

Role & Function of Retail in the City Centre

Review of the Dublin City Council Development Plan 2022-2028

Prepared by Bannon Commercial Property Consultants for Dublin City Council

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Executive Summary

This report analyses Dublin City Centre's position in the context of the wider competitive retail environment and makes recommendations in relation to the future development of retail in the City for consideration in the preparation of the new City Development Plan 2022 - 2028. While the City Centre is a well-established retail destination, development in the City's suburbs over the last three decades has seen a significant quantum of retail space provided to an extent where they now compete directly with the City Centre for comparison spend. The current supply of new retail into the market in Dublin is largely focused at Strategic Development Zones and expansions of existing centres located at and around the M50.

The opportunity for retail within Dublin's City Centre is broadly based around the interaction between four key factors: customer pools, current supply, market trends and City experience. The intersection of these influence and determine the sustainable scale and type of opportunity for the City's retail core.

Bannon interviewed a number of stakeholders of the City Centre retail environment to establish an insight as to the attitudes towards the City Centre. Common themes that arose concerned enhancing the City's experience and accessibility and how communication can be made more cohesive between the public and private sectors for a mutual benefit that ultimately produces a more attractive retail trading environment. Stakeholders also expressed the need for a deeper analysis of footfall in the City Centre to more accurately understand the profile and capacity of the trading environment.

Analysis of customer pools highlights the importance of those living in Dublin's suburbs, office workers, students and tourists to the vitality of the City's retail environment and recommendations have been made in consideration of how the City can provide an experience to attract retail spend from these customer pools. The more attractive the City is to shoppers the more attractive it is to retailers. The more diverse and interesting the retail on offer, the more attractive the City will be to shoppers, residents, tourists, and workers. The recommendations set out in the report seek to enhance Dublin as a destination for consumers and retailers alike.

Ensuring the City is accessible and that barriers to accessibility are minimised where possible, linking key transport nodes with the retail core and promoting diverse transport options to cater for a range of retail trips will attract shoppers into the City.

By identifying activity zones in the retail core linked to clusters of shopping, food & beverage, and culture, we have recommended strategies to coordinate these to enhance the City experience. This has also allowed us to identify opportunity zones that can be developed to further extend the depth of the retail offer and promote linkage within the retail core. This has been considered alongside current retail policies in Dublin and internationally on how these opportunities may be unlocked.

The communication and availability of data relevant to the retail sector has been identified as a requirement to improve the attractiveness of the City Centre as a retail destination. Interactions between the public and private sector are required to provide a collaborative approach. The provision of a data portal available to all potential retailers considering the City will make it easier to attract the international and domestic retailers that can successfully trade in the City.

The future vibrancy and vitality of Dublin's retail core is contingent on successfully attracting customers. The more customers it attracts the more retailers will require representation within the City which in turn will make the City more attractive. Despite the competition from online retail and the difficulties caused by the Covid-19 pandemic, Dublin remains an attractive proposition for retailers and customers. This report seeks to identify ways to build upon this opportunity for the benefit of the City retail core going forward.

Following the recommendations made by in respect of City Centre retail, Bannon have provided thirteen **Action Points** for the Councils consideration on how these recommendations may be addressed. These **Action Points** have been summarised as follows:

A. Capitalise on the City's Real Experiences

Action Point No.1 – Opportunity for Micro Dwell Zones

We are recommending an audit be carried out of potential dwell zones within or adjacent to the City's retail core. A dwell zone is an area in the public realm that attracts and/or engages people, encouraging increased dwell time in this area with an overall focus of enhancing the attractiveness and vibrancy of the streetscape. Specific focus should be on areas which link the retail areas to each other, to transport nodes, to cultural attractions and to locations with potential customer bases such as concentrations of office workers or students. Once suitable sites have been identified, the Council could reach out to individual businesses within the identified areas and work with them to activate these sites.

Action Point No. 2 – Incorporate Cultural and Retail Experiences

Identify key cultural elements encapsulated in Dublin's City Centre and carry out an audit of points of interest across the City Centre. Once these points have been recognised, identify a coherent and functional trail through which these can be connected, with a focus on activating streets within the retail core where appropriate. Wayfinding signage or markings or an alternative interactive method, such as a phone-based app (as can be used with the Boston Freedom Trail by way of example), should be invested in to activate the trail(s). Trails should be marketed appropriately to both international and domestic persons to promote engagement.

B. City Activity Zones

Action Point No. 3 – Benefits of the Food & Beverage Economy

Promote diversity of uses in the Henry Street area with a focus on food & beverage to enhance the appeal of the north retail core.

The benefits outdoor dining can bring to a streetscape should be recognised and should be granted on a location focused basis.

Action Point No. 4 – The Opportunity Zones

Identify underutilised and inactive City Centre street and lanes. Develop an initiative to support the rejuvenation of these areas through the inclusion of art, landscaping, street furniture, outdoor dining, and activity spaces. Include in the initiative, an incentive to promote the small-scale tenancies targeted at local operators.

C. Street Hierarchy

Action Point No. 5

Category 1

It is suggested that the extent of Category 1 streets be reviewed to be aligned with modern retail demands and requirements and to allow for the City retail core to evolve into an experience focused shopping destination. This may be done by focusing the Category 1 allocation to only Grafton and Henry Street and converting the remaining Category 1 streets to Category 2. This will allow the surrounding streets to be promoted for activities consistent with developing the City Centre experience through cultural, food & beverage and leisure offers complimentary to higher order comparison. An additional benefit of this will be increasing the occupier pool for retail core space, subject to the Category 2 controls, which may address vacancies in the retail core

which may arise from the 2020 Pandemic and resulting change in economic conditions.

Category 2

The scale of the area covered by both Category 1 & 2 looks overly ambitious in 2020. When the policy was introduced originally there was a period of rapid expansion in the retail sector. This was replaced by contraction and then relative stagnation. It is unlikely, looking at the market trends, that a large-scale expansion of the retail footprint within Dublin City Centre will happen in the short to medium term. This would suggest that the areas covered by the Category 1 & 2 streets be needs to be significantly reduced. We have highlighted above where we feel some of the Category 1 streets should be reallocated to Category 2. There is also merit in considering the removal of Category 2 status from the streets that are remote to the current retail core.

D. Linkages & Connectivity

Action Point No. 6 – Improving Access to the Retail Core

Recognise the increased uptake of cycling as a means to access the City Centre and provide strategically placed bike stands to accommodate for such.

Action Point No. 7 – Improving Access to the Retail Core

A cost benefit analysis of the removal of limited car parking versus greatly enhanced pedestrian connectivity should be carried out in streets such as Molesworth Street which connects the cultural hub, comprising the National Museums and National Gallery to the Grafton Street retail core.

Action Point No. 8 – Improving Access to the Retail Core

Ensure car parking is maintained on the periphery of the retail core, in order to allow for car-based commuters while improving the pedestrian environment within the retail core. Car parks such as at The Ilac Centre and St. Stephens Green can be easily accessed by consumers without disrupting pedestrian flow within the retail core. Continue to promote sustainable transport methods including bus and Luas services to the suburban population as a means of transport into the City for retail purposes.

Action Point No. 9 – Supporting Retail Through Transport

Consider incorporating ‘drop-points’ at key transport nodes including peripheral multi-storey car parks and train stations to provide a resource for City Centre retailers to engage in omni-channel distribution. DCC and its City Centre partners could conduct a workshop with businesses within the retail core to ensure logistical and usability requirements are met and undertake an audit of transport nodes to establish appropriate locations for drop-points.

Action point No. 10 – Improved North-South Pedestrian Links

Continue with the pedestrianisation of streets within the retail core and expand to include the enhancement of the pedestrian realm along Westmoreland Street to improve the connectivity between the north and south retail cores.

Action Point No. 11 –Suburban Public Transport Links and City Retail Cores

Recognise Tara Street Stations central position to the epicentre of the retail core and enhance the pedestrian linkages between the station and O’Connell Bridge.

Action Point No. 12 – Improve Pedestrian Links between Activities

Undertake a critical review of all key routes between the retail core and cultural, office and transport hubs and improve the pedestrian experience where possible.

E. Data & Communication

Action Point No. 13 – Data & Communication

Dublin City Council should consider actively marketing the City Centre utilising publicly available information from the CSO, CSRI, OECD and other reliable research sources. This can benchmark Dublin internationally.

The action points that are listed can be read with recommendations that are detailed further in this report.

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Role and Function of Retail in Dublin City Centre

1. INTRODUCTION & SCOPE OF STUDY

Dublin City Centre serves as the preeminent shopping destination in the country, providing a broad scope of retail offers from many leading international and domestic retailers. The retail core in the City Centre can broadly be defined as the north retail core, centred around Henry Street and the south retail core, comprising Grafton Street and its environs. Changes in demographics, economic conditions, trends, and technology have and will continue to challenge Dublin City Centre's position at the top of Ireland's retail hierarchy. The two greatest impacts affecting the City's retail at the time this report was written are the Covid-19 pandemic, which has affected the retail industry on a global level and the effect of competition from online shopping on the physical retail environment. This report aims to analyse and address how these and other long-term trends need to be acknowledged and adapted to, ensuring that the City Centre can retain and enhance its position as a sought after and viable place for international and domestic retailers to trade while being an attractive place for customers.

This report provides recommendations that we feel support the Council's vision for vibrant shopping districts within the City. The recommendations are born from an analysis of how Dublin performs as a retail destination for all its relevant stakeholders and against competing destinations. It considers the performance of Dublin City against the backdrop of changing trends and their impacts. Through this, we can advise how to best shape policy going forward in a way to allow Dublin to continue as a thriving retail destination.

The purpose of this report is to research and advise on the role and function of retail in Dublin City Centre.

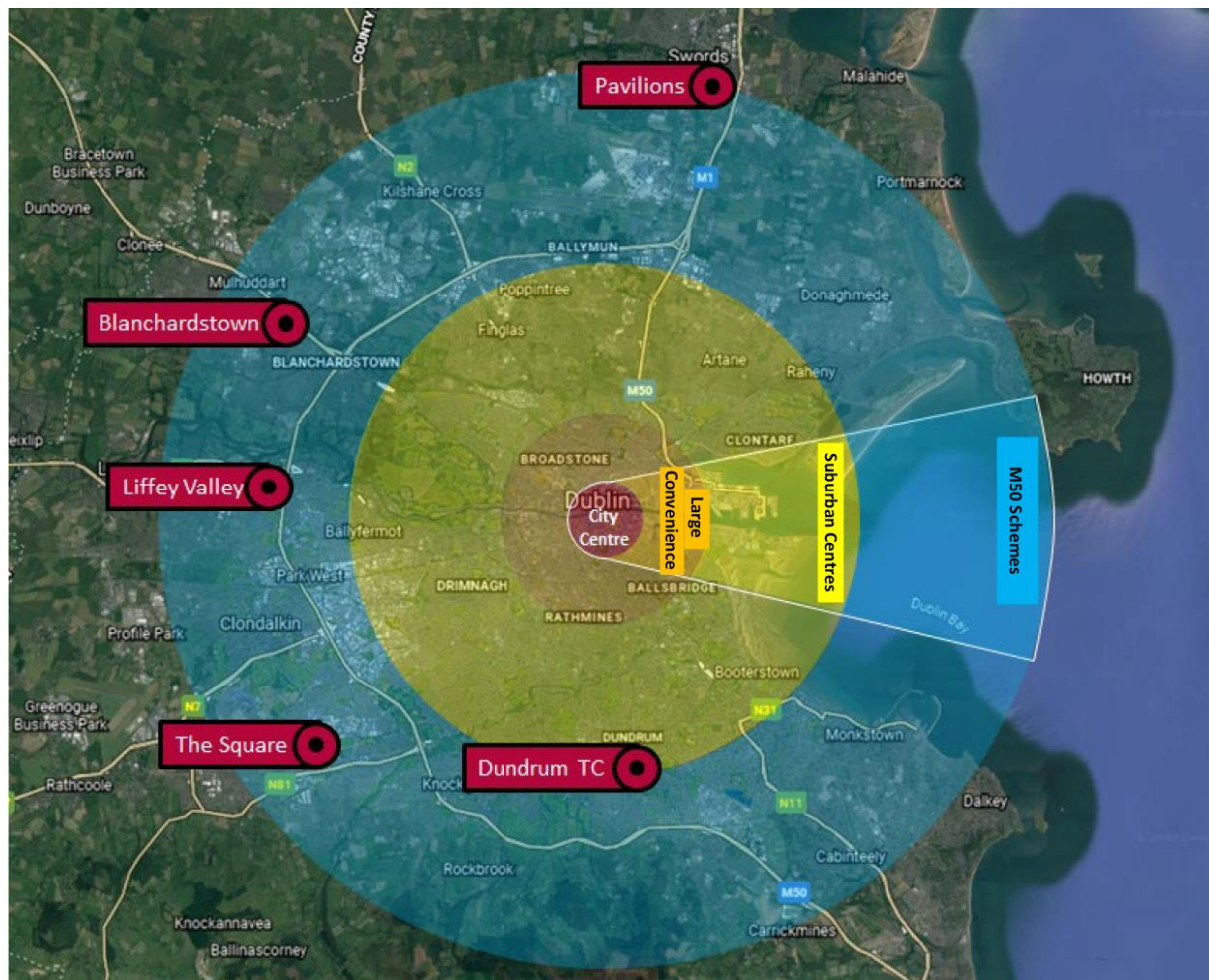
Specifically, what measures and policy provisions will be required to ensure that the vitality and viability of the City is maintained and enhanced?

The methodology adopted was to research under the following headings:

- Market overview
- Impact of Macro trends
- Comparison & Competition
- Stakeholders
- Retailer Demand, Requirements & Trends

2. RETAIL MARKET OVERVIEW

Dublin's Retail Centres



Map 1. Dublin Shopping Zones

Dublin's retail provision can be broadly divided into three categories, detailed on Map 1. In the outer ring are the five major M50 centres. Each of these combines large-scale supermarkets with a large offering of comparison retail and most have retail warehousing close by, creating dual service retail destinations. These five centres combine to offer over 300,000 sq.m. of retail space. Most of these centres have continued to expand slowly since their completion.

In the middle, Dublin City Centre is Ireland's largest concentration of comparison retailing, centred around Grafton & Henry Street which offer 300,000 sq.m. of retail space. By contrast with the M50 centres, the City's retail offer has been static over the last 15 years, with any expansion offset by the closure of department stores.

Between these two dominant offers are the pre-M50 centres as shown on Map 2 (see Appendix 1) and urban villages. These are largely anchored by supermarkets, are

convenience based and track the expansion of Dublin in 1970-80's. While these centres are not in direct competition with the City Centre, they do function to serve the needs of the local communities in which they exist. These centres generally provide convenience retail or retail services for the local catchment and comparison retail may be provided by independent or niche retailers who can either benefit from more affordable space in these areas or whose brand is aligned with the location. While these retailers attract a level of spend that does not position them as significant competitors with the City Centre, they add to the vibrancy of their urban village and the diversity of the retail environment across the greater Dublin area. As these centres are generally well served by transport links and by their nature, have a tight catchment, they support the concept of the '15-minute City' servicing the needs of local population hubs.

M50 Centres

30 years ago, Dublin had no significant out of town shopping centres. Over a period of 15 years, five were built (The Square 1990, Blanchardstown 1996, Liffey Valley 1997, Pavilions 2000 and Dundrum 2005) as shown on Map 3 (see Appendix 1), Dublin's M50 Centres (see Appendix 1). None have remained the size that was originally envisaged, Liffey Valley for example, was originally capped at less than 23,000 sq.m. and is now more than double that size with proposals to dramatically increase the centre currently with South Dublin County Council. The original planning permission for Dundrum Town Centre was for approximately 40,000 sq.m. of retail, it now has over 85,000 sq.m. The five centres now combine to approximately 300,000 sq.m. similar in quantum to the combined total of retail within the Grafton & Henry Street areas.

These centres house over 600 units and offer over 15,000 car spaces. All had ambitious plans for expansion in 2007, representing an additional 200,000 sq.m. of space, but none of these extensions have been built and most of the planning permissions that were granted have now expired.

Supply of New Retail

New retail planned for the City's suburbs, as shown on Map 4 (see Appendix 1), is largely limited to: (1) new growth areas in the wider Dublin area - Strategic Development Zones, where retail is required to provide services for new communities (Cherrywood, Clonburris & Adamstown) and (2) extensions to current centres such as at Blanchardstown and The Square in Tallaght. The only M50 shopping centres / districts attempting largescale extensions are The Park in Carrickmines and Liffey Valley. A limited number of stand-alone supermarkets and convenience stores have also been developed in the Dublin area.

The Park, Carrickmines

Planning permission was obtained in 2019 for Phase 3, The Park, Carrickmines. The proposed 60,400 sq.m. development will comprise retail warehousing, neighbourhood retail, food & beverage, leisure, entertainment space, including a 7-screen cinema and additional office and residential accommodation. The masterplan for the site includes the creation of a new public park and connectivity to Dublin City Centre through the Luas.



Image 1 & 2, Phase 3, The Park, Carrickmines

The retail & leisure components within the proposal are:

- | | |
|----------------------|--|
| • Retail | 7,983 sq.m. including 2 supermarkets |
| • Retail warehousing | 11,154 sq.m. |
| • Retail services | 552 sq.m. |
| • Restaurant/café | 3,210 sq.m. |
| • Leisure | 3,235 sq.m. including an indoor skydiving facility |
| • Cinema | 3,194 sq.m., 7 no. screen |

Liffey Valley Shopping Centre

Liffey Valley Shopping Centre has lodged a planning application to build a 2-storey extension to the south of the centre.

The proposed development includes:

- | | |
|---------------------------------|--------------|
| • Mixed leisure & entertainment | 9,247 sq.m. |
| • Food & beverage | 4,052 sq.m. |
| • Retail | 21,051 sq.m. |
| • Anchor stores | 10,090 sq.m. |
| • Car parking | 900 spaces |

This development, if approved, would be the largest expansion of retail space in Dublin since 2005 and would make Liffey Valley the largest retail development in the State, close to 4 times larger than was originally granted for the location. The centre recently received permission for a bus interchange as part of the Bus Connects roll out.



Image 3, Northern Extension, The Square, Tallaght

The Square, Tallaght

The Square in Tallaght currently has planning permission for two extensions. The proposed northern extension (Image 3, pictured above) includes an anchor retail unit (6,032 sq.m.), eight retail units (7,456 sq.m.) as well as a six-level multi-storey car park with 832 car spaces. The development also links with the proposed Transport Interchange by South Dublin County Council & Bus Connects.

The proposed southern extension includes six retail units (2,611 sq.m), a food hall / market hall area for multiple restaurant and food & beverage type uses with associated seating areas (2,041 sq.m). There are also two external buildings accommodating nine restaurant and bar units (3,324 sq.m). The plans include a new outdoor public plaza (0.74ha) which is suitable for multi-purpose events, civic and recreational uses and retail and food & beverage.

Strategic Development Zone (SDZ) Retail

Adamstown

Located approximately 1km south of Lucan Village, there is a requirement for a town centre with a minimum requirement for 11,700 sq.m. of retail space. This will be a relatively small addition to Dublin's retail supply and will predominately serve the needs of local shoppers. Phase 1 has recently received planning permission and will see the delivery of a supermarket, retail, retail services and food & beverage offers.

Cherrywood

The Cherrywood Town Centre will provide a mix of uses including comparison retail, retail services at a district centre level and a large convenience outlet. Currently, the planned retail component is approximately 40,000 sq.m., similar in size to the Pavilions Shopping Centre in Swords.



Image 4, Proposed Retail, Adamstown



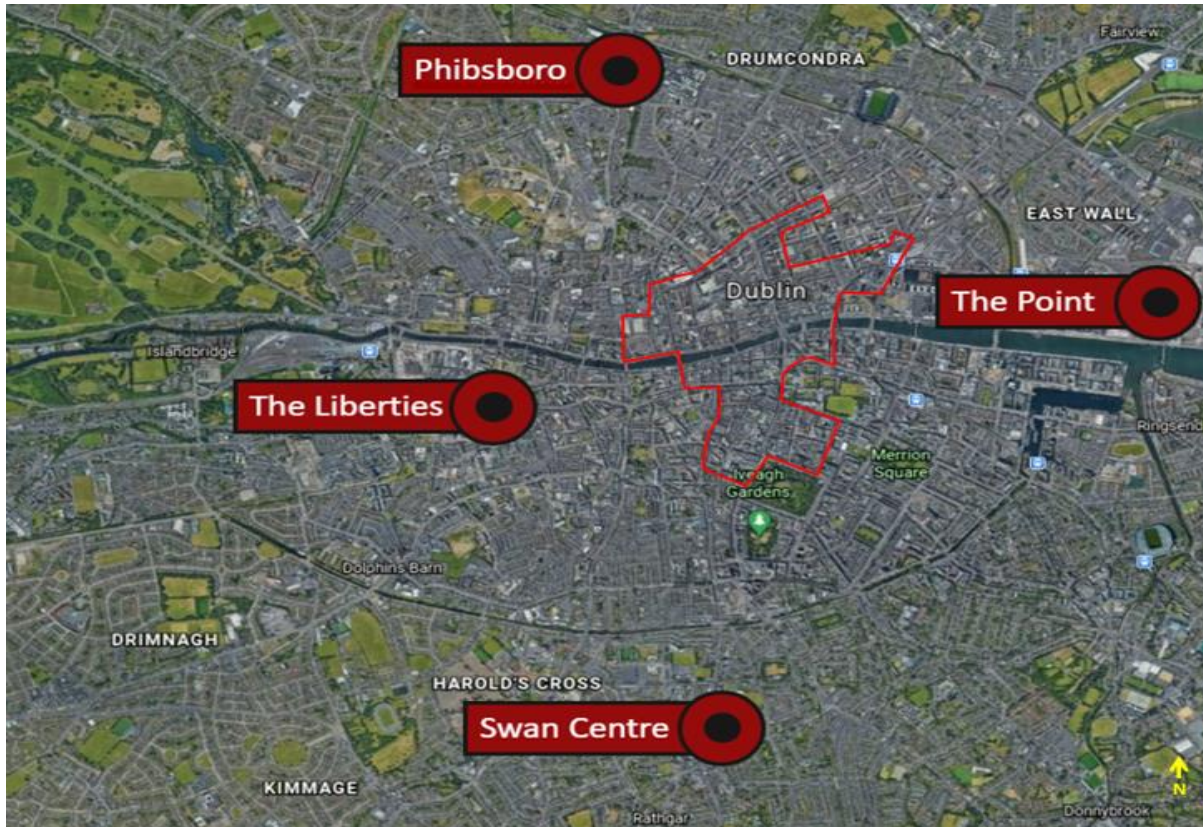
Image 5, Proposed Retail, Cherrywood

Clonburris

The Clonburris SDZ is located between Adamstown and Clondalkin and allows for a 16,500sq.m. District Centre and a 3,500 sq.m. Local Centre. The centres are focused around the Kishoge and Clondalkin/Fonthill train stations. A further 2,500 sq.m. of retail is provided for between four local nodes, seeing a total maximum provision for 22,500sq.m. of retail space.

City Centre Convenience Shopping

The City Centre is surrounded by an ample supply of necessity shopping in close proximity, as shown on Map 2 (see Appendix 1) and Map 5 below. By way of example, to the south in Rathmines there is a Lidl, Aldi, Tesco, and a Dunnes Stores within the Swan Centre. Immediately to the west, The Liberties offers a wide range of convenience and necessity shopping, with a Supervalu outlet further west in the Heuston Square development. To the north, Phibsboro has a range of convenience and food offers whilst Tesco has a store on Prussia Street and there is a new Lidl at Hanlon's Corner. To the east, there is the yet to be activated Point Shopping Centre where the anchor store is owned by Dunnes Stores. The presence of these and multiple other convenience shopping clusters limits the relevance of Dublin City Centre as a necessity shopping location for all but its immediate residents.



Map 5. Sample of convenience shopping destinations close to the City Centre (retail core outlined)

Swan Centre Rathmines Case Study

The Swan Centre is a large-scale convenience scheme positioned between the City Centre and Dundrum Town Centre. Shoppers are characterised by a low travel time and high visit frequency, highlighting the centres popularity among local shoppers. The main competitor for the Swan Centre retail spend is the City Centre with 55% of Swan Centre shoppers visiting the City Centre on a frequent basis (at least one visit per month). The Swan Centre demonstrates that locations such as these, that serve the necessity shopping needs of local communities, can be viable in close proximity to the City Centre and that the City Centre cannot rely upon this category of spend from locations outside its immediate catchment population.

Phibsboro Case Study

Phibsboro is a well-established neighbourhood positioned on the intersection of the North Circular Road and Phibsboro Road approximately 2km from the City Centre. The location supports high accessibility and has good public transport links. The main mixed-use development is anchored by an 1,800 sq.m. Tesco and provides a convenience-led retail mix in a parade of units. The centre was sold in 2015 alongside two adjoining development sites and is earmarked for substantial development works. In addition to the centre, there are multiple food & beverage offers in close proximity.

The Liberties

The Liberties is one of Dublin's most historic neighbourhoods immediately adjacent to the southern City Centre. The Liberties contains Ireland's leading cultural attraction, the Guinness Storehouse, which attracts some 1.7m visitors annually to the area. Thomas Street forms part of an arterial route leading into the City Centre and Heuston Station is located alongside the area, further enhancing the areas connectivity.

Thomas Street (the areas original main street) and Meath Street both offer an eclectic mix of retailers while Francis Street serves as hub for antiques dealers. Retailers are largely independent operators, with national/international brands comprising mainly grocery, pharmacy and bookmaker operations. The Shopfront Improvement Scheme is active in the area, providing financial assistance to encourage the regeneration and improvement of shopfronts to enhance the streetscape of shopping areas. The Liberties are earmarked for significant urban development in the coming years, including Guinness who intend to develop a 5-ha site into a mixed-use commercial quarter and through the completion of the mixed-use development of Heuston Station.

The Point

The Point Village is a development in Dublin's northern Docklands, located approximately 2.2km from O'Connell Street. The development comprises the 4-star Gibson hotel, 3Arena, bars, restaurants, a 6-screen multiplex cinema, office space, over 37,000 sq.m. of retail space and a 1,000 space car park. The Point Luas platform links the scheme with the North Docklands and IFSC area. The development ran into problems during the Financial Crisis and was taken over by NAMA in April 2013. The hotel, car park and cinema opened and remain open. The retail element of the development has been virtually empty since 2010 due to the economic downturn and a dispute with the anchor tenant, Dunnes Stores. It is anticipated that when the anchor store does open for trade that The Point Centre will become a major convenience destination in the Docklands area.

Retail Summary

The role of Dublin's retail core has changed dramatically over the last 30 years with the development of five major M50 centres. Whilst there has been little retail development in Ireland since 2010, the M50 centres have solidified their position as regional destinations within Dublin's suburbs, displacing comparison retail focussed shopping trips that were once the exclusive remit of the City Centre. This pattern of development was a nationwide phenomenon with a dramatic increase in retail supply nationally between 2003-2007 also impacting on the relative attraction of Dublin City Centre for shoppers across the Country.

In addition, the convenience and lower order comparison needs of Dublin shoppers are met by the pre-M50 centres dotted around the inner suburbs and the immediately adjacent convenience destinations that surround the City Centre within an approximate 2km radius.

The nett effect is that Dublin City Centre must work hard to bring in the suburban shoppers. It must offer an experience and a depth of offer that entices consumers out of the major M50 centres. The City cannot rely upon all but a very local population to drive its non-convenience retail offer. In the absence of attracting these shoppers the City Centre will rely upon the workers, tourists and students who visit the City and we examine the depth of these customer pools further on in the report below.

3. STAKEHOLDERS

Bannon undertook a number of interviews with key Dublin City Centre stakeholders with a focus on commercial landlord / investor mind-sets to establish their views on the current Dublin City Centre retail core.

The questions targeted feedback in relation to the following themes:

- Current City Centre retail core performance
- Range and mix of uses
- The quality and suitability of the public realm
- Access to and around the City Centre
- Impact of the various user groups on City Centre retail, i.e., workers / tourists / students / residents
- Daytime v Night-time economy / activity
- What would influence investment or divestment decisions within the City Centre

Stakeholder Feedback

- While footfall has remained relatively steady, the make-up of same has changed with a greater proportion comprising workers etc. who are in the City Centre for reasons other than retail.
- The necessity to come to the City Centre for shopping has declined immensely – this has resulted from increased suburban competition and online accessibility.
- South City Centre provides a more mature environment that can be viewed as more of a finished product with buildings being redeveloped / repurposed as they reach the end of their economic cycle. The north City Centre has not reached this level and remains more of a continuing project. To date the north City Centre focus has been almost purely on retail, which, by itself, is no longer sustainable. There is a need for office and leisure to form a critical part of the overall mix.
- The perception of a lack of safety / dilapidation particularly in the north City Centre, with a lack of visible policing. This can be off-putting to potential customers. This is particularly relevant to the night-time economy with a lack of activity beyond retail closing time.
- The planning system needs to be less prescriptive, permitting greater flexibility to deal with the ever-changing situation and to react to circumstances without being boxed into a corner. We require more retail and leisure in office locations and more offices and residential in retail locations. We need more shops and restaurants in the main office areas of Burlington Road / Mespil Road, Hatch Street / Harcourt Street and Dawson Street/Molesworth Street. More office and other uses in the predominantly retail locations of Grafton Street and O'Connell Street should also be encouraged.
- There was a view that the withdrawal / reduction of cars from the City Centre is inevitable and that transit across the City in private vehicles will be discouraged.
- A targeted advertising campaign for Dublin City Centre is needed to promote the City as an attraction in its own right just like London or New York. The Wild Atlantic Way and the Ancient East show that a targeted marketing campaign can be extremely effective in promoting Ireland to both domestic and international travellers. Right now, what is required is a concerted effort by the vested parties to attract people from all over Ireland to Dublin through promoting the value available in hotels, the attractions, shopping and food and beverage. Post the restrictions, Dublin needs to attract more people from outside Dublin to the City.

- More long-term outdoor space - Before the more recent lockdown, there has been increasing numbers of cafes and restaurants using outdoor spaces for seating. This should be actively encouraged in every way possible. These should be permanent with the café operators encouraged to use the space through incentives.
- Residential in City Centre - Promotion of more residential units in the City Centre. Less onerous planning for the conversion of existing buildings into residential. Direct application to the local authority with no third-party appeals. This makes it easier for developers and investors to convert existing buildings into residential. Internal work should not require planning permission so long as the development is within the envelope of the building and meets fire and other requirements, then the property can secure a grant of planning permission.
- Promote incentives around parks (outdoor food markets) - property owners in conjunction with the local authority can promote placemaking through a simple application process to promote adjacent outdoor markets. The property owners fund the costs, the market is co- branded with the City. This is professionally managed and promoted in conjunction with support from Dublin City Council.
- The City Centre needs to be revived through a process of leadership and place making.
- The wide scale development of offices has led to the creation of campus style environments. This can internalise activity as everything is provided on site for employees, and therefore, there is less reason to encourage circulation and flow around the City Centre.
- Pocket parks should be actively pursued as part of planning policy to provide dwell spaces within the urban environment.
- O'Connell Street, although a national thoroughfare, lacks a cultural anchor.
- The attitude to retail has hardened and is now viewed much more as a specialist asset class, requiring hands on expertise to manage and maximise value.
- Flexibility in policy is required to enable a place making strategy and the creation of neighbourhoods.
- A marriage of development and public realm provision is required with the example of Dawson Street and Molesworth Street cited in respect of new / attractive period buildings sitting within what presents as poor public realm that therefore detracts from the overall appeal.

- There is positivity on the opportunity that Dublin City Centre represents. Dublin is referred to as the as the European, Middle East & Africa (EMEA) hub for global IT players, making this the most exciting time for the City since the 1790's.
- There is a lack of coherent retail policy between the four Dublin Councils.
- The City Centre was recognised as offering the best mix of retailers, restaurants, pubs and shops. The South City Markets area was described as being particularly interesting.
- Improve communication about the resources of the City and promotion of the attractions / benefits of the City Centre. This could be in the form promoting linked trips.
- Location focused investors who have a long-term view will always be attracted to City Centres as they will always be value generators.
- Transport policy and focus should not be on just one segment of the offer, i.e., commuters. The discussion needs to consider the needs of all City Centre users.
- There was a feeling that red tape stifles innovation that could rejuvenate derelict sites. Pace of decision making is slow and very often focused on what cannot be done. Need for joined up approach between different disciplines within the City Council.
- A focus and solution to activate upper floor accommodation is needed which will require a flexible approach to policy from DCC.
- Following on from the growth in on-line retailing it is expected that the growth in multi-channel retailing will result in less space being required as stockholding in store reduces and that online sales can be distributed from suburban stores that offer more affordable space.
- Future core regeneration will involve repurposing vacant retail accommodation into residential use with greater vacancy to be expected on secondary and tertiary streets.
- The public realm provision is not fit for purpose with parks and recreation space not being unified. There is the need for the creation of pedestrianised areas that are set up for entertainment that will serve to attract people.

- There is a mixed view from various Dublin City Centre retailers on pedestrianisation as the distance to parking and difficulties for deliveries cause operational problems.
- Suburban offers have impacted on City Centre retail attraction as schemes like Dundrum Town Centre and Kildare Village Outlet Centre provide convenience and a safe environment.

Stakeholder Feedback Overview

Overview of common themes arising from stakeholder interviews:

- Underlying footfall trends need to be assessed as the overall number can mask the make-up between shoppers, office workers, tourists and students.
- South City Centre is much more advanced than the north City in terms of development maturity.
- The planning system would benefit from being more flexible so that it can be more adaptive and responsive to evolving trends.
- Transport solution needs to be coherent and not ignore importance of private transport or be solely focussed on commuters.
- Lack of unity and variety in quality of public realm. Place making is an essential part of creating a City Centre identity.
- Perception v reality: City Centre needs to present as safe, convenient, and pleasant.
- Developers need to interact and collaborate with the council to the benefit of both.

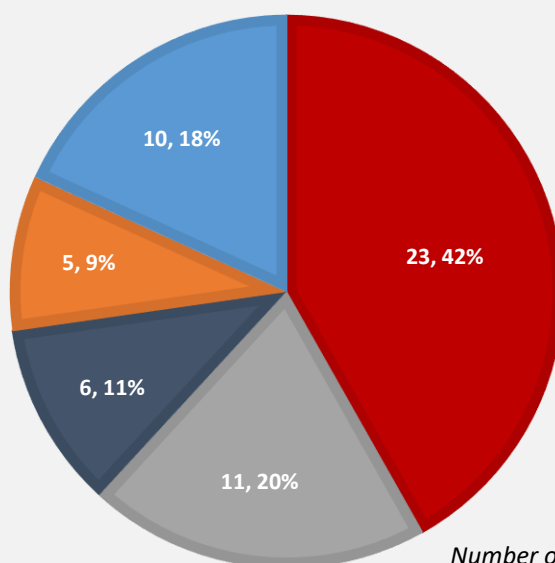
4. HENRY STREET & GRAFTON STREET

Henry Street Retail

Charts 1 & 2 represent the uses represented on the ground floor level of units on Henry Street and Mary Street. We have analysed this by unit count and use, both excluding department stores. The analysis indicates a street dominated by clothing and footwear operators, especially in terms of ground floor area.

CHART 1: HENRY STREET UNIT COUNT

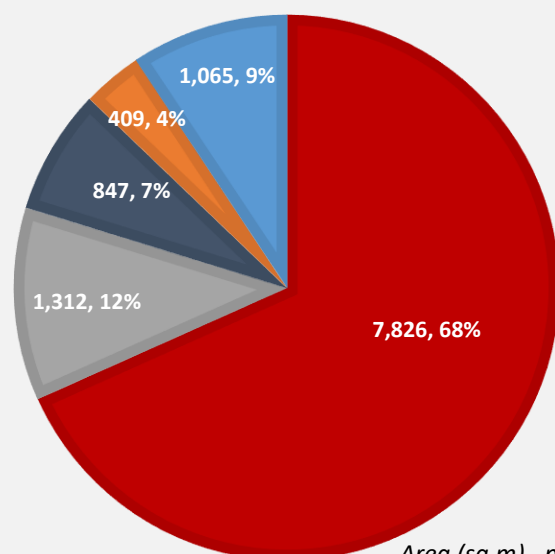
■ Clothing & Footwear ■ Services ■ F&B ■ Jewellery & Acc ■ Health & Beauty



Number of units, percentage of units

CHART 2: HENRY STREET GROUND FLOOR AREA BREAKDOWN (SQ.M.)

■ Clothing & Footwear ■ Services ■ F&B ■ Jewellery & Acc ■ Health & Beauty



Area (sq.m.), percentage of area (sq.m.)

Henry Street Goad Map

Henry Street is dominated by 4 large department stores, although Debenhams may shortly be remodelled. This, combined with the presence of the Jervis and Ilac shopping centres, means there are comparatively few shops on the street despite its length.



Map 6, Henry Street Goad Map¹

Henry Street offers more clothing and footwear offer than Grafton Street, with this being the dominant offer. The presence of the Ilac and Jervis shopping centres, the Arnotts department store and the former Debenhams has resulted in a larger grain on the street than would be typical in Dublin City's retail core, as shown on Map 6, and therefore, has provided owners and occupiers with significant influence over the streetscape. These current uses are broadly consistent with the Category 1 approach as designated in the Dublin City Development Plan 2016 – 2022, in presenting higher order comparison retailers on the street.

Unlike Grafton Street, there is very little cohesion with adjoining streets, which positions Henry Street as an isolated hub of intense retail activity. The shopping centres and departments stores act as an extension of Henry street rather than as independent hubs. The loss of Debenhams will affect the offer available on the street, with the retail area potentially requiring subdivision to appeal to market requirements. The store will most likely be converted to Medium Size Unit (MSU) tenancies, thereby creating a finer grain to the central core of Henry Street and reanimating the frontage.

Overall, the tenant mix on Henry Street is largely characteristic of an attractive shopping street, comprising predominately international and established national brands of mainly clothing and footwear, but supported by retail services.

¹ Goad maps are detailed street maps that provide information on individual buildings, such as tenants / uses.

Grafton Street Retail

Charts 3 & 4 below represent the uses represented on the ground floor level of units on Grafton Street. We have analysed this by unit count and use, both excluding department stores. Despite being shorter (370m vs 420m) Grafton Street has a lot more shops than Henry Street - 72 versus 55. It has two large department stores versus four currently for Henry Street. Somewhat surprisingly, less of the units on Grafton Street are in Clothing & Fashion usage than on Henry Street.

CHART 3: GRAFTON STREET GROUND FLOOR AREA BREAKDOWN (SQ.M.)

■ Clothing & Footwear ■ Services ■ F&B ■ Jewellery & Acc ■ Health & Beauty

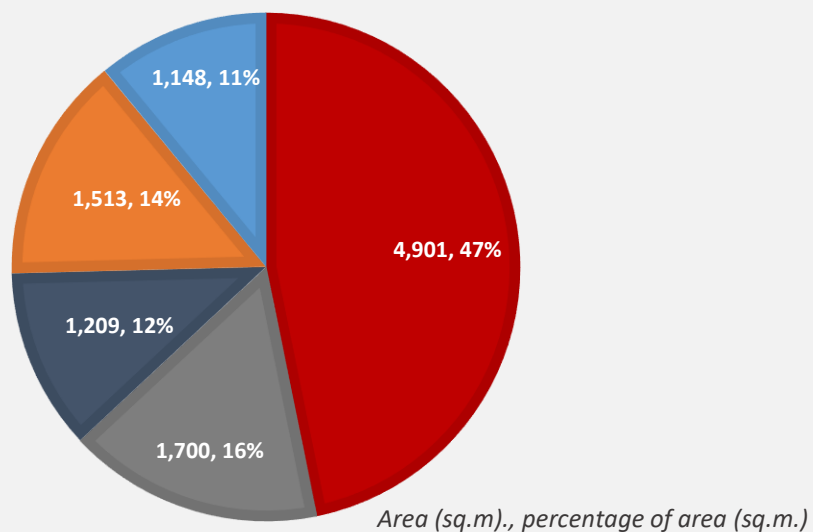
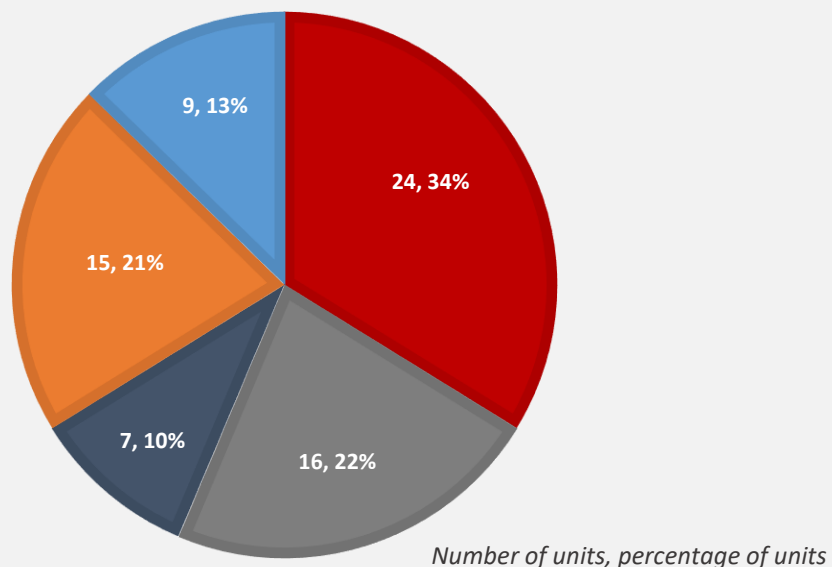


CHART 4: GRAFTON STREET UNIT COUNT

■ Clothing & Footwear ■ Services ■ F&B ■ Jewellery & Acc ■ Health & Beauty



Grafton Street Goad Map

Grafton Street differs from Henry Street in numerous ways. It integrates with its hinterland more organically, connecting with seven different side streets and laneways along its shorter length allowing easier pedestrian movement. The department stores are at one end of the street rather than dominating the central area as in Henry Street and the only shopping centre is located off the southern end of the street rather than being integrated as is the case with Jervis and the Ilac Centre with Henry Street. It also benefits from the dual tourist attractions of Trinity College & St. Stephen's Green.



Map 7. Grafton Street Goad Map

As shown on Map 7, Grafton Street presents a finer grain than that of Henry Street and does not offer access to any significant shopping centres other than St. Stephen's Green Shopping Centre. While clothing and footwear absorbs almost half the floorspace on Grafton Street, there is a more diverse variety of retail types when compared to Henry Street. This is largely due to a combination of the finer grain of the street and the larger units being occupied by clothing and footwear retailers, with the likes of Massimo Dutti and River Island both occupying larger stores at ground floor.

While the share of retail services on both Grafton Street and Henry Street regarding space and unit take up are similar, the share of jewellery and accessory retailers on Grafton Street is comparably higher. Grafton Street and its surrounds have a history of jewellers, with Weir & Sons and the cluster on Johnson Court historically dominating the use, within the City.

The Grafton Street area also has a significant advantage in terms of food and beverage offer. This is particularly attractive to the tourists, office workers and younger demographics that visit the City Centre.

Goad Map Comparison

Grafton Street and its environs display a finer grain when compared to the Henry Street retail area which is dominated by larger floor plans, particularly those which are attributed to the shopping centres and department stores. These features are evident on Maps 6 & 7 shown together below.



Henry Street



Grafton Street

5. CITY CENTRE PERFORMANCE

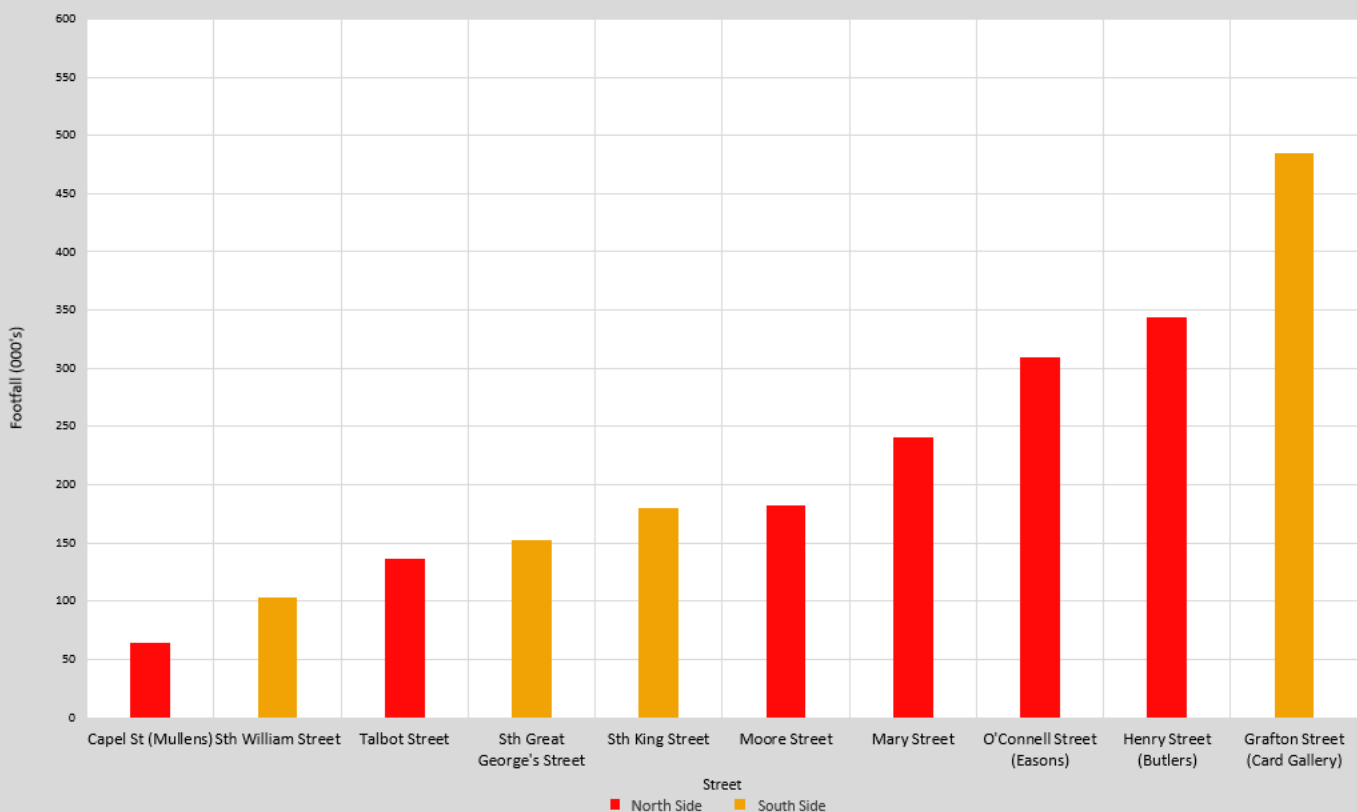
Average Weekly Footfalls 2019

Chart 5, below, shows the average weekly footfall for 2019 on the main shopping streets in the north and south retail cores. While footfall may see considerable peaks and troughs depending on seasons and events, the aggregated data provides an insight as to the significance of streets in Dublin's retail hierarchy.

Grafton Street is the standout performer, recording 140,000 more persons weekly on average than its north side associate, Henry Street. North side footfall was largely concentrated around Henry Street and O'Connell Street, the latter of which provides a key north-south route through the City.

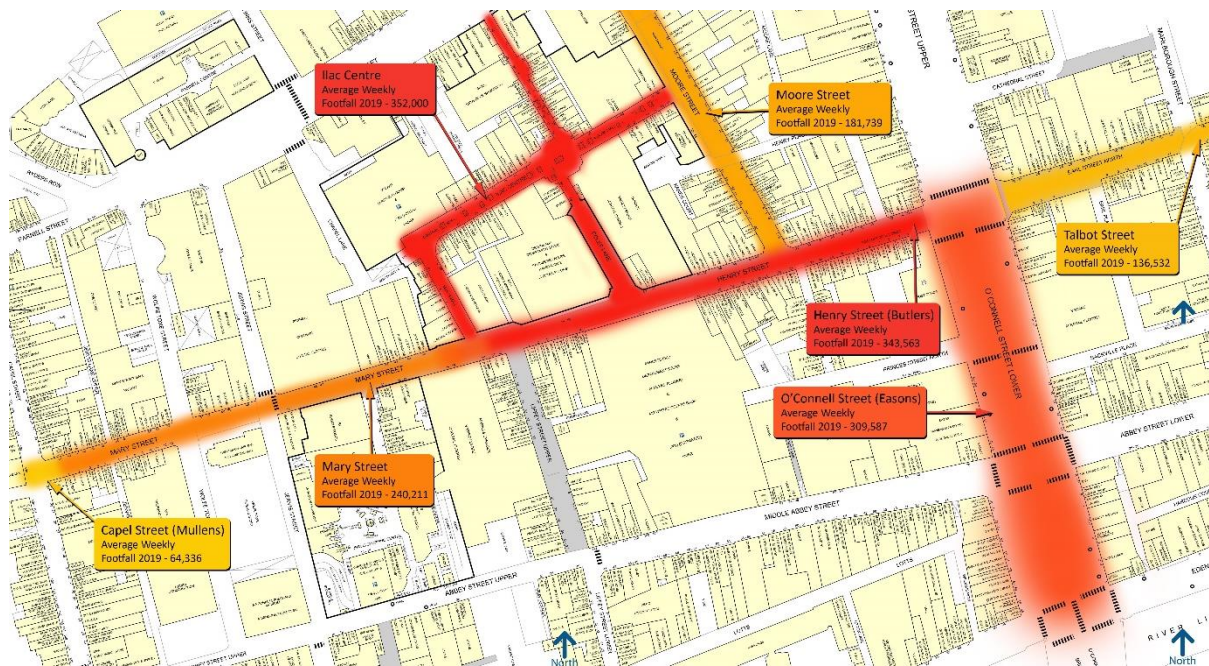
South King Street serves as another standout performer in the Grafton Street area. Despite considerable dead frontage along the south side of the street and The Gaiety Theatre dominating much of the north side frontage, the street still saw footfall of 180,000 persons weekly.

Chart 5: Average Weekly Footfall 2019



Henry Street Pedestrian Flow

The north retail core heatmap (Map 8, below, see Appendix 1 for full page map) provides an insight into levels of City Centre footfall (average weekly footfall). The greatest levels of footfall are represented in red, with the lower being represented in yellow. In the north retail core, the footfall is highly concentrated around Henry Street and the Ilac Centre with the intensity dispersing as you move away from the street. The pattern of circulation amongst streets highlights the intensity of retail activity on Henry Street and the lack of activity throughout the rest of the north retail core. The section of O'Connell Street from The Spire to the river shows very strong footfall performance.

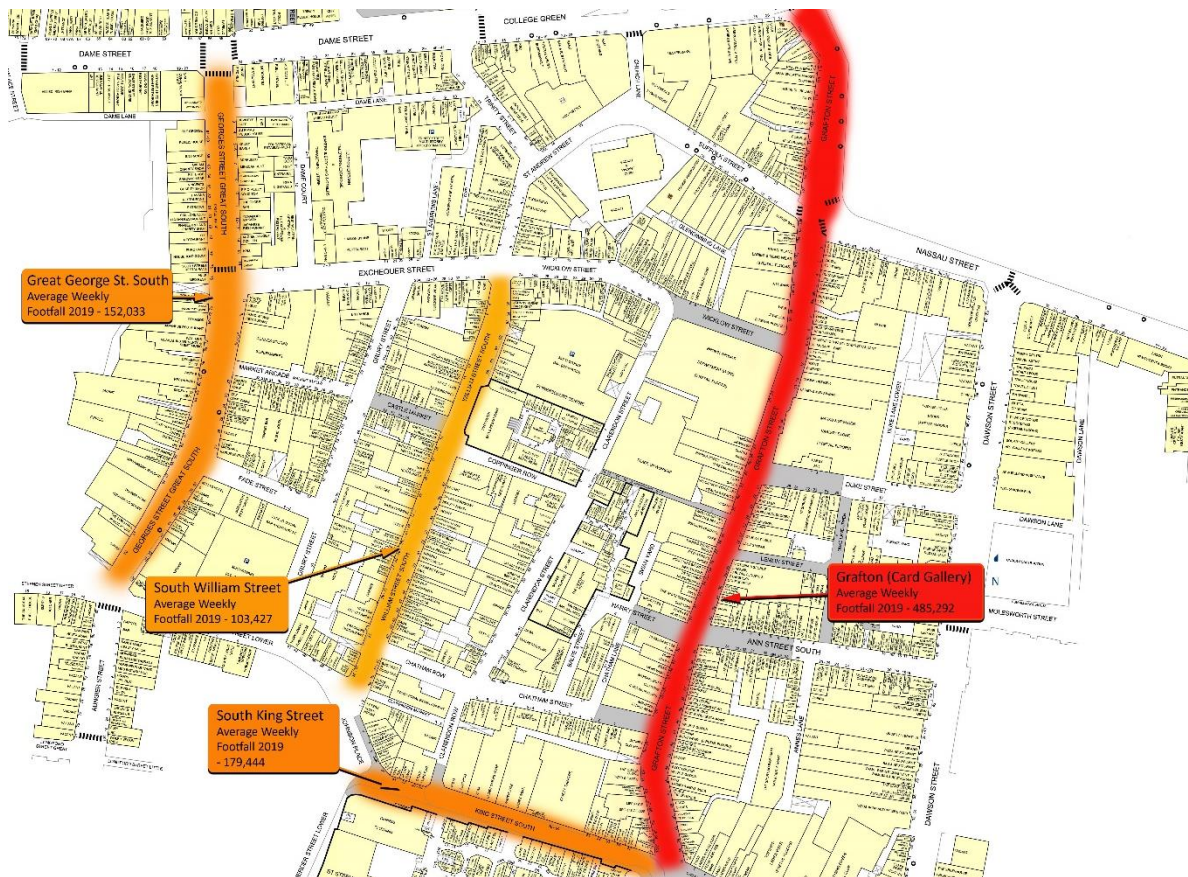


Map 8. North Retail Core Heatmap

Grafton Street Pedestrian Flow

Grafton Street generates the greatest level of footfall within the retail core, highlighting its position as the City's premier retail street. These levels of footfall are likely supported from the additional use of the street by tourists.

The south retail core heatmap (Map 9, below, see Appendix 1 for full page map) shows a greater spread of footfall through the hinterland of the Grafton Street area compared to Henry Street, indicating pedestrian movements permeating through the core. While the north core retail offer is largely confined to Henry Street, the south core retail area extends from Dawson Street to the east to South Great George's Street in the west. The area provides a large quantum of retail space housing a diverse tenant mix and the heat map indicates a greater east to west percolation of footfall through the core.



Map 9. South Retail Core Heatmap

Covid-19 Restrictions Effect on City Centre Retail

Chart 6 (see Appendix 2) shows changes in footfall levels within the retail core between 2019 and 2020. The data is taken from weeks 13 – 20 covering the Lockdown period from 27th March – 18th May. This aims to highlight the impact of Covid-19 on City Centre retail.

While all streets recorded significant decreases in footfall over this period, streets on the south side appear to have taken the worst hit, likely due to a scarcity of convenience retail in the area. South William Street recorded a 95% decrease in footfall. This is unsurprising given the concentration of bars on the street which saw full closure. Moore Street, Capel Street and Talbot Street saw the smallest decrease in footfall. These streets have a greater mix of convenience retailers positioning them as a source of essential retail services. Further restrictions against comparison retailers and, local travel limitations, the decline of tourism and a shift to work-from-home are all impacting on the City Centre's retail.

The Challenges for Department Stores

Recent years have seen a change in retailing patterns with a move away from larger format stores in particular the department store format. This has in large been brought about by the increased ease of access to online retailing providing direct access between retailers and customers supplanting the historic requirement for large scale varied offers within one store. With retail evolving towards experience, a retailer's physical presence becomes more about the brand and this is best provided through own store operations rather than being a concession within a much larger offer. In Dublin City Centre this has been manifested in the closure / repurposing of:

- Debenhams, Henry Street – Recently closed, likely to be partially repurposed.
- Debenhams, Jervis Shopping Centre – Repurposed into a number of MSU units, likely to be further sub-divided.
- Clerys, O'Connell Street – Redevelopment underway to create mixed use scheme with MSU units, offices, & hotel.
- Boyers, North Earl Street / Talbot Street – Repurposed into single brand sports store.

The above has created the opportunity for a number of MSU's which are in short supply in the City Centre.



Image 6, Ilac Centre



Image 7, Dublin Central



Image 8, St. Stephens Green Shopping

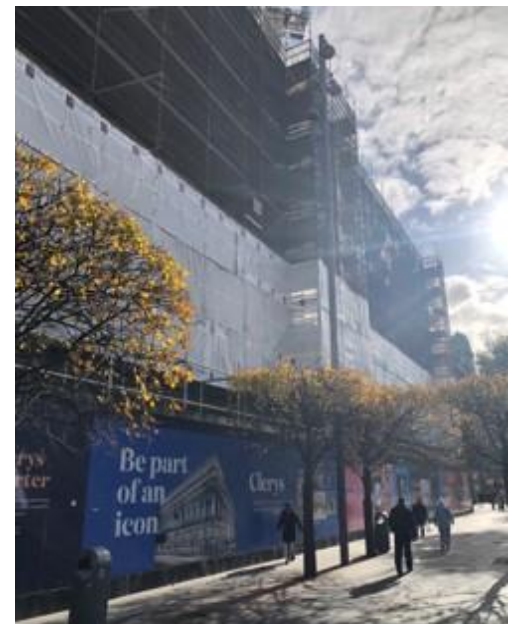


Image 9, Clerys

Reduction of Retail Area

The prospect of significant new retail within the City Centre has diminished greatly. The most ambitious scheme was the approved scheme for Dublin Central which had 61,000 sq.m. of retail space over three trading levels and incorporated a new 25,000 sq.m. John Lewis department store. This site remains undeveloped, but the current owner, Hammerson has recently confirmed their plans to significantly pivot the scheme from a retail led design to one focussed on offices, residential and hotels with a much-reduced retail component.

Similarly, Clerys, which had been a department store since 1922, is now being converted to retail on the lower floors and offices and a hotel above, roughly halving the retail component. In the Chatham & King development off Grafton Street, the first floor has been converted from retailing in the original design to offices. We understand a similar approach has been adopted in the development on the corner of Nassau & Dawson Street. The proposed redevelopment of St. Stephens Green Shopping Centre, which has been in design for a number of years, is likely to see the upper floors converted to office or hotel.

The trend is clear from a position 15 years ago, where developers were actively pursuing retail development opportunities in the key retail areas converting office to retail such as the South King development that now houses H&M and Zara. This trend has now reversed where both existing and proposed retail developments within the City Core are pivoting away from the sector towards offices and hotels and we expect going forward, increasingly to residential development.

The outcome of this trend has been a stagnation of retail supply in Dublin City Centre against a backdrop of a dramatic increase in the supply of retail in the suburbs. The indicators are for these trends to continue and to be exacerbated going forward.

Dealing with Vacancy

The demise of two large department stores in the City, Debenhams and Clerys, creates an opportunity for new retailers within the retail core. The basement, ground and first floors are likely to be recycled as MSU's which have long been a deficiency in the City's retail infrastructure. This process is evident in the new approved scheme at Clerys. This trend has already been seen with the sub-division of the old Debenhams store in Jervis Street and the new Next store on Henry Street which was carved out of the Arnotts store. The facilitation of this type of development is likely to be easier than amalgamations of smaller stores which requires an alignment of ownership, vacancy, and planning to come to fruition.

6. WHO ARE THE CUSTOMERS?

Dublin Growth Dynamics - POPULATION

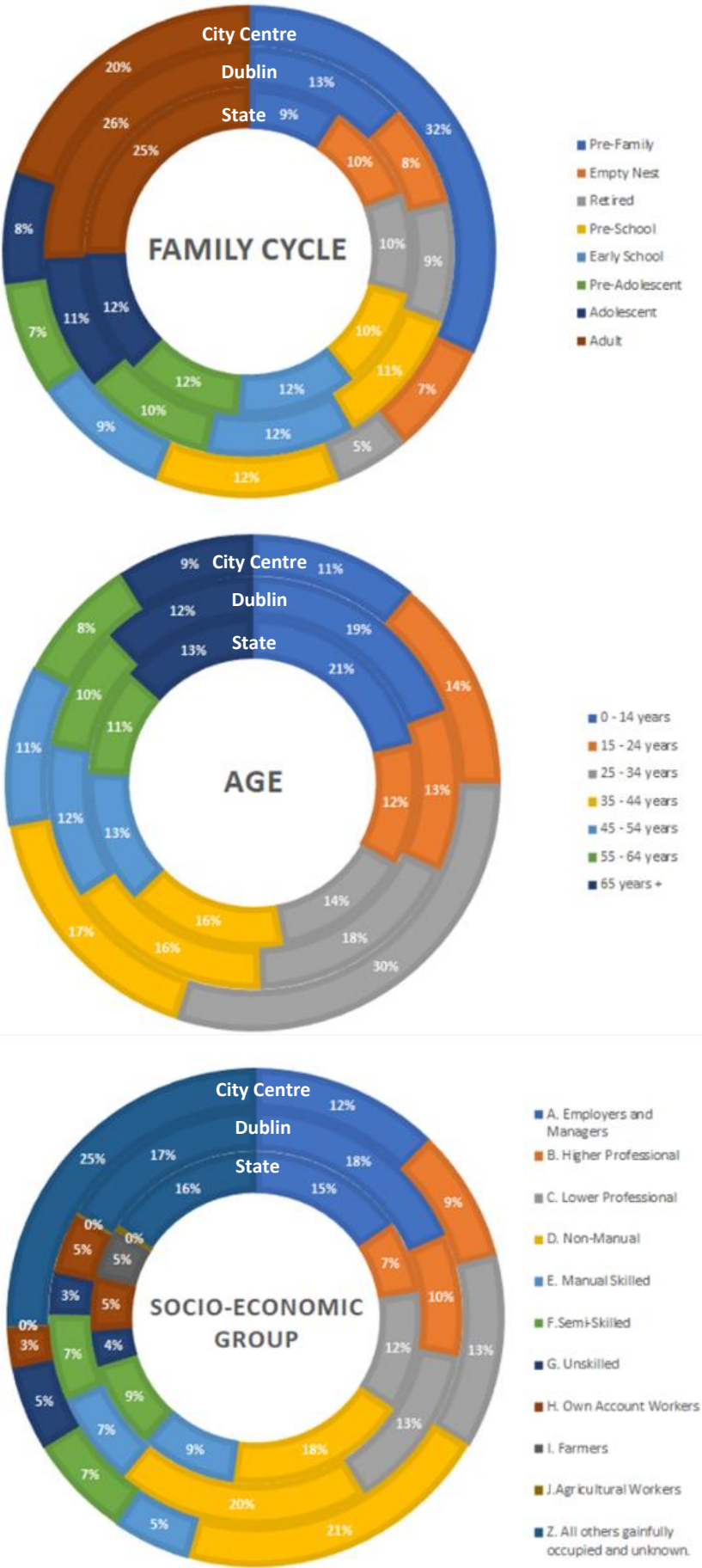
Between the 2006 and 2016 census, a general increase in the Irish population occurred. While a population increase can signal an increase in consumer demand, the population within the canal ring is still not at a level that can viably support the City Centre retail offer on its own.

POPULATION	Census 2006	Census 2016	Change
Dublin City Centre (inside canal ring)	146,000	169,000	+16%
Dublin	1,186,000	1,346,000	+13%
State	4,235,000	4,758,000	+12%

To support City Centre retail, the 1.35m Dubliners living around the City must be recognised as a core customer base and initiatives must focus around promoting the City Centre as an attractive alternative to the M50 centres that are also seeking to capture their custom. Advantages such as the City Centre's accessibility to both public and private transport, access to large car parks, linkages to culture and the unrivalled food & beverage offer all need to be communicated to potential customers.

Chart 7 on the following page uses population data from the Census 2016 to examine the difference in the characteristic of the residential populations in Dublin City Centre (inside the canal ring), Dublin and the State. The analysis highlights that Dublin City Centre's population is largely characterised by a young (45% aged 15-34), pre-family (32%) population. As we look through the various family cycles the City Centre is underrepresented in all but the pre-family and pre-school category. ABC socio-economic groups comprise just over one third of the resident population in both Dublin and the City Centre, indicating a concentration of professional workers in the Dublin area.

Chart 7. Breakdown of family cycles, age groups and socio-economic groups in the City Centre, Dublin and State



Dublin Growth Dynamics – STUDENTS

STUDENTS	Enrolment
Dublin (inside canal ring)	125,000

Dublin City Centre contains multiple tertiary educational institutes attracting a student population, as recognised by Dublin City Council, of 125,000 college students enrolled within the canal ring alone.



Image 10, Trinity College Dublin

From 2005 there has been a steady increase in attendance levels in City Centre tertiary institutes. International students provide a source of overseas spend and it may be prudent for DCC to collaborate with the universities in promoting the City Centre in any promotional or prospectus information for international / Erasmus students. The student population can provide support to the hospitality sector and promote vibrancy and activity within the retail core outside regular business hours. Irish students from outside of Dublin and International students are recognised to be particularly attractive to the retail and hospitality sectors.

Dublin Growth Dynamics - TOURISM

Tourism (Visitors)	2005	2018
Dublin (Overseas)	4,000,000	6,300,000
Dublin (Domestic incl. N.I.)	1,200,000	2,000,000
State	7,000,000	11,000,000



Image 11, Guinness Brewery

Dublin is an attractive destination for both domestic and international visitors alike, with a concentration of cultural attractions. According to Fáilte Ireland, in 2018 over six million overseas tourists visited Dublin, generating over €2.1bn of spend in the capital. A further 2m visits were made to Dublin from domestic residents (Republic of Ireland and Northern Ireland) with domestic tourism worth a further €442m to the City.

While the unprecedented impact of Covid-19 has largely brought international tourism across the globe to a halt, Dublin may benefit from a short-term increase in domestic tourism (pending domestic travel restrictions) due to the domestic retention of funds which would have otherwise be spent overseas (some €6.5bn) and the promotion of the 'staycation'. The linkage between the tourism sector and the retail core is mutually beneficial for Dublin City retailers and its tourism industry.

Dublin Growth Dynamics - HOTELS

Hotel accommodation in Dublin has doubled over 15 years. With an increase from 123 to 240 Hotels resulting in an increase of 14,000 keys to 24,000 keys. 1,500 keys were added to the stock in 2019 alone with the sector seeing considerable activity in the latter half of the 2010s to meet industry demands. This development was earmarked to continue into the first half of the 2020s with both extensions to existing stock and construction of new stock in the pipeline. The impact of Covid-19 has led to a significant fall in occupancy rates, with a sub 16% occupancy rate recorded across Europe.



Image 12, Shelbourne Hotel

Dublin Growth Dynamics – OFFICES



Image 13, 2WML

Based on average office occupancy rates and City Centre vacancy rates, approximately 185,000 office workers are employed in Dublin's City Centre, with 82,000 in the IFSC and Docklands alone. While office workers will largely be unavailable to retailers during business hours, retail opportunities exist outside of work hours and during breaks. Office workers may be particularly conducive to food & beverage retail and convenience retail during these periods, largely limiting the need for visits to Category 1 streets. The reintroduction of office workers to the City Centre may provide a lifeline to food & beverage businesses in a post-Covid environment.

The ability to attract office workers into the public realm and retail cores may provide for incidental comparison purchases by placing the consumer within proximity of retail space. Attracting office workers into the core may further activate the streetscape and vibrancy of the retail core. Attraction may come through the provision of public amenities which prompt journeys out of the office or promote dwell time on the way to or from the office. Such initiatives could include the provision of informal lunch spaces or green spaces to enjoy nature or coffee carts/food trucks. The creation of large-scale campus style workplaces by Technology, Media & Telecom (TMT) tenants in the City often contain onsite amenities, limiting the incentive for employees to venture off site during working hours.

The IFSC and Docklands area has seen intense development of brownfield sites introducing of over 610,000 sq.m. of office space to the market since the 1990s and has provided a hub for Dublin's financial, legal and tech sectors. Since 2015, there has been over 215,000 sq.m. of offices constructed in the Dublin Docklands, 153,000 sq.m. in the south Docks and 60,000 sq.m. in the north Docks. There is currently a further 144,600 sq.m. under construction (80,600 sq.m. in north Docks & 64,000 sq.m. in south Docks). Referred to as 'Silicon Docks', the space is dominated by TMT tenants including Google, Facebook, Salesforce, Hubspot, Stripe and Indeed. The TMT sector accounted for almost 55% of take up in 2019 with demands for large floorplates by this sector.

Increased Sustainable Travel

Office Stock vs Commuter Footfall

Chart 8 on the following page shows the relationship between the number of commuters crossing the canals into the City Centre during peak AM traffic times (7:00am - 10:00am) and the quantum of office space completed. It must be recognised that the data was collected during peak morning traffic on a weekday, suggesting the majority of these commuters are likely travelling into the City for work. The Global Financial Crisis saw a halt in the delivery of office space between 2009 – 2014. Commuter numbers also saw a decline during this period, driven by a sharp increase in unemployment rates over this period. As employment began to recover, a delayed increase in development occurred. This highlights the significance of the City Centre office market in its ability to bring people into the City Centre.

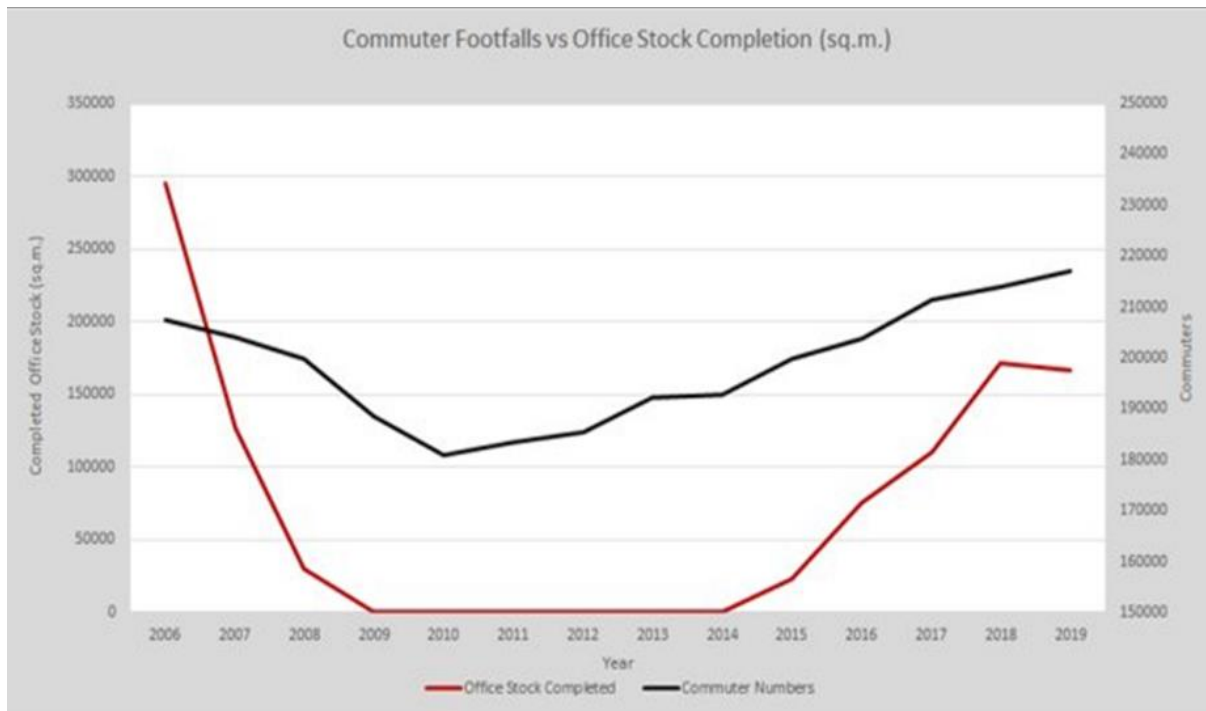
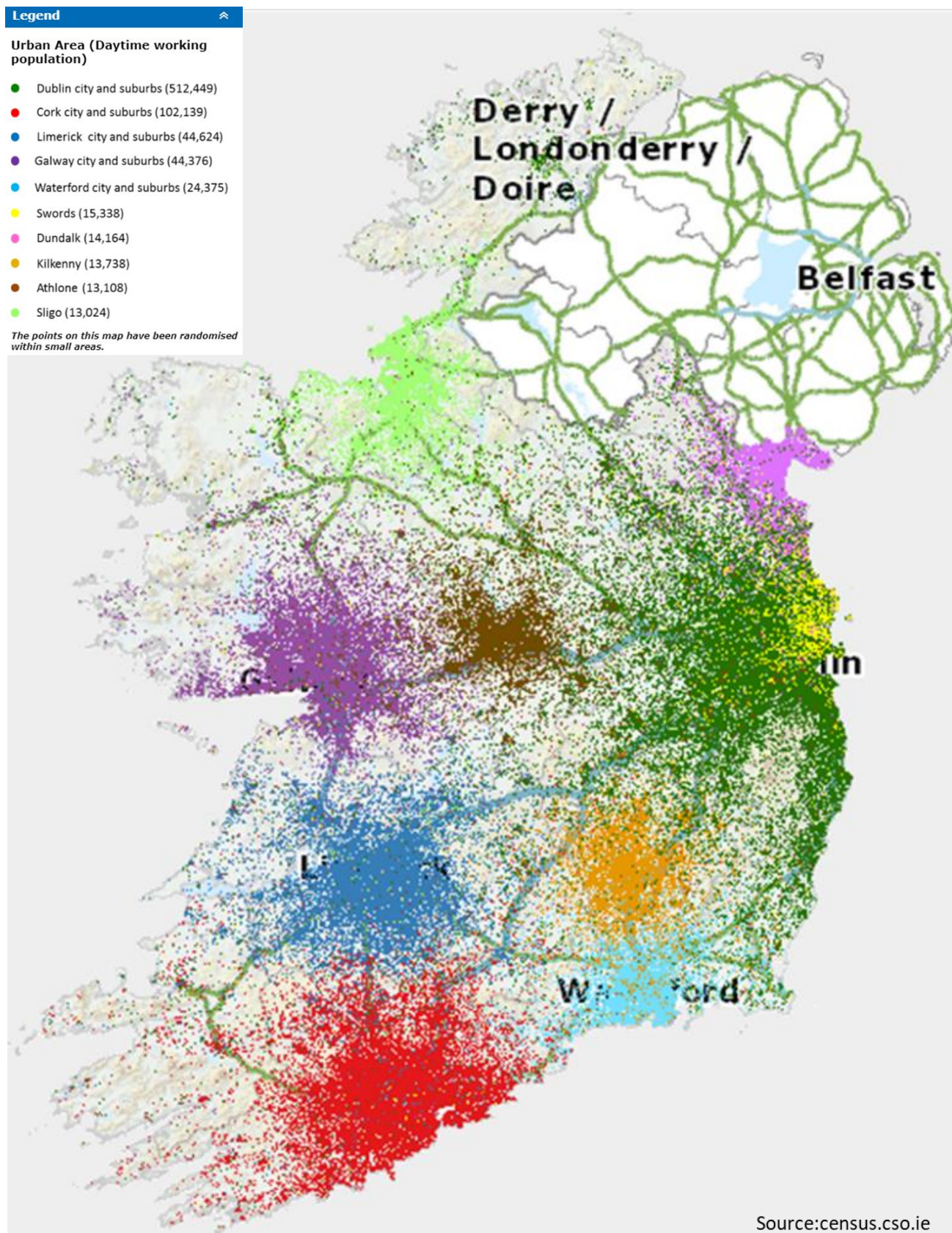


Chart 8: Commuter footfalls vs office stock completion (sq.m.)

Commuting Workers

Prior to Covid-19 over 0.5m commuted into Dublin (Dublin City and suburbs) to work every day, with an estimated 250,000 persons working within the City Centre. What is significant is that the employment catchment pool reaches into the midlands, the south-east and to the north, the extent of which is represented on Map 10 on the following page. This allows the potential for Dublin City Centre to access a greater customer base than is available within the County alone. As this pool is comprised of commuters, it must be recognised that the purpose of their trip is for work and that the ability to access spend will be largely restricted to times outside of regular business hours. Initiatives which ensure an easy access to retail and leisure experiences may encourage spend outside of working hours. All these workers are potential advocates for Dublin City Centre's retail and leisure attractions within their own communities.



Map 10. Origin of daytime workers in key centres, Ireland

7. MARKET TRENDS

You can now work, shop & be entertained from home.

Necessity is being removed as a motivation to visit City Centre's.

It must be replaced by desire to visit.

Online Retailing

The growth of online retailing has been the pervading narrative in the retail sector for over a decade. The erroneous message that gets most coverage is that online retailing will take over from physical retail leading to empty shopping centres and desolate High Streets. The reality is more nuanced and deserves further examination in the context of analysing its potential impact on policy.



Online retailing has different impacts on different businesses, for example its impact on book, music, movie, and travel retailing has been dramatic with a considerable volume of this business now taking place online. This is logical as many of the products have migrated online. By contrast the impact of online retailing on coffee shops and hairdressers is negligible for the opposite reason. Most retailing falls somewhere in between where the retailer has the ability to sell a product either in store or online or through a combination of the two platforms e.g. by click and collect.

The vast majority of retailing globally still takes place in physical stores and most retail businesses will combine an online presence with a physical network of stores with the split between the platforms dictated by the nature of the product or service they sell, their target customer and their own resources. The true trend is to omni-channel retailing with retailers combining a physical network of stores with an online presence.

The Growth of Environmentally Aware Consumerism

Another dynamic trend that is occupying the minds of retailers and especially fashion retailers is the growth of environmentally aware consumerism. In the recent past the market has been dominated by fast fashion retailers, low-cost fashionable clothing that

attracts consumers to make multiple and frequent purchases for clothing that is not designed or intended to last for a long period. There is a consumer reaction emerging against this phenomenon, where especially younger consumers are becoming more aware of the environmental impact of fast fashion purchases. The depth and durability of this trend is unclear at this point, but it is having an impact on retailers and their expansion plans.

It may also lead to a reaction against online retailing. The environmental costs associated with retailer to consumer direct delivery both in terms of carbon footprint, packaging and unwanted returns going directly to landfill may see this trend spillover into the online shopping growth pivoting this market more towards omni-channel retailing where the customer still interacts with the retailer online but also instore. It also fuels the growing shop local narrative that we have seen during the pandemic.

Experience Driven Trips

The growth and monetisation of experience as a key driver in the retail sector is a clear market trend. The ability to buy products and services online has the dual impact of causing brick and mortar retailers to up their game to make the in-store experience a value-added proposition for the customer, making it pleasant and rewarding to visit the store. This combined with the inability to experience certain things online mean that experiential attractions will be key to the future success of traditional retailing destinations.

Growth of Local

A trend that has accelerated dramatically during the pandemic lockdown has been the shop local movement. This is in part enforced by geographical constraints on people's movement and in part recognition of the importance of the local availability of products and services. Whether these trends will survive beyond the lifting of restrictions will be particularly relevant to traditionally largescale destinations such as Dublin City Centre.

The second element of this trend is the desire to avail of products which are not ubiquitous or generic. Finding a local coffee shop is more rewarding than visiting a chain, purchasing a



Image 14, Independent retailers,
South Great Georges St.

product directly from the maker can be more rewarding than one purchased and imported from the other side of the globe. Positioning Dublin City Centre within the shop local mind-set will be key going forward.

The Growth of Food & Beverage and The Night-time Economy

Another key trend in the market has been the growth of food & beverage. Across the retail sector and especially in larger shopping centres and town centres, food & beverage has become an increasingly important occupier of retail space. This is an international trend where retailers displaced by online competition have given way to operators who cannot trade effectively online such as cafes and restaurants. It is also a by-product of the growth in experience motivated trips where retail destinations are using food and leisure to attract shoppers.

This trend can be seen in the Grafton Street area of the City, where a food & beverage hub has developed at the South City Markets. This has created a positive dynamic for both Grafton Street's retail and the South City Markets, with both areas feeding off each other. A similar dynamic is also evident on Dawson Street.

The importance of this trend cannot be overstated in the context of Dublin City Centre's retail core's reliance on the office and tourism sectors for visitors / customers. Tourists by definition require food & beverage outlets. Office workers can be attracted to retail areas both during lunchtime and post-work by strong food & beverage clusters. The contrast between the strength of Grafton Street's adjoining food & beverage cluster and Henry Street's relative lack of supply may go some way to explain their relative performance.

8. STRATEGIC GOALS FOR DUBLIN'S RETAIL CORE

It is clear from the analysis carried out that Dublin City Centre's retail core faces a number of challenges. The competition from the five large M50 centres challenges the City Centre's position with suburban shoppers. The resident population within the City is relatively low and not of a sufficient level to support the current scale of retail in the core. The market trends associated with online shopping, the green agenda and local shopping represent challenges to all established retail locations and reacting to these challenges will be imperative for the City to survive and thrive going forward.

Dublin's retail core has become increasingly reliant on the footfall generated by tourism, students, and offices workers. This reliance has been laid stark by the impact of Covid-19 restrictions, which have had a disproportionately negative impact on Dublin City Centre compared to other retail destination across Ireland.

As a consequence of these trends, Dublin City's retail core should have the following as strategic goals:

- The maximisation of the attraction of the retail core for office workers, tourists and students
- The attracting of suburban shoppers into the City by capitalising on its unique characteristics

The more attractive the City is to shoppers the more attractive it is to retailers. The more diverse and interesting the retail on offer the more attractive the City will be to shoppers, residents, tourists and workers.

Dublin is a wealthy and successful City by international standards. Its retail experience has not developed in the same way the office and tourism sectors have grown over the last decade. The opportunity that Dublin represents for retailers needs to be communicated to the market and we have sought to include recommendations to enhance Dublin as a destination for consumers and retailers alike.

9. RECOMMENDATIONS & ACTION POINTS

A. Capitalise on City's Real Experiences

There is a distinct contrast between the experience in the historic City Centre and that of purpose-built shopping centres. This section aims to highlight how through (1) the creation of dwell zones through the optimisation of the City's external spaces and (2) through enhancing how visitors to the City interact with cultural offers, can benefit the retail core. Overall, the benefit that comes from developing the experience one can have within the City should be enjoyed by both shoppers and visitors and City retail stakeholders.

Capitalise on Organic & Genuine Experience

Dublin City Centre has evolved over time, developing a diverse mix of architecture, use patterns, streets and parks that are unique. By contrast, the competing suburban shopping centres are an artificial construct representing the latest in retail design as and when they were built or refurbished. This contrast of a genuine versus artificial experience is Dublin's key advantage in the battle for suburban customers. A clear consumer trend is the desire to find that different experience reflecting their own desire to be unique. Dublin's retail core can benefit from the activation and marketing of the elements of Dublin that make it unique. This dovetails with the growth of experiential retail.



Image 15, Blanchardstown Shopping Centre

Capitalise on the City's External Spaces

The City Centre has an array of public spaces including parks and squares. Spaces that are attractive and well utilised enhance the City's public realm, such as Merrion Square which is further enhanced by its food markets, open air cinema events and open-air art gallery. The proposed plaza at College Green represents another important opportunity for the City's retail core as it is directly on the route between Grafton Street and Henry Street. A dynamic approach to these public spaces utilising them for events and pop-ups will fully capitalise on this competitive advantage.

(1) Opportunity for Micro Dwell Zones

A dwell zone is an area in the public realm that attracts and/or engages people and encourages increased dwell time in this area with the overall focus of enhancing the attractiveness and vibrancy of the streetscape. Dwell zones may be non-permanent in their nature, occupying a space for a temporary period but providing a point for the public to gather and interact. Dwell zones may also have a more permanent or fixed nature,



Image 16, Dwell Space, Sofia, Bulgaria

being suitable for areas in which the local authority wishes to promote increased activity or provide amenity.

Dwell zones may provide a functional role, such as seating, a retail role, such as coffee carts or be unique and engaging, such as interactive street installations in order to draw people to the space. Dwell zones may encourage movement and activity on the streetscape and may increase pedestrian traffic on retail streets. The licensing of space to commercial operators (e.g. coffee carts) may enhance the retail offer in an area while generating additional revenue for DCC.

The promotion of defined dwell zones within the City Centre retail core where the potential for new park space is somewhat limited, is in keeping with City Council's Parks Strategy which seeks to create an open space network that is both meaningful and connected. Below are examples of spaces in the City that may be targeted as dwell zones by DCC.



Image 17, Pearse Street



Image 18, South King Street



Image 19, Stephen Street



Image 20, Castle Market



Image 21, Suffolk Street



Image 22, Temple Bar



Image 23, Palace Street



Image 24, Wicklow Street



Image 25, Duke Street

Dwell Zone Case Study – Lisbon, Portugal

Lisbon policy makers approach public space development with the idea that horizontal investment leads to vertical investment, believing high quality public spaces will attract private sector investment and support a pedestrian friendly environment. The strategy focuses on highly visible locations which appeal to residents and visitors, locations which support other strategic objectives such as improving access to green space, high impact, low cost (in terms of outlay and running costs) interventions and "opportunities where ownerships and interests can be pooled for maximum impact and benefit, including those of both other public bodies and the private sector" (Academy for Urbanism: Valuing the Public Realm) such as BIP/ZIP strategies.



Image 26, Portable Gardens, low cost, low maintenance garden and seating



Image 27, Civic Stage, an interactive public performance space.

A BIP/ZIP strategy like that applied in Lisbon provides an initiative for stakeholders in an identified neighbourhood to take collective ownership of the public realm and promote strategies and improvements which they perceive will enhance their neighbourhood as a place to live, work and trade from. In key shopping streets this may allow for retailers and landlords of retail premises to work collectively to deliver industry led improvements for the public realm that promote an improved trading environment. Further engagement from those who live and work or operate commercial businesses from these locations may provide further insights as to what encourages pedestrian activity in these centres.

Dwell Zone Case Study – Christchurch, NZ

Christchurch City Council supported projects through the Enliven Places Programme and community-led developments to "transform underutilised sites into vibrant and welcoming public spaces" (ccc.govt.nz). These projects are temporary installations and events with are aimed to enhance amenity and activity. Projects may include offering rates incentives for property owners, to offer vacant space for community projects, encouraging artworks and creative installations including on construction hoardings, street improvements and wayfinding schemes that support movement and discovery and placemaking. Activation initiatives such as pop-up gardens, interactive art installations and unique outdoor furniture should also be supported. These initiatives create dwell spaces through pedestrian engagement. Many of these initiatives are to reactivate the City Centre after devastating earthquakes in 2010/11.



Image 28, Enliven Places programme initiatives: Sheep traffic bollards, interactive art installation, unique public seating.

Action Point No.1

We are recommending an audit be carried out of potential dwell zones within or adjacent to the City's retail core. Specific focus should be on areas which link the retail areas to each other, to transport nodes, to cultural attractions and to locations with potential customer bases such as concentrations of office workers or students. Once suitable sites have been identified, the Council could reach out to individual businesses within the identified areas and work with them to activate these sites.

(2) Incorporate Cultural and Retail Experiences

Dublin City Centre features four of the 10 top fee charging attractions in Ireland, as recognised by Failte Ireland: Guinness Storehouse, Dublin Zoo, Book of Kells and St Patrick's Cathedral. Dublin City also features four of the top 10 free attractions in Ireland, as recognised by Failte Ireland: National Gallery, IMMA, National Museum of Archaeology and the Science Gallery at Trinity College.

These attractions saw a combined 7.8 million visitors in 2018. Furthermore, EPIC The Irish Emigration Museum was recognised as Europe's Leading Tourist Attraction 2019 & 2020 at the World Travel Awards. This highlights the significance of Dublin City's cultural offer as a means to attract people from outside of the City. The major cultural attractions in the City follow an east-west path with the majority of attractions found within, or adjacent to the City Centre retail core. This highlights an opportunity to incorporate a cultural trail and shopping trail within the City Centre, fostering a multi-activity trip environment, bringing increased spend to retailers aiming to enhance the visitor experience. This linked trail aims to promote multi-activity trips into the City Centre, allowing retailers to access spend from those visiting the City's cultural attractions. This may foster an overall greater retail experience within the City, with a defined culture trail incorporated with the shopping trail promoting access to retail and hospitality businesses. A further benefit of this trail is improving the vibrancy of the streetscape by increasing pedestrian activity within the retail core.

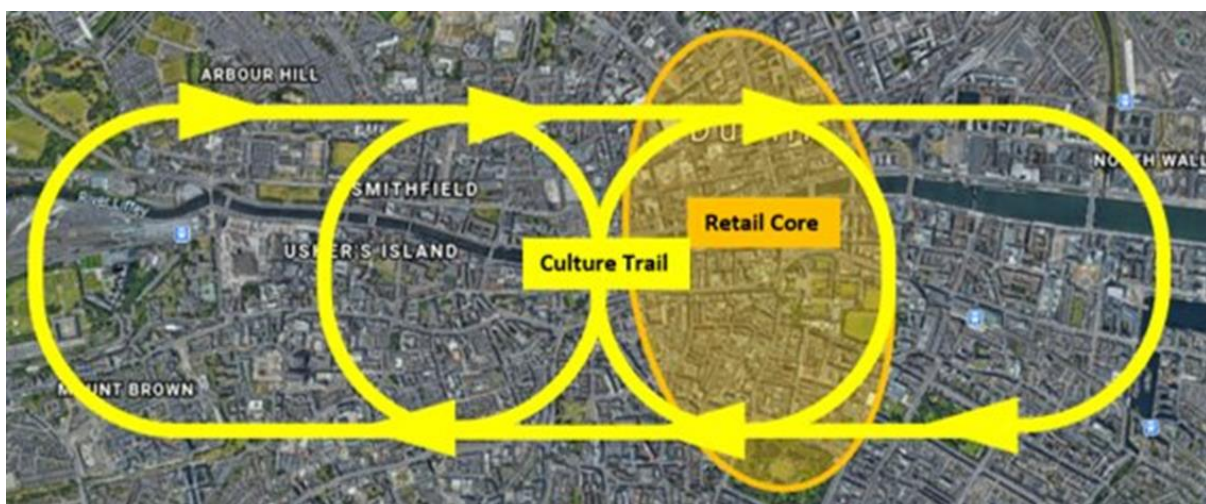


Image 29, Interaction of cultural and retail experiences

A culture trail may be further tied to Georgian Dublin and The City of Literature UNESCO recognitions. Defined trails incorporated in and around the City retail core may allow for managed pedestrian flows, activation of spaces in the public realm and bring spend to retail and hospitality operators within the retail core whilst providing amenity or service for visitors.

A pedestrianised culture trail may be well suited due to the City's compact nature and generally flat topography and promotes sustainable movement throughout the City. It has the potential to appeal to both international and domestic tourists as well as attracting suburbanites and providing cultural amenity for those living in the City. It would increase the City experience overall. A successful international example is the Freedom Trail in Boston which directs tourists around the City focusing on key locations associated with the struggle for American Independence. There is an opportunity for multiple similar trails across Dublin focusing on Irish Independence, architecture, commerce, education, and literature which would interact naturally with Dublin's retail core.



Clockwise from top left: Image 30 – 34: MOLI, Temple Bar, Georgian Doors, CHQ / EPIC, Jameson Distillery

Action Point No. 2

Identify key cultural elements encapsulated in Dublin's City Centre and carry out an audit of points of interest across the City Centre. Once these points have been recognised, identify a coherent and functional trail through which these can be connected, with a focus on activating streets within the retail core where appropriate. Wayfinding signage or markings or an alternative interactive method, such as a phone-based app (as can be used with the Boston Freedom Trail by way of example), should be invested in to activate the trail(s). Trails should be marketed appropriately to both international and domestic persons to promote engagement.

B. City Activity Zones

The City currently has a number of activity zones, highlighted on Map 11 below, such as the retail cluster in Henry Street and in and around Grafton Street. Added to this are successful cultural clusters such as Trinity College and Dublin Castle. South City Markets and Temple Bar are food & beverage clusters. There is an opportunity to develop Capel Street as a further food & beverage cluster. Adjacent to these clusters are two largely underutilised areas, the North Lotts area and Westmoreland Street. Given the evolution of the retail market in the age of the internet, it is important not to see these activity zones as mutually exclusive. They should be allowed to cross pollenate uses, retailing within food & beverage areas and vice versa. Combining this approach with the benefits of agglomeration is the ideal outcome for the City. Areas with a sufficient concentration of likeminded uses could be promoted in such a way that allows them to become destinations for certain activities, whilst ensuring that they do not become mono-functional. The South City Markets currently strikes this balance, it is a food & beverage hub but has a strong representation of smaller retailers that complement its core use.



Map 11. City Activity Zones

Benefits of the Food & Beverage Economy

The presence of a strong agglomeration of food & beverage operations adjoining a retail area has the benefit of increasing dwell time, trading hours and catchment penetration by attracting office workers, students and tourists. The retail area is more attractive to shoppers by virtue of the adjoining food & beverage offer and in turn night-time focussed uses gain the benefit of daytime trade from retail customers. This is particularly relevant in Dublin where office workers, students and tourists make up an important contingent of the available shopping population within the City Centre.

As identified in the stakeholder feedback, the south City retail core benefits from a much higher level of adjacent night-time activity than the Henry Street area. The promotion of a more diverse mix of uses in the Henry Street area would enhance its overall offer and attractiveness to customers.

In addition to the Clerys and Central Bank redevelopments, development opportunities including Dublin Central, the Fruit & Vegetable Markets, and North Lotts may provide elements of food & beverage, leisure and retail alongside other uses such as offices, hotel and residential.

Outdoor dining allows streetscapes to be activated and may be best suited to areas where food & beverage operators are clustered and as such, permission should be granted on a location focused basis.

Action Point No. 3

Promote diversity of uses in the Henry Street area with a focus on food & beverage to enhance the appeal of the north retail core.

The benefits outdoor dining can bring to a streetscape should be recognised and should be granted on a location focused basis.

The Opportunity Zones

The inactivity of the North Lotts area and to a lesser degree Westmoreland Street represents key opportunities within Dublin's retail core. The North Lotts area can help invigorate the Henry Street area which lacks a South City Market equivalent. The activation of Westmoreland Street would fill a missing link in the retail experience between Henry Street and Grafton Street.

Opportunity for North Lotts

Can North Lotts be Henry Street's South City Markets?



Image 35-38: North Lotts and Strand Street, Dublin

Case Study: Laneways, Melbourne, Australia

Initiatives addressing the enhancements of the public realm and improvement of the pedestrian experience aimed at making Melbourne's CBD a more attractive place to live, work and shop saw some laneways upgraded from purely function service lanes to iconic boutique retail, dining, and culture hotspots in the City. Melbourne's laneways provide a unique space for social interaction while supporting the vibrancy and vitality of the City through an enhanced public realm and improved pedestrian circulation. Local policy promotes the inclusion of art, landscaping, street furniture, activity spaces and the like to support a vibrant environment. Many laneways are utilised as al fresco dining areas. New developments are encouraged to provide small scale tenancies at ground level and this supports a boutique trading environment within these laneways often occupied by local operators. The laneways also provide an opportunity for small retailers to enjoy a CBD tenancy without facing the cost of main street rental rates, allowing for a more diverse retailing environment.

The activation of North Lotts and Strand Street aims to address the DCC objective in mobilising ignored lanes and streets. A policy suggestion may be that North Lotts and Strand Street are recognised in policy in order to promote small tenancies to cater for local businesses. On street dining and extended opening hours may be encouraged to support this trading environment.

Local policy recognises four core values, outlined on the next page, which contribute to the lanes success as a pedestrian environment in the Melbourne CBD (note that any new development must not impede essential servicing).



Image 39, Map of Melbourne's Laneways

Connectivity

Physical Connection through a city block.



Image 40, Hosier Lane, Melbourne

Views

From the lane's public realm towards a connection lane street or landmark.



Image 41, Degraes Street, Melbourne

Elevational Articulation

Architectural character of the buildings and the aesthetic and spatial interest to the public realm.



Image 42, Centre Place, Melbourne

Active Frontages

Frontages that provide for visual and physical interaction between the public space and the building.

Action Point No. 4

Identify underutilised and inactive City Centre streets and lanes. Develop an initiative to support the rejuvenation of these areas through the inclusion of art, landscaping, street furniture, outdoor dining, and activity spaces. Include in the initiative, an incentive to promote the small-scale tenancies targeted at local operators.

C. Street Hierarchy

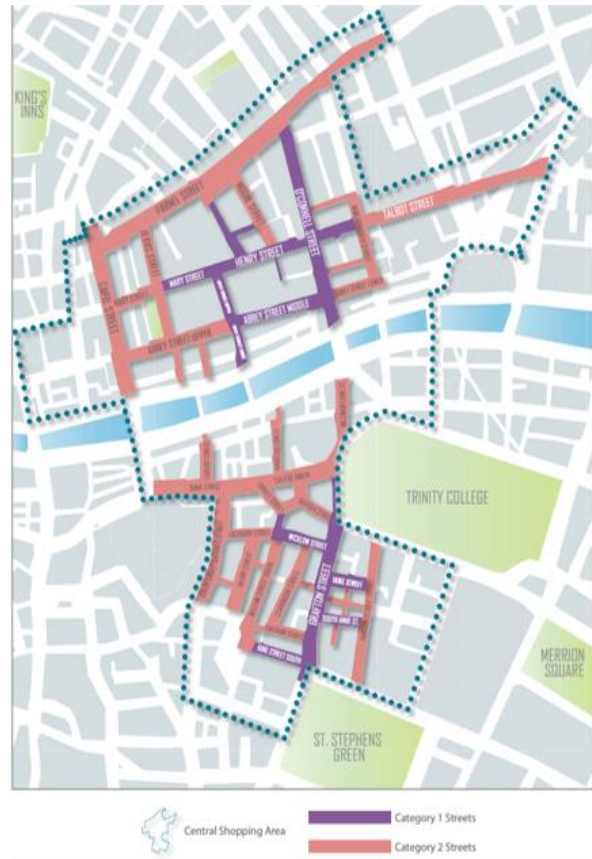
Category 1 & 2 Streets

Overview

The current Development Plan (2016–2022) allocates categories 1 & 2 status to key shopping streets within the City's retail core aimed at promoting retail trading to varying intensities. These streets are highlighted accordingly on Map 12.

The Category 1 designation focuses on delivering a predominately high-order retail tenant mix at street level. Category 1 streets aim to promote premium retail within Dublin. Under Category 1, low-order retail services are prohibited and non-retail services may be provided for, on merit, provided they are complimentary to the main shopping focus.

Category 2 streets comprise key retail streets within the Grafton and Henry Street environs and apply to streets where there is an existing mix of operators or where there is a potential for increased development of the streets retail character. Category 2 streets aim to promote a more integrated mix of both retail, hospitality and leisure, providing the primary retail function is sufficiently supported.



Map 12. Principal Shopping Streets – Dublin
City Council Development Plan 2016-2022

Categorisation of Streets – Context

When the categorisation of retail core streets was first considered in the 1990's, the narrative concerning the retail sector and the pipeline of retail development was significantly different to today. Changes in market trends as highlighted and economic events, being the Financial Crisis and Covid-19 Pandemic, have had a significant influence over how people shop and how retailers operate their businesses.



Image 43, Street frontage on O'Connell Street, part of the Dublin Central Site

Category 1 Streets

Result/Effectiveness/Policy Outcomes & The Current Retail Environment

The current retail environment on Grafton Street is one which is not wholly aligned with the current objectives. The trading restrictions have seen existing traders who fall outside the Category 1 band holding onto the space they have with fear of losing a site in the City Centre's prime retail area.



Image 44, Mixed use building, South King Street

While the allocation of retail space on Henry Street is somewhat consistent with this policy target, where higher order retail accounts for the majority of space and units occupied (excluding department stores) the same cannot yet be said for Grafton Street. Higher-order retail is not commanding the same dominance as it is on Henry Street, a concern as Grafton Street is flagged as Ireland's premier retail destination. The finer grain of Grafton Street may be contributing to a more balanced distribution of retailer types along the street.

Action Point No. 5

Category 1

It is suggested that the extent of Category 1 streets be reviewed to be aligned with modern retail demands and requirements and to allow for the City retail core to evolve into an experience focused shopping destination. This may be done by focusing the Category 1 allocation to only Grafton and Henry Street and converting the remaining Category 1 streets to Category 2. This will allow the surrounding streets to be promoted for activities consistent with developing the City Centre experience through cultural, food & beverage and leisure offers complimentary to higher order comparison. An additional benefit of this will be increasing the occupier pool for retail core space, subject to the Category 2 controls, which may address vacancies in the retail core that may arise from the Covid-19 Pandemic and resulting change in economic conditions.



Image 45, Higher order comparison, Grafton Street

Category 2

The scale of the area covered by both Category 1 & 2 looks overly ambitious in 2020. When the policy was introduced originally there was a period of rapid expansion in the retail sector. This was replaced by contraction and then relative stagnation. It is unlikely, looking at the market trends, that a large-scale expansion of the retail footprint within Dublin City Centre will happen in the short to medium term. This would suggest that the areas covered by the Category 1 & 2 streets be needs to be significantly reduced. We have highlighted above where we feel some of the Category 1 streets should be reallocated to Category 2. There is also merit in considering the removal of Category 2 status from the streets that are remote to the current retail core.

D. Linkages & Connectivity

Improve Connectivity

- It is necessary to improve the linkages between the City retail core and its key potential customer pools
- Improve the connectivity between the two principal retail areas and:
 - Suburban transport routes
 - Office clusters
 - Cultural attractions
 - Each other



Image 46, Multiple modes of transport active within the City Centre

Improving Access to the City Retail Core

Dublin City Centre is well served by transport infrastructure, with transport links for all major transport methods radiating from the City Centre, through the suburbs and expanding across Ireland. It is important that this accessibility is promoted and that transport nodes in the City Centre are easily linked to the retail core for pedestrians.

The Canal Cordon Report 2019 highlights the preferred commuter transport methods into the City Centre (data based on people crossing the Canal into the City Centre during peak AM traffic times: 7:00am – 10:00am). These findings, shown on Chart 9 (see Appendix 2) highlight commuter behaviour, the popularity of sustainable transport

methods among commuters and provide an insight to the infrastructure available to support access to retail from outside of the City Centre. Rail and Luas combined have the ability to service more than 50,000 persons. Both Luas lines run through the heart of the City's retail core, providing a direct route of access between the suburban south and west Dublin and the City retail core. Plans to expand the Luas north should allow greater access to City Centre retail areas for suburban Dublin residents. Additionally, multiple bus networks access stops situated in proximity to Henry Street and Grafton Street.

As of 2019, public transport accounts for over 50% of commuter journeys into the City Centre. Sustainable transport methods (public transport, walking and cycling) account for 72% of journeys, up 11% from 2006, with cycling seeing a threefold increase in uptake between 2006 - 2019. This increase may prompt strategies to encourage retail activities amongst these travellers. Such strategies may include provision of bike pumps alongside stands, drop points or lockers for purchases. The bike parking in Drury Street Car Park could be enhanced to provide these facilities. The location of bike racks should be such as to not interfere with the desired retail streetscape or to create a cluttered appearance or interfere with the access to shops.



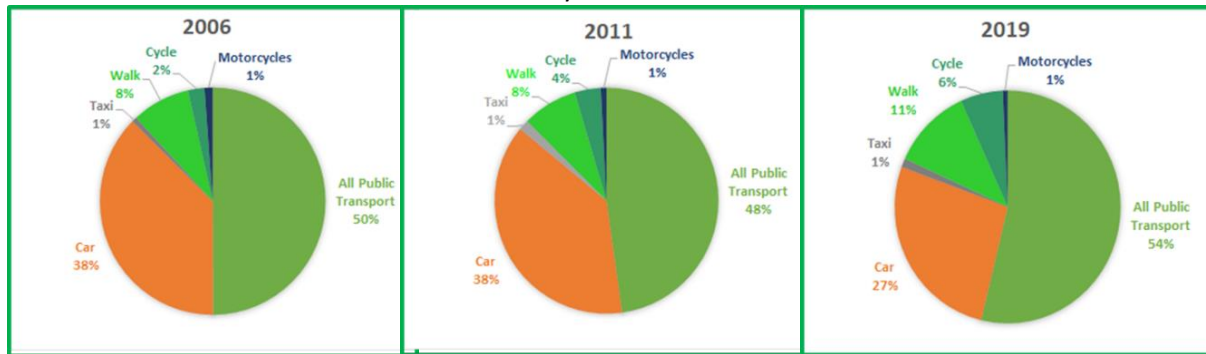
Image 47, Bike Pump & Repair Stands, UCD, Dublin



Image 48, Bike Pump & Repair Stands, Christchurch, NZ

Travel by private car now represents significantly less commuters, reflected by a fall of 25% with the number of private car users. Decreased traffic levels may encourage further pedestrianisation or shared streets, removing barriers of entry (roads) to retail shops and promoting improved pedestrian circulation within the retail core. The impact of temporary increased pedestrianisation in the south City retail core should be monitored through active liaison with business owners and permanent implementation should be considered. Private cars should not be considered bad for the City retail core in their own right, but traffic should be driven by City destination trips rather than transitory cross-city routes and consideration given to the location of parking facilities.

Chart 8. How commuters travel into Dublin City Centre



While there is increased focus centred around sustainable transport in cities, with sustainable transport methods being increasingly adopted by those commuting into the City Centre, car parking is still required to support City Centre retail. Shopping centre research suggests that trips involving the purchase of a large volume of goods, generally associate with high dwell time and high spend, are predominately undertaken by those who drive.

Travel into Dublin City				
Means of Travel	Year			
	2006	2011	2019	% Change ('06-'19)
Bus	59,874	54,251	65,048	8.64%
Rail	33,534	22,932	37,407	11.55%
LUAS	9,029	9,949	13,832	53.20%
All Public Transport	102,437	87,132	116,287	13.52%
Car	76,850	69,681	57,985	-24.55%
Taxi	1,453	2,674	2,661	83.14%
Walk	17,114	14,551	24,691	44.27%
Cycle	4,839	6,870	13,131	171.36%
Goods	2,291	1,176	983	-57.09%
Motorcycles	2,395	1,485	1,485	-38.00%
Total Private Trips	104,942	96,437	100,936	-3.82%
TOTAL PERSON TRIPS	207,379	183,569	217,223	4.75%

Table 1. Travel into Dublin City Centre

The current distribution of car parking is scattered across the retail core. The ideal location for customer car parking is on the periphery of the retail core facilitating access whilst not disrupting pedestrian flow within the core making the retail core accessible to those travelling from outside the Dublin suburbs and from outside the region, where sustainable transport options may be limited.

Action Point No. 6

Recognise the increased uptake of cycling as a means to access the City Centre and provide strategically placed bike stands to accommodate for such.

Action Point No. 7

A cost benefit analysis of the removal of limited car parking versus greatly enhanced pedestrian connectivity should be carried out in streets such as Molesworth Street which connects the cultural hub, comprising the National Museums and National Gallery, to the Grafton Street retail core.

Action Point No. 8

Ensure car parking is maintained on the periphery of the retail core, in order to allow for car-based commuters while improving the pedestrian environment within the retail core. Car parks such as at The Ilac Centre and St. Stephens Green can be easily accessed by consumers without disrupting pedestrian flow within the retail core. Continue to promote sustainable transport methods including bus and Luas services to the suburban population as a means of transport into the City for retail purposes.

Supporting Retail Through Transport

Sustainable transport nodes present an opportunity to enhance the trading environment for City Centre retailers through omnichannel distribution. The creation of 'drop-points' at transport terminals and car parks which allow those working and commuting to make purchases during breaks with the ability to collect their item from their transport hub prior to their commute could benefit City Centre retailers. Collection points currently exist in Ireland through providers such as Parcel Motel and provide customers with a virtual address through which they can collect, send or return parcels. Through providing a similar service at key transport nodes in the City Centre, customers may be encouraged to buy from a store in the City Centre, whether it be an in-store purchase, through phone or online with the option to collect their purchase at a later time from a collection point. This may allow for office workers to access and incorporate retail activity into their day more conveniently through greater streamlining of the purchase and delivery process. The parcels may be delivered to the drop-points by the retailers during off-peak trading times or through a courier service. In the UK, InPost, a polish logistic service with over 1 million parcel locker boxes worldwide, partners with Transport for London to provide parcel lockers at key rail hubs. While these systems are generally aimed at facilitating deliveries from online shopping or through the postal system, they may serve as an appropriate business partner to provide a service for City Centre retailers, perhaps coordinated through the BIDS group 'We Are Dublin Town'.

Action Point No. 9

Consider incorporating 'drop-points' at key transport nodes including peripheral multi-storey car parks and train stations to provide a resource for City Centre retailers to engage in omni-channel distribution. DCC and its City Centre partners could conduct a workshop with businesses within the retail core to ensure logistical and usability requirements are met and undertake an audit of transport nodes to establish appropriate locations for drop-points.

Improved North-South Pedestrian Links

The temporary pedestrianisation of streets in the south retail core that occurred during the period of Covid-19 restrictions in 2020, appears to be largely positively received by the public and the improved pedestrian circulation should result in a benefit for retailers. While the pedestrianisation delivered to date has focused on improved circulation through the south retail core, there is an opportunity for pedestrianisation to enhance the link between the north and south retail cores.

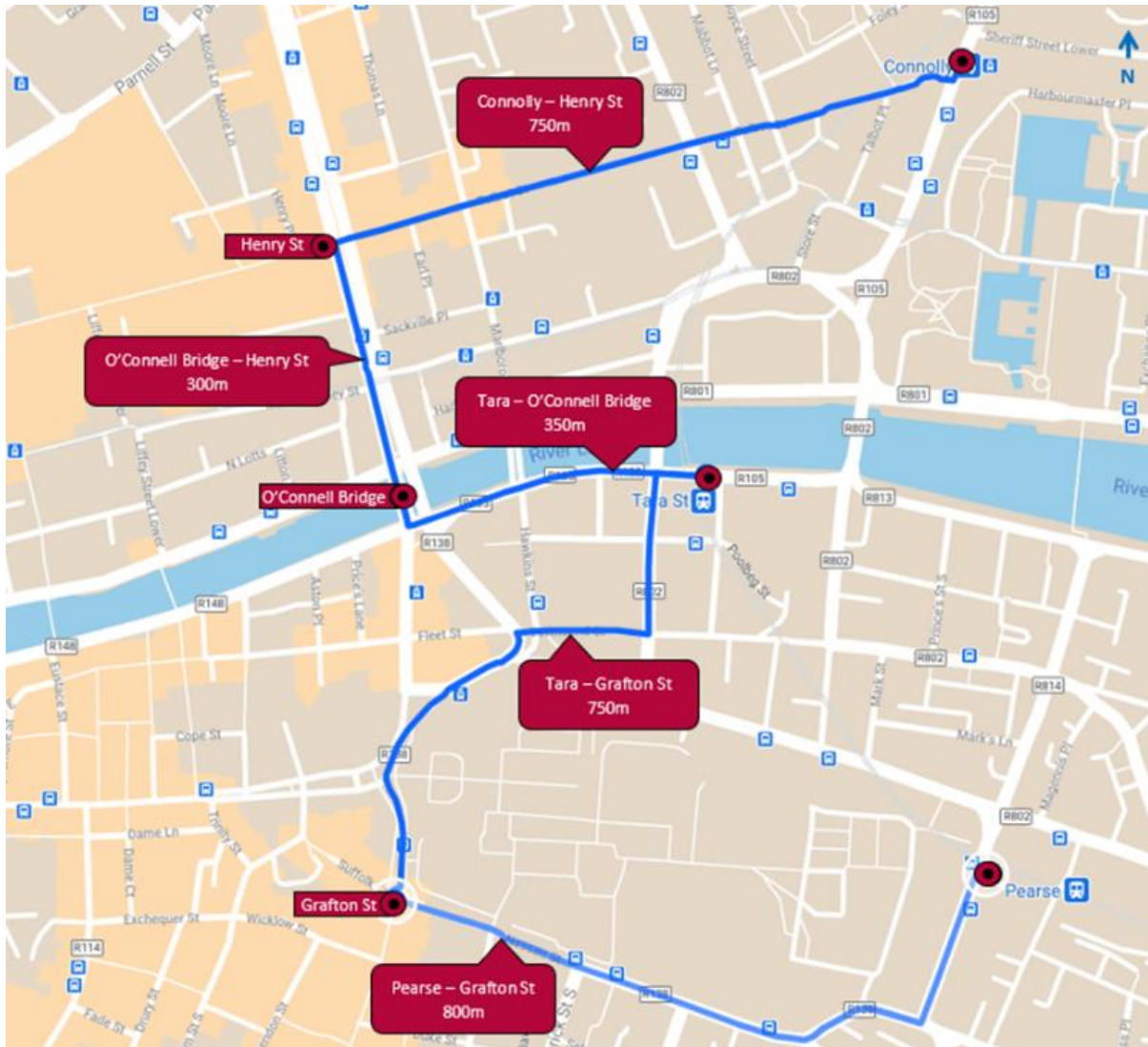
A focus on improving the pedestrian realm on Westmoreland Street may encourage pedestrian flow between the cores. The street's current configuration of three lanes of roadway and a Luas track creates a sub-optimal customer experience. Greater pedestrianisation on the street and improvements to the public realm will make the street a more attractive destination for shoppers and retailers. Westmoreland Street's function as a link between the north and south retail cores is very important for the City.

Action point No. 10

Continue with the pedestrianisation of streets within the retail core and expand to include the enhancement of the pedestrian realm along Westmoreland Street to improve the connectivity between the north and south retail cores.

Links between Suburban Public Transport Links and City Retail Cores

The junction of O'Connell Bridge and Westmoreland Street is the closest point to the DART for the retail core. The Map 13 below highlights rail links through Dublin's City Centre. The nearest DART station to the retail core is Tara Street, only 350m from O'Connell Bridge. We recommend focussing on the pedestrian connectivity between the station and O'Connell Bridge and recognising this as a point of arrival to the retail core with cafes, on street seating and clear indications that you have arrived in Dublin's retail core.



Map 13. Linkage of rail to retail

Action Point No. 11

Recognise Tara Street Stations central position to the epicentre of the retail core and enhance the pedestrian linkages between the station and O'Connell Bridge.

Improve Pedestrian Links Between Activities

We have set out below, some examples of poor pedestrian environments on key customer link routes between the City's retail core and office and cultural clusters.

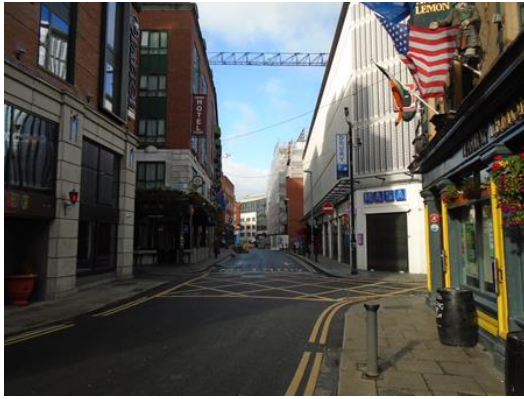


Image 49, Stephen Street Lower



Image 50, Exchequer Street



Image 51, Westmoreland Street

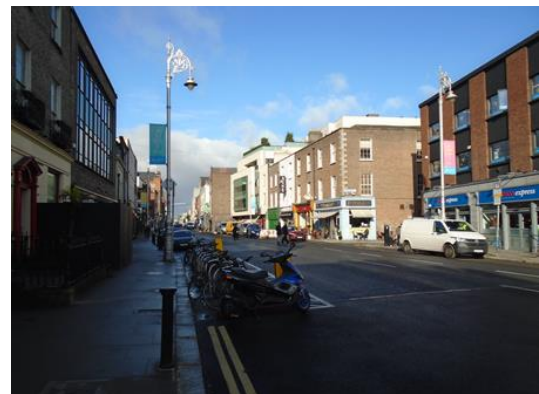


Image 52, Baggot street

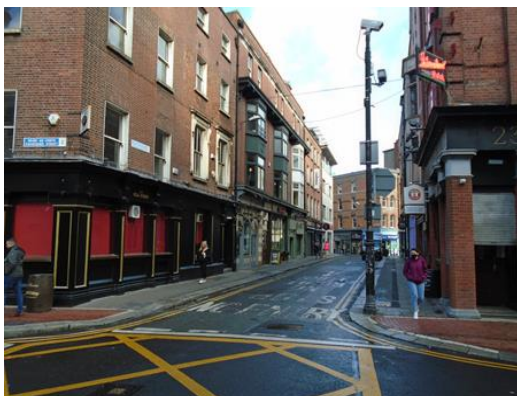


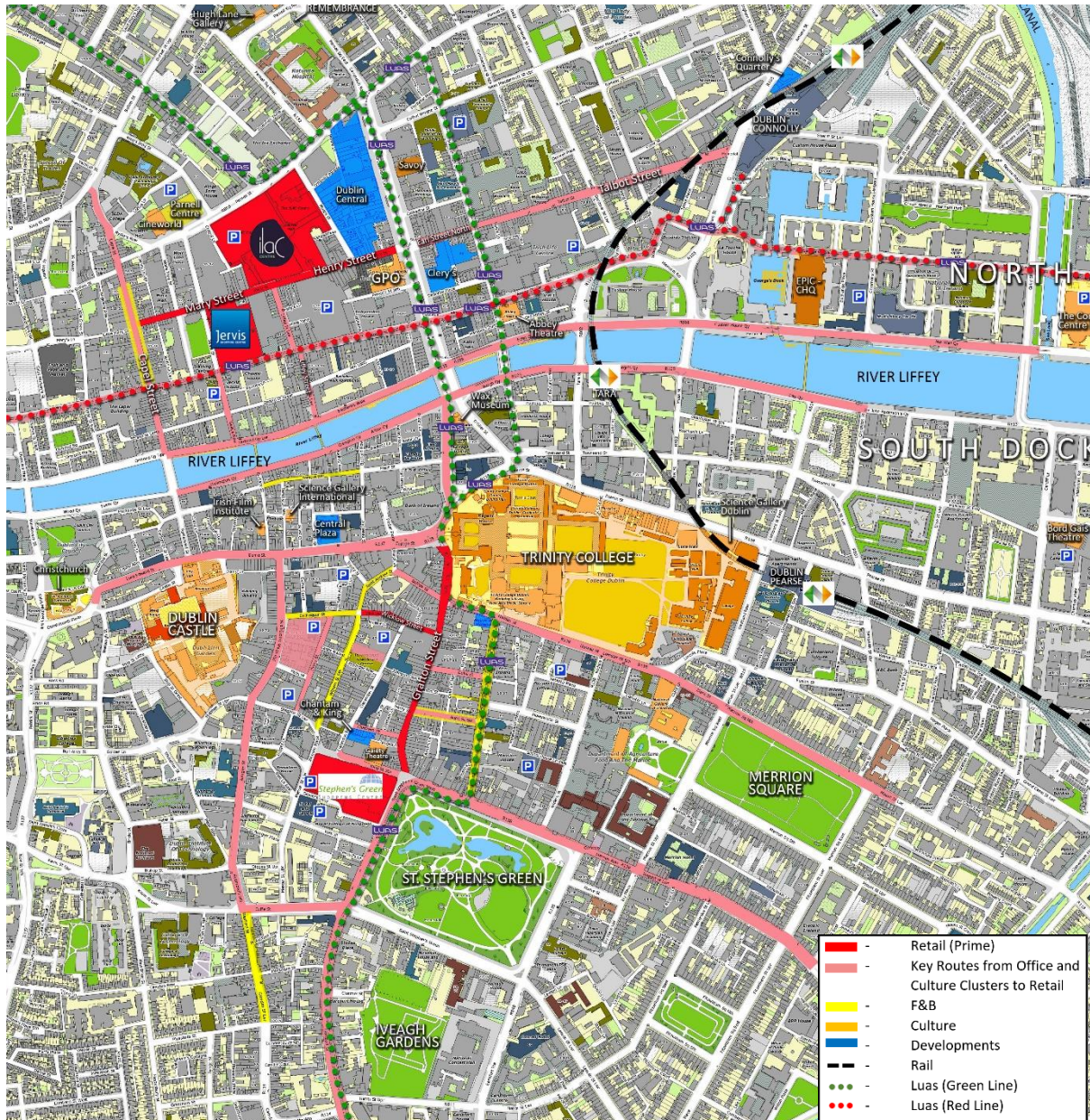
Image 53, St Andrews Street



Image 54, College Street/D'Olier Street

The City's core retail is represented in red on Map 14 below. We have highlighted in pink the key routes from the retail core to office and culture clusters which we are recommending be audited for customer experience. The goal is that the journey from these clusters is pleasant, easy, safe, and intuitive so that the office workers and tourists, upon whom the City's retail vibrancy is so reliant find the journey to and from the retail core easy to navigate.

In many locations, previous investment by DCC has already achieved this goal such as the pedestrian routes located on the north and south of the River Liffey. The key is ensuring that the linkages are comprehensive. There may be opportunities for dwell zones and pocket parks on these journeys that are referenced earlier in the report.



Map 14. Key Routes from Office and Culture Clusters to Retail

Action Point No. 12

Undertake a critical review of all key routes between the retail core and cultural, office and transport hubs and improve the pedestrian experience where possible.

E. Data & Communication

We recommend the creation of an online portal which details the opportunity that Dublin City Centre represents to a potential trader. There is considerable information online detailing why Dublin is attractive to potential office-based industries, but very little information demonstrating that Dublin is a compelling opportunity for retailers. The absence of retail development over the past 15 years has exacerbated this deficit. When large retail schemes such as what was envisaged for Dublin Central are planned there is a strong incentive for an individual developer to market the City extensively, conducting the research required to set out why the City and more specifically, their development, represents a good trading opportunity. In the absence of large-scale development, the City is reliant upon individual owners seeking to let individual stores, usually in competition with others. Dublin is a relatively wealthy City and that message is not currently being communicated to the international retailer that one would expect to find in a European Capital.

Relevant metrics that may engage and provide insight to retailers may include (but are not limited to) population figures and insights, household spend trends, City Centre activity including footfall, daytime population and commuter insights, tourism activity and commentary on relevant planning permissions or developments. These metrics, when considered collectively, aim to provide a retailer with an overview of the trading environment within the City Centre. In order to develop deeper insight, a further layer of information may be provided through customer insights. This involves undertaking surveys of shoppers in the Dublin City retail core to understand their motivations for engaging with the retail opportunities available. By DCC hosting such a data portal, it would be available to all potential retailers considering the City.

Action Point No. 13

Dublin City Council should consider actively marketing the City Centre utilising publicly available information from the CSO, CSRI, OECD and other reliable research sources. This can benchmark Dublin internationally.

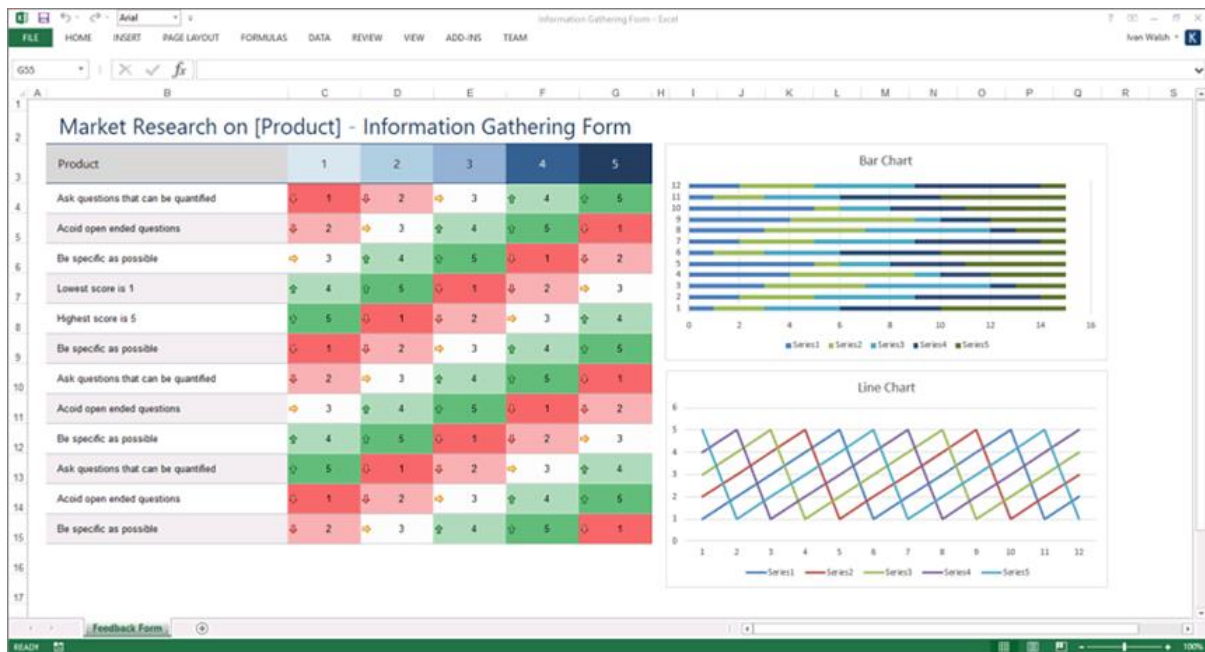


Image 55, Example of research and metrics.

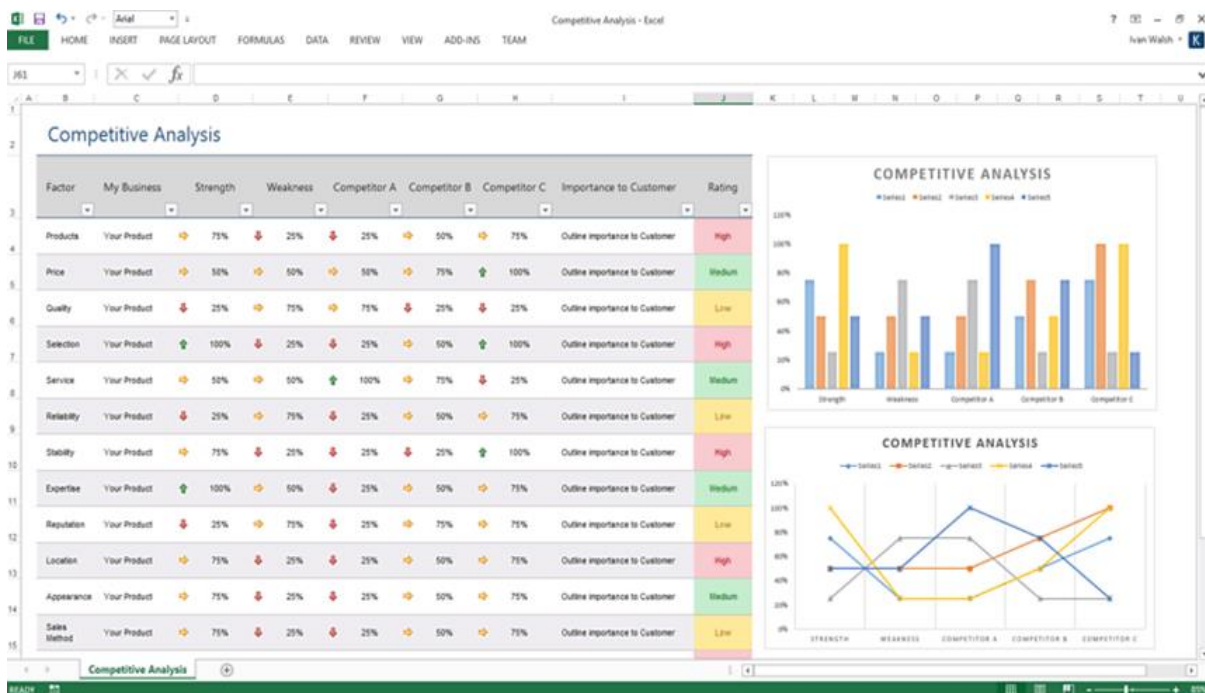


Image 56, Example of research and metrics.

10. SUMMARY & CONCLUSION



Image 57, South Anne Street.

Summary

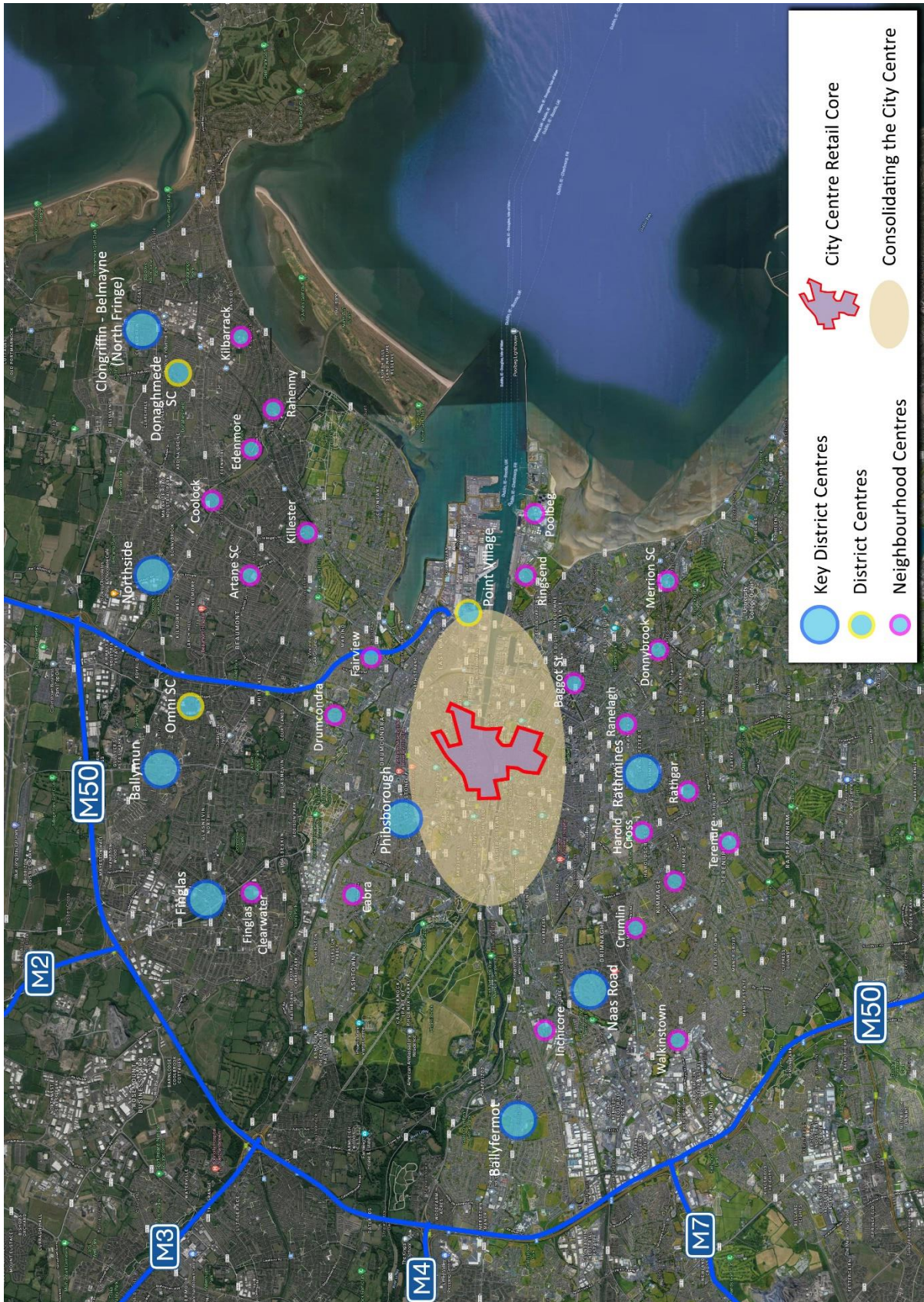
Dublin City's retail core has a strong and viable future. To assure this, the City Centre must combine the retail strengths with its considerable resources from a cultural, economic, and demographic perspective to communicate a single compelling attraction for retailers and customers alike.

Conclusion

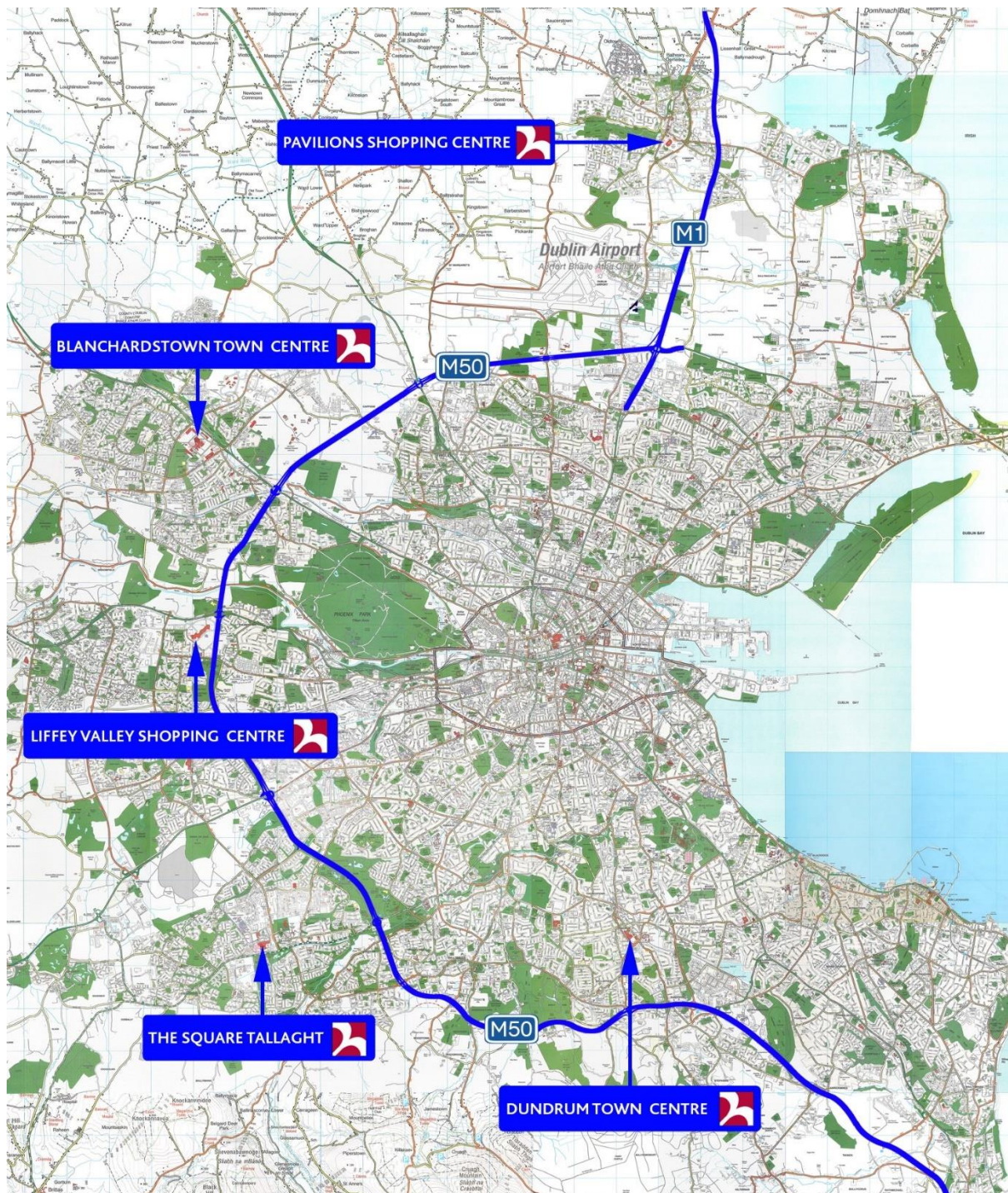
The future vibrancy and vitality of Dublin's retail core is contingent on successfully attracting customers. The more customers it attracts the more retailers will require representation within the City which in turn will make the City more attractive to customers. The key customer bases the City needs to attract are the suburban residents and the office, tourist, and educational attendees that the City traditionally has in abundance. The City possesses the raw material to do this successfully and our recommendations are a combination of physical, regulatory, and data-based initiatives which will aid the City in fulfilling its role as one of Europe's premier City Centre retail destinations.

APPENDIX 1: MAPS

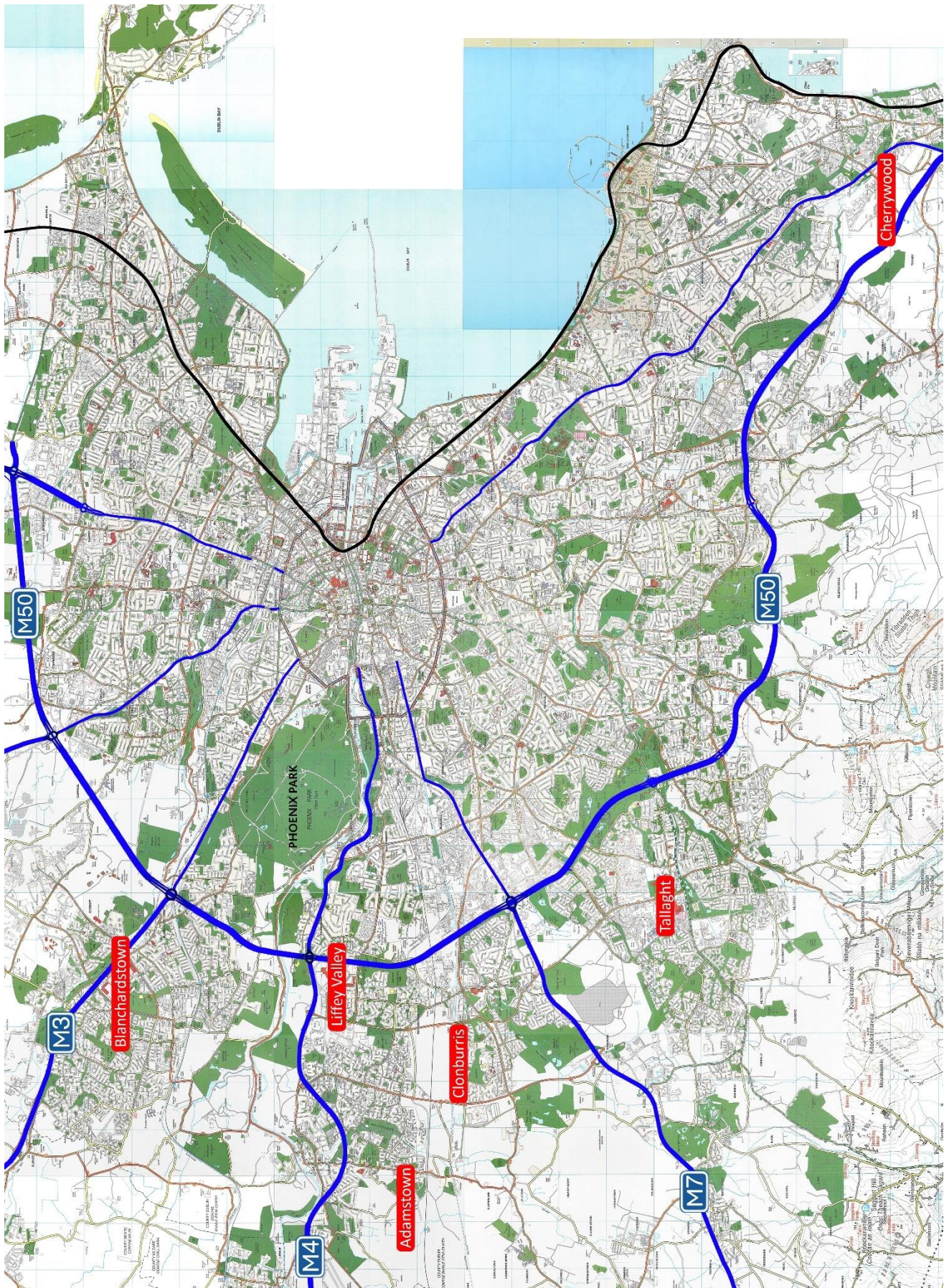
Map 2. Dublin's Retail Clusters



Map 3. Dublin's M50 Centres



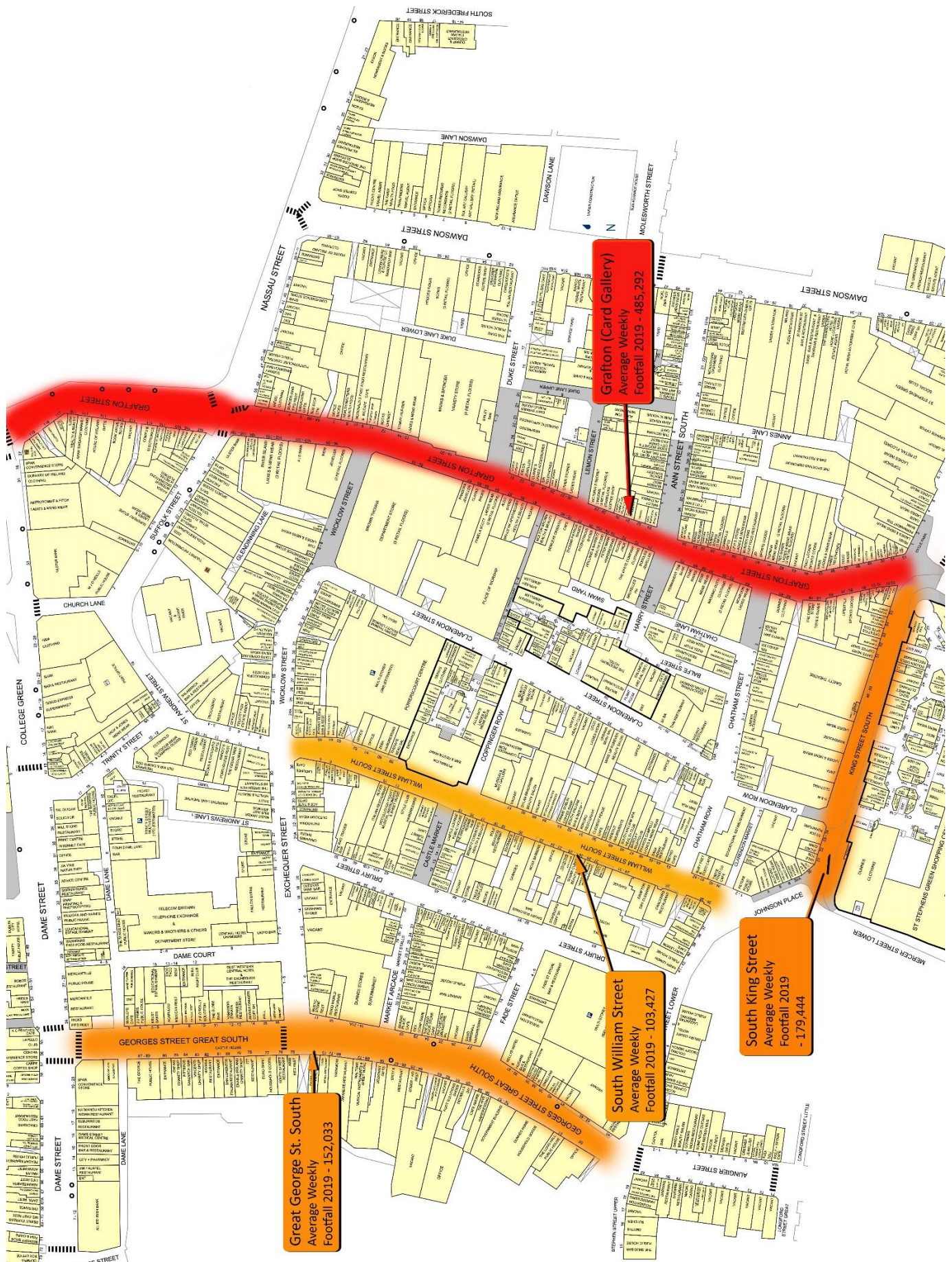
Map 4. Location of New Retail Developments



Map 8. North Retail Core Heatmap



Map 9. South Retail Core Heatmap



APPENDIX 2- CHARTS

Chart 6: Footfall change over lockdown period

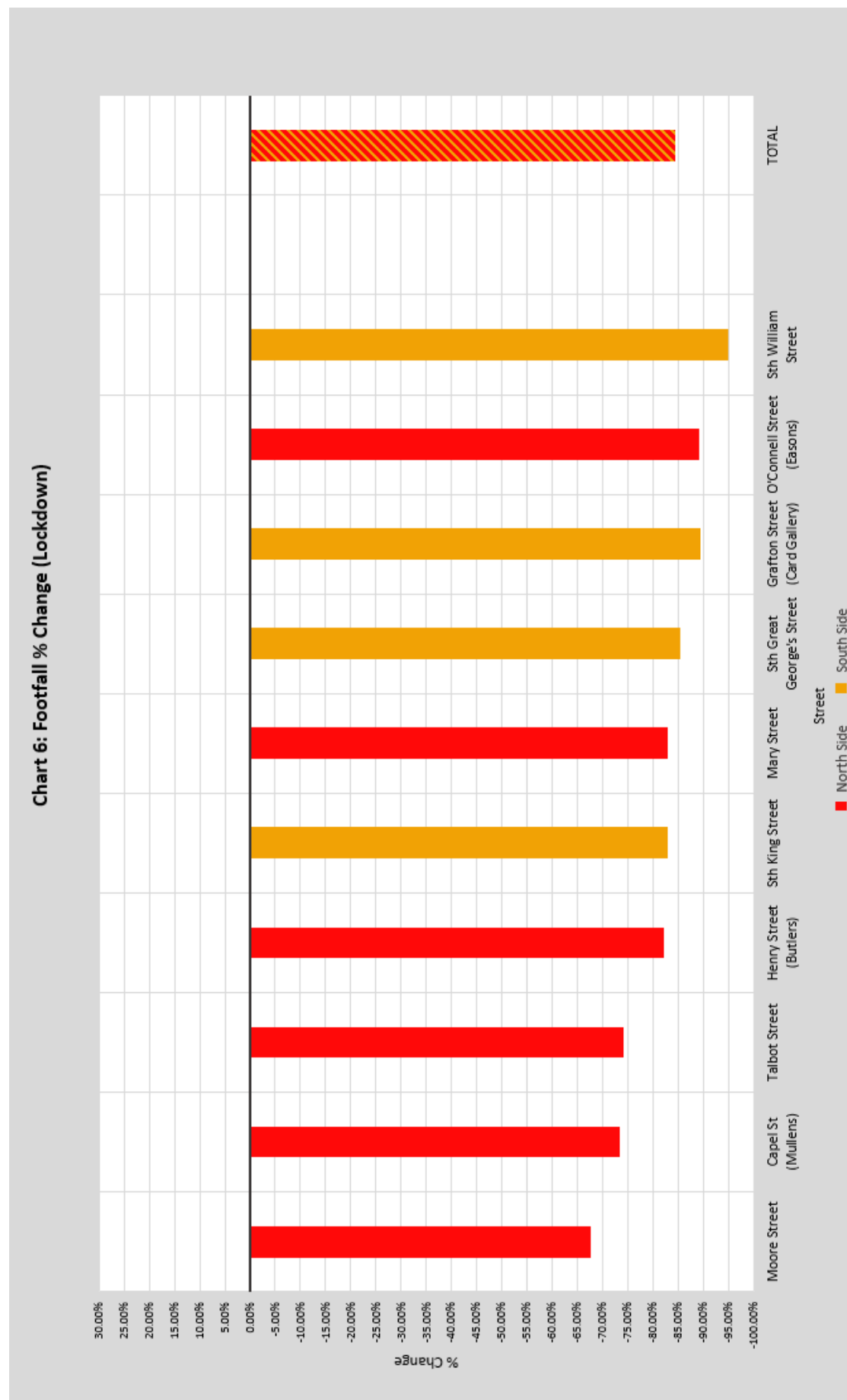


Chart 9: Travel into Dublin City 2006 - 2019

