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## Retailing at the Periphery: An Analysis of Dublin's Tertiary City-Centre Shopping Streets (1972-2002)

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# Retailing at the Periphery: An Analysis of Dublin's Tertiary City-Centre Shopping Streets (1972-2002)

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## **KEYWORDS:**

RETAIL, CITY-CENTRE, TERTIARY, PRIMARY, STREETS, DUBLIN.

## **Abstract**

This research examined changes in Dublin's tertiary city centre shopping streets over a thirty year period to 2002. An observational study of the occupancy of the city's tertiary streetscape was undertaken in the summer of 2002 and compared with historical data. Results indicate significant change over the period examined: an increased vacancy rate, a very low survival rate, a considerable incidence of non retail specific activities, a decline in traditional retail offerings and the emergence of new categories of retailer. The paper concludes by suggesting a proactive approach is required by present day retailers in the tertiary streets to ensure future survival.

## **Biographical note:**

Both authors are lecturers at the School of Retail & Services Management, part of the Faculty of Business at Dublin Institute of Technology, Ireland.

# Retailing at the Periphery: An Analysis of Dublin's Tertiary City-Centre Shopping Streets (1972-2002)

## **Introduction**

Dublin, capital city of the Republic of Ireland, has experienced the vagaries of the retail trade during the past thirty years, through periods of recession as well as economic boom. Large-scale planned retail developments, both in city-centre and suburban locations have altered the retail landscape. Such developments have not only altered inter-firm competitor dynamics within the city but have also fuelled inter-location rivalry between city-centre and suburban retail offerings. While the development of new city-centre shopping facilities has improved the market attractiveness and competitive capability of the city-centre as a shopping destination and has ensured its survival as a viable entity, the benefits of development have not been uniformly felt by all city-centre retailers. Primary and secondary locations have benefited from the rejuvenation of the city centre as evidenced by the rents that such locations can command, while other peripheral city-centre locations have suffered.

These peripheral locations or tertiary streets, which historically represent unplanned retail development, have suffered as a direct result of two major local government policy decisions. Firstly, the decision to re-engineer the primary shopping areas through planned city-centre shopping developments. This enabled the city centre to compete more effectively for the suburban shopper. Secondly, the policy decision to re-house entire local city-centre communities to suburban areas effectively disenfranchised retailers operating in tertiary streets of the city-centre by depopulating their primary trading areas. It is important to note that these tertiary trading areas were essentially 'local villages' within the city boundaries, dependent on a local customer for the majority of their trade. Between 1971 and 1991, the population of Dublin's inner city fell from 131,503 to 76,558, a drop of almost 50%. As a result, population per square kilometre, the key determinant in the

success of business districts that depend on local populations, fell dramatically. Those who remained living in the city centre faced poorly cared-for streets, ugly metal security shutters and a greater incidence of vacant premises. At night, the city centre became a desolate and dangerous place. The economic decline of such central business districts in Dublin is not unique. It mirrors the experience of many European and North American cities. The traditional core of Dublin city centre was abandoned through such planning and social housing policies, producing the doughnut effect (no inhabitants in the centre, all on the fringes). Since 1991, there has been a change of policy. Dublin City Council is encouraging migration back to the city centre. It is estimated that by the end of the 1990s that over 20,000 people had moved back into city centre areas. The demographic profile of these urban migrants is different to the traditional city area communities. They are mostly young single professional people and have breathed life back into some city centre areas.

This micro study is the first part of a longitudinal study of Dublin city centre shopping streets – both the current primary high-rent streets and relatively lower rent tertiary streets. These tertiary streets are city-centre streets that were once important shopping streets but have now become run down, and no longer feature in published retail rent surveys. This study examines the modern day composition of both tertiary and primary shopping streets and presents a comparative analysis with their composition and tenant mix of thirty years ago.

### **The Irish Planning System**

Irish retail planning is part of the overall planning system with local government responsible for implementation. The planning system is enshrined in national legislation with retail land uses part of the process which plans all land uses. The planning system is a product of the 1963 Local Government (Planning and Development) act. This act defined

the objective of the overall planning process as ‘to make provision in the interests of the common good, for the proper planning and development of cities, towns and other areas, whether urban or rural including the preservation and improvements of the amenities thereof’. Each local authority is required to develop and adopt a development plan for their areas, with periodic reviews every five years. All development proposals require planning permission from the local authority. While nine amendments were made to the act between 1963 and 1999 it still formed the basis of the planning system up until 2000, when a new Planning and Development act was introduced. This act codified the provisions of the previous acts, and introduced new concepts that do not directly impact on the retail sector.

The principal actors within the Irish planning system include local politicians, planners, trade associations and chambers of commerce. Local politicians decide on the adoption or rejection of development proposals and make decisions on the zoning of land. Planners act in an advisory role. They produce draft policies and objectives. Development control is exerted by the fact that all developments require planning permission. Trade associations and Chambers of Commerce tend to support the status quo and the interests of the established business lobby. They often appeal planning applications for large retail developments in local areas. If planning permission is initially refused, then the decision can be appealed to ‘An Bord Pleanála’ -a national body with representatives of groups interested in development or conservation and advised by an inspectorate of professional planners. Appeals are the part of the process with the greatest potential for conflict, with retail planning appeals conducted as oral hearings.

Until the 1980s, little guidance was offered to local authorities by central government. This resulted in an inconsistency in the national planning system with significant regional difference. Retail planning guidelines were first issued in 1982 under the Local

Government (Planning and Development) General Policy Directive. This directive provided general advice regarding large-scale additions to existing retail shopping capacity. All local authorities were to be directed by the following considerations; the adequacy of existing shopping outlets, the size and location of existing retail shopping outlets; the quality and convenience of existing retail shopping outlets; the effect on existing shopping communities, including in particular the effect on established retail shopping outlets and on employment; the needs of the elderly, infirm and disabled persons and of other persons who might be dependent on the availability of local retail shopping outlets; the need to counter urban decline and to promote urban renewal and to promote the utilization of unused infrastructural facilities in urban areas.

However, the directive did not provide sufficiently focused and specific criteria for assessing proposals or for preparing development plans. For example, terminology within the directive was vague. Terms such as 'quality and convenience' or 'adequacy' were not specified and were therefore left open to local authority decision makers to interpret. New retail development proposals were required to conduct an impact study as a result of the directive. Methodology involved utilizing a variety of demographic and expenditure statistics to indicate 'need' for retail development. Keogh (1995) expressed the view that the directive reinforced rather than changed the planning policies of local authorities. A further directive was issued in 1998 {Local Government (Planning and Development) General Policy Directive (Shopping)}. This directive restated in a strengthened form the considerations outlined in the 1982 Directive and contained a specific additional reference to the impacts on road traffic. It also introduced a cap on supermarket store size of 3000 square metres pending a legislative review of retail planning policy.

## **Retailing in Dublin City Centre**

Metropolitan Dublin contains a little over quarter of the total population and in national terms accounts for 41% of all comparison turnover and 31% convenience turnover in the state. It provides the broadest range of comparison goods shopping and supplies retail functions of a specialist nature not found elsewhere in the state (Tym & Partners, 1999). Dublin city-centre hosts two principal shopping districts, separated by the river Liffey, that form the spine of city shopping activity. *Grafton Street* to the south of the river and *Henry Street* to the north. Numerous secondary streets feed off these prime shopping streets with tertiary shopping areas on the periphery. *Grafton Street* is Dublin's most prestigious shopping street with a distinctly up-market ambience. It commands the highest retail rents in the country and is often the preferred location for specialist up-market national and international retailers. The *Henry Street* area was traditionally Dublin's principal shopping high street. It is a bustling shopping area and boasts treble the footfall of the *Grafton Street* area. It includes two of the city's best-known shopping centres, the *Ilac Centre* and the *Jervis Centre* and has a large concentration of the city's largest retailers-*Arnotts, Dunnes Stores, Roches, Penney's* and *Marks & Spencers*.

Since the early 1980s, the city centre through the *Dublin City-Centre Business Association*, has adopted a proactive approach to attract consumers back to the city centre. Retailers were encouraged to refurbish their premises, up-date shop fronts and to standardise shopping hours (introduced late opening). Over the decade, several initiatives were developed to improve the overall ambience of the city centre. Examples include the pedestrianisation of the primary streets, additional car parking, street furniture, improved lighting, flowers, additional litter bins and attractive murals and art work. All these improvements were designed to transform the shopping environment in the city. Through these changes, retailers attempted to adapt their retail offer to meet the changing

requirements of their customer. The city consumer was changing. They almost exclusively used their car for shopping trips, shopped less frequently, spent more per visit and increasingly valued safe, secure and inexpensive or free parking. The suburban shopping centres certainly benefited from city-centre problems. For example, as a result of city-centre traffic congestion, cost and security of parking, the city centre lost custom to suburban shopping-centres. A recent survey of Dublin city-centre retailers, carried out for the Dublin Chamber of Commerce indicated that consumer concerns are shared by retailers (DTZ Pinda 2001). This report found traffic congestion and lack of quality public transport as issues of major concern. The final concern was the increased cost of retail space, not surprisingly, given the fact that retail rents have risen by as much as 100% in the past five years (Ibid).

### **City Improvement Schemes**

The Henry Street-Mary Street Partnership was Ireland's first Business Improvement District (BID) and was set up in 1994 at the instigation of five key retail anchors in the Henry Street/ Mary Street/ Ilac area. A BID is an organizing and financing mechanism used by property owners and occupiers to determine the future of their retail, commercial and industrial areas. Costs are spread across all owners and occupiers, thus reducing the impact on individual retail businesses. Local traders assess the needs of the area and determine a course of action to be followed. BIDS provide supplementary services not provided by the local authority, such as special events and promotions, capital expenditure for improvements in the streetscape. Funds are collected by the local authority and passed on to the BID. In effect it becomes a system of self-help through self-taxation. Henry St./ Mary St. area was traditionally Dublin's principal shopping high street before the emergence of the Grafton street, as reflected in Zone A rents and a major differential between investment yields in the two areas. The Partnership's vision was *'To Build an Exciting future for Dublin's Traditional Shopping centre'*. Initially the key elements



identified as requiring attention included illegal street trading, the need for a safer and more secure environment, cleanliness and a need to vastly improve the streetscape. As a result of the co-ordinated co-operation between Dublin City Council (Local Authority), An Garda Siochana (Police), Dublin Bus (municipal bus company) and the local business community, the area has been rejuvenated.

### **Planned Retail Development in Dublin**

There are currently fifty one shopping centres, twelve retail parks (2750 square metres or more of lettable space) and over 660,000 square metres of lettable shopping centre and retail park floorspace in the Dublin region (Parker et al 2001). This represents a veritable metamorphosis of the Dublin retail sector over the past three decades. The first planned shopping centre development was opened in the Dublin suburb of Stillorgan in 1966. There followed more than thirty years of substantial planned retail development, most of which was located in suburban Dublin. These developments were fuelled by the accelerated suburbanisation of the city's population. The increased competition from suburban shopping centres posed a significant challenge to city-centre retailing. Table I shows the number of purpose built shopping centres and the amount of lettable retail space opened in different time periods since 1966.

< Take In Table I >

The 1970s saw 114,506 square metres of retail space added through planned shopping centre developments. It is important to note that all these developments were in the suburbs. The 1980s might be regarded as the decade in which the Irish shopping centre industry came of age with an additional 122,182 sq. metres of retail development. This was the decade that saw the initial fightback by the city centre. Both the *Ilac Centre* and the *St. Stephen's Green* shopping centres opened in this decade and many urban regeneration schemes were initiated. The decade of the 1990s was a remarkable decade in

the amount of additional retail space added to the city's retail landscape and reflected new confidence in the country as a result of exceptional economic growth figures. A further 214,790 square metres of new shopping centre developments and 92,159 square metres of retail parks came on stream during this decade. 1996 was an exceptional year with an additional 75,000 square metres of retail selling space coming on stream. This represented the biggest investment in retailing for over ten years. The increased demand for space in the latter half of this decade was fuelled by an 'invasion' of international retailers, mostly from the United Kingdom. For example, the Jervis Centre opened in 1996 (30,416 square metres and costing IR£50million) with big name UK retailers e.g. *Boots*, *Debenhams*, *Dixons*, *Tesco*, *Waterstones*, *Burtons*, *Marks & Spencer*, and *Argos* acquiring the majority of lettable space.

The retail park format was first introduced to the Dublin suburban market in 1990, with a further nine parks developed during this decade. These retail parks added an additional 92,159 square metres of retail space to the city and improved the relative attractiveness of the suburban shopping offering.

While the power struggle between the city-centre and suburban shopping centres for the consumer spend continues, city-centre developments also alter shopping flows within the city-centre itself. The new *Jervis Centre* shopping mall in Mary Street opened in 1996 has boosted the drawing power of the area which is now commonly referred to as 'Henry Street Mary Street'. Results from independent market research commissioned by *Arnotts* department store show that the Henry Street area attracts 21.7 million shoppers annually, compared with 7.1 million for the Grafton Street area (*Arnotts Annual Returns*, 1997). While primary and secondary streets are constantly aided as well as encouraged to improve their retail offer, the tertiary street retailers receive little help or encouragement. The cost of retail space is a good barometer as to the relative attractiveness of trading in various

locations. Rents on premises within the tertiary trading areas have for the most part remained static over recent times, while by comparison, the premises in the primary and secondary areas have increased substantially. Table II illustrates the rent differential over the 1998-2001 period between primary, secondary and tertiary locations. While primary and secondary street rents increased by 55% and 47% respectively in the 1998-2001 period, tertiary rents remained static. The data are difficult to interpret because of the diverse nature of tertiary locations i.e. some locations will achieve rents as high as €546 per square metre per annum, while others will only achieve rents of €273.

< Take In Table II >

### **The Study**

The study covered about 6 kilometres of Dublin city-centre street frontage. This included 1km of prime high rent Dublin city centre streets and about 5 km of tertiary streets. Secondary streets – defined for the purpose of the study as those adjacent to and benefitting from shopping overflow from the primary streets as reflected in typical rental costs, were not included in this exploratory study.

The methodology chosen was an observational approach covering about 1,500 city centre addresses. It was carried out in July and August 2002. Current occupancy was compared with the recorded occupancy over two randomly chosen time frames ie. five years ago and thirty years ago. The historical data were compiled using the *Thoms Street Directory*. This is a commercially produced almanac published each year since 1844 containing detailed street address entries for occupants, type of business and rateable valuation covering all city centre and suburban Dublin. This same *Thoms Street Directory* that was used by James Joyce in writing his 1922 work *Ulysses* - a fictionalised account on one day in the life of Dublin characters in 1903.

For the purposes of the study the Primary streets included were:

South City: Grafton Street & Wicklow Street  
North City: Henry Street & Mary Street (part)

These are streets defined as having the highest rental costs in the city centre. For the purposes of the study, only retail premises having a ground floor presence were included. Excluded were the following:

- Traders whose premises were on first floor or basement only
- Traders located in shopping centres or arcades on the primary streets

The Tertiary Streets included were defined as city centre streets having a predominance of retail activity at street level but excluding primary and secondary streets (as defined above).

This study did not include all tertiary streets but those sampled would be seen as being the principal such streets in the city and were therefore judged to be representative. Each of the streets chosen had the additional characteristic of being

- Centrally located – near primary streets,
- Would in former times have served an inner city population – now re-located.
- Suffering decline in fortune over the past thirty years – e.g. more rundown or with more retail premises vacant
- Adversely affected by traffic and with parking restrictions

The sample used covered the principal tertiary streets:

South City

South. Great Georges Street  
Aungier Street  
Redmonds Hill  
Wexford Street  
Camden Street (upper and lower)  
South Richmond Street

North City

Capel Street  
Bolton Street  
Dorset Street (upper and lower)  
Parnell Street  
Moore Street

Not all premises in the streets in question were in retail use and this reduces the usable data as follows:

< Take In Table III >

The total number of retail addresses and businesses in the tertiary streets has decreased over the thirty year period reflecting a decline in the retail offering. The large number of addresses described as “excluded” in the table were premises which were vacant, derelict or non-retail in usage. This is analysed in Table IV where the large increase in the number of vacant premises in the tertiary streets is demonstrated

< Take In Table IV >

The increase in the number of vacant premises between 1972 and the present time is indicative of the way in which the tertiary streets have generally fallen into decline. In contrast the number of vacancies in the primary streets actually fell, reflecting tighter pressures on space costs and a significantly higher demand for retail premises.

In order to maintain the richness of the data it was decided not to aggregate categories in the way that the NACE Rev1 economic classification does. The code 52.42 (in NACE Rev1) for example is used to covers all retail sales of clothing. This misses the variety of niche clothing stores reflected by specialist shops. Instead, in this study, separate categories are used for each specialism e.g.

- Ladies Wear/Boutiques
- Mens Wear/Mens Outfitters
- Ladies/Mens Wear
- Childrens Wear
- Ties, Socks etc
- Hats
- Lingerie
- Bridal Wear

Such an approach approximates the level of detail formerly contained in the Business Monitor series SDA25 (Great Britain) or in the Census of Distribution (Republic of

Ireland) rather than the more recent Sector Review: Retailing (UK) or the Annual Services Enquiry (Republic of Ireland) both of which are based on the NACE classification but which give less detailed information.

The same detailed categorisation was used for both Primary and Tertiary streets. In total 145 separate categories of activity were recorded – including activities that would not normally be classified under retail headings. These include professional and other services, some wholesale activities and, in respect of the 30 year old data, some industrial and construction industry activities. It may be observed that category B - referring to a different named trader in the same broad line of business as previously – may not necessarily represent a change of ownership. Sometimes stores change names or trading formats in line with what is fashionable. This trend was particularly noticeable in the case of pubs. The present study did not allow for a more in-depth search into the nature of ownership of premises.

< Take In Table V >

### **The Primary Streets**

The changing nature of the retail offer in the primary streets provides a barometer of significant socio-economic change. This records the retail categories of which 3 or more examples were found in 1972 and 2002. Categories showing decline or reduction in numbers in the primary areas were: Banks, Fabrics, Footwear, Furniture, Furs, Jewellery, Opticians, Pubs, Travel Agents, and TV Rental (now extinct), while there was an increase in Ladies wear. Several new categories (not in the 1972 data) emerged by 2002 eg. a category described as Ladies *and* Mens Wear, Phones, Sports Clothing & Goods, Cosmetics, Fast Food, Tourist Souvenirs. Other categories with increased frequency on primary streets in 2002 included: Records CDs etc, Cafés, Newsagents, Hairdressers, Leather Goods, and Photographic. The 2002 primary street retail mix simply reflects a

changed society: changed modes of communications (mobile phones), greater affluence (increased fashion offering, sporting goods, and street cafes) and increased convenience (Fast Food).

The changes in occupancy in the primary shopping streets over five years and over thirty years are classified in Table VI

< Take In Table VI >

Unsurprisingly, in the shorter five year timescale, there was less change than over thirty years. Reflecting the volatile nature of competition, 128 of the premises had different traders in different trades compared to what had been the case thirty years earlier. Conversely, of the 200 comparisons made, only 24 of the premises were occupied by the same trader after 30 years. Allowing for traders occupying more than one premises, this represented 20 separate traders. The categories having the same occupant after 30 years included jewellery, banks, department stores, footwear and tobacconists.

Among the trader categories where the same occupant was in place in the five years to 2002, the most significant were Ladies Wear (18) Footwear (13) Ladies and Mens Wear (9) Department Store (8) Jewellery (7) Records/CDs etc (7) and Banks (5):

The occupancy of the Primary Streets in 1972 and 2002 is summarised in Appendix 1.

### **The Tertiary Streets**

The sample of 5 km of tertiary streets, as described earlier, was larger in scope than the primary streets, being five times the street frontage of the latter and thus having a larger number of addresses and businesses to examine. Appendix 2 summarises the nature of the activities in the tertiary streets in 1972 and 2002.

In the tertiary streets, the range of activities is very diverse and not all retail in nature as defined for Division 52 in NACE Rev 1. Thus it includes hotel and catering, some wholesale and a range of professional services such as legal, medical etc. By contrast, the primary streets contain virtually no non-retail activities.

The tenant mix changed considerably in the tertiary streets over the thirty year period examined. Notable declines occurred in the numbers of Butchers (from 60 to 12), Footwear stores (34 to 2) and the category Grocery (44 to 4). The grocery category is partially compensated for by the newer categories 'Convenience Store' (0 to 12) and 'Ethnic' (0 to 28), many of which are in fact specialist grocery stores. Other declining categories were Drapery, Wallpapers and Paints, Dry Cleaning, Fruit and Vegetable, Bakery and Confectionery, Fish and Poultry and Carpets. In addition in 1972 the now almost obsolete categories Television Rental and Pawnbrokers still featured in the list of stores with significant numbers.

By 2002 newer categories had appeared such as Internet Shops (10), Call Centres (7), Adult Shops (6) and small numbers of Phone shops (4) Video Rental (4) as well as higher numbers of Travel Agents and various categories of take-away and fast food outlets.

There was a wider range of activities in the tertiary streets relative to the primary streets. This may be explained by the fact that higher rental costs tend to concentrate trade into relatively fewer categories in the primary streets. A measure of the relative diversity of activities of the tertiary streets as compared with the primary streets can be seen by the cumulative percentage of the total covered by different numbers of categories in each.

< Take In Table VII >



This diversity was evident both in 1972 and in 2002 – if anything this had become more marked in 2002. The total number of separate categories identified decreased between 1972 and 2002 for the Primary streets (from 63 to 48) but increased (from 124 to 145) for the Tertiary streets.

### **Changes in Occupancy of Tertiary Streets**

The nature of occupancy change in the two time frames (five and thirty year periods to 2002) is summarised in Table VIII. Not surprisingly there was a larger rate of business survival in the shorter five year period (44%) compared to the thirty year period (10%). In the longer term 30 year interval, 25% of the compared premises had become vacant or derelict.

< Take In Table VIII >

Table IX analyses differences in the thirty year change patterns as between the primary streets and the tertiary streets.

< Take In Table IX >

Clearly, there was more stability in the occupancy of the primary streets than of the tertiary streets. (Table IX) However, both types of street recorded very low survival rates over thirty years: 12% in the primary streets and 10% in the tertiary streets.

### **Concentration and Specialisms**

In 1972 there was a very high degree of specialist concentration in what are now the tertiary streets - especially in the north-side streets. Thus, for example, Moore Street had a high density of butcher shops and Capel Street had a high density of furniture shops. Despite the growth of suburban shopping centres and retail parks, Capel Street still has a strong concentration of furniture stores. While there are fewer butcher shops in the city centre, the decline in numbers

is not uniform throughout the city. The total number of butcher shops in the greater Dublin area has not experienced the same freefall (Nielsen 2000 and Census of Distribution 1971).

### **Ethnic Shops**

A striking feature of the 2002 population was the emergence of ethnic shops – defined here as shops selling specialist or exotic merchandise (or services). These stores target the ethnic consumer or recent immigrant communities rather than mainstream consumers. The 2002 survey identified 32 such retailers, only two of which were in existence five years earlier. Ethnic restaurants, which have long been a feature of Dublin were not included, as they are not necessarily aimed at consumers from ethnic minorities. It would appear also that many of the Internet Stores (10) and International Call Centres (7) are ethnic in ownership or clientele but this is not always possible to establish with certainty.

The growth of ethnic stores and services reflects the phenomenon of inward migration from less developed economies either as asylum seekers or simply economic migrants. This is a new experience for the citizens of Dublin who were well used to inward migration from other parts of Europe including Great Britain, from Northern Ireland and other parts of the Republic of Ireland itself but – unlike similar cities in the UK - had not previously seen third world immigration in any numbers. It is not clear whether this trend will continue but in the meantime it has added a new diversity to city centre shopping.

### **Summary of Findings**

- Reflecting the volatile nature of competition, 128 of the primary street premises had different traders in different trades at the end of the thirty year period. Conversely, of the 200 comparisons made, only 24 of the premises were occupied by the same trader after thirty years.
- The primary streets contained were almost exclusively concerned with retail activities.

- In terms of occupancy, the primary streets demonstrated greater stability. However, both primary and tertiary streets had very low survival rates over the thirty year period to 2002.
- Retail categories showing decline or reduction in numbers in the primary streets included: Banks, Fabrics, Footwear, Furniture, Furs, Jewellery, Opticians, Pubs, Travel Agents, and TV Rental ( now extinct)
- Tertiary streets have generally fallen into decline as indicated by the increased vacancy rate between 1972 and 2002.
- Over the thirty year period, only 10% of the compared premises in tertiary streets had the same occupant as thirty years earlier and 41% had changed completely.
- The primary shopping streets also recorded a low (12%) survival rate over thirty years.
- There was a wider range of activities in the tertiary streets relative to the primary streets where higher rental costs tend to concentrate trade into relatively fewer categories.
- Tertiary streets recorded a significant range of non retail specific activities.
- In tertiary streets notable declines occurred in traditional retail offerings eg. Butchers, Fish and Poultry, Bakery, Footwear, Grocers over the period.
- By 2002 newer categories had appeared in tertiary streets such as Adult Shops (6) Call Centres (7) Internet Shops (10) and small numbers of Phone shops (4) Video Rental (4) C-Stores (12) Ethnic Stores (28) as well as higher numbers of Travel Agents and various categories of take-away and fast food outlets.

## **Concluding Observations**

The study of two different types of city-centre shopping street over thirty years provides an interesting reflection of changes in lifestyle and trading patterns over that period. Both type of location have evolved against a background of a relatively benign retail planning regime from the 1960s which allowed the growth of substantial suburban planned shopping capacity. This has drawn many types of both convenience and comparison shopping out of the city centre into new suburban and town-fringe locations with better provision for motorised shoppers. In a way this reflected parallel changes in housing policy which led to the movement of large numbers of people from the city centre to the suburbs up to the late 1980s. However, this policy effectively disadvantaged the tertiary shopping streets and left them poorer as a result. Meanwhile, the primary streets – mainly catering for comparison shopping – have flourished. Planned city centre retail developments, too, adversely affected the tertiary unplanned shopping areas—as reflected in vacancy rates and rent differentials. The rent differential between primary and tertiary streets has widened in recent years. This is reliable indicator of relative market attractiveness.

In the tertiary streets, there was a greater incidence of more run-down shops and significantly more vacant stores than in the primary streets. Not surprisingly, the total retail population of these tertiary streets has fallen markedly over the 30 years period examined. There are few signs of these streets finding a specialist niche – with certain exceptions, one of which has a very high concentration of furniture stores (Capel Street) and two others which have a relatively strong concentration of ethnic stores.

Traders in both types of location had low survival rates over thirty years – perhaps one generation may be the natural lifespan of a consumer services enterprise. A factor not

explored in the study, however, is differences in firm size – relatively few of the occupants of tertiary streets were large in scale, either in terms of premises or scale of operation. It is notable also how few of the occupants of tertiary streets were branches of national multiples. In contrast, the primary streets contained few traders that were not national or international brands.

Business start-up in the low-rent tertiary streets faces fewer cost barriers, thus allowing for a wide range of business activities including those catering for experimental or minority markets. A noticeable fact too was the very high proportion of the occupants of the tertiary streets in 1972 that appeared to be family owned. This was not enough to prevent their demise over a thirty year timespan.

Dublin City Council's housing policy of the 1970s and 1980s severely disadvantaged tertiary shopping areas by relocating local city-centre communities to the suburbs. This deprived tertiary retailers of their core market. At the same time, the planning regime failed to protect existing retailers on tertiary streets of the city centre as was envisaged in the retail planning guidelines. These were overlooked by the City Council in the measures they have taken to ensure the survival of the city centre as against onslaught of suburban shopping centres and retail parks. The survival of tertiary streets will depend on local collaborative efforts in improving the retail offering such as through the creation of specialist clusters. This could be achieved through the BIDS mechanism. A clear focus will be necessary in the development of a more targeted approach to attract the modern day consumer.

## **Note**

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# APPENDICES

## APPENDIX 1

### Primary Streets: Comparing Categories of Occupancy 1972 and 2002

Dublin City Centre Primary Shopping Streets							
Occupancy in 1972				Occupancy in 2002			
	No.	%	Cumulative		No.	%	Cumulative
Ladies Wear	24	13.0%	13%	Ladies Wear	28	15.0%	15%
Footwear	21	11.4%	24%	Footwear	17	9.1%	24%
Jewellery	15	8.1%	32%	Ladies/Menswear	13	7.0%	31%
Menswear	11	5.9%	38%	Jeweller	12	6.4%	37%
Bank	7	3.8%	42%	Phones	10	5.3%	43%
Restaurant	7	3.8%	46%	Dept Store	8	4.3%	47%
Dept Store	6	3.2%	49%	Sports Clothing & Goods.	8	4.3%	51%
Pharmacy	6	3.2%	52%	Records CDs etc	7	3.7%	55%
TV Rental	5	2.7%	55%	Restaurant	7	3.7%	59%
Furs	4	2.2%	57%	Café	5	2.7%	61%
Travel Agents	4	2.2%	59%	Menswear	5	2.7%	64%
Employment Agency	3	1.6%	61%	Newsagents	5	2.7%	67%
Fabrics	3	1.6%	63%	Pharmacy	5	2.7%	70%
Furniture	3	1.6%	64%	Bank	4	2.1%	72%
Opticians	3	1.6%	66%	Tourist Souvenirs	4	2.1%	74%
Pub	3	1.6%	68%	Cosmetics	3	1.6%	75%
Tobacconists	3	1.6%	69%	Fast Food	3	1.6%	77%
46 Other Categories	57	30.8%	100%	Hairdressers	3	1.6%	79%
				Leather Goods	3	1.6%	80%
				Photographic	3	1.6%	82%
				28 Other Categories	34	18.2%	100%
Total Traders	185				187		

## APPENDIX 2

Table 10: Changes in Occupancy of Tertiary Streets 1972-2002

Dublin City Centre Principal Tertiary Shopping Streets							
Occupancy in 1972				Occupancy in 2002			
	No	%	Cumulative		No	%	Cumulative
Pub	66	8.5%	8%	Pub	56	8.9%	9%
Butchers	60	7.7%	16%	Restaurant	46	7.3%	16%
Grocery	44	5.6%	22%	Ethnic Stores	28	4.4%	21%
Footwear	34	4.4%	26%	Furniture	28	4.4%	25%
Drapery	28	3.6%	30%	Take Away	20	3.2%	28%
Menswear	25	3.2%	33%	Charity	18	2.9%	31%
Industrial	22	2.8%	36%	Butchers	12	1.9%	33%
Hardware/DIY	20	2.6%	38%	Convenience Store	12	1.9%	35%
Ladieswear	20	2.6%	41%	Hairdressing	12	1.9%	37%
Pharmacy	19	2.4%	43%	Travel Agents	12	1.9%	39%
Betting Shop	18	2.3%	46%	Betting Shop	11	1.7%	40%
Wallpapers/paints	17	2.2%	48%	Internet Shop	10	1.6%	42%
Bakery and Confectionery	16	2.1%	50%	Newsagents	10	1.6%	44%
Hairdressers	16	2.1%	52%	Antiques	9	1.4%	45%
Jewellery	16	2.1%	54%	Bank	9	1.4%	46%
Furniture and Cycles	15	1.9%	56%	Pharmacy	9	1.4%	48%
Newsagents	14	1.8%	58%	Hotel	8	1.3%	49%
Restaurant/Café	14	1.8%	59%	Jeweller/Antiques	8	1.3%	50%
Café	13	1.7%	61%	Ladies Clothing	8	1.3%	52%
Fruit and Veg	13	1.7%	63%	Café	7	1.1%	53%
Bank	11	1.4%	64%	Call Centre	7	1.1%	54%
Dry Cleaning	11	1.4%	66%	Insurance Brokers	7	1.1%	55%
Confectionery	9	1.2%	67%	Laundrette	7	1.1%	56%
Fish and Poultry	8	1.0%	68%	Music Instruments	7	1.1%	57%
Laundrette	8	1.0%	69%	Adult Shop	6	1.0%	58%
Wholesalers	8	1.0%	70%	Off Licence	6	1.0%	59%
Construction Trades	7	0.9%	71%	Photographic	6	1.0%	60%
Electrical Appliances	7	0.9%	72%	Stationery	6	1.0%	61%
Shoe Repairs	7	0.9%	73%	Video Rental	6	1.0%	62%
TV Rental	7	0.9%	73%	Car Sales	5	0.8%	63%
Car Sales	6	0.8%	74%	Electrical Appliances	5	0.8%	64%
Carpets	6	0.8%	75%	Menswear	5	0.8%	64%
Leather Goods	6	0.8%	76%	Motorbikes	5	0.8%	65%
Opticians	6	0.8%	77%	Sports Equipment	5	0.8%	66%
Stationery	6	0.8%	77%	Wholesale	5	0.8%	67%
Car Repairs	5	0.6%	78%	Amusements	4	0.6%	67%
Fancy Goods	5	0.6%	79%	Bridal Wear	4	0.6%	68%
Motor Factors	5	0.6%	79%	Delicatessen	4	0.6%	69%
Pawnbrokers	5	0.6%	80%	Dry Cleaners	4	0.6%	69%
Pet Shops	5	0.6%	81%	Fast Food	4	0.6%	70%
Printing	5	0.6%	81%	Grocery	4	0.6%	71%
RecordsCDs etc	5	0.6%	82%	Hardware	4	0.6%	71%
Toys	5	0.6%	82%	Office Furniture	4	0.6%	72%
Clothing mnfrs	4	0.5%	83%	Optician	4	0.6%	72%
Hotel etc	4	0.5%	83%	Pet Shop	4	0.6%	73%
Musical Instruments	4	0.5%	84%	Phones	4	0.6%	74%
Off Licence	4	0.5%	84%	Records CDs	4	0.6%	74%
Photographic	4	0.5%	85%	Shop Equipment	4	0.6%	75%
Post Office	4	0.5%	86%	Upholsterers	4	0.6%	76%
TakeAway	4	0.5%	86%	Variety Store	4	0.6%	76%
TV Radio Musical	4	0.5%	87%	95 Other categories	150	23.8%	100%
73 Other Categories	105	13.5%	100%				
<b>Total</b>	<b>780</b>	<b>100.0%</b>		<b>Total</b>	<b>631</b>	<b>100.0%</b>	