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COMPETITIVE PAPER
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Streets of Stability and Change: A comparative analysis of Dublin city-centre streetscapes 1972-2002

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Streets of Stability and Change: A comparative analysis of Dublin city-centre streetscapes 1972-2002

Abstract

Studies on city streetscapes are relatively rare in the retail literature despite the fact that retail offerings at any point in time approximate the volume and nature of societal consumption. This study examines past and present composition of streetscape activity and street ownership in Dublin city centre. The data generated will constitute a historical record of both the degree of stability and the degree of change in the Dublin streetscape. Findings illustrate the volatility of the street and the importance for central places of fulfilling both social and economic roles. The study also identifies the need for more innovative and carefully targeted interventions to regenerate specific tertiary street s. Finally, the study concludes that an analysis of change in retail provision over time provides a relatively accurate barometer of socio-cultural change.

Key words Retail, streetscapes, change, regeneration, Dublin

Streets of Stability and Change: A comparative analysis of Dublin city-centre streetscapes 1972-2002

INTRODUCTION

Dublin city, capital of the Republic of Ireland and home to in excess of one million inhabitants, is currently a vibrant retail centre that reflects Ireland's recent national economic and social transformation. The strong demand for retail space throughout the city from both national and international retailers has driven up the cost of commercial property and associated tenancy costs. The river Liffey divides Dublin city centre's two primary shopping districts, the *Grafton Street* district to the south of the river and the *Henry Street* district to the north. A multitude of secondary streets feed off these primary shopping-streets with tertiary shopping areas on the periphery. *Grafton Street* is Dublin's most prestigious shopping street and commands the highest retail rents in the country. Both national multiples and international retailers vie to locate there despite its cost. It was recently found to be the fifth most expensive trading street in the world in terms of retail rents after other branded places such as Fifth avenue (New York), Champs Elysees district (Paris), Bond St. (London) and Pitt Mall (Sydney) (Kennedy, 2003). The *Henry Street* area was traditionally Dublin's principal shopping area but lost out to *Grafton St.* during the 1980s. Two principal factors have been attributed to its loss of pole position: the lack of significant side-street activity (in contrast with Grafton St) and the limited night-life activities near the street (Dublin City Council Website, 2003). However, as a primary street of a thriving city, it commands Zone A rents and also hosts a significant proportion of both national and international retailers.

The relative attractiveness of a trading area is critical to retailer success. It provides not only the setting in which consumer expenditure takes place, but has been shown, in a fashion context, to have implications for the image and positioning of the brand (Fernie et al, 1997). Despite its importance, the streetscape of the modern city has been described as a relatively rich but under-explored area of research (Crewe, 1994; Hayden, 1995; Fitch, 2000) with a research tendency towards 'consumption sites' that focus on the department store or the shopping mall (Lowe and Wrigley, 1996:17). Fitch (2000) describes the lack of research focus on the street as a consumption site as a 'lacunae in the literature' and rationalises that the 'the street is positioned below the wider sweeping analyses of the city, yet above that of the site'. In his examination of the Edinburgh streetscape (Ibid), he states that the street remains 'arguably one of the most important, the most contentious, and yet least understood places that make up a city'. This paper attempts to address such a deficit.

The key objective of this research was to establish both the degree of stability and of change in the composition and economic activities of Dublin's urban streetscape, over the most recent generation. It augments previous research on the tertiary streets of the capital (O'Callaghan & O'Riordan, 2003), and will constitute a historical record of change on the Dublin streetscape over a thirty-year period.

THE CITY STREET

City streets have been viewed in a variety of ways; as exterior sites of display (Featherstone, 1998); as branded locations (McDonald, 2003; Fernie et al, 1997); as places for social activity (Wrigley & Lowe, 2002:211); as shopping malls and even as sites of resistance (Ibid: 200). Fitch (2000) illustrates the volatility of the urban streetscape by using a theatrical metaphor in which the street is the stage set and the consumer is actor.

> *'The street should be viewed as a stage, with consumers performing as actors upon (and within) the stage set. The street, its set and its staging, is not a fixed entity, but a fluid environment which is continuously changing and evolving at a local level.'*

This metaphor is useful in illustrating the transitory nature of both street occupancy and business activity and demonstrates the evolutionary nature of any commercial street landscape. While new entrants reflect a combination of new retail innovation, entrepreneurial vision and international interest, departures will often reflect poor business management, changing societal needs or even re-location. The recording of change and stability, the tension between the old and the new, allows an appreciation of how the streetscape changes over time and how it retains a degree of stability.

Historically, central places developed as a point of maximum accessibility and contact, usually where roads leading to other settlements met and provided both an economic and social focus for the surrounding community. They offered a place for people to gather and meet for a multitude of reasons including commercial, social and shopping activities. The composition of a city streetscape reflects the varying needs of the local population. On the demand side, Hannigan (1998) proposes an interesting consumer needs' classification system that a modern city should address as 'shoppertainment, eatertainment and edutainment'. Such classifications categorise consumer need and also offer a useful basis for

the analysis of streetscape change. Fitch (2000) focused his analysis of the street on the supply side and classified the nature of the street offer in terms of retail, service and leisure provision.

RETAILING IN THE GREATER DUBLIN AREA

Retailers within the greater Dublin area[1] are the beneficiaries of more than forty per cent of national comparison goods turnover and over thirty per cent of convenience turnover. However, the benefits of this concentration in retail spending have not been uniform. Dublin city centre experienced a decentralisation of retail capital in the 1980s and 1990s, similar to the 'first three waves' of decentralisation of retail capital in the UK (Schiller, 1986). Convenience retailing was the first to 'suburbanise', so that by the late 1970s, the city-centre accounted for less than fifteen per cent of the city convenience offering (Litchfield & Partners, 1979). This 'suburbanisation' of convenience retailing allied to the associated migration of both inner-city and rural populations to suburban Dublin, accelerated the decline of retail activity in the city-centre and created the subsequent need for retail regeneration strategies (O'Callaghan & O'Riordan, 2003). In the decade to 1977, an analysis of the turnover performance of retailing in Dublin city-centre was indicative of the relative decline of the trading area. While the turnover of city centre retailers increased by seventeen per cent, there was a corresponding increase of sixty seven per cent in the turnover performance of retailers in the greater Dublin area (Litchfield & Partners 1979). Other factors contributed to the decline of Dublin city-centre as a shopping destination: the convenience and increased availability of the suburban shopping offering, increased consumer car usage for shopping trips, traffic congestion in the city-centre linked to insufficient car parking facilities, as well as the high cost of parking. In contrast, suburban retailers offered an integrated one-stop shopping experience, a pleasant shopping environment and free and safe parking facilities.

The regeneration Dublin city-centre

In the early 1990s, a series of urban related interventions was initiated aimed at restoring the physical fabric of the city (Drudy & MacLaren, 1994). Central government devised measures aimed at stimulating the use and development of land. It used a combination of tax incentives, grant and development initiatives concerning land assembly, landscaping and environmental improvements (Adair, Berry & McGreal, 1993, 1994). The need for measures to stimulate private sector investment in the regeneration of central Dublin was recognised through

a series of planning (establishment of designated areas) and fiscal measures (Ibid). By the end of the 1990s, over 20,000 people had moved back into city centre areas. The demographic profile of these urban migrants contrasted sharply with traditional city-centre communities. A combination of young single professional people and recently arrived immigrants contributed to the economic upturn of many city centre areas. The development of new city-centre shopping facilities during the 1990s improved the market attractiveness and competitive capability of the city-centre as a shopping destination. The Planning and Development Act (2000) provided further support for retail developments on the Dublin city-centre streetscape. It reinforced the sequential approach to retail development, which by nature facilitated the development of 'brownfield sites' by retailers, favourable to the retail regeneration of Dublin city centre districts.

Dublin—A Changing Context

The latter period of this study coincides with the most significant economic, social and cultural transformation in the nation's history. Dublin, as capital city, mirrored this transformation. Low inflation, historically low interest rates and unprecedented economic growth have resulted in a local economy characterised by affluence. The 1990s was a remarkable decade for the amount of additional space added to the retail landscape of the greater Dublin area. The development of larger and better retail facilities was simply a reflection of a new found confidence in the country as a result of the exceptional economic growth being experienced during the period. This increased demand for retail space in the latter half of this decade (see table 1) was fuelled by what has been described as an 'invasion' of international retailers, mostly from the United Kingdom. These retailers were attracted to Dublin because of its increased prosperity and the availability of retail infrastructure of suitable size and format (O'Callaghan,1997) For example, in the Henry street district, the Jervis Centre opened in 1996 (30,416 square metres) with big name UK retailers e.g. *Boots, Debenhams, Dixons, Tesco, Waterstones, Burtons, Marks & Spencer,* and *Argos* acquiring the majority of lettable space. The increased demand for retail space in the city, allied with a more intense level of competitive rivalry, impacted negatively on the independent retail sector, many of whom either were forced to close due to trading conditions or cashed in on the vibrant property market and exited.

The Dublin city consumer market also changed. It became increasingly characterised as a culturally diverse market both as a result of immigration and foreign visitor numbers to the city. Dublin is one of the most popular European city destinations with 3.65 million

[1] Usually defined as Dublin city centre, suburban Dublin as well as parts of Kildare, Meath and Wicklow

overseas visitors coming to Dublin 2004 (Dublin Tourism Annual Report, 2004). It was also found to be the number three city in Europe for visitor bed-nights after London and Paris (Ibid).

Spatial Costs

The cost of retail space reflects demand and accurately indicates the attractiveness of a trading area or location. Equally, changes in the rent differentials between locations or trading areas over time also signal positive or negative trading trends. Significantly, rents on premises within the tertiary trading areas have for the most part remained static during the boom times. By comparison, rents in the primary and secondary streets have increased by 85 percent and 59 per cent respectively. Table 1 illustrates the rent differential of locations over the 1998-2002 period.

Table 1 Dublin City Centre Retail Rents per square metre per annum 1998-2002

Dublin City Centre Street Classifications	***1998***	***1999***	***2000***	***2001***	***2002***	***% Change 1998-2002***
Primary City Centre: (e.g. Grafton St, Henry St.)	€ 2,459	€ 3,013	€ 3,492	€ 3,818	€ 4,560	85%
Secondary City Centre	€ 1,045	€ 1,307	€ 1,436	€ 1,539	€ 1,660	59%
Tertiary City Centre	€ 273-€546	€ 273-€546	€ 273-€546	€ 273-€546	€ 273-€546	N/A

Source IAVI *Annual Property Survey 2002* and preceding years

DESCRIPTION OF RESEARCH

This study examined changes in the composition of businesses located in Dublin city-centre over a thirty year period to 2002/3. It covered thirty seven city-centre streets, two thousand six hundred addresses that constitute approximately ninety per cent of city centre shopping streets. Businesses were required to have a direct street frontage at pavement level to be included in the survey. Trades and economic activities in non-pavement level floors (e.g. basement or upper floors) or on off-street premises (e.g. city centre shopping malls, arcades, etc) were not included in the data set. A list of the streets surveyed is provided in Appendix A.

The 1972 dataset was collated from '*Thoms Dublin Street Directory 1972'*. This is an annual directory of traders and occupiers of Dublin streets and suburbs that has been

published since 1844. The more recent data was collected over a six month period between Autumn 2002 and Spring 2003 by way of an observational 'street-walk' where the fascia name, description and nature of activity at each street premises was noted by audio recording and later entered on a database in respect of current usage. The two periods 1972 and 2002/3 were then compared on a premises-by-premises basis and change or lack of change recorded. The fifty most frequently encountered activities in each time period are shown in Appendix B. Such a presentation of the survey data reveals a richness of detail that is sometimes lost in the development of a classification system necessary for structured analysis.

CLASSIFICATION OF DATA

While the kind of comparison described in the previous section provides a general appreciation of the texture of central area streetscapes, it does not allow for a more micro view of the streets of the city or indeed trading areas. Therefore, in order to refine and clarify the data, a further classification system was developed where businesses were divided into broader street usage and business ownership groups. The data was then organised and categorised using the classification described below:

A. Street categorisation
B. Key shopping districts
C. Activity (business description) classification
D. Ownership type classification

A. Street Categorisations.

Shopping streets were categorised as primary, secondary and tertiary (Table 2). Primary shopping streets are identified as commanding the highest rent per square metre according to commercial rental surveys. Secondary shopping streets are streets adjoining or near to the primary streets where rentals reflect the overspill of demand for retail space from the primary streets. Tertiary shopping streets included here are streets that are adjoining secondary streets but considered to be more run-down or less developed or to have less demand for retail space as reflected in rental rates. Rent differentials were significant on the tertiary streets (Table 1) but a further sub-classification was not found to be feasible for the purposes of this study. On the basis of rents, ten streets were reclassified in the 2002/3 dataset (Appendix A).

Table2: Overview of the Data in the Survey

	1972			2002/3		
	Streets	Addresses	Activities*	Streets	Addresses	Activities*
Primary	5	304	200	4	279	192
Secondary	19	988	638	17	830	566
Tertiary	13	1,323	1,093	16	1,506	966
Total	37	2,615	1,931	37	2,615	1,724

*Business activities may trade at several adjoining addresses hence the difference between the numbers of Addresses and of Activities in the above table.

B. Key shopping districts

The two key shopping districts of Grafton Street and Henry Street were used as further basis for analysis to provide an alternative perspective on the data. Adjacent areas to these two primary streets were merged to form two distinct shopping districts for analysis purposes. This process resulted in the division of all 37 streets into three groups:

- The Grafton Street District
- The Henry Street District
- The Remaining Streets

C. Activity Classification

The diverse nature of city centre commercial activity ranges from retailing to catering, to tourism and leisure services, to consumer services, to business services, to government services and other institutional activities such as churches, schools etc. Equally, some buildings or sites become run down, derelict, undergo re-construction or reconfiguration or re-enter active economic life in a variety of ways. Traders come and go, expand, contract, re-locate or re-brand over a period of time. Evidence of firms remaining on the same site over thirty years but in a different line of business was uncommon.

The generally used classification of economic activity within the European Union is the NACE code – used by the Irish Central Statistics Office for its *Annual Services Enquiry*. The NACE classification system has a number of disadvantages from a retailing perspective, such as inadequate depth of categorisation of retail formats especially in respect of non-specialist stores, and has been departed from when reporting retail activity in a number of EU

countries such as France and Germany. The American *Annual Benchmark Report for Retail Trade and Food Services* uses the newer North American Industrial Classification System (NAICS), which reflects in considerably more detail the various types of retail activity found in the USA.[2]

Since the NACE system was felt to be inappropriate for the kind of analysis best suited to the data available here, a simpler type of classification was developed, influenced by Fitch (2000). This breaks down the detailed business descriptions into the following six broad categories to reflect the general nature of business conducted at a particular address and which would sufficiently reflect the general character of each street. The business classifications used in this study are shown and briefly described in Table 3.

Table 3 Description of Activity Classifications

Activity Classification	*Description of What is Included*
Retail	Stores selling goods to the public
Leisure	Service and retail activities having a mainly leisure or tourism application such as restaurants, cafes pubs as well as gift and souvenir shops and sports equipment stores (but not sportswear).
Services	Personal services such as dry cleaning, hairdressing, beauty salon etc
Financial	Banks, building societies, insurance
Business to Business B2B	Manufacturers, wholesalers, printers, shipping agents etc
Institutional	Public bodies, charities, religious and cultural organisations.

The six headings reflect the varied nature of economic activity in the modern city. This is increasingly seen as including amenity and leisure uses, thereby extending the civic life of the city into the evening and night-time hours. While the authors accept that retail, leisure, services and financial could all be included in the 'Retail' category and also accept that the boundaries between such classifications are blurring, it was necessary for analysis purposes. The usage of these classifications are illustrated in more detail in Appendix C.

D. Ownership Type classification

The nature of business ownership and changes in ownership over time is indicative of the penetration by multiples and by international retail brands. The trading name of each

[2] For a recent review of some of difficulties with and non-compatibility of various international industrial classification systems see Jacobs and O'Neill (2003).

business was identified and classified into four broad categories, also influenced by Fitch (2000). These consisted of the following

- Independent Single Branch, Irish owned
- Irish Multiple – Irish retail or financial services
- Branch or Franchise of International Retail Brand
- Institutional e.g Government or similar

Traders were classified in the Irish multiple category if they had operated stores in more than one street which meant that this category covered both very small and very large Irish multiples. A further classification "Franchise" was initially used to note premises trading under the heading of symbol groups or trades where franchise operation was known to predominate. However this was later abandoned, since branches of international retailers could not always be correctly distinguished as being a branch or a locally operated franchise. Thus fast food brands like McDonalds were classified as "Branch or Franchise of International Retail Brand", while convenience stores such as "Centra" operating locally controlled franchises were classified as Irish multiple.

Classification of Changes in Activity and Ownership

As well as examining the types of economic activity and types of ownership found in the two timeframes examined, the study also examined separately the changes over the thirty-year period involved. Therefore, each address was compared in each of the two periods examined and the changes classified as described below under five headings.

These were

1 Same Trader (the same trader in 2002-03 still engaged in broadly the same activity as was the case in 1972)
2 Same Activity (a different trader in 202/03 but engaged in a broadly similar activity as previous trader in 1972
3 Changed (a different trader in 2002/03 engaged in different activity to what was carried on at that address in 1972)
4 Left (In 2002/03 there was no activity being carried on at an address which was economically active in 1972)
5 New Entrant (in 1972 the address was inactive but by 2002-03 was occupied)

RESEARCH FINDINGS AND DISCUSSION

The changing nature of society is reflected in the changes in the type of business street activities. Perhaps not-surprisingly, the pub retained pole position as the most frequently encountered business type in both time periods. The increased importance of leisure is reflected in the higher incidence of eating establishments (from 58-100) and travel agents (from 16-39). Other noteworthy items are the decline in numbers of butchers, footwear, menswear and the disappearance of categories like grocery, drapery, TV rental and coal merchants. New categories in 2002/3 included convenience store (replacing grocery), ethnic stores (reflecting immigration a phenomenon relatively new to Ireland), phone shops, video rentals, charity shops, call centres, fast food, beauty salons, camping equipment and adult shops, all reflecting the changing demands of the modern urbanite.

The overall findings of the study are now described and discussed under the following headings.

- Economic activities in the streets (Usage of city-centre premises)
- The nature of business ownership (Independent, Irish Multiple International etc)
- Stability and change in the activities and ownership of city streets.

Economic Activities in the streets

Not surprisingly, retailing was the principal commercial activity for all street categories in both time periods. This was especially evident on primary streets where retailing accounted for 67% of street activity in 1972 and 77% in 2002/3. While there was a 10% increase in the incidence of goods retail activity on the primary streets, a modest increase of 3% was recorded on the secondary streets with a decline of 17% on the tertiary streets. This reflects the location preferences of goods retailers for primary street locations and illustrates the importance of retailer demand on the rental yields of city premises. The declining incidence of goods retailers on the tertiary streets may reflect the decline of the independents on city centre streets as well as falling footfall on such streets.

An increase of 12% in the incidence of the leisure offering was recorded between the two time periods. While a modest increase of 2% was recorded for the primary streets, there were more significant increases of 16% and 10% in the leisure offering of both the secondary and tertiary streets respectively. This illustrates the growing importance of the

leisure component of city streets and reflects lifestyle changes, greater spending power, a growing tourism spend and the blurring of boundaries between pure "retail" and "leisure" offerings. It also is indicative of both economic and social change. A decline of 4% in the incidence of 'B2B' businesses resulted from many wholesale businesses moving out of the city to less costly locations. Financial and services showed little overall change between the two time periods. The migration of institutions to the tertiary streets between 1972 and 2002/3 is noteworthy and probably reflects high economic rents of primary and secondary locations for such institutional bodies.

Table 4 Percentage Usage Type by Street Category

Premises Usage	Primary		Secondary		Tertiary		Total	
	1972	2002/3	1972	2002/3	1972	2002/3	1972	2002/3
Financial	4.0%	3.6%	6.1%	4.1%	1.9%	1.8%	3.5%	2.7%
Institutional	.5%	.0%	3.1%	2.7%	2.1%	4.8%	2.3%	3.5%
Leisure	11.0%	13.0%	13.2%	29.5%	16.0%	26.5%	14.6%	26.0%
Vacant	7.5%	2.6%	18.2%	12.5%	14.9%	19.6%	15.2%	15.4%
Retail	67.5%	77.1%	40.6%	43.3%	47.8%	31.1%	47.4%	40.2%
Services	8.5%	3.6%	10.7%	6.7%	9.3%	11.4%	9.7%	9.0%
B2B	1.0%	.0%	8.2%	1.2%	8.0%	5.0%	7.3%	3.2%
Total	100%	100%	100%	100%	100%	100%	100%	100%

While the vacancy rate across all city centre streets remained virtually unchanged over the period, there are significant differences in the experience of the various street categories. Reflecting better economic conditions, there were significant reductions in the vacancy rates on both the primary and secondary streets. A substantial fall of two thirds in the vacancy rate on the primary streets reflects strong demand for primary street locations in recent times. Although less significant, the vacancy rate also fell by a third in the secondary streets who undoubtedly were the beneficiaries of an 'overspill' from the primary streets. However, there was a 25% increase in the vacancy rate on tertiary streets between the two periods with approximately one in five premises vacant or derelict in 2002/3 indicating a need for new public policy interventions targeted specifically at these commercial districts or a review of planning laws that allow derelict sites to be kept without penalty for long periods of time. While there are substantial differences in vacancy rates on individual tertiary streets, it is clear that many have not benefited from the economic boom of the 1990s and require more locally focussed regeneration. The socialisation of the Grafton street district by comparison to the Henry street district is illustrated in Table 5. While the 'leisure' category remains virtually

unchanged in the Henry street district, there was a 5% increase in its incidence in the Grafton street district.

Table 5 Usage Types for Main Shopping Districts

	Grafton Street District		Henry Street District		Other Locations		Total	
	1972	2003	1972	2003	1972	2003	1972	2003
Financial	4.1%	4.6%	0.9%	2.2%	3.7%	2.5%	3.6%	2.8%
Institutional	1.9%	1.7%	0.9%	0.0%	2.4%	4.1%	2.3%	3.5%
Leisure	16.0%	21.4%	6.2%	6.7%	14.9%	28.0%	14.6%	26.0%
Vacant Premises	13.8%	7.1%	15.0%	4.5%	15.4%	17.4%	15.2%	15.3%
Retail	49.6%	59.2%	67.3%	80.9%	45.7%	34.3%	47.5%	40.1%
Services	10.4%	5.9%	7.1%	5.6%	9.6%	9.8%	9.6%	9.0%
B2B	4.1%	0.0%	2.7%	0.0%	8.2%	4.0%	7.3%	3.2%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Ownership of the businesses in the streets

The nature of street ownership demonstrates both stability and change. Significant change occurred in the incidence of both international brands and independent traders on city streets. There has effectively been a transfer of retail space from independent traders to international retail brands.

Table 6 Comparing Ownership Type by Street Classification in 1972 and 2002/3

		Independent	Irish Multiple	International Retail Brand	Institutional	
Primary	1972	49%	35%	15.%	1%	*100%*
	2002/3	26%	34%	40%	0%	*100%*
Secondary	1972	66%	23%	6%	5%	*100%*
	2002/3	58%	25%	12%	6%	*100%*
Tertiary	1972	85%	12%	1%	2%	*100%*
	2002/3	81%	12%	2%	5%	*100%*

While the occupancy of city premises changed over the period, a degree of stability is evident in the share of the street held by both Irish multiples and institutions, which remained more or less the same. There was a significant reduction in the presence of independent retailers on city-centre streets, most notably on the primary streets where their representation was halved. A modest decrease on both the secondary (8%) and tertiary streets (4%) was recorded. Independents now account for four out of every five premises on the tertiary streets of the capital. High primary street rents have effectively priced the independents out of the market, although some may also have cashed in their high profile locations. The increased internationalisation of the Dublin streetscape is clearly evident. Over the period, there was a 25% increase in the incidence of international retail brands on

the primary streets, which accounted for 40 % of primary street premises in 2002. While international retail brands are less represented on the secondary streets, their proportion doubled over the period. This reflects an increasing tendency among international entrants to establish a 'footprint' in the Dublin market, even if their preferred primary locations are not available. It is also indicative of the health of the local economy as a result of the 'celtic tiger' years and the increased attractiveness of certain secondary streets adjacent to the primary streets particularly within the Grafton street district.

A further perspective on the above data can be obtained by considering the situation in the two key shopping districts in central Dublin (see Table 7). The Grafton and Henry street districts accounted for 18% of total business premises, had a disproportionate share of international retailers and Irish multiples and was underrepresented by independents compared to other districts in the city centre. Thirty years ago international retailers controlled 8.8% and 8.5% of businesses in the Grafton and Henry street districts respectively. By 2002/3, the internationalisation of Dublin's primary shopping districts is confirmed with international retail brands accounting for nearly 28% and 34% of business activity. Albeit less dramatic, the Irish multiples had also increased their share of businesses in the Grafton street district from 20% to nearly 25%, but had a 5% lower share of the Henry street district at 40%. The flight of the independent retailers from Dublin's key shopping districts is also confirmed. Their share of businesses in the key shopping districts fell from 68.3% to 45.7% in the Grafton street district and from 44.7% to 24.4% in the Henry street district. Outside these prime city-centre shopping districts, changes were slight by comparison. The independent retailer continues to dominate and accounts for three out of every four business premises. International retail brands continue to have only a marginal presence in other locations, while Irish multiples accounted for 16% of the businesses.

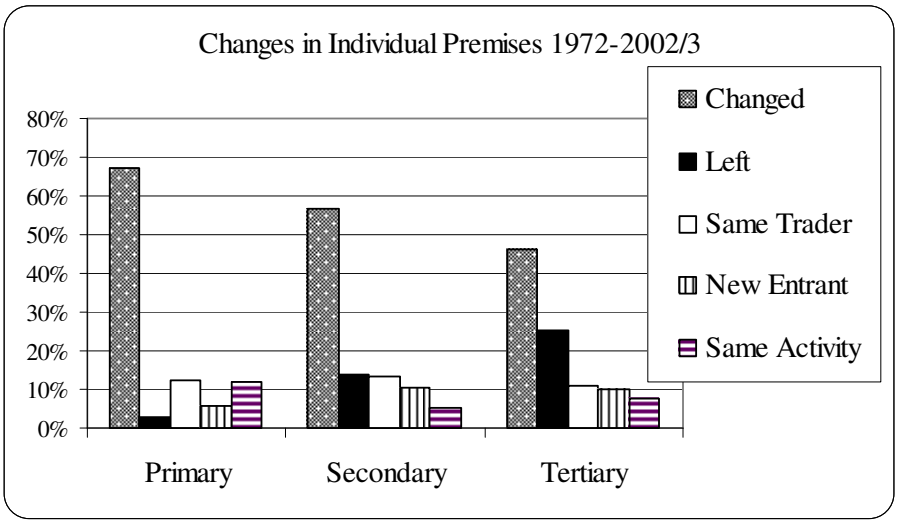
Table 7 Ownership in Key Shopping Districts of Dublin City

	Shopping Districts						Total	
	Grafton Street District		Henry Street District		Other Locations			
	1972	2002/3	1972	2002/3	1972	2002/3	1972	2002/3
Institutional	2.6%	1.8%	2.1%	1.2%	3.1%	5.2%	3.0%	4.5%
Irish Multiple	20.3%	24.7%	44.7%	40.7%	16.9%	16.3%	19.0%	19.1%
International Retail Brand	8.8%	27.9%	8.5%	33.7%	3.6%	5.3%	4.6%	10.4%
Independent	68.3%	45.7%	44.7%	24.4%	76.4%	73.2%	73.4%	66.1%
Total	100%	100%	100%	100%	100%	100%	100%	100%

Stability and change in the activities and ownership of city streets

While previous analysis gives an overall view of change, a further dimension of understanding can be obtained through a line-by-line comparison of addresses to analyse changes in both activities and ownership. A comparison of each address was made between 1972 and 2002/3 and the differences classified under five headings as outlined earlier. Figure A summarises the changes.

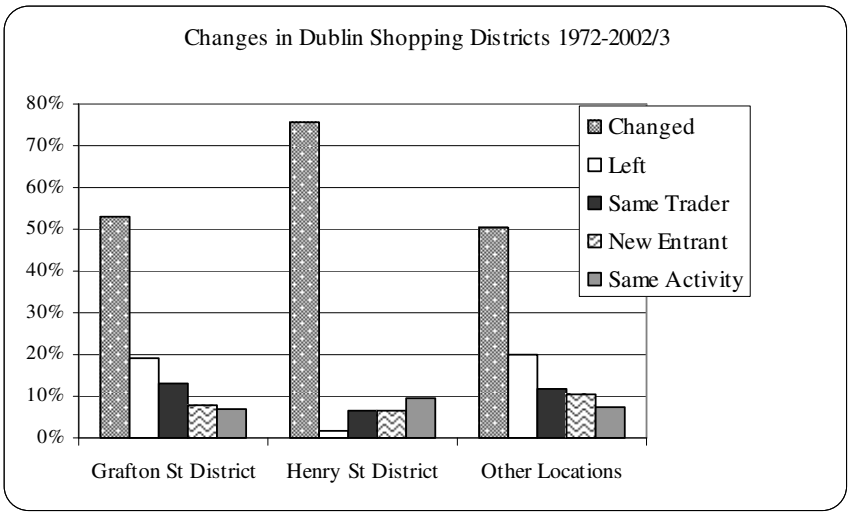
Fig A



The survey found that the occupants of the Dublin city streetscape had almost completely changed over the thirty-year period. Incidences where the "same trader" was in place represented only 12% of total addresses examined. While the differential in the rate of change is not significant between the three categories of street, the highest rate of change occurred in the primary streets with over two thirds of addresses having a different activity between the two periods. The measurement of change is somewhat problematical in that premises enter and leave the active economic life of the street either through vacancies between occupancy, reconstruction, dereliction or conversion to housing or other non-business use. Alternatively, it could be argued that the streets exhibit a degree of stability, given the fact that that one in eight street premises was host to the same trader after thirty years. Equally, the fact that one in five premises was host to either the same trader or same activity indicates a remarkable measure of stability in such a phenomenal period of change. The primary streets exhibit the greatest degree of stability with nearly one in four premises either having the same trader or same activity after the thirty year period.

Further analysis of the dataset by shopping district indicates a greater volatility in the Henry Street district, with only 7% of same traders surviving after thirty years while 13% survived in the Grafton Street district.

Figure B



Surprisingly, there were relatively little differences in survival rates across all street categories. The survey shows also the ebb and flow of new or redesigned premises coming on stream and others being withdrawn for refurbishment or consolidation or simply "resting" between tenancies.

CONCLUSIONS

Studies of city streetscapes are relatively rare in the retail literature and therefore comparative studies are problematical. This study illustrates how an analysis of the ownership, usage and nature of demand offers a useful diagnostic on the health of a trading area or street. The findings support the thesis that the streetscape of a city exhibits a substantial degree of volatility. The changing nature of the Dublin streetscape between 1972 and 2002 reflected the socio-cultural transformation of the Irish retail landscape for the period. The emergence of the leisure offering as a key category, consumer demand for international luxuries and the flight of 'bulk' retailers to the car accessible suburbs provide empirical evidence of changes in consumer behaviour as well as the retailer response. Further evidence of change is provided by the demise of certain categories of retailer such as 'television rental' and 'coal merchants' from the city streets, and the emergence of new retail offerings such as internet cafes, phone shops, adult shops and ethnic stores. Dublin city-centre hosted a vastly different tenant mix in 2002, with only twelve per cent

of premises being occupied by the same trader after thirty years. This has resonance with the view that a street constantly exhibits tension between the old and the new, with varying degrees of stability and instability. The vacancy rate along some city centre tertiary streets is noteworthy. The fact that one out of every four premises on tertiary streets is vacant proves that the regeneration of Dublin city centre has not been uniform across street categories. This highlights the necessity for more innovative and carefully targeted interventions to regenerate specific categories of tertiary street.

The research also supports the notion that the city street provides a reasonably accurate barometer of societal consumption at a particular point in time. The increased affluence of the Irish consumer, due to unprecedented economic growth in the late 1990s, is reflected in the increased incidence of the leisure offering, particularly in the 'eatertainment' offer. The growing incidence of international retailers on the major thoroughfares of Dublin city can be interpreted either as empirical evidence of its increasing attractiveness as an international retail location or alternatively simply reflects the increased level of European retailer internationalisation. The research clearly indicates international advances in street occupancy in the key locations have been effectively at the expense of the independent retailer.

Research findings re-enforce the importance of central places fulfilling both a social as well as an economic and commercial role. Historically, town centres developed as a focal point for social, economic and shopping activities. The Grafton Street shopping district has developed as such a focal point as evidenced by the increased incidence of the 'leisure' offer in the area. By contrast, while the Henry Street/Mary Street shopping district is a bustling hive of economic activity during retail trading hours, it remains virtually deserted at night.

Finally, the analysis Dublin of city-centre streets supports Fitch's (2000) view of the street as a fluid environment, continuously changing and evolving at a local level. This is borne out by the findings of the study which identified significant changes in premises usage, street usage and street ownership across all street and district categories identified. Further research might focus on the primary causes of vacancy and dereliction on tertiary streets of the capital and suggest appropriate types of regeneration interventions.

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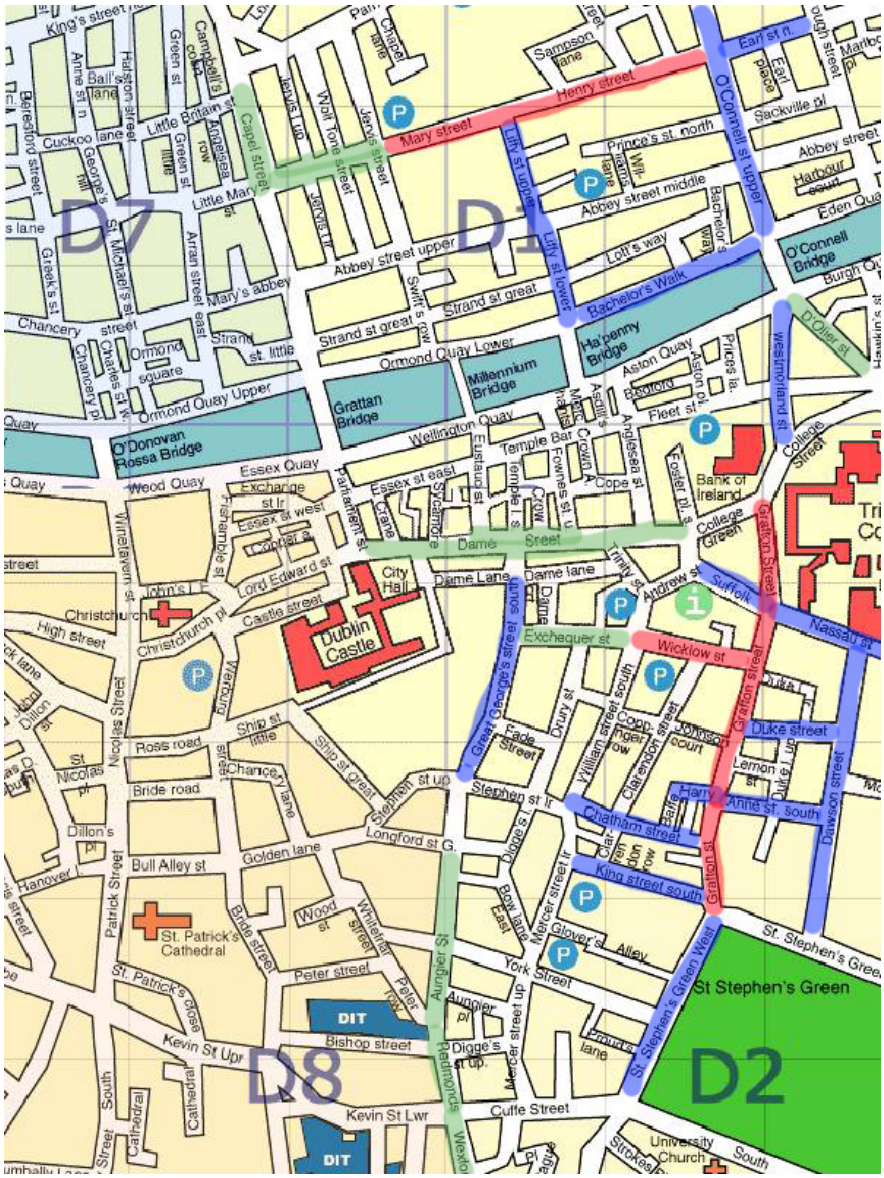
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Exhibit 1. Dublin Streets in the Survey and their Categorisation



Appendix A

The Streets in the Survey and their Categorisation

Street	Category 2002/3	Category 1972	Location
Aungier St	Tertiary Shopping Street	Tertiary Shopping Street	South Centre
Batchelors Walk	Secondary Shopping Street	Tertiary Shopping Street	North Centre
Bolton St	Tertiary Shopping Street	Tertiary Shopping Street	North Centre
Camden Street	Tertiary Shopping Street	Tertiary Shopping Street	South Centre
Capel St	Tertiary Shopping Street	Tertiary Shopping Street	North Centre
Chatham St	Secondary Shopping Street	Secondary Shopping Street	South Centre
Dame Street	Tertiary Shopping Street	Secondary Shopping Street	South Centre
Dawson St	Secondary Shopping Street	Secondary Shopping Street	South Centre
D'olier St	Tertiary Shopping Street	Secondary Shopping Street	South Centre
Dorset St	Tertiary Shopping Street	Tertiary Shopping Street	North Centre
Duke St	Secondary Shopping Street	Secondary Shopping Street	South Centre
Exchequer St	Tertiary Shopping Street	Secondary Shopping Street	South Centre
Georges St South Great	Secondary Shopping Street	Tertiary Shopping Street	South Centre
Grafton St	Primary Shopping Street	Primary Shopping Street	South Centre
Harry St	Secondary Shopping Street	Secondary Shopping Street	South Centre
Henry St	Primary Shopping Street	Primary Shopping Street	North Centre
Liffey St Upper	Secondary Shopping Street	Secondary Shopping Street	North Centre
Liffey Street Lower	Secondary Shopping Street	Tertiary Shopping Street	North Centre
Mary St Part A	Primary Shopping Street	Primary Shopping Street	North Centre
Mary St Part B	Tertiary Shopping Street	Secondary Shopping Street	North Centre
Middle Abbey St	Tertiary Shopping Street	Secondary Shopping Street	North Centre
Moore St	Tertiary Shopping Street	Tertiary Shopping Street	North Centre
Nassau Street	Secondary Shopping Street	Secondary Shopping Street	South Centre
North Earl St	Secondary Shopping Street	Secondary Shopping Street	North Centre
O'Connell St	Secondary Shopping Street	Secondary Shopping Street	North Centre
Parnell St	Tertiary Shopping Street	Tertiary Shopping Street	North Centre
Redmonds Hill	Tertiary Shopping Street	Tertiary Shopping Street	South Centre
South Anne St	Secondary Shopping Street	Secondary Shopping Street	South Centre
South King St	Secondary Shopping Street	Secondary Shopping Street	South Centre
South Richmond St	Tertiary Shopping Street	Tertiary Shopping Street	South Centre
St Stephens Green PartA	Secondary Shopping Street	Secondary Shopping Street	South Centre
Suffolk St	Secondary Shopping Street	Primary Shopping Street	South Centre
Talbot St Part A	Secondary Shopping Street	Secondary Shopping Street	North Centre
Talbot St Part B	Tertiary Shopping Street	Secondary Shopping Street	North Centre
Westmoreland Street	Secondary Shopping Street	Secondary Shopping Street	South Centre
Wexford St	Tertiary Shopping Street	Tertiary Shopping Street	South Centre
Wicklow St	Primary Shopping Street	Primary Shopping Street	South Centre

APPENDIX B

Fifty Most Frequently Encountered Business Types 1972 and 2002/03

Rank	1972	Number	%	2002/03	Number	%
1	Pub	92	5.6%	Pub	90	6.2%
2	Footwear	82	5.0%	Restaurant & Café	51	3.5%
3	Butchers	66	4.0%	Ladies Wear	42	2.9%
4	Ladies Wear	55	3.4%	Travel Agents	39	2.7%
5	Mens Wear	55	3.4%	Restaurant	37	2.6%
6	Grocery	49	3.0%	Furniture	34	2.3%
7	Bank	39	2.4%	Hairdressers	33	2.3%
8	Jewellers	36	2.2%	Mens Wear	33	2.3%
9	Betting Shop	35	2.1%	Jewellers	32	2.2%
10	Drapers	35	2.1%	Bank	32	2.2%
11	Pharmacy	35	2.1%	Footwear	30	2.1%
12	Furniture	34	2.1%	Café & Restaurant	29	2.0%
13	Newsagents	30	1.8%	Newsagents	29	2.0%
14	Restaurant	29	1.8%	Convenience Store	22	1.5%
15	Hairdressers	25	1.5%	Betting Shop	20	1.4%
16	Bakery & Confectionary	24	1.5%	Department Store	20	1.4%
17	Hardware	24	1.5%	Ethnic Stores	18	1.2%
18	Wallpapers & Paints	23	1.4%	Café	18	1.2%
19	Industrial	22	1.3%	Booksellers	17	1.2%
20	Tailors	21	1.3%	Pharmacy	17	1.2%
21	Café	20	1.2%	Ladies/Mens Wear	16	1.1%
22	Booksellers	16	1.0%	Phone Shop	16	1.1%
23	Dry Cleaners	16	1.0%	Records CDs etc	16	1.1%
24	Fruit & Vegetables	16	1.0%	Hotel	16	1.1%
25	Travel Agents	16	1.0%	Fast Food	16	1.1%
26	Fancy Goods	15	0.9%	Charity Shop	16	1.1%
27	Insurance	15	0.9%	Take Away	14	1.0%
28	TV Rental	14	0.9%	Butchers	13	0.9%
29	Department Store	13	0.8%	Antiques	12	0.8%
30	Carpets	11	0.7%	Musical Instruments	10	0.7%
31	Fish & Poultry	11	0.7%	Office	10	0.7%
32	Leather Goods	11	0.7%	Amusement Arcade	10	0.7%
33	Opticians	11	0.7%	Launderette	9	0.6%
34	Records CDs etc	11	0.7%	Ladies wear	9	0.6%
35	Antiques	10	0.6%	Charities	8	0.6%
36	Auctioneers/ Est Agents	10	0.6%	Off Licence	7	0.5%
37	Clothing Manufacturers	10	0.6%	Fancy Goods	7	0.5%
38	Confectioners	10	0.6%	Insurance Brokers	7	0.5%
39	Jewellery	10	0.6%	Video Rentals	7	0.5%
40	Off Licence	10	0.6%	Opticians	7	0.5%
41	Shoe Repairs	10	0.6%	Call Centre	7	0.5%
42	Stationery	10	0.6%	Adult Shop	6	0.4%
43	Electrical Goods	9	0.5%	Jewellery	6	0.4%
45	Hotel	9	0.5%	Photographic	6	0.4%
44	Restaurant & Café	9	0.5%	Solicitors	6	0.4%
49	Building Society	8	0.5%	Camping Equipment	6	0.4%
48	Childrens Wear	8	0.5%	Beauty Salon	6	0.4%
50	Coal merchants	8	0.5%	Building Society	6	0.4%

Appendix C

Broad Business Activity Classifications Examples of Use

Retail	Leisure	Services	Financial	B 2 B	Institutional	Other
Most Retail Stores	Restaurants	Airline Offices	Banks	Wholesalers	Government	Vacant
	Pubs	Bus Tickets etc	Building Societies		Utilities	Demolished
Florists	FastFood	TV Rental	Insurance Cos	Manufacturers	Local Authorities	Entrance
Antiques	Hotels	Hairdressing	Credit Unions			Under construction
Art Gallery	Off Licence	Opticians		Offices	Schools	
	Video Rental	Tailors	Mortgage Brokers			
Charity Shop	Cinema	Solicitors		Newspaper Offices	Colleges	
	Amusments	Accountants				
Coal Merchants	Betting	Estate Agents	Pawnbrokers	Stationers + Printers	Charity	
	Internet Café	Medical Practice				
Off Licence	Tourist Information	Theatrical Costumers	Stockbrokers	Shipping Agents	Post Office	
	Museums					
	Tourist Shop	Repairs			Cultural Organisn	
Car Sales	Travel Agents	Dry Cleaning				
Filling Stations	CarFerry Offices				Religious	
Motorbikes	Airline Booking	TradingStamps				
Bicycles	Car Hire	Taxis			Churches	
	AA/RAC	Shipping Agents				
Sportswear	Sports Equipment					
	Camping Goods	Auctioneers				
	Souvenir shop					
		Photographers				
	Bureau de Change	Employment Agency				