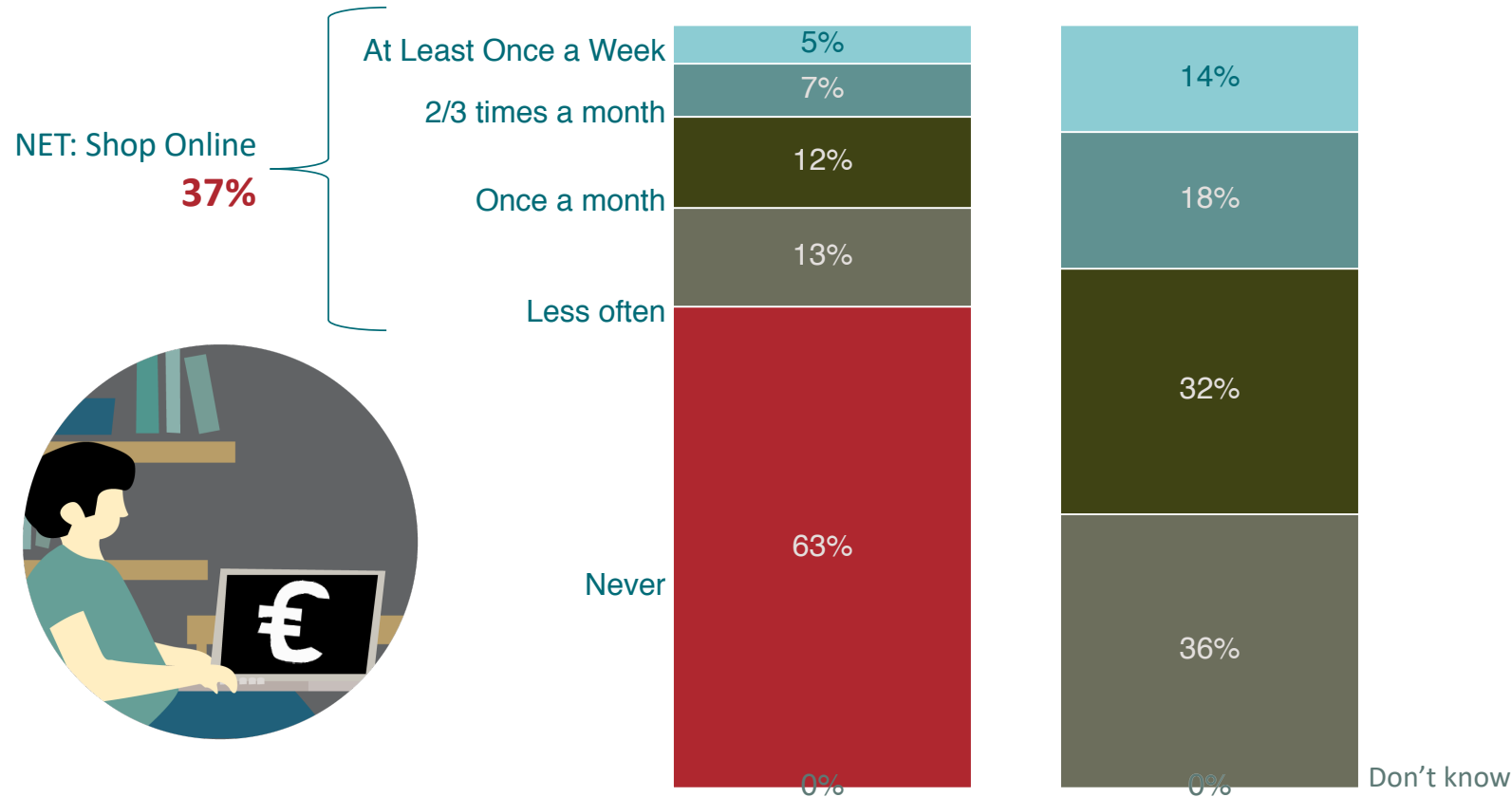
(Q.11)
28



4. Online Shopping

Shopping Online

Q.5 And how often, if at all, do you shop online?



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 37% of those who do, two thirds of these shop either just once a month or less often.

REDC

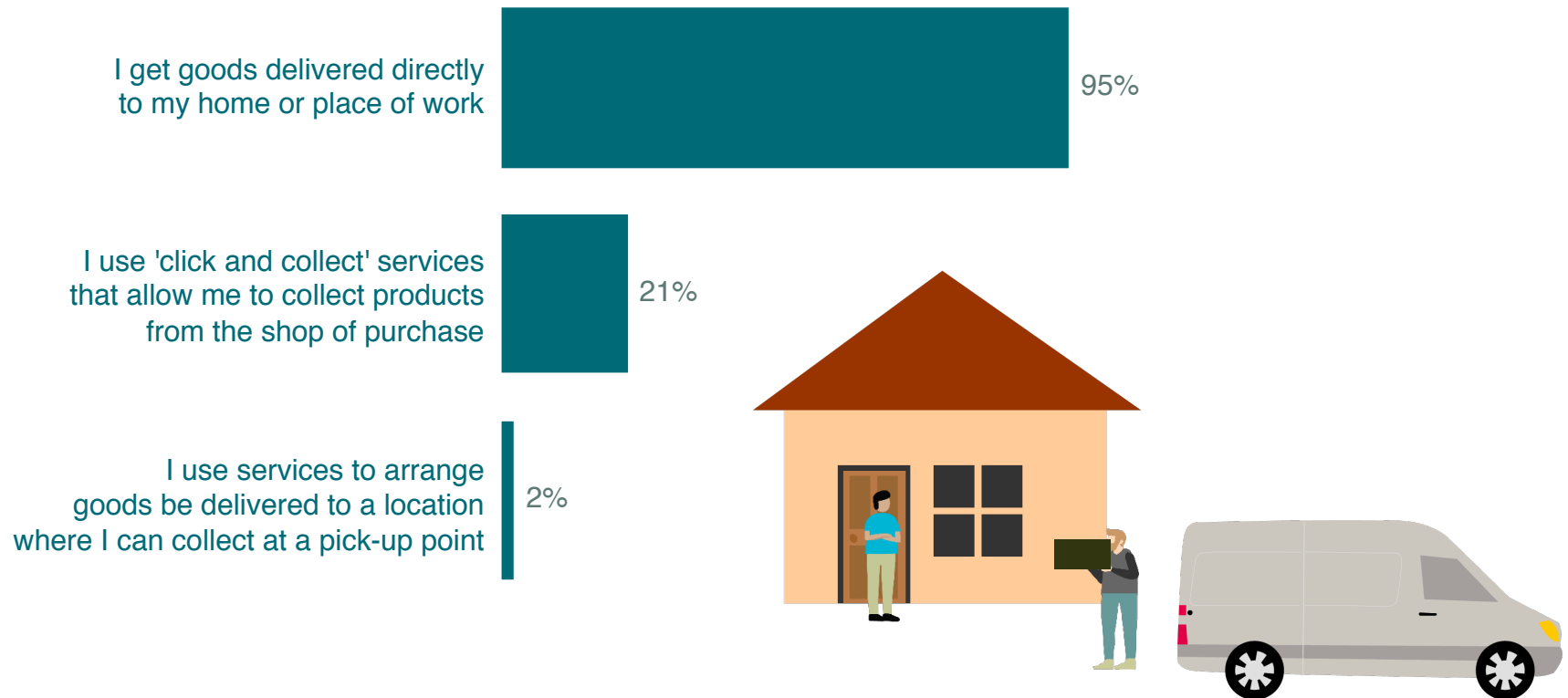
(Q.5)

30

Online Delivery Options

(Base: All Who Shop Online; n=149)

Q.6 Which of the following do you do when you purchasing goods online?



The vast majority of online shoppers get goods delivered to their home or work, but notable that 1 in 5 also use 'click and collect' services, suggesting they might be ordering online from local stores. Very few arrange for goods to be delivered to a pick up point.

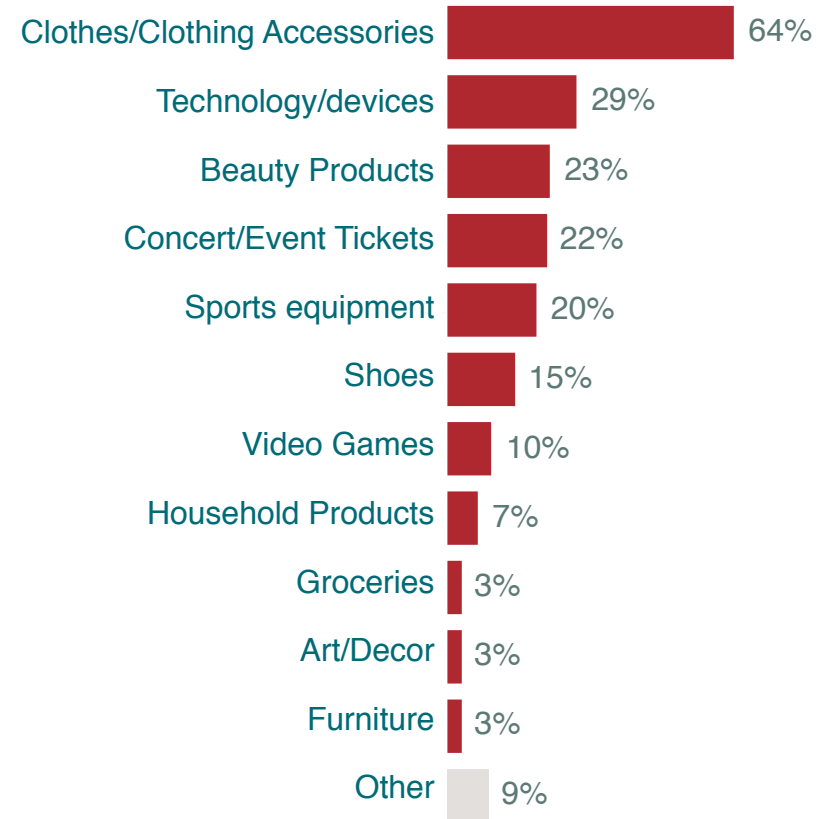
REDC

(Q.6a)

Main Items Bought Online

(Base: All Who Shop Online; n=149)

Q.6b What types of goods do you mainly buy online?



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.

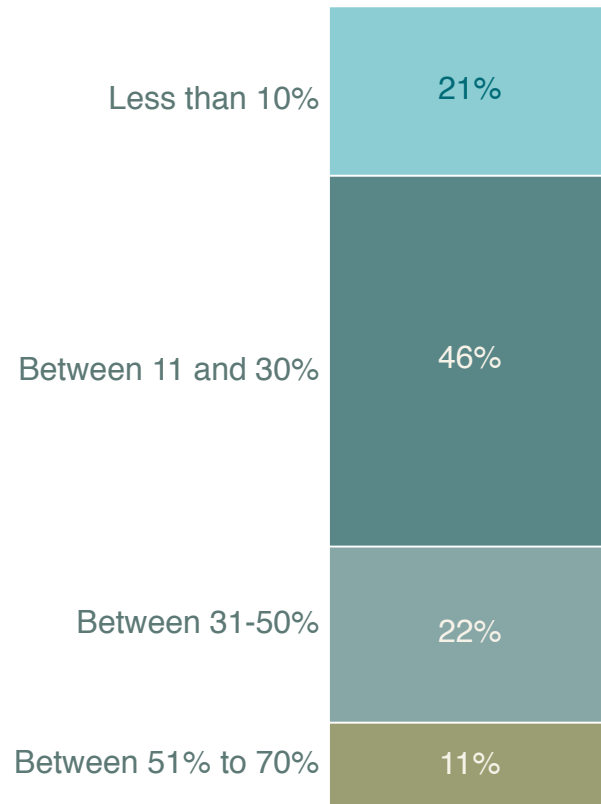
REDC

(Q.6b)

Proportion of Clothes and Accessories Bought online

(Base: All Who Bought Clothes Online; n=96)

Q.7a Roughly what percentage of your clothing and accessories do you buy online?



Of those who are buying clothes online, positive to see that 67% say they are buying less than 30% of their clothing and accessories online, suggesting that retail is still their primary point of purchase for these goods.

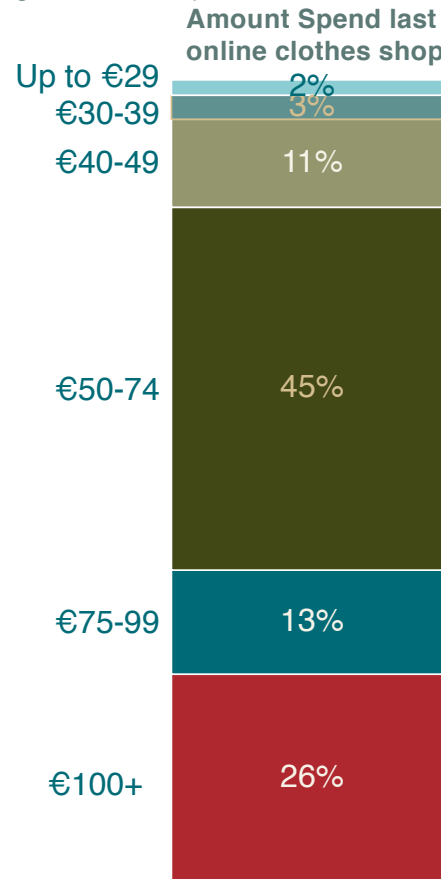
REDC

(Q.7a)

Online Spend On Last Clothes Purchase

(Base: All Who Bought Clothes Online; n=96)

Q.7 And thinking back to that last time you made a clothes/clothing Accessories purchase online, how much did you spend? Please round up your estimate to the nearest euro.



Average Spend
€92.42

Average spend for those shopping online is just approximately €90. Over 85% of online shopper surveyed are spending at least €50 online.

REDC

(Q.7b)

Benefits of Shopping Online

(Base: All Who Shop Online; n=149)

Q.8 What do you feel are the benefits of shopping 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.

REDC

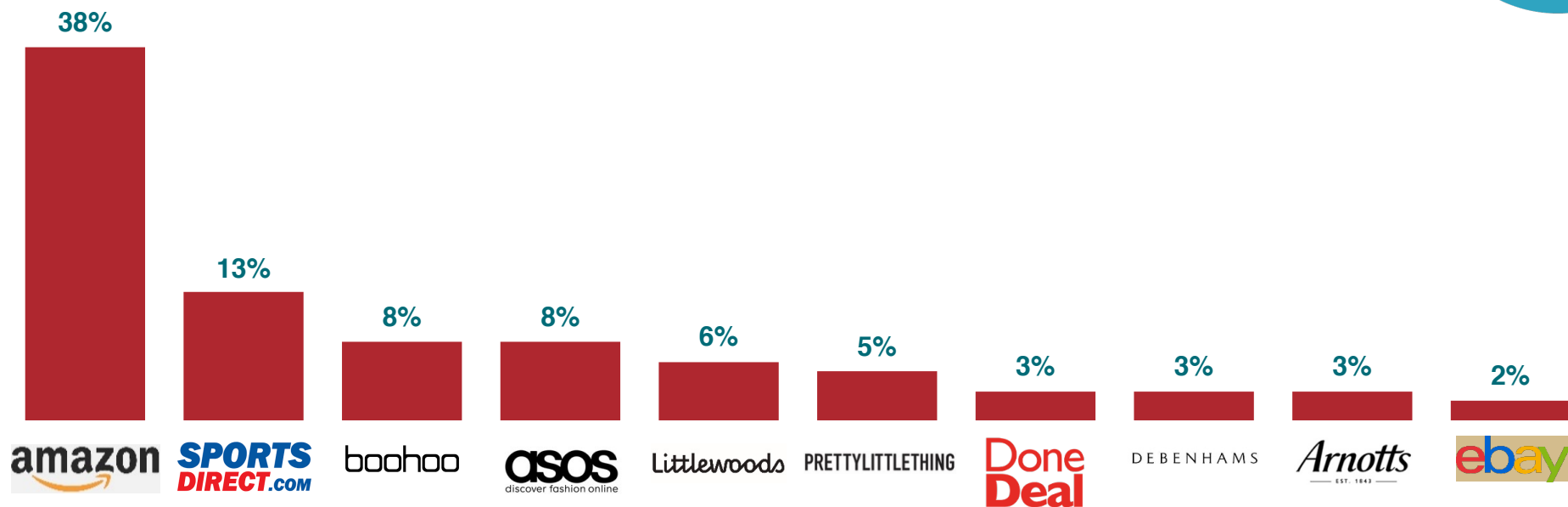
(Q.8)

35

Favourite Online Store/Website

(Base: All Who Shop Online; n=149)

Q.9 What is your favourite online store/website to shop?



Unsurprising in the context of the selection of stores being the primary driver of online shopping, Amazon is by the most popular site for buying products online for Monaghan Town Centre Users who shop online.

REDC

(Q.9)



5. Public Events and Festivals

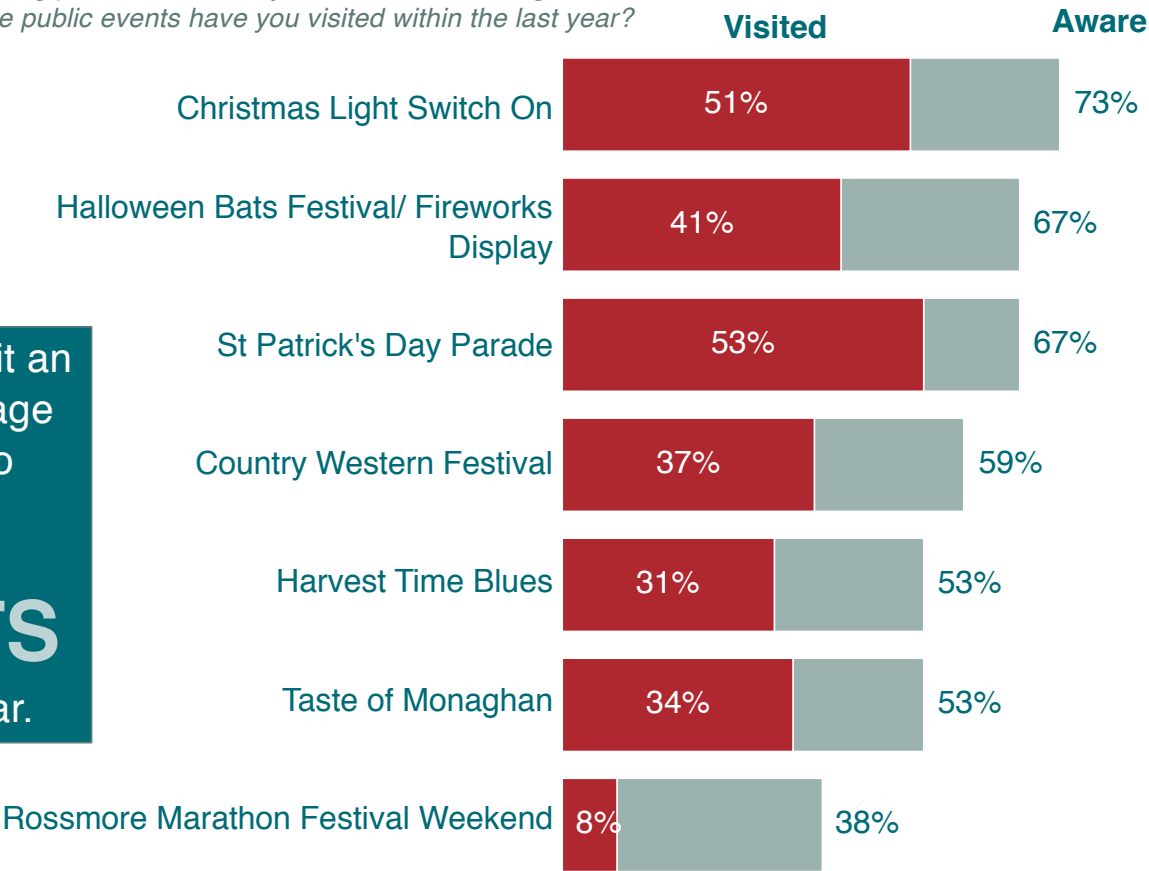
Monaghan Public Events

(Base: All Users of Monaghan Town Centre; n=408)

Q.14 Which of the following public events are you aware of in Monaghan Town Centre?

Q.15 And which of these public events have you visited within the last year?

People who visit an event on average have been to **3 EVENTS** in the last year.

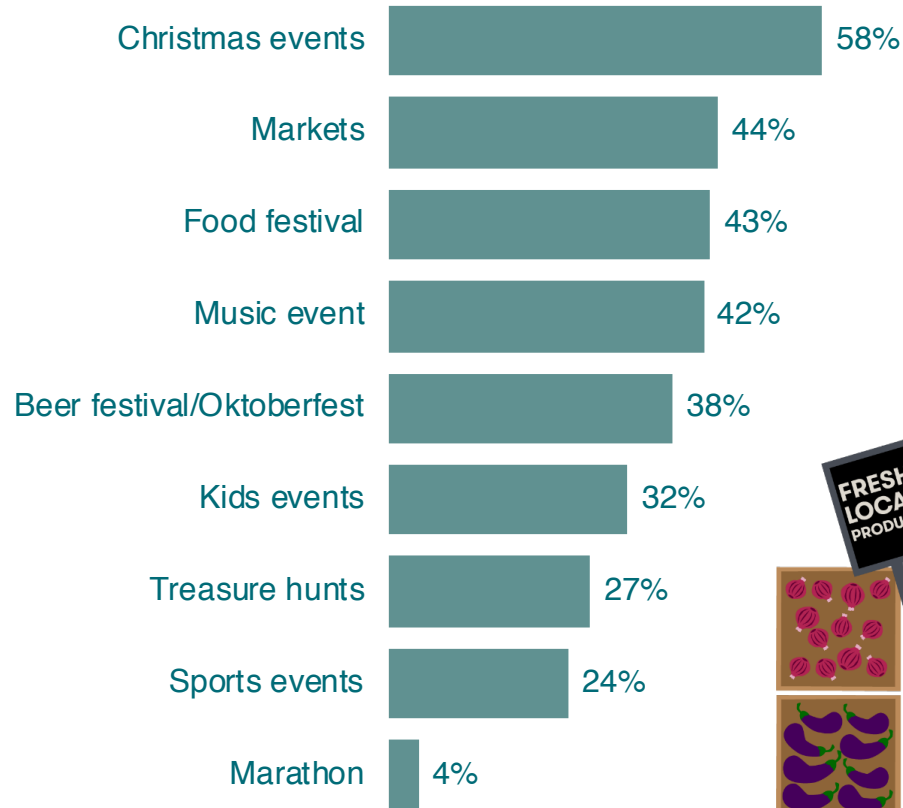


The Christmas Light Switch on tops the list in terms of event awareness, followed closely by the Halloween Bats Festival and the St. Patricks Day Parade.

Future Events In Monaghan

(Base: All Users of Monaghan Town Centre; n=408)

Q.16 Which of the following types of event, if any, would you like to see take place in the town centre to entice you to visit and spend more time in the town centre of Monaghan?



6 in 10 would be interested in seeing more Christmas events in Monaghan Town Centre in the future, while Markets, food festivals, music events and a beer festival would also be quite popular.

REDC

(Q.16)
40

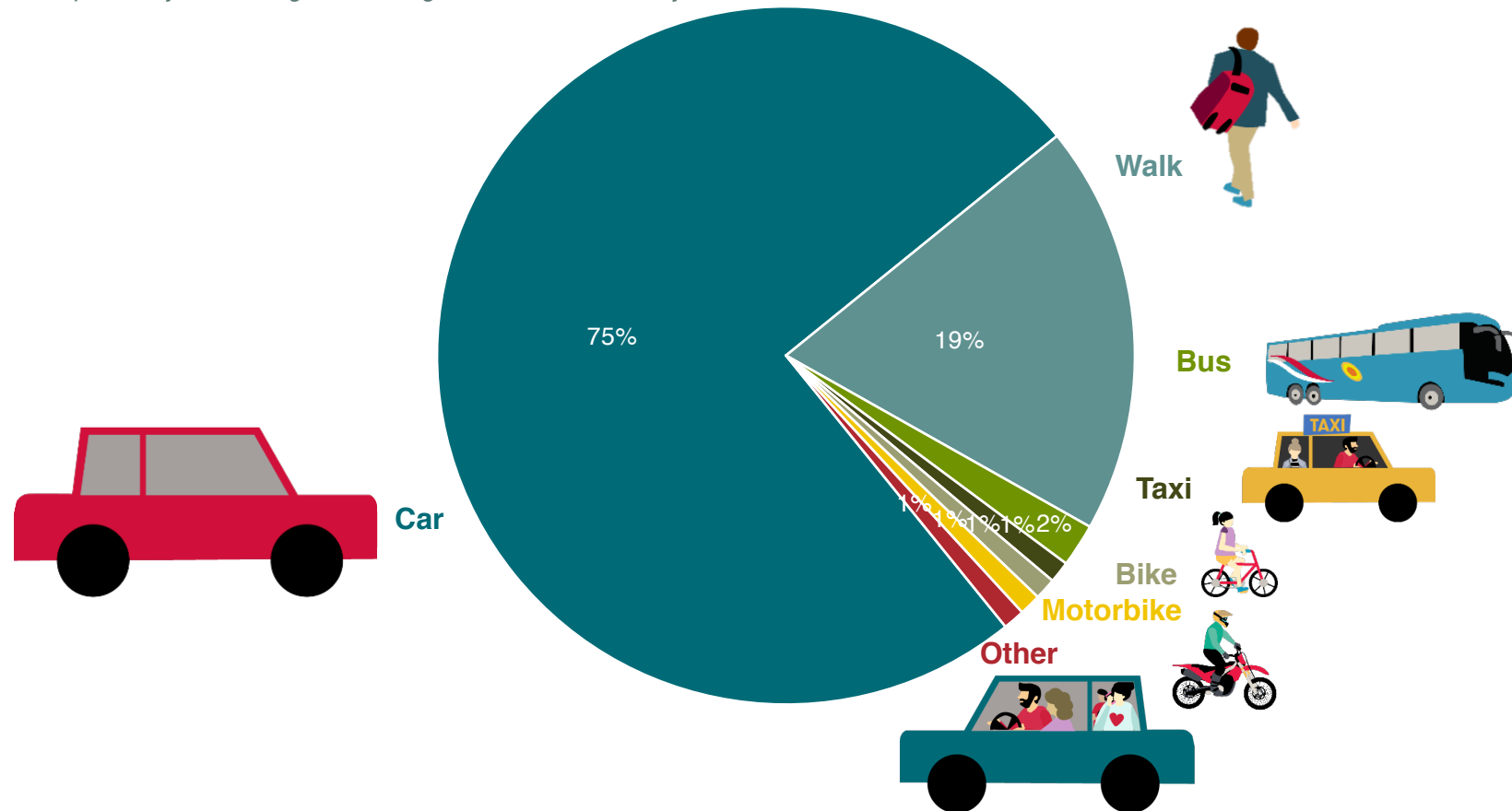


6.Transport & Parking

Mode of Transport

(Base: All Users of Monaghan Town Centre; n=408)

Q.18 What form of transport did you use to get to Monaghan town centre today?

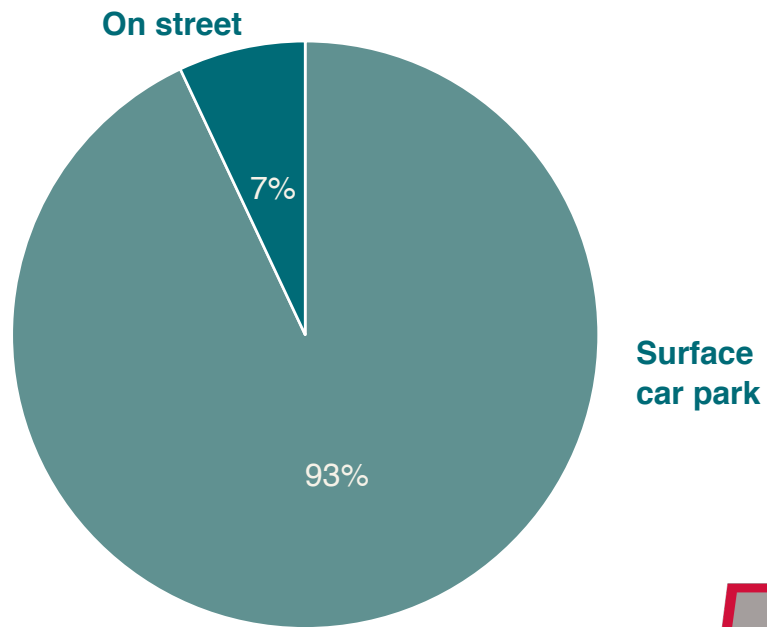


An overwhelming majority (three quarters) of town centre users travel by car, with 1 in 5 travel on foot, highlighting that it is very small numbers indeed that are using any other form of transport.

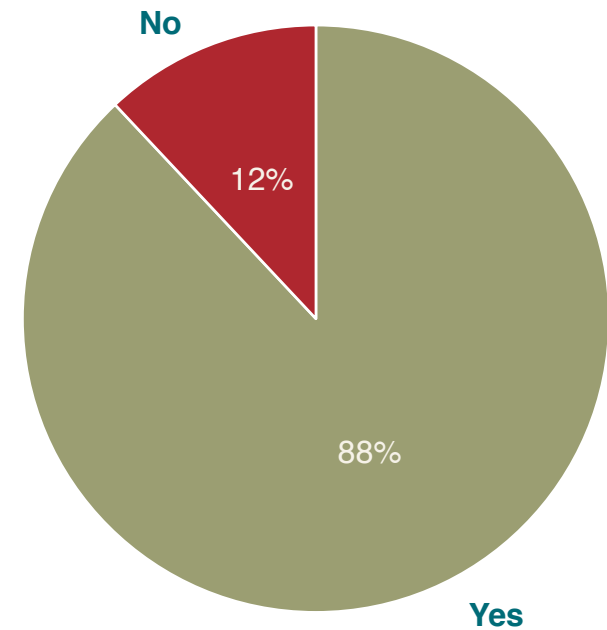
Parking Preference

(Base: All Who Drove In A Car; n=308)

Q.19 When in Monaghan Town Centre, would your preference be to park in...



Q.20 Did you pay for parking today?



Of those travelling by car, 93% would rather leave their car in a surface car park as opposed to parking on the street, and perhaps reflecting this, almost 9 in 10 of drivers paid for parking on the day.

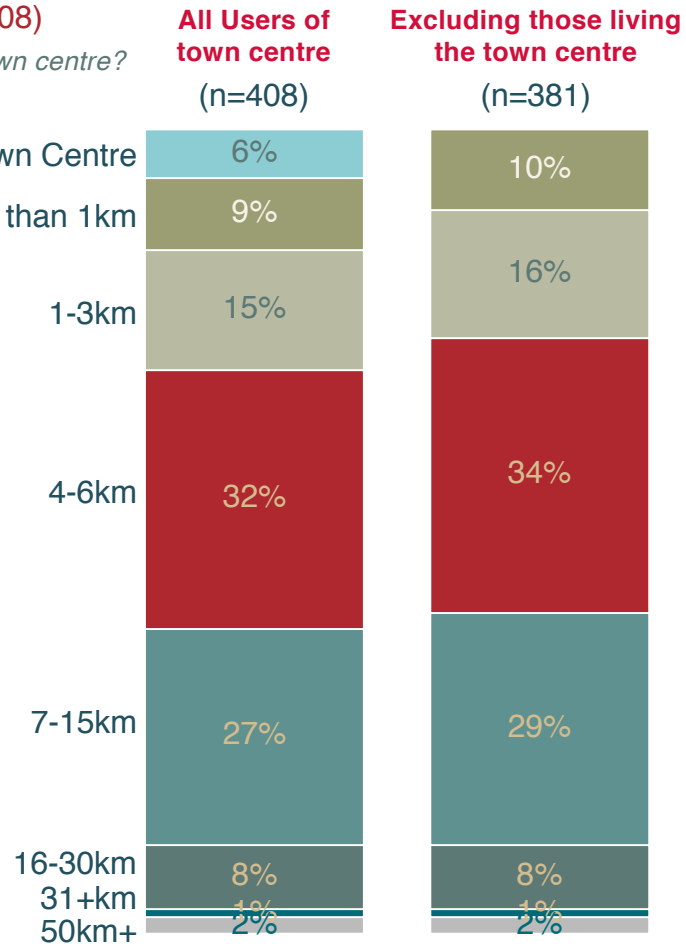
REDC

(Q.19/
20)

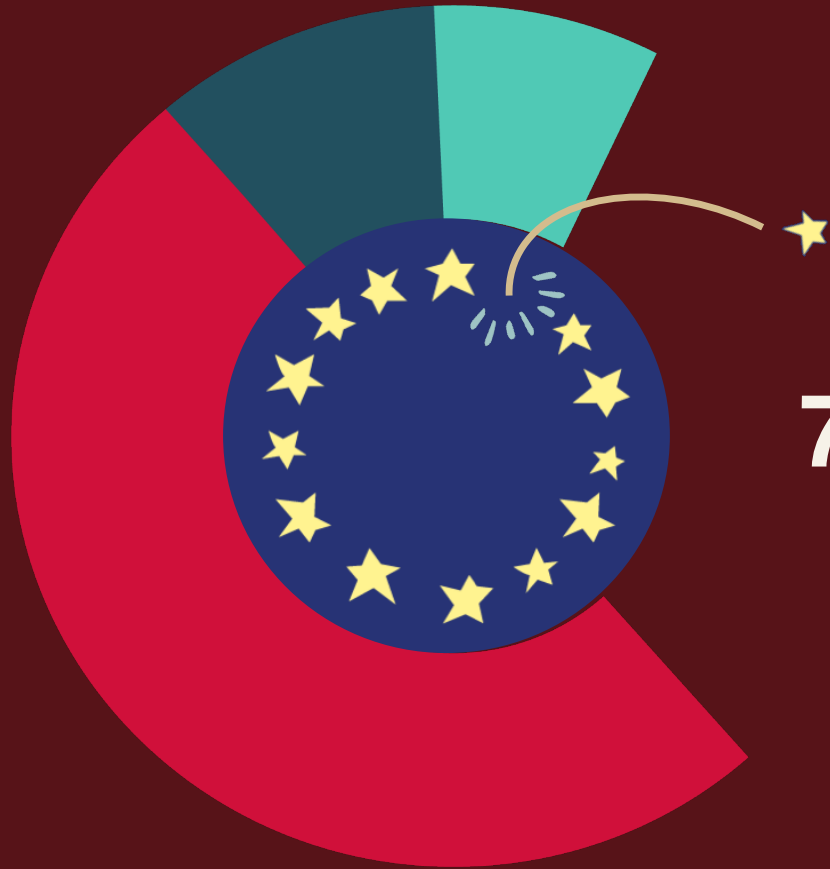
Monaghan Catchment

(Base: All Users of Monaghan Town Centre; n=408)

Q.22 How far do you actually live from the Monaghan town centre?



Nearly two thirds (63%) of Monaghan Town Centre users live within 6km of the town Centre, highlighting the importance of the local community to the town centre.

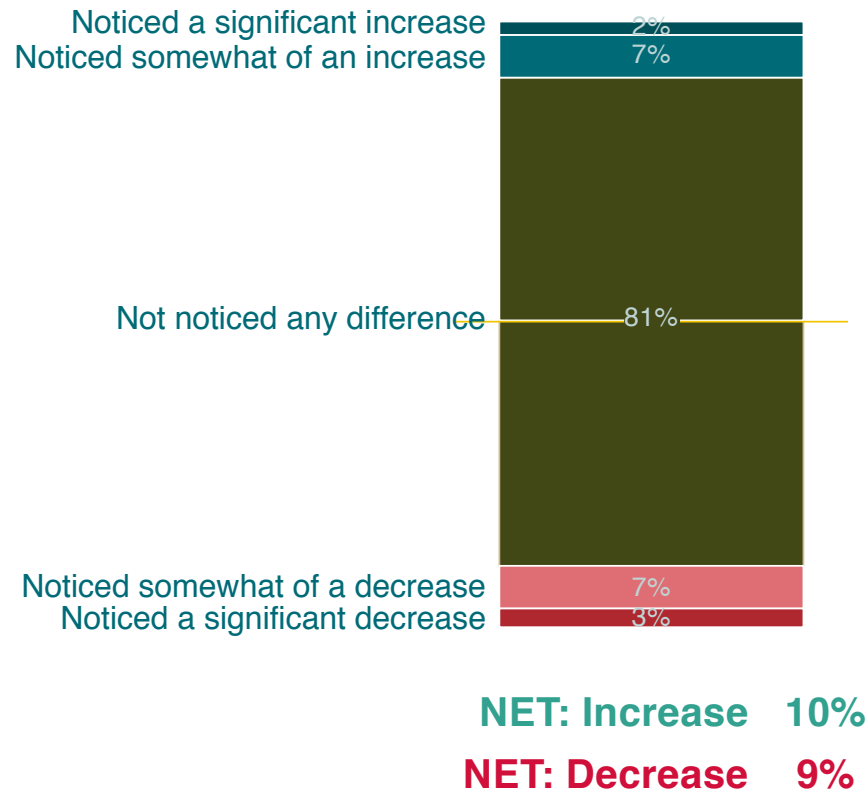


7. Brexit?

Change in Activity in Town Centre Since Announcement of Brexit

(Base: All Users of Monaghan Town Centre - 408)

Q.24 Since the announcement of Brexit, which of the following best describes the extent to which you have noticed any change in activity in Dundalk town centre?



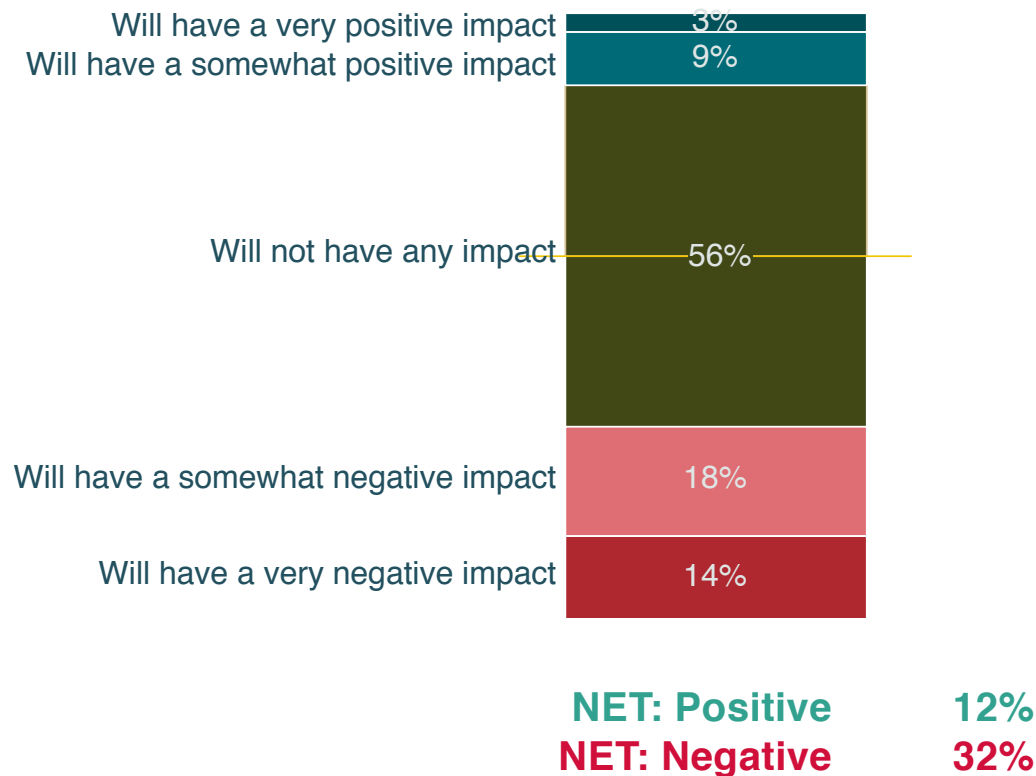
The vast majority of town centre users say they haven't noticed any difference in activity in the town since Brexit was announced with just 1 in 10 saying they have noticed an increase in activity and a similar number saying they have noticed a decrease.

REDC

(Q.24)

Impact of Brexit on Town Centre

(Base: All Users of Monaghan Town Centre - 408)



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.

REDC

(Q.25)

Project Team



Ali Harvey

The Heritage Council

- / Founding Co-ordinator of the CTCHC Training Programme in Ireland
- / Qualified Spatial Planner and Project Manager with a background in economics and urban development
- / Twenty-three years' experience of project managing planning and regeneration programmes and projects in Ireland (both private and public sectors);
- / Author of the Community-led Village Design Statements Toolkit, 2012;
- / Founding Co-ordinator of the Irish Walled Towns Network (IWTN) in 2005.



Máire Cullinan

Monaghan County Council

- / 20 years' experience in planning, economic, community, regeneration and active land management roles.
- / Masters in Town and Country Planning from Queen's University Belfast
- / Local coordinator of the Monaghan pilot Collaborative Town Centre Health Check programme.
- / Manages local authority funding programmes, including Town and Village Renewal and Regeneration and Development Funds
- / Led the preparation of the Dublin Street Regeneration Plan (winner Irish Planning Institute Design Award 2017/2018 and KPMG Irish Independent Property Excellence Awards Excellence in Planning 2018)



Trevor Connolly

Monaghan County Council

- / Trevor Connolly is the Town Centre Co-ordinator for Monaghan Town.
- / MSc in Planning & Urban Development and specialises in Economic Development, Planning & Regeneration.
- / Developed a number of networks in Monaghan to help deliver projects that have a positive economic impact on the town & surrounding areas.
- / Core responsibility is to work with the Town Team & the local business community to promote Monaghan Town & District by delivering new projects and added value where possible.
- / Member of Association of Town Centre Managers (ATCM) Ireland & UK

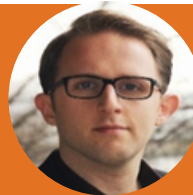
Project Team



Bryan Cox

**RED C Research & Marketing
Director**

- / Bryan has 15 years experience in market research.
- / Bryan has a honours degree in Marketing from Dublin City University
- / Bryan has worked in RED C for the past 13 years and has vast experience in a qualitative and quantitative capacity
- / Bryan is the Research project Director on consumer surveys for the ongoing Heritage Council Collaborative Town Centre Health Check Research Project.



Mark Curley

**RED C Research & Marketing
Associate Director**

- / 5 years' experience in market research; specialising in quantitative methodologies.
- / Mark has a MSc. in Marketing from Smurfit Business School and also has an MA from Trinity College in Business and Economics.
- / Mark has extensive experience in the management of projects across a wide variety of industries including Governmental research, FMCG, Telecoms, Health insurance, Transport and Utilities.
- / As a core member of the RED C Polling team, Mark has overseen a significant number of F2F projects across Ireland.



John Rogers

**RED C Research & Marketing
Research Project Manager**

- / Joined RED C in early 2016 after completing a Honours Degree in Psychology and Masters in Cognitive Science from UCD.
- / John is a Quantitative specialist and is currently working with several Irish and international clients across a number of sectors including Retail, Telecoms, Insurance, Supermarkets and Tourism.
- / Experience across several industries including political polling, tourism, telecoms and retail.

THANK YOU

