

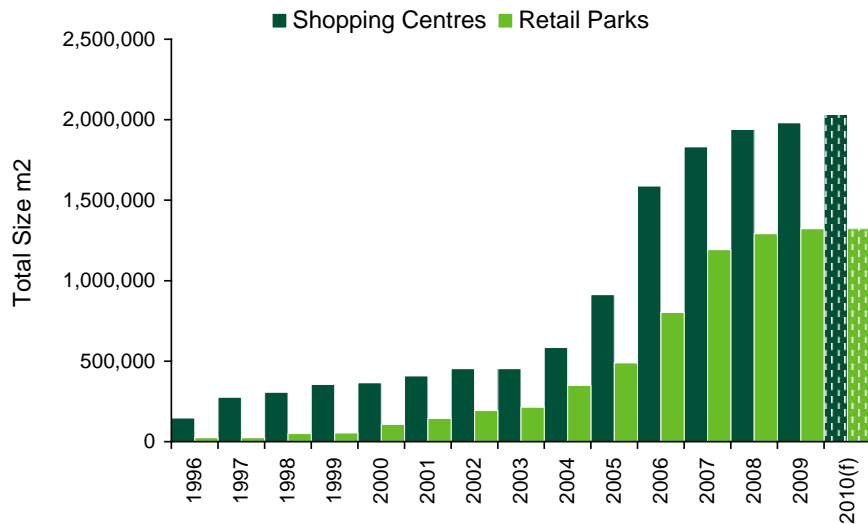
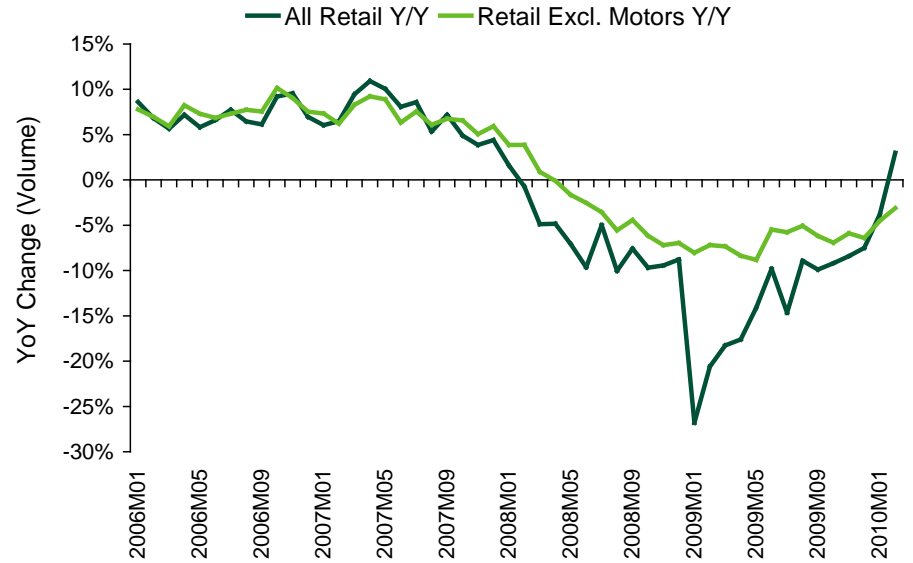
# PRESENTATION TO IRISH PLANNING INSTITUTE



WHAT IS THE FUTURE  
FOR TOWN CENTRES?



# THE RETAIL CONTEXT



# TOWN CENTRE CRITERIA



# DO TOWN CENTRES MEET THESE CRITERIA?

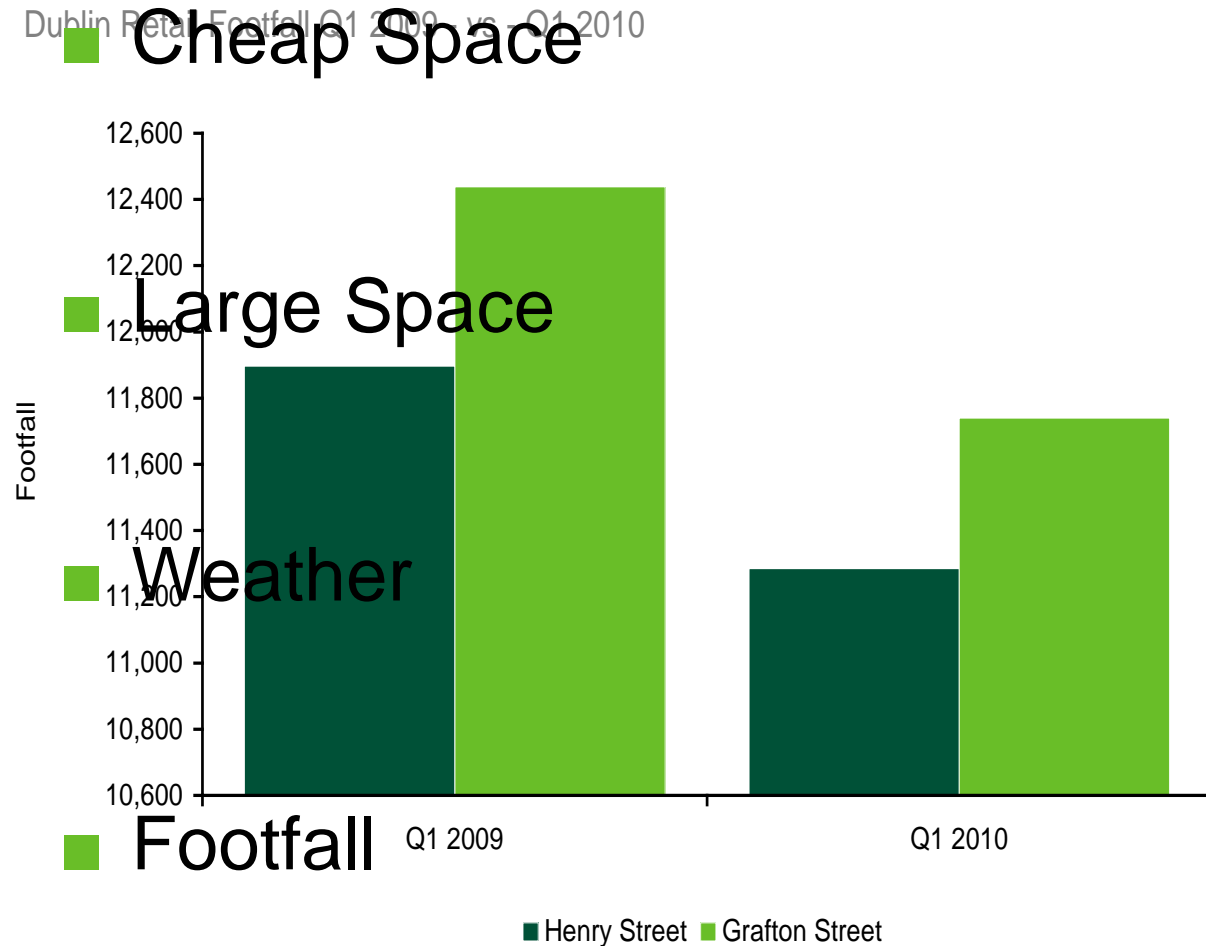
- Old vs. New
- Dublin City vs.
  - Dundrum
  - Liffey Valley
  - Blanchardstown
  - Adamstown
- If you build it will they come?
- Are these really town Centres?



# WHAT DO RETAILERS WANT FROM A TOWN?



Dublin Retail Footfall Q1 2009 vs. Q1 2010



# COMPETITION TO TOWN CENTRE

- Out of Town Parks
  - Open Planning
  - Retailer business models changing
- Easy to Get to
- Free Parking
- Multiples Dominance



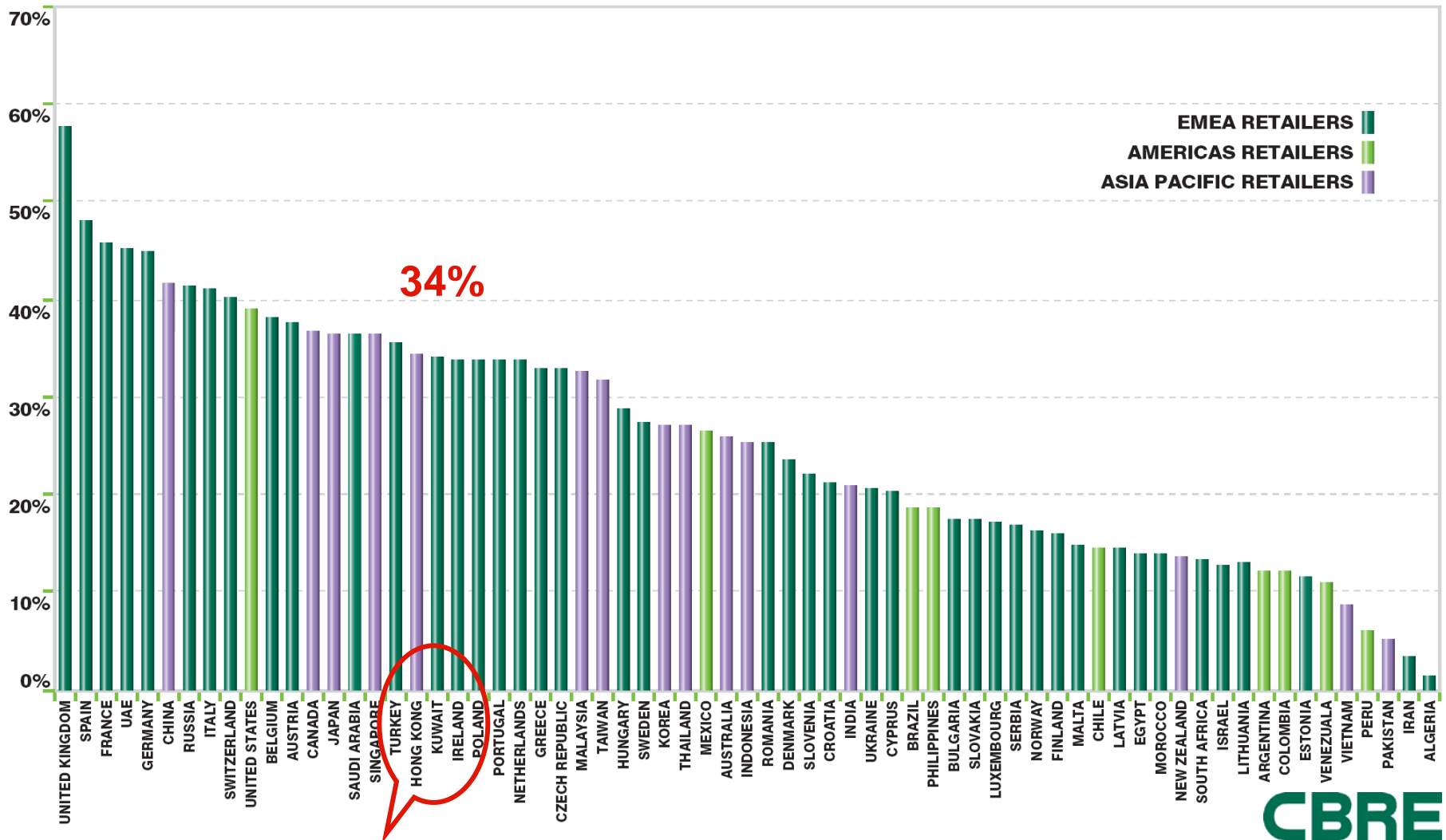
# How Global is Irelands Retail?

Figure 19: Global Ranking 2008

% of International Retailers Present				
2008 Rank	Country	2008	2007	2007 Rank
1	United Kingdom	58%	55%	1
2	Spain	48%	47%	2
3	France	46%	43%	4
4	U.A.E.	45%	39%	6
5	Germany	45%	44%	3
6	China	42%	37%	10
7	Russia	41%	38%	9
8	Italy	41%	40%	5
9	Switzerland	40%	38%	8
10	United States	39%	39%	7
11	Belgium	38%	34%	12
12	Austria	38%	36%	11
13	Canada	37%	31%	18
14	Japan	37%	33%	13
15	Saudi Arabia	37%	24%	31
16	Singapore	36%	33%	14
17	Turkey	36%	30%	23
18	Hong Kong	34%	31%	19
19	Kuwait	34%	25%	30
20=	Ireland	34%	31%	20
20=	Poland	34%	32%	16
20=	Portugal	34%	31%	20

# How Global is Irelands Retail?

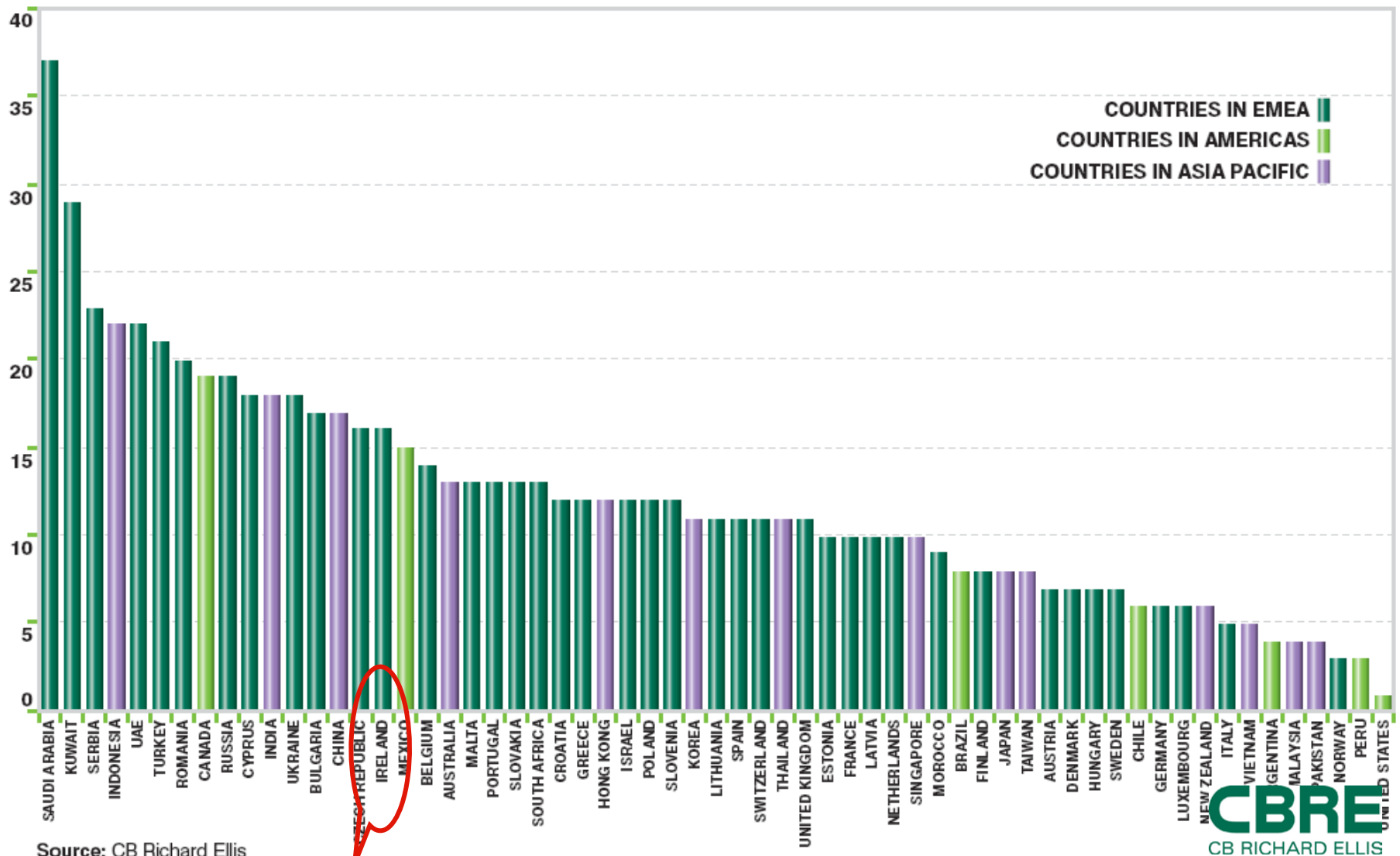
Figure 8: International Retailer Presence by Country



Source: CB Richard Ellis

# How Global is Irelands Retail?

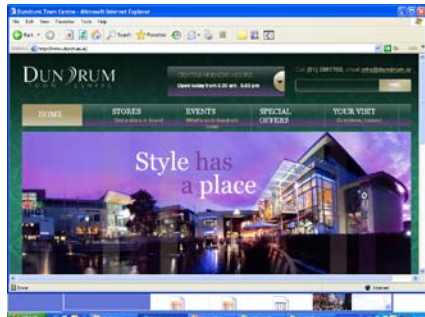
Figure 18: Number of New International Retailer Openings



Source: CB Richard Ellis

# FUTURE TOWNS

- Grey Market
- IT / Online Branding
  - Twitter/Facebook
  - Chat rooms/blogs
  - Web page presence
  - Online sales & pick up points
- Leisure
- New Towns
  - Culture
  - Sense of Ownership
- Changing Retail Offer
  - Limited book/music stores
  - Shops now showrooms
  - More Multiples



- Retailers will follow footfall and spend
- Continue giving sense of ownership & place
- Market themselves against suburban competition
- Planning policy to allow multiples growth
  - Foodstore with surface car park?
  - Don't force retail units if no demand e.g. Cork Street
  - Easier amalgamation of units

# SO WHAT IS THE FUTURE FOR TOWN CENTRES?



...if the Challenge is Taken Up to Compete Effectively



...if Planning Policy Swims with the Multiple Tide



...if Parking & Access Take Priority



...if the Town can continue to Get Customers In