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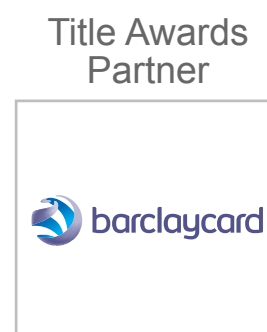


RETAIL PREDICTIONS FOR 2015



With thanks to our Corporate Partners
2014 | 2015

for their support of
Retail Excellence Ireland and the Irish Retail Industry



Welcome to the Quarter 1 2015 edition of Retail Times

I very much hope that Christmas 2014 delivered for each and every member. The speculation was that we would enjoy a robust trading period but this can sometimes disguise a very challenging trading situation being experienced by many members and especially those located in provincial Ireland.

It is clear that retail is gradually moving up the Government agenda. Last year, after intensive lobbying by REI we witnessed the establishment of the Government Retail Consultation Forum. Chaired by Minister Gerard Nash, and with representation from most Government departments, this Forum provides us with a vehicle to articulate your concerns and feed directly into the construction of the annual Budget. The Forum meets four times a year and throughout 2015 it is our intention to host a member luncheon directly after each meeting to share progress with members, and most importantly, to listen to your concerns and feed these back at the next meeting.

We are very much looking forward to the annual REI Retail Retreat. This year's Retreat is scheduled for 12th and 13th May at Carton House, Kildare. This is a great opportunity for members to get together and enjoy contributions from a wide variety of speakers. I would urge you to pencil the dates into your diary and join us for what will be two days of valuable insights and invaluable networking.

We are currently working hard to construct a very practical and beneficial Retail Certificate in partnership with National College of Ireland. I would like to thank Paul Candon of Topaz for leading the retail steering group who are constructing the programme. The Certificate is being designed by retailers for retailers and will be made more accessible for all members by having a large proportion of the content available online.

The Board and Council of REI have also decided that our industry awards programme requires an overall. To that end we are working to change the assessment process.

In 2015 all store entrants will now undergo a stage one store assessment meeting. This assessment will be conducted by one of four qualified store assessors. Additionally we have decided to award excellence on a sectoral basis. We believe this will resonate greatly with consumers and thus award winners and finalists will benefit from enhanced footfall and sales.

As you are aware, REI is a not for profits organisation with a superb executive team. The team reports into a member Board. It is very important that the Board is representative of all members, small and large, urban and rural. It is thus with great pride that I can confirm the appointment of Roisin Woods, McElhinneys and Patrick McCormack, Sam McCauleys to the REI Board. Both exemplify retail excellence and I look forward to working with Roisin and Patrick over the coming years. I would also like to thank Mairead Horkan, Horkan's Garden Centres and Petworld who has retired from the Board. Thank you Mairead for your invaluable time and dedication in recent years.

It is with the greatest of pleasure that I can also confirm that Colm Carroll, Chairman Carrolls Irish Gifts has been selected to become REI Chairman in 2016 | 2017. Colm is an absolute gentleman and I can think of no one better to lead our fine organisation into the future. I am sure you all join me in congratulating Colm on his appointment.

Yours sincerely,
Oonagh O'Hagan
OONAGH O'HAGAN
Managing Director, Meagher's Pharmacy Group



OONAGH O'HAGAN
CHAIRPERSON, RETAIL EXCELLENCE IRELAND



RETAIL EXCELLENCE IRELAND BOARD MEMBERS

BOARD: Oonagh O'Hagan, Meaghers Pharmacy Group • Keith Rogers, Ecco Footwear • Paul Kealy, Tony Kealys • Jacquie Marsh, The Butler's Pantry • JP Kennedy, TileStyle • Colm Carroll, Carrolls Irish Gifts • Paul Cahill, Vodafone • David Myers, Heatons • Patrick McCormack, Sam McCauleys • Roisin Woods, McElhinneys • David Fitzsimons, Retail Excellence Ireland • Seán Murphy, Retail Excellence Ireland

TRUSTEE: Sharen McCabe, McCabes Pharmacy Group • Kevin Jephson, Ardkeen Quality Food Store • Paul Candon, Topaz Energy

Bites

South Korean manufacturer **LG's** most advanced smart refrigerator has a built-in camera that allows owners to see what's in the fridge as they stand in the aisle of a supermarket, phone in hand.

One of the most visually stimulating stores visited as part of the recent **REI** retail safari in London was **Anthropology**, Regent Street. Their living wall is superb.

Mellericks Pharmacy in Fermoy has recently moved to new premises in the town. The new store is superb and a must visit.



We noticed this great sign in **The Colour Store**, Dungarvan recently. Well done Shane – you can't beat a bit of retail humour – "Husbands **MUST** have a note from their wives before selecting colours!"



A group of **Dunnes Stores** workers brought a claim to the Labour Court in October 2014 relating to their work and pay conditions.



During a recent **REI** trip to a retail tech conference in Lille, leading French grocery chain **Auchan** kindly hosted a tour of their stores. We were impressed with their service allowing customers to have their online purchases delivered to their local Auchan store for collection.

COLM CARROLL ANNOUNCED AS REI CHAIRMAN DESIGNATE



Colm Carroll will become REI Chairman for the 2016 | 2017 period

Colm Carroll, the Chairman of Carrolls Irish Gift stores has been announced as Chairman designate of Retail Excellence Ireland for the period 2016 | 2017. Speaking about the appointment David Fitzsimons, Chief Executive, Retail Excellence Ireland said "REI has a policy of selecting Board members who epitomise retailing excellence. Colm's selection as Chairman designate is a wonderful development for REI. Colm has always been tremendously supportive as a member, a Board member and now as our future Chairman. The Board were unanimous that Colm is the best person to lead REI. He epitomises all that is great about retail. Both I and the REI team are looking forward to supporting Colm in his role". Colm added "Being selected to take up the mantle of Chairman of REI for the 2016 | 2017 period is a tremendous honour for me. I look forward to working alongside our current Chairwoman Oonagh O'Hagan

The new Butlers Chocolate Café in the Crescent Shopping Centre, Limerick brings the number of Cafes operated by Butlers in Ireland to seventeen



throughout 2015 and will work hard to ensure REI continues to grow from strength to strength."

NEW BUTLERS CHOCOLATE CAFÉ OPENING IN LIMERICK

Butlers Chocolates recently opened their newest Chocolate Café in the Crescent Shopping Centre, Limerick. This brings to seventeen the number of Butlers Chocolates Cafes now operating in the Republic of Ireland. Speaking on behalf of Butlers Chocolates, Michelle McBride, Retail Director, commented on the opening saying; "We are delighted to be opening our first Butlers Chocolate Café in Limerick and we are excited about our expansion into the mid-west region. We look forward to welcoming new and existing customers and to bringing the full Butlers Chocolate experience to a new customer base."

WE ARE EXCITED ABOUT OUR EXPANSION INTO THE MID-WEST REGION

MINISTER ANNOUNCES ZERO HOUR CONTRACTS SURVEY

The Minister for Business and Employment, Gerard Nash TD, has issued a call for tenders to carry out a study into the prevalence of zero hour and low hour contracts and the impact of such contracts on employees. Zero hour contracts of employment are contracts typically where the employee is available for work but does not have specified or guaranteed hours of work. It is expected that the survey will collect information on the extent of these contracts, the manner in which they are used and also to look at recent developments in other jurisdictions, particularly in the UK. The study will also focus on how these contracts operate in practice and particularly on how they impact on employees. It will assess the advantages and disadvantages from the perspective of employer and employee and assess the current employment rights legislation as it applies to employees on zero hours contracts. Minister Nash said, "We are seeing increasing debate both here at home and further afield on zero hour contracts. But, there is a distinct lack of hard data in Ireland on the prevalence of zero hour contracts and low hour contracts and the impact they have on workers. We are addressing this information gap through this study".



Minister Gerard Nash is to conduct a survey investigating the prevalence of zero and low hour contracts in the Irish economy in Q1 2015

WE ARE SEEING INCREASING DEBATE BOTH HERE AT HOME AND FURTHER AFIELD ON ZERO HOUR CONTRACTS

TOPAZ ANNOUNCE TWO MAJOR NEW SERVICE STATIONS



Paul Candon, Deirdre Bruton, Jonathan Diver all of Topaz announcing expansion plans for 2015

Topaz, Ireland's largest convenience and fuel retailer has announced that it will create 110 new jobs between two major new service stations opening in North Dublin and County Laois in January. The two stations are being developed at a cost of €10 million. In addition to the full time jobs being created, an additional 200 people are employed on the development of the sites which will include service stations, restaurants and shops. One of the stations is located at Junction 3, adjacent to where the M50 meets the M1 at Clonsaugh in North County Dublin while the other is at Junction 3 on the Dublin Cork motorway near Ballacolla in County Laois. Both stations will open in January next. Paul Candon, Marketing and Corporate Services Director at Topaz said "Topaz is in job creation and expansion mode and we are constantly looking at sites with good potential – particularly near motorways. Our award winning sites at Dublin Airport and Cashel have been extremely successful and we expect these new sites to be likewise. We are actively looking for new sites and locations across the country."



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REI has commissioned research to investigate issues pertaining to retailing in border counties and to also review visitor perceptions of the retail offering and value in Belfast and Dublin markets. The findings will be available in early January.

A group of **Applegreen** executives recently completed the New York marathon all in aid of Crumlin Hospital. Well done to Joe Barrett, Keith Ennis and the team.



Ted Baker outperformed the market by recording a 12.7% like for like climb in sales for the thirteen weeks to November 8th. Most other fashion retailers suffered through a period of unseasonably clement weather.



We understand that the newly opened **Ecco** store in Limerick City Centre is trading extremely well. A good indicator for other progressive retailers planning to open in the city in 2015.

REI and some other trade associations have come together to commission **Behaviour & Attitudes** to conduct an assessment of the impact of aggressive begging in Dublin City on footfall and shopper behaviour. We will profile the findings in January.

REI is a member of the **LUAS Cross City Work Group**. We are working hard to ensure that Dublin City Centre is as accessible as possible during the construction phase.

Spar Gourmet, Merrion Row, Dublin was recently selected by leading UK Retail journal Retail Week as their store of the week. Well done Thomas!

3 Ireland have announced the appointment of **Johnston Shopfitters** in their rebranding of over forty stores nationwide. 3 Ireland said "it is great to be working with an Irish company again".



An Taoiseach Enda Kenny TD, Oonagh O'Hagan, REI Chairwoman and MD Meagher's Pharmacy Group and REI Chief Executive David Fitzsimons were on hand to launch Small Business Saturday.

AN TAOISEACH LAUNCHES SMALL BUSINESS SATURDAY

Retail Excellence Ireland recently launched an initiative to support small independent retailers. The Small Business Saturday campaign built up to December 6th last and endeavoured to get consumers to shop local for one day in the run up to Christmas 2014. The initiative was supported by Bobby Kerr's Down to Business programme on Newstalk which hosted a special segment on the 6th interviewing independent retailers around the country. The campaign was a success with many independent members stating that their local towns received a significant boost in trade.

COUNTY CLARE RETAILER OF THE YEAR ANNOUNCED

Ennis retailer Madden Furniture recently scooped the coveted County Clare retailer of the year gong at the annual FBD Ennis Chamber of Commerce awards. Founded in 1977 the retailer is one of the most progressive in Ireland. Speaking after the win company managing director Michelle Madden said "To be selected as the best retailer in County Clare is a great achievement for the business. It is great to be acknowledged having invested significantly in the business in recent years. I am particularly delighted for our dedicated and hard working team".



Michelle and Aoife Madden (seated left and centre) celebrate their recent selection as Clare retailer of the year

LIFE PHARMACY PASSES THE FORTY MARK

Since its launch in April, the Life Pharmacy symbol group has grown rapidly having just passed the forty members mark in December. The symbol group is a partnership between independent pharmacists and the wholesaler Uniphar, where all pharmacy members, also become shareholders of the life pharmacy company. Paul Spiller Group Manager said "Our successful formula of providing valuable services at low cost has fuelled this rapid membership growth. With an ever increasing range of supports coming on stream, I would expect the rapid growth rate to continue right through 2015"



Life Pharmacy Group expands across Ireland

SERVICES AT LOW COST HAS FUELLED THIS RAPID MEMBERSHIP GROWTH



Some of the most famous models in the world touchdown in London

VICTORIA'S SECRET LONDON SHOW FIRST

For the first time ever Victoria's Secret held their annual extravaganza in London December last. The show which is broadcast to over one hundred and fifty countries is the fashion equivalent of the Superbowl. Some of the world's leading models were accompanied by performers such as Taylor Swift, Ariana Grande, Ed Sheeran and Hozier. The lingerie company flew in the models on a specially chartered flight which caught the attention of the UK media. The show commenced in 1995 and has grown to be one the largest of its type in the world.

CENTRAL EUROPE ONLINE SALES SPURT

With an average growth rate of nearly 23% in 2013, the e-commerce market in Central Europe is showing no signs of slowing. This development is far above the average European growth of 17.5%. At €93.3 billion, Central Europe accounts for 25.7% of e-commerce sales in Europe. Last year, 68 million of the 165 million Central European citizens bought goods and services through the Internet. Germany is still by far the largest e-commerce country in the Central European region. With its e-commerce turnover of €63.4 billion, it accounts for 68% of the region's total e-commerce turnover. At 86%, internet penetration in Germany is very high, and consequently the country has the largest online population in Europe. Central European consumers spent on average €1,379 per person online in 2013. This is over €100 more than in 2012 and a little more than the European average of €1,376. However, it is less than the EU28 average of €1,500. With an average amount of €2,122 per person, Austrians spent most online in 2013.



Central European customers spend €1,379 each online in 2013

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During a recent visit to **Lille** we noticed this innovative merchandising of washing machines.



American Eagle has opened three stores in quick succession in the United Kingdom. The stores are located at Westfield Stafford, Westfield London and Bluewater in Kent.



We felt a bit old recently when we shared a bottle of vino with the next generation of retail. Martin McElhinney of **McElhinneys** and Keelan Bourke of **Patrick Bourke Menswear** catch-up following a visit to the National Tailoring Academy.



Galvin For Men Tullamore have recently completed a refit of their store. The results are first class. Well worth a visit.

TOWNS TEAMS PAY OFF OVER CHRISTMAS 2014

The establishment of Town Teams and Business Improvement Districts (BIDS) has proven to pay off for local businesses over the Christmas 2014 period. Many Town Teams created specific plans to enhance footfall and consumer activity in their towns, with many others creating investment prospectuses to drive retail investment and occupancy. Of specific benefit was the willingness of many Local Authorities to work with Town Teams and offer car parking promotions over the December period. Limerick and Galway were two such examples with both cities offering extensive free car parking periods in the run up to Christmas 2014. Speaking about the development Cormac Kennedy, Eason and Chairman of the REI Town Revival Group said "It is really pleasing to see local Town Teams working in such a collaborative manner with Local Government. Through such collaboration everyone wins. Businesses enjoy enhanced footfall and spending while the Local Authority retain and grow their rates base."



Places like Limerick proved that the establishment of a Town Team paid-off over Christmas 2014

BROWN THOMAS AND THE BUTLER'S PANTRY TIE-UP

Brown Thomas welcomed The Butler's Pantry into store over December 2014 with the leading artisan food producer opening concessions in a number of Brown Thomas stores. The partnership proved to be a real winner. Jacquie Marsh, The Butler's Pantry Managing Director said of moving into Brown Thomas, "We were delighted to bring a premium Irish handmade selection to Brown Thomas where we showcased the most popular foods in our Christmas, gift and hamper range. Edel Woods, Brown Thomas said, "We were delighted to welcome The Butler's Pantry Christmas pop-up to Brown Thomas. The integrity of The Butler's Pantry brand and what they stand for reflects Brown Thomas perfectly in terms of service and quality of product offer." The tie-up also provided The Butler's Pantry with its first retail exposure outside of the Dublin market.



The Butler's Pantry Brown Thomas concession stores proved a real winner over Christmas

SHOWCASED THE MOST POPULAR FOODS IN OUR GIFT AND CHRISTMAS HAMPER RANGE

PETER O'BRIEN NEW ACCESSORY COLLECTION FOR ARNOTTS

Peter O'Brien recently launched a new accessory collection for Arnotts. The launch also saw the designer collaborating with Irish milliner John Shevlin to present hats in his accessory collection for the first time. The collection boasted three silk scarves, which feature a selection of drawings from his theatre costume drawings. One scarf focuses solely on ball gowns, while another focuses on ladies and men's costumes. Speaking about the scarf collection, Peter said: "As I have been designing for the theatre for the last twelve years I have a huge archive of drawings and people are very interested about the whole design process and are curious about looking at my sketches."



Peter O'Brien brings an exclusive and tantalising collection to Arnotts



The Bodyshop openings proved great additions to the high streets in Limerick, Cork and Dublin



Allcare fundraising initiative benefits a very worthy cause

CORK ALLCARE PHARMACIES CHARITY INITIATIVE

Sixteen well-established Cork pharmacies, all members of Allcare Pharmacy, a 100% Irish owned network of 64 community pharmacies, recently teamed up with Marymount Hospice for a fundraising initiative to benefit the local community. The aim of the charity initiative was to raise funds for the purchase of two new community care cars for Marymount Hospice, which enables them to provide vital support to the seriously ill. Through the combined donations of customers in the Cork pharmacies, a €30,000 target was exceeded, with a total of €31,118 raised for this very worthy cause. Commenting on the charity initiative, Tony McEntee, CEO, Allcare Pharmacy said; "Allcare is a nationwide network of long established community pharmacies where the local community is at the centre of everything we do. Consequently, we are delighted that Allcare Pharmacies could use its countywide network of 16 pharmacies to support Marymount's vital community palliative care service and most importantly we want to thank all our customers who generously donated to this very worthy cause."

NEW BODYSHOP STORES PROVE SUCCESSFUL

The Bodyshop Ireland recently opened new stores in Cork, Limerick and Dublin just in time for the busy Christmas period. The stores enjoyed a very robust trading period over December. Speaking at the launch, Peter McDonald, Managing Director, The Bodyshop Ireland said "We were delighted to open this new store in the heart of Cork, Dublin and Limerick City Centres. The stores include lots of recent store design enhancements and the reaction from consumers has been second to none. We are planning some further store openings in 2015".

LOCAL COMMUNITY IS AT THE CENTRE OF EVERYTHING WE DO

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the NUMBERS

12&13

The dates in May 2015 when REI host the annual Retail Retreat

130

The average basket value in pounds sterling at UK retailer Majestic Wine

179

The like for like percentage increase in Smeg cookers sales at John Lewis during November

1,142

The average Euro amount spent by visitors to Ireland according to recent research conducted by REI and NIIRTA

52

The percentage of Littlewoods purchases which are made on a mobile device

6

The date in December when Ireland enjoyed its first ever Small Business Saturday

40

The number of REI members who are participating in the new REI eCommerce Dashboard

1.8

The like for like percentage decline in recent Walmart sales excluding petrol

90

The percentage of Dubliners who believe that aggressive begging in our capital city is deterring customer visits according to recent research commissioned by REI

WE ARE DELIGHTED TO BE EXPANDING THE CARRAIG DONN BRAND IN THESE REGIONS

CARRAIG DONN EXPANDS ITS RETAIL FOOTPRINT

Carraig Donn, the leading Irish retailer, recently opened a further four new stores bolstering its position in the Irish market. The new stores located at Arklow, Dundalk, Waterford, and Navan led to the creation of 50 new jobs, bringing the total number of employees in the group to 450. Carraig Donn Chief Executive Pat Hughes said 'We are delighted to be expanding the Carraig Donn brand in these regions and creating much needed jobs in the local area. We are looking forward to welcoming new customers in these regions and this announcement marks the beginning of another great chapter in the Carraig Donn story, as we embark on our 50th year in business'.



Carraig Donn continue to grow with the addition of four new stores

SKECHERS SHOW NO SIGNS OF SLOWING DOWN



Stock market analysts recommend a buy of Skechers stock

2014 proved a very productive year for iconic footwear brand Skechers. Not only has the company grown its retail presence in Ireland, globally it has also over achieved. Skechers proved to be one of the top performing stock market stocks globally in 2014 recording gains of 76% year to date. Market analysts have become very bullish about Sketchers with a significant number making buy recommendations. The analyst's position is founded on growing market share and strong sell through of innovative product ranges leading to earning per share growth of a whopping 500%.

EXAMINERSHIP PROVES THAT WE ARE NOT OUT OF THE WOODS

The recent examinership of the Karen Millen group of companies proves that many retailers remain in a distressed state, many of whom are struggling with onerous Celtic tiger rent costs. Commenting on the development David Fitzsimons, Chief Executive, Retail Excellence Ireland said "We are aware of a number of large retail companies who are planning a reorganisation of business affairs in early 2015. No matter to what degree the economy recovers, these companies simply cannot sustain commercial rent costs which increased by 240% between the years 2000 and 2007, a period when consumer prices increased by 30%. What is particularly concerning is the number of small business owners who continue to suffer from the burden of personal guarantees tied to these onerous leases." It is hoped that the Karen Millen group of companies will successfully exit examinership in early 2015.



Many other retailers are planning a reorganisation of their leases in 2015

WE ARE AWARE OF A NUMBER OF LARGE RETAIL COMPANIES WHO ARE PLANNING A REORGANISATION OF BUSINESS AFFAIRS IN EARLY 2015

REI LAUNCH ECOMMERCE KNOWLEDGE DASHBOARD

Retail Excellence Ireland, in partnership with StudioForty9, has announced the launch of an e-Commerce Knowledge Dashboard. The eCommerce Dashboard aims to foster knowledge and understanding of e-Commerce Analytics and Data among members. Commenting on the launch Jayne O'Driscoll, REI eCommerce Executive said "The dashboard will help our eCommerce members to analyse the performance of their e-Commerce Site within a controlled peer group. This data will be unique in Ireland and will help participating members to understand the trends and standards derived from statistics which are directly relevant to their business and market. It will also help to drive a programme of eCommerce education based on an analysis of data gathered as part of this initiative."



The new REI Dashboard will allow participants compare their performance with a benchmark group

WIR CHRISTMAS GET TOGETHER

The REI Women in Retail Network hosted their annual Christmas get together in the Kilkenny Shop, Nassau Street on December last. The evening was hosted by Marian O'Gorman, CEO of Kilkenny Group. Marian spoke passionately about her life in retail and provided members with some helpful insights into her success. Celebrity Stylist Lorna Claire Weightman also joined the evening's festivities. She brought along some beautiful models and showcased How to Make Your Work Wardrobe Work For You. The night ended with an exclusive VIP experience in the Kilkenny store along with great conversation and networking opportunities. A wonderful night was had by all.



Women in Retail Christmas Get Together



JANUARY - We led a member delegation to the Big Retail Show New York....



APRIL - We spent four days with a great group of Retail Managers....

SOME TOP MOMENTS IN

2014



APRIL - We facilitated the formation of many town teams nationwide including this one in Bray....



AUGUST - The World Garden Centre Congress came to Ireland....



SEPTEMBER - Granny came to Limerick....

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RETAIL PREDICTIONS FOR 2015

With 2015 upon us,
and retailers facing into a new year
with fresh targets to achieve,
**David Fitzsimons, Chief Executive,
Retail Excellence Ireland**
takes a look at the major trends which might
dominate Irish retail over the next 12 months



The push to posh by many value retailers such as Primark | Penneys has left the middle market squeezed

A TREND WHICH IS CERTAIN TO
CONTINUE AS THE ECONOMY
IMPROVES IN 2015 IS OUR
GROWING FONDNESS TO
INCLUDE FOOD AS A CENTRAL
PART OF OUR SHOPPING
EXPERIENCE

THE PUSH TO POSH

It is undeniable that many of the value retailers, particularly in fashion, have created store environments which could be mistaken as luxury stores. Penneys | Primark is an obvious case in point. Furthermore the luxury fashion stores have responded and upped their game by redesigning their retail footprints to become ultra decadent. This push to posh at either end of the market has impacted significantly on the squeezed middle market retailer. This trend will continue in 2015.



BREAKING BREAD

A trend which is certain to continue as the economy improves in 2015 is our growing fondness to include food as a central part of our shopping experience. Whilst midweek shopping is all about convenience, and thus we seek out convenient eating opportunities, the weekend is all about experience. Hence we will continue to witness retailers knitting food into the shopper's day out. The department stores continue to add square footage to eat in food, the garden centres have become retail and dining destinations and soon we will see other retailing destinations do likewise. Recent space allocation changes at Avoca best demonstrates this trend. The majority of this progressive Irish retailer's footprint is now dedicated to eat in and take out food. Don't be surprised when in 2015 we begin to see coffee and dining offers pop up in stores around the country.

THREE TIER ECONOMY

It was concerning to hear Minister Michael Noonan recently comment on inflation in Dublin hotel bedroom prices. The Minister suggested that he would withdraw the 9% VAT rate if he felt that businesses were

abusing the incentive. What Minister Noonan failed to do was look at the economy holistically. It is my contention that there are in fact three economies in retail today. The Dublin evening economy is powering ahead and shows no signs of slowing down. This economy has been enhanced by increased visitor numbers to our capital city. The second economy is the Dublin daytime economy. This is at best flat at present. The Dublin daytime economy continues to suffer from anti-social issues and weekly protests which according to AA reports make the city a no go area. The third economy is everyone else outside of the M50 – provincial Ireland if you like. This economy continues to struggle primarily due to emigration. The divide between the three is likely to grow in 2015.

BIG DATA MAN

Many retailers now realise that their epos data has value. More and more retailers are interrogating their data and, using this new found business intelligence, are making decisions relating to open to buy budgets, category performance, net margin analysis, store grading and such like. In some cases the data is being mined by a third party company and thus the retailer is also presented with data pertaining to their sector as well as their business. More and more retailers will invest time in the interrogation of their data and as a result will make better and more informed decisions.



CUSTOMERS
EMBRACE
H2H -
HUMAN TO HUMAN
ENGAGEMENT.



Customers embrace H2H - Human to Human engagement



Companies like Tiger will grow significantly in 2015 - they are one of the fast fifty

COMPANIES LIKE TIGER WILL GROW
SIGNIFICANTLY IN 2015 - THEY ARE
ONE OF THE FAST FIFTY

CONSUMERS HAVE A GROWING HUNGER TO HEAR THE PRODUCT STORY

H2H HUMAN TO HUMAN ENGAGEMENT

At a recent retail technology conference in France I was struck by the amount of technology being developed for the retail industry globally. Some of it was sensational, but most of it served no real purpose. What I learned was that just because you can create a technology to do something, does not necessarily mean that it should be implemented. In many ways in our rush to embrace online, tech and loyalty we have somewhere along the way forgotten the basics of retail. I was asked at the tech conference to outline what I believed will be the next big technology in retail. I told the assembled audience that from my perspective the next big thing would be H2H – Human to Human engagement. It is my belief that consumers desperately seek out an engaging person to person experience in store, whether that be

someone making the customer a cup of coffee or selling them a vacuum cleaner, the customer wants a pleasant and informed interaction. Technology will come and go but H2H is here to stay.

CRAFT & CURATION

Consumers are very eager to learn of the provenience of many day to day purchases they make. A trend which is likely to grow in 2015 is for more and more retailers to embrace this consumer demand by stocking and better curating crafted items which have a back story. The resurgence in the craft beer market is one such example. Whether it be a burger, glassware, pottery, fragrance, cosmetics, shoes..... consumers have a growing hunger to hear the product story.

MOBILE SHOPPING

You don't need to be a genius to work out that we all are wedded to our phones. More and more we live our lives through our mobile devices. It is thus no great surprise that online shopping and purchase research

generally is going mobile. 52% of Littlewoods online sales are now made on mobile devices. The lesson here is that if you have a website, you build it for mobile first.

FAST FIFTY

REI is often asked to comment on retail sales data and for many years we have used the standard jargon of annual like for likes etc. I personally think it is time to change how we express sales data. The reason is that whilst the economy might grow or indeed decline, there are a number of retailers who either way will forage a future of growth. It is my belief that 2015 will witness the accelerated growth of approximately fifty "on-trend" retail brands. Thus in many ways the sales story of these on trend companies will be far different to the rest.

ANTI-BIG

A trend we saw in London recently was a growing cohort of customers who have grown tired of the "big retail brands" and instead choose to shop with independent retailers whom they feel offer a more personal relationship. The anti-big trend has led retailers such as Tesco and Starbucks to endeavour to localise their stores through innovative and unique design, and the delivery of an offering that is more focused on the needs of the local community they serve. There is a real opportunity here for independent retailers to embrace this trend and actively communicate what their brand stands for.



Anti-big provides smaller retailers with an opportunity to embrace local and tell their story - This Manhattan retailer is very clear about what they stand for

CONVENIENCE IS KING

As the economy continues to recover and we all invest more time in our work due to scarce resources, we will continue to be time poor. Behaviourally we have also changed; to some degree we embrace what is easy and that behaviour in turn then becomes habitual. The rise in online shopping and other facets such as click and collect underline the fact that if we can make it easy for consumers they will respond. Whether that be text ordering a sandwich or having an online purchase delivered within two hours, the fact is that convenience is king and will remain so.

SPACE PRODUCTIVITY

Ireland is over retailled (as we all know) and many larger format stores have too much space. In 2015 we will begin to see this matter being addressed through the introduction of new categories and shop in shop concession formats. Garden centres are also critically assessing how they can do more with their space. Be assured that by the end of 2015 many larger format stores will look a lot different to how they currently look.

PERSONALISATION

More and more we are witnessing significant levels of personalisation in the high street. Whether that involves adding your personalised monogram onto a handbag or a piece of jewellery being designed just for you, personalisation will continue to grow. Walk down any street and you will be offered the opportunity to build your own sandals, teddy bear, mobile phone cover, handbag strap and the list goes on. One of the fastest growing retailers in New York is 3x1 – a jeans retailer with a difference – you build your own pair of jeans and pay at minimum \$800 for the pleasure. More and more we will notice customers asking for products their way.

DON'T BE
SURPRISED TO
WALK INTO A
GARDEN
CENTRE
WHICH HAS
FOOD TRUCKS
DOTTED
AROUND
THE EXTERIOR
SPACE

Larger format stores will look to new innovative uses of space - don't be surprised to walk into a garden centre which has food trucks dotted around the exterior space



RETAIL – IT'S ALL ABOUT PEOPLE

At Retail Excellence Ireland, we are 100% focussed on helping our members achieve excellence in all aspects of their retail businesses. Good people management is one of the fundamentals required in achieving this standard.

We have listened to our members' needs and have introduced a range of measures in 2014 to assist members with their HR responsibilities. This is only the starting point. In 2015, we have a range of exciting interventions and learning events which will equip our members with knowledge and skills to enable them drive their business to the next level of excellence.

In this edition of Retail Times, Clare Dowling, Head of HR Advisory Services at REI explores how retailers can be the best by forging a strong people culture in their organisations.

HR REVIEW OF 2014 AND LOOK AHEAD TO 2015

On the workplace legislation front, 2014 was a busy year which saw the introduction of a number of pieces of legislation affecting employment and also a number of announcements regarding changes to the workplace in the future. Clare Dowling together with the new Deputy CEO in REI, Seán Murphy are working hard to ensure REI

members' voices and concerns are being heard on a range of representation issues including the following:.

JLCs

New legislation has been introduced purportedly remedying any constitutional or legal difficulties with the Joint Labour

Committee (JLC) system. It remains possible however that the system will be subject to further legal scrutiny. The JLCs for the Retail Grocery and Catering sectors have yet however to be reconstituted.

REVIEW OF ZERO AND LOW HOUR CONTRACTS

A study is to commence in early 2015 on the prevalence of zero and low hour contracts among Irish employers, their

impact on employees and to make policy recommendations to Government on foot of the study. A full update with advice has been emailed to REI members recently on this issue.

LOW PAY COMMISSION

A statutory Low Pay Commission is to be established in 2015. The Low Pay Commission will be asked to make annual recommendations to Government on the national minimum wage rate and related matters.

ACCRUAL OF ANNUAL LEAVE WHILE ON SICK LEAVE

Existing legislation is to be amended to allow workers on long term sick leave to accrue and retain annual leave for up to 15 months from the end of the year in which it accrued.

EQUIP OUR MEMBERS WITH KNOWLEDGE AND SKILLS TO ENABLE THEM TO DRIVE THEIR BUSINESS TO THE NEXT LEVEL OF EXCELLENCE

NEW LEGISLATION:

National Vetting Bureau (Children and Vulnerable Persons) Act 2012

This Act, which is expected to come into force shortly, puts in place a mandatory national vetting process for persons who seek employment in certain limited protected areas. The type of worker that requires vetting is listed in the Act but primarily includes those persons working with vulnerable adults and children and employees covered under the Private Security Services Act 2004.

EMPLOYMENT PERMITS (AMENDMENT) ACT 2014

This Act aimed to improve the application process and introduced new classes of employment permits, the aim of which is to attract highly qualified and specialised individuals to the State to boost the economy and to encourage further development in the ICT sector.

According to the Department of Jobs, Enterprise and Innovation the average waiting time for permits is down 51% on January 2013. As at September 2014, the average waiting time was 18 working days.

PROTECTED DISCLOSURES ACT 2014

This Act provides protection against penalisation for employees who report wrongdoing. While this legislation is aimed at protecting employees, proper disclosure can also be of benefit to employers as it can assist in uncovering wrongdoing within an organisation which may help to prevent accidents, financial scandals, criminal offences and regulatory breaches.

GOVERNMENT JOBS INCENTIVES SCHEMES – PLANS FOR 2015

JOBSPLUS: There will be a doubling of JobsPlus places in 2015 from 3,000 to 6,000 to incentivise employers to hire long-term unemployed people from the Live Register. Employers can receive up to €10,000 in monthly cash grants over 2 years for each eligible employee.

A new JobsPlus strand for young people will be launched in 2015 under the Youth Guarantee.

JOBPATH: €12 million will be provided for the new employment activation programme JobPath. It is expected that JobPath will help about 115,000 long-term unemployed jobseekers return to work.

Further information on the Government labour activation schemes is available at www.welfare.ie.

REI will keep members informed of all relevant employment related news throughout 2015.

REI HR NETWORK

2014 also saw the establishment of the REI HR Network which is made up of HR Managers and Directors of member companies. The Network will meet on various dates throughout 2015 including at the annual REI Retail Retreat on Tuesday 12th May 2015 at Carton House, Maynooth, Co. Kildare. Details of all HR Network meetings in 2015 will be circulated to members of the Network in due course.

GOOD PEOPLE MANAGEMENT IS ONE OF THE FUNDAMENTALS REQUIRED IN ACHIEVING THIS STANDARD.



REI HR Network meets Minister Nash, Department of Jobs, Enterprise and Innovation at the REI Leadership Symposium, September 2014.

EXCELLENCE IN PEOPLE MANAGEMENT TOP TIPS FOR 2015

The starting point to ensure that people are at the very centre of your business is to ensure you and your people managers embrace the following key points:

- 1. Know the law** – REI has produced a very handy wall chart which members may use to check the statutory entitlements of employees. This will be posted to members shortly. REI in conjunction with Tommy Smyth HR Consultants continues to offer complimentary telephone advice to REI members on HR issues. HR is also, of course, included as a key learning strand at all main REI learning events.
- 2. Start on the right note: training and induction** – Ensure employees receive the training they need to allow them properly carry out their job responsibilities. Every new employee should undergo a comprehensive induction detailing the standards required in the business. This assists in creating the culture you want in your business by ensuring your standards are met from the get-go.
- 3. Set your boundaries early on** – Clear, objective standards of acceptable behaviour and conduct should be set out early on to ensure bad habits are not formed. This can be achieved by way of a well drafted staff handbook, structured team meetings and performance appraisals.
- 4. Use your probation period** – Too often underperforming employees are not properly screened during the probation period. A probation period affords employers the opportunity to assess whether an employee is a suitable match for the job. The applicable probation period should be set out in writing in the contract of employment to avoid any dispute on this issue.
- 5. Review your employment contract** – Check you have fulfilled your legal obligation by providing all employees with a written statement containing their terms and conditions of employment. Preferably this will take the form of a comprehensive contract of employment containing many clauses for the protection of the employer e.g. probation period, non-competition clause, retirement age etc. If you are satisfied all employees have already received contracts, review the content to ensure it is up-to-date and meets the requirements of your business.
- 6. Review your workplace policies** – Check you have the appropriate workplace policies in place i.e. disciplinary, grievance, security, use of CCTV, cash handling procedures, alcohol and drugs etc. It is important that clear rules are set out in advance, otherwise it can be very difficult to tackle a problem at a later stage.
- 7. Set out the applicable retirement age in your business** – There is no single retirement age in Ireland, although 65 is generally regarded as the age most people retire at. The age at which the State Pension is payable is increasing. This may result in disputes if a retirement age is not defined and the employee may not be in a position to afford to retire.

Currently the State Pension is paid at 66 years however the qualifying age will rise to 67 in 2021 and 68 in 2028. Employers should ensure the applicable retirement age is confirmed in the contract of employment thus avoiding any ambiguity on the matter.

8. **Communicate clearly** – Often problems arise solely due to poor or little communication in the workplace. Keep your employees involved in the bigger picture. Let them know what is going on overall in the business, even if it does not directly affect their role. Good communication keeps employees motivated and aligns their goals with the objectives of the business. Set out all rules, standards and procedures in writing to avoid any uncertainty.
9. **Recognise training as an ongoing need in the business** – Employees at all levels in a retail business should

receive regular training to ensure they have the skills and knowledge required to successfully carry out their job functions. Frontline retail employees should receive ongoing training on customer service, cash handling and security procedures. Managers should receive training on how to effectively manage and lead their team and how to drive business strategy. Proper training will also assist with maintaining motivation and morale amongst employees. Remember REI offers relevant training to members throughout the year.

10. **Remember happy employees make happy customers...** - Employees represent a company and its brand. Their interactions with shop-goers have long been considered the 'moment of truth' for customers. Ensuring your employees are happy and engaged in the workplace is a

critical task for any retailer. REI can assist members in a variety of ways in achieving that level of excellence.

If you require any assistance with HR in your business, REI offers members a range of services at reasonable rates. Here are some examples of the services provided:

- Review of contracts of employment, workplace policies and staff handbooks to ensure best practice and business requirements are met;
- Review of HR administration to ensure legal compliance;
- Advice on handling a formal disciplinary process;
- Advice on dealing with grievance and / or bullying and harassment complaints;
- Advice on change management such as restructuring, redundancy etc.

LAUNCH OF PEOPLE MANAGEMENT TRAINING FOR RETAIL MANAGERS

GET YOUR TEAM BEHIND YOU



"In REI we often deal with queries from retail managers who do not know how to approach a situation which often means it has escalated into a full-blown dispute with all parties fully entrenched in their positions. These

interruptions to your business are costly, time consuming, distressing and without doubt negatively affect your customers' experience of your store. With the right help and early intervention these situations are altogether avoidable." says Clare Dowling, Head of HR Advisory Services in REI.

HR is an integral part of every retail business regardless of size. Lack of investment in HR often results in financial expenditure and time lost elsewhere in terms of disputes, theft and shrinkage, reduced productivity, high staff turnover rates, low morale etc.

To assist members in achieving both legal compliance and best standards in HR, REI is delighted to announce the launch of a training programme specifically designed for store managers in the retail industry.

We have successfully delivered this programme to a number of members in 2014. It is a practical one day training

course which gives your store managers the knowledge and skills they need in order to effectively manage their retail staff. Every business has its own structures and challenges so the training is entirely tailored to your individual business requirements and based on the particular responsibilities of your managers.

A sample of the modules involved in the training is detailed below, however please note the content is completely customisable, depending on your own requirements:

- **Conflict management:** Drugs and alcohol, staff surveillance, theft and shrinkage, interpersonal disputes
- **Handling difficult conversations with your employees:** How to approach them and what can you say
- **Dealing with discipline:** Conducting formal investigations and disciplinary hearings
- **Managing grievances / bullying and harassment complaints:** How to manage formal complaints properly and effectively

- **Performance management:** Getting the most out of your employees
- **Managing absenteeism:** Dealing with absence and creating an attendance culture
- **Managing change:** Approaching redundancies, restructuring and reviewing terms and conditions of employment

The one day training course is delivered in-house in your own business. Places on the course are limited so as to ensure a high level of interaction and to ensure all participants' queries are fully answered. The cost of the course is €1,950 plus Vat at 23%.

The benefits good people management practices bring to your business include:

- Less conflict in the workplace
- Reduced risk of claims and litigation
- Increased levels of productivity, motivation and morale
- All of which results in a better experience for your customers thus increasing the bottom line

TESTIMONIAL

"This training has had a significant impact on our managers, both in terms of their skill levels and how we work together as a team. The content was practical and focused on developing the skills and also the confidence of our managers in their day-to-day people management." Orla Briggs, HR Manager, Carroll's Irish Gifts.

FOR BOOKINGS AND ENQUIRIES: please contact Clare Dowling, Head of HR Advisory Services in Retail Excellence Ireland. Tel: 065 684 6927 Email: clare@retailexcellence.ie.



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A case for contactless

Why should your business embrace contactless payments? There are many reasons. Here are three of the most important.

Reduced transaction times

It takes less than a second to pay by contactless card*, which means you can process more customers in less time.

Average transaction values can increase

When Chelsea FC introduced contactless payments on match days, they found that average transaction values shot up 50% in comparison to cash**.

New technology is increasing growth

Contactless technology on smartphones and wearables is increasing awareness and usage***. Don't get left behind.

“Barclaycard has been the leader in contactless payment technology throughout Europe, and penetration is growing at a rapid pace across Ireland. Let Barclaycard help you unlock the potential of better customer experience and increased sales.”

Peter Sweeney
Strategic Business Development
Manager, Barclaycard

Find out more about how contactless payments can help your business. Contact Peter.Sweeney@barclaycard.co.uk



* Only for offline transactions. ** Chelsea FC, 2014. *** Apple Pay has accounted for 50% of contactless payments in McDonalds in first month of release. The New York Times, 2014, and smartphone penetration at 59% in Ireland by Q2 of 2014, with 14.7% jump from Q1. The Irish Times, 2014.



7 GOOD REASONS TO LEAVE YOUR PAYROLL TO THE PROFESSIONALS



Angela Garvey is an accountant that specialises in retail accounting and affordable payroll solutions for the SME Retailer. A Preferred Supplier with Retail Excellence, Angela runs AG Associates Accountants and works with some of the leading retailers in the country. For further information please contact Angela at angela@agassociates.ie or 021 4824723 website: www.agassociates.ie.

Payroll is a complicated, mandatory business function for any business. For retailers, it is even more complex. You have employees on salary and you have employees on hourly rates, scaled and overtime rates, not to mention shift changes or no-shows.

All this complexity adds to the time it takes to do payroll. Add to that the continuous changes to tax credits, allowances, benefits, emergency tax bands and cut-offs, it is a job in itself trying to keep up.

With a new year dawning and new goals being set, now is a good time to re-examine your payroll requirements. Payroll is an overhead but it doesn't have to be an expensive one. Here are seven areas to consider when making an informed decision about whether to continue with your in-house payroll or outsource it to an accountant who specialises in retail payroll.

trouble with Revenue. The last thing you need in 2015 is being liable to pay Revenue penalties and back pay for making a payroll mistake, not matter how small. There are so many dates and returns to be aware of. Tax credits and P2Cs which the Revenue sends electronically through-out the year must be imported into your payroll system. It's imperative that all staff are paying the correct amount of relevant taxes. Keeping track of important dates such as P35 returns (February 15th) is incredibly important, as is ensuring that your P60s are generated and distributed to staff at the beginning of the year.

4. SICK PAY AND DISABILITY PAY

Sick & disability pay is one of the most complex areas when processing payroll. In the retail sector, due to the nature of employment, you do face more incidences of these types of pay. It's important to get it right. For example, where an employee is entitled to sick pay or 'job illness benefit' from Department of Social Protection, that amount is now taxable and must be entered in the payroll system. The onus is on you to ensure all payroll deductions are correctly applied.

5. HOLIDAY PAY ENTITLEMENTS

Similarly, not all holiday pay is created equal. Everyone is entitled to holiday pay and days off, it just depends on how much work is done in the leave year and how it is calculated. It could be 8% of hours worked or 4 weeks off or one third of a working week. And you need to know what days are considered 'working hours'. For example, sick hours are not included but maternity leave and parental days are.

6. CONTINUAL TRAINING AND BEST PRACTICE

Anyone who processes your payroll must be continually trained in payroll. Every year, there are new changes introduced in the budget which affects payroll. Take for example the property tax. That's now going through payroll which is another deduction to work through. So your staff needs to be up-to-date with the obvious (and not so obvious) annual budget changes which affects payroll.

And it's not just budgetary changes that you ought to be aware of, there are also employment rights and NERA compliance to consider as well.

The second last thing you don't want in 2015 (after a Revenue penalty pay-out) is a NERA visit. Payroll can assist you with your compliance.

Confidentiality is of key concern when processing payroll. You must have 100% peace of mind that best practices are in place. When you outsource, that confidentiality is guaranteed.

7. CONTINGENCY PLANNING

As a business owner, you hope that all your staff are in full attendance for work as usual. But payroll is a function that needs to be done on a weekly, bi-weekly or monthly basis. There is no exception. Your employees need to get paid. If your employee who processes payroll is out sick for a few days, then your payroll and your employees will be affected.

To conclude, it's really your decision to continue with payroll in-house but make sure it's an informed one. For most businesses, your wage bill is your biggest bill, so it's important to get it right.



1. COST OF PAYROLL

Payroll can be costly to your retail business from a time perspective. Gathering information about employee's hours, shifts, shift changes, holidays, overtime and individual benefits takes time.

Analyse how many hours are spent gathering information for payroll, preparing the payroll and running the payroll. Include the admin hours of filing tax returns, distributing wage-slips and answering queries from employees.

You might be amazed at the hours that are clocked up especially if you run payroll on a weekly basis.

2. EFFICIENCY OF FINANCE STAFF

If you do the exercise as outlined in step no. 1, you will find that payroll is a time-consuming exercise. Removing payroll will in turn free up your employee's time, for other work better spent in your business.

If you have an in-house accountant or accounts clerk doing your payroll, imagine taking away those hours of doing the payroll and spending it more productively on preparing and analysing your day to day and monthly accounts. Keeping up to date with your financials will help identify monthly gross margins and allow you to produce current reports on liquidity ratios, cash-flow statement and KPI's to name a few.

3. ACCURACY OF PAYROLL

If you are not doing payroll day in day out, then there is a high chance that you could get it wrong. The onus is on you as the employer to ensure the correct amount of taxes are deducted, in terms of PAYE, PRSI, USC, LPT etc and returned to the Revenue on time. Getting it wrong opens you up to

SMOOTHING THE CUSTOMER JOURNEY

Now that the Christmas shopping frenzy and post festive season sales rush is behind us, it's time to sit back and start implementing our resolutions for the year ahead. Getting more organised generally falls into everyone's top three things to improve upon. For many of us, we just want to win back some of the time that we waste waiting for things to happen and become more focused on getting the job done.

Life is busy and time is a precious commodity. We live in a world where we want things quickly; waiting isn't something that's acceptable anymore. Yet the e-consumer's journey from pre-decision to purchase to receipt of their order can be a long and arduous one.

Awareness, familiarity, consideration, intent and decision, we know these are the steps that happen prior to the purchase even being made. For many years, that's where the engagement process stopped. With on line shopping and omni-channel retailing now the more commonplace, post-purchase experience, including delivery, has become a really strong factor in driving customer loyalty. These elements of the customer journey require as much focus as any of the steps up to the point of purchase.

We're living in the era of the digital native which leads to more empowered consumers. Choice is available to us at the click of a mouse or the flick of a finger across a tablet screen and the information is there 24/7/365. As consumers, rather than look to manufacturers or retailers for overviews of the products we're interested in purchasing, we seek personal feedback from our friends and family via social media. The social media "friend" net spreads far wider than the friends we meet face to face every day so access to opinion is far reaching. Ratings and reviews posted by consumers are seen to be more credible as they are being



generated by "people like ourselves".

Delivery continues to be a key focal point for the e-consumer and is an area that regularly generates strong opinions. When asked what the most important options to have at the on-line checkout, respondents to a 2014 UPS survey cited that details on Free Shipping, Information on the Cost of Shipping and Estimated

Delivery Date were the top three topics. There is no single solution that suits all consumers but offering a reasonable level of flexibility around delivery allows the consumer an element of control.

The same survey maintained that consumer delivery preferences were evolving and that while most e-shoppers still preferred delivery to

LIFE IS BUSY AND TIME IS A PRECIOUS COMMODITY



their home,

there was a growing trend for alternative delivery locations including workplace, family or friend's address, store collection, parcel shop and locker box. The key to satisfying the consumer requirement is to offer a variety of options which the consumer can choose from depending on their preferences at a particular time. Up to date communications during the ordering and shipping processes ensure that the consumer is always aware of the status of their order. In flight options from the delivery partner is an added bonus. If these options are provided, once the parcel has arrived with the carrier, the consumer can still opt to change delivery date or location. Life doesn't go according to plan sometimes, and consumers appreciate having the flexibility to make last minute changes.

In autumn 2014, DPD Ireland launched DPD Parcel Wizard™, a free service dedicated to the on-line consumer who receives their deliveries via DPD's network of 38 depots throughout Ireland. www.DPDParcelWizard.ie lets the consumer set up delivery schedules through the Parcel Wizard™ calendar. The consumer also receives a suite of messaging pre-delivery including their Predict™ one hour delivery window via SMS and email. The Parcel Wizard member engages with DPD directly with regard to their delivery preferences reducing customer service overheads for the shipper; all the while DPD also keeps the shipper updated with any changes relating to the delivery. DPD Parcel Wizard™ was awarded a Geopost Quality and Management Award for Sales and Customer Experience Enhancement. The DPD Parcel Wizard initiative was developed wholly with the e-shopper in mind, to smooth the customer journey from checkout to doorstep.

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**NAME:** GERALDINE KELLY**COMPANY:** L'OCCITANE EN PROVENCE**POSITION:** REGIONAL MANAGER**A brief description of your business**

L'Occitane offers high quality beauty products and fragrances. Our textures and fragrances are inspired by the Mediterranean lifestyle. We're proud to offer premium, award winning, natural based beauty products created from the finest ingredients, harvested in Provence, keeping alive its farming traditions. A visit to any of our boutiques is always a very special one, every customer is greeted with our unique L'Occitane welcome which includes a cup of herbal tea, chocolates and if you time it right we will even offer a glass of French Rose wine.

How did you get started in the retail industry? I have worked in retail since I left school. I spent my first 10 years working for Feargal Quinn, since then I have worked across many sectors including, food, home, fashion and beauty, in Ireland, Jersey, Australia and the UK.

Which retailer (national or international) do you admire the most and why? Avoca. Their unique layout and variety of product is something very different. I love their attention to detail and how they really bring the seasons alive in their stores. A real Irish success story.

What is your favourite retail store and why? Apart from L'Occitane of course I love to visit the Kilkenny Shop, it is my go to store when I am looking for a gift with a difference. I also love to visit the Newbridge Silverware showrooms, a real shopping experience with a difference.

Who has taught you the most in your career as a retailer? I have been very lucky to work with some fantastic people and I have learned so much from all of their different strengths and styles. But I have to say my experience working for Feargal Quinn was a real Master Class.

What is your favourite restaurant? Cinnamon Garden Indian restaurant in Ashbourne. A very unique dining experience, great food and a special atmosphere.

Where is your favourite holiday destination? I love the Algarve and have spent many

summer holidays there, I also love to spend time in Ireland and on a good day there is nowhere like the West Coast, truly stunning.

What was your last purchase? Another pair of shoes!!!

What is your favourite quotation? I have a few that I really live by "Ask - Believe - Receive" and "Count your blessings and be grateful for all the good things in your life".

What do you love most about your job? I am in a different location every day and I love the experience from each of our beautiful boutiques and I really see each one with a new freshness on every visit. I love our products but most of all I love spending time with the teams, their commitment and passion never ceases to amaze and delight me.

If you were not in retail what job would you have pursued? I can't imagine doing anything other than retail. However I really enjoy interior décor and have a real eye for detail. So maybe something along those lines.

How do you achieve a work life balance? I love my work but there is nothing like being at home for real honest comfort. I really enjoy entertaining with family and friends. Candles, music, food and good company. Not forgetting a nice glass or two of wine!

What is the one thing that you have done that has had a profound and positive effect on your business? The on-going investment

in training and developing our teams while also developing a very robust succession plan has had a very positive influence on the business. In addition to this I would also say that our CRM and marketing strategy which is specific to Ireland has also influenced the business in a very positive way.

What is the greatest challenge currently facing your business? To keep abreast of the ever growing multi-channel opportunities as online shopping continues to become more and more popular. I'm very excited about implementing our digital road map. Next year we are planning to launch Click and Collect in our boutiques and we are also introducing iPads which will enable us to take mobile payments as well as offering our product details: ingredients, efficacy and benefits - all of which will be available in a number of languages which will really help us deliver an even greater level of customer service. We will also continue to improve our CRM and WEB business ensuring it is relevant and exciting

What advice would you give one starting out in retail? Find a Brand you love and work hard. Watch and learn from the best. Treat your mistakes as lessons learned. Remain positive there is always something to celebrate.

Whats on your 'bucket list'? I don't have a bucket list. I live each day and don't count the years! Life is great.

**NAME:** OONAGH O'HAGAN**COMPANY:** MEAGHER'S PHARMACY GROUP**POSITION:** MANAGING DIRECTOR AND OWNER

A brief description of your business? The Meagher's Pharmacy group consists of six pharmacies all in South Dublin which provide prescription and healthcare products together with a wide range of health screening services to a diverse customer base. We also have an extensive range of luxury cosmetic brands as well as quirky gifts, jewellery and photographic services.

How did you get started in the retail industry? I studied pharmacy in Trinity College Dublin from 1991-1995 and following my graduation I had to choose a tutor to do my intern year with in order to get my professional qualification. I chose Pierce Meagher on Baggot Street because I loved his shop and the area in Dublin. I worked with Pierce for one year and we forged a very strong relationship that continued

long after I left his shop. Every few months I touched base with him and always asked him to let me know when he intended selling as I saw huge potential in his pharmacy. In 2001 my dream came true and I got that call. I bought the Meagher's pharmacy on Baggot Street in 2001, kept the name and the family values but have expanded to six pharmacies now.

Which retailer (national or international) do you admire the most and why? In Dublin I love Donlybrook Fair as you are always certain to get top quality products sourced in Ireland. The presentation and merchandising standards in all their stores is second to none but it is their staff that really makes them stand out. They could not be more helpful and always give me hints and tips for cooking the meat or fish which is always really useful for me. Internationally I love Zara as I am obsessed with fashion. I love how they turn around their stock so quickly so that every time I go in there is something different and also when you buy something you know that it's not going to be in stock for lots of months and therefore the dress or jacket is not going to be everywhere. I find that it's really affordable for work clothes and is my "go to" shop for my Monday-Friday wardrobe.

What is your favourite retail store and why? It has to be Selfridge's in London as it has such a diverse range of brands and so many exclusive lines it's a real haven to discover things that you cannot find anywhere else. They really know how to create an experience in the store and bring retail theatre to life. There is always some new inspiration brought to life in the store which just creates that "WHAO" factor. Plus they have the largest show collection in the world and did I mention already.... I love shoes!!!

Who has taught you the most in your career as a retailer? Pierce Meagher has probably taught me most and would certainly be a very early role model to me. He had an innate ability to connect to customers from all walks of life - he never judged anyone and always showed immense empathy to those customers who were not feeling very well plus

**NAME:** GILLIAN MAXWELL**COMPANY:** TIGER RETAIL IRELAND**POSITION:** OPERATIONS DIRECTOR**A brief description of your business?**

Introduced to Ireland in 2011, and focusing on a Danish designed mix of low cost but unique, high value range, Tiger offers the consumer a diverse and interesting mix of products. Our in-house designers deliver a new range of products on a monthly basis, offering a fresh and exciting shopping in-store experience to the consumer with each visit. We now have 13 stores in Ireland.

How did you get started in the retail industry? My background is in HR and I was working in recruitment in Trinity

College Dublin when Niall (my husband) and I visited Tiger in London. We were instantly drawn to the concept and novelty of the store and partnership model, and so became the partners for Ireland in 2011. It has been an amazing adventure since then!

Which retailer (national or international) do you admire the most and why? Coming from a HR background, I admire any store where you feel that the people working there are happy to be there and proud of their brand. I think John Lewis is a great example of this - Great concept, great shopping experience and fantastic people who through their model are living the brand.

What is your favourite retail store and why? I love Department store shopping - So probably Arnotts! Our new offices are right beside it, and I love that I can get everything I need in one place!

Who has taught you the most in your career as a retailer? The creator of the Tiger concept Lennart Lajboschitz has been the greatest teacher as he is a true innovator and challenges us to think differently and try things new. He embraces the concept of building the airplane while you are flying it and that is such a creative environment to work in.

he could adapt within seconds to a completely different character. Pierce certainly showed me the dos and don'ts of great customer service- which in the end is what it is all about in retail.

What is your favourite restaurant? I love Dax in Dublin- great food with beautiful presentation - great buzz in the restaurant and amazingly attentive waiters- it just ticks all the boxes.

Where is your favourite holiday destination? I love getting away totally from it all- the phone and email but I have problems turning both off if I am honest so the best place for me to be on holiday is an island with no reception. Mustique in the Caribbean was amazing as are the Maldives- both have stunning beaches and amazing turquoise blue seas. However since my two children have arrived it is more difficult to travel long distances so a caravan in Rossknowledge in Donegal is just perfect too!!

What was your last purchase? My last clothes purchase was a black cape in Zara- great for dressing up or down over jeans.

What is your favourite quotation? It's one I have stolen from my mum but it is absolutely true for me: "Everything happens for a reason".

What do you love most about your job? The people that I meet both customers and everyone within my business. I love to be surrounded by high energy positive people and I am absolutely blessed to work with a team of people who are just that- it makes work and life a lot of fun!! I also love the fact that every day is different.

If you were not in retail what job would you have pursued? I had originally applied for medicine in Trinity and got it but changed my course of choice when my results came out because I am absolutely petrified of needles. If I wasn't doing what I am doing now I would get whatever help I could to overcome that fear and I would be a surgeon or a paediatrician.

How do you achieve a work life balance? Very badly. I have a lot of things going on both inside

Meagher's and outside too and sometimes there is just not enough hours in the day and I have to work late at night when I put my children to bed. I try hard to schedule my time properly but every week something seems to turn up. I do take Tuesday nights out and attend a philosophy course just for me and I try very hard to take the entire weekend off unless an emergency turns up.

What is the one thing that you have done that has had a profound and positive effect on your business? To surround myself with positive, hard- working people who really believe in my business as much as I do- who will go way beyond the requirements because they want to- who are absolutely loyal and who I trust implicitly. I am so grateful to be surrounded by a core of incredible people.

What is the greatest challenge currently facing your business? Reference pricing which is the process that the HSE is implementing to reduce drug prices in Ireland to become in line with those across Europe is my biggest challenge. It has a negative impact on our turnover and margins and it is totally outside our control which makes it even more challenging for me.

What advice would you give one starting out in retail? Love what you do and always look at every decision you make through the eyes of your customer to see if it makes sense to them and gauge how they will react to it. Retail is really all about the customer and if you find products/ services that match their needs and you deliver these to the customer in a wonderful environment with highly trained people who are passionate you are unlikely to fail.

Whats on your 'bucket list'? A skydive which I am doing in early 2015- to learn how to sing one song as I don't have a note in my head- to play the guitar to that song would be even better!!! - To swim in the ocean with dolphins and visit Nepal.

How do you achieve a work life balance?

I am not sure I do! With two small children it is something I work on, and feel like I am failing at all the time! It is not easy and they are masters of the guilt. Good thing they are cute!

What is the one thing that you have done that has had a profound and positive effect on your business? Spending time on strategy - Once a month we have a day away from the business where we focus on growth, structure and expansion. We work with a business mentor for this, who challenges and provokes and helps make sure that the husband/wife dynamic does not get in the way.

What is the greatest challenge currently facing your business? Managing our expansion plans with sustained growth in the existing business and finding and retaining the right teams.

What advice would you give one starting out in retail? Have fun with it, don't take yourself too seriously but take the finance side seriously and invest in good sound advice.

Whats on your 'bucket list'? As a family we are planning a trip to America to indulge our space mad children. That and finding the elusive work-life balance.

**NAME:** ROISIN WOODS**COMPANY:** MCELHINNEYS**BALLYBOFEY, CO. DONEGAL****POSITION:** SENIOR MANAGER - MARKETING & eCOMMERCE

A brief description of your business? McElhinneys is a family owned department store located in Ballybofey, Co. Donegal. In business for 43 years, we are passionate about product, service and price. We launched two websites back in 2012 - www.mcelhinneys.com and www.mcelhinneysbridalrooms.com. We were voted Best Independent Department Store in the UK and Ireland

2015 by Drapers and Best eCommerce Website 2015 at the REI awards.

How did you get started in the retail industry? When I was 14 years old, I got my first Saturday job in our local hardware store and I loved it. I stayed there for 4 years working every Saturday morning. I started in McElhinneys shortly after I completed work experience in computerised accounts.

Which retailer (national or international) do you admire the most and why? Internationally, I really admire Saks for the instore experience, customer service and social strategy. At home, I visited Arboretum Home & Garden Centre in May and was so impressed, it really is a destination store, definitely worth visiting.

What is your favourite retail store and why? I love to walk around Selfridges when I am in London, the luxury brands, merchandising standards and creative displays are so inspiring.

Who has taught you the most in your career as a retailer? It undoubtedly would be John McElhinney, he is so passionate about retail, people and is progressive in his approach. He is open to change and development and is always encouraging when we want to try something new or different.

What is your favourite restaurant? Kee's Hotel, Stranorlar always offers good food and friendly service. My kids love the desert counter at their Sunday carvery!

Where is your favourite holiday destination? It has to be New York...

What was your last purchase? A beautiful pair of leather Hispanitas ankle boots in our Footwear Department.

What is your favourite quotation? Failing to Plan is Planning to Fail

What do you love most about your job? I love everything to do with digital, from coming up with new technologies for the websites, overseeing the day to day running of the sites or social media planning. Representing Ireland at the eCommerce awards in Barcelona last summer was a great personal achievement.

If you were not in retail what job would you have pursued? I got a real buzz from working with the local transition year students and doing a few guest lectures, so I think a career as a teacher.

How do you achieve a work life balance? I have two wonderful children which ensure I get the balance right. I coach youth athletics in our local running club.

What is the one thing that you have done that has had a profound and positive effect on your business? Undoubtedly has to be the launch of both websites. We are shipping to over 58 different countries making McElhinneys truly a global brand.

What is the greatest challenge currently facing your business? The fast pace of digital is a challenge, remaining relevant and up-to-date so that you are using time and resources in a way which is going to positively impact on our business. Further scaling www.mcelhinneys.com into other markets.

What advice would you give one starting out in retail? Be prepared for long hours and hard work. Gain experience in as many different parts of the business as possible, listen to others around you and remember the customer is king. Be customer centric and you will succeed in retail.

Whats on your 'bucket list'? When my kids get older I would love to spend the summer with my hubby and kids travelling around America. I believe some of the most valuable lessons in life are learned outside of the classroom.



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MARGIN CONTROL - What do RETAILERS do that PHARMACISTS don't?



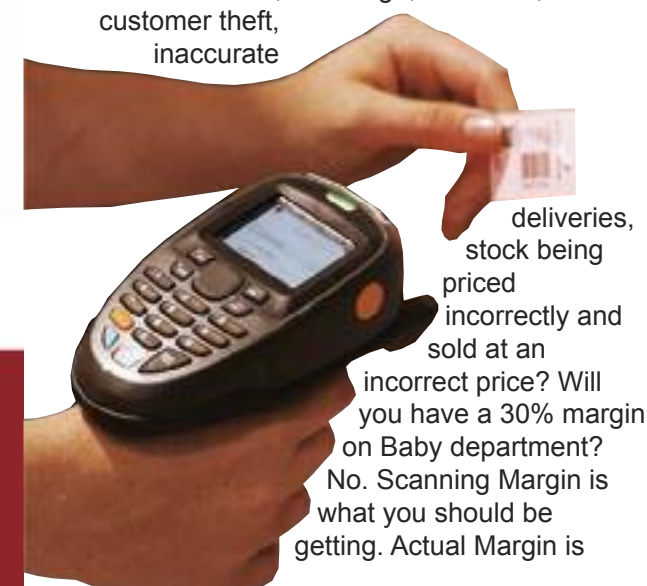
Firstly let's look at what they do, put simply, Retailers retail and Pharmacists dispense.

In the past two years, the margins in the Dispensary has been reduced considerably due to government policy, reference pricing, increase in generics due to patents expiring etc. and more and more pharmacists have turned to finding their margin in the front of house stock rather than in the dispensary. The area where best margin is now achieved is the retail/front of pharmacy area.

In the past number of months it has been apparent to us that there are more and more pharmacy owners who undertake a stocktake because their Accountant tells them that there is one required.

But what do Accountants want with this valuation of stock? We will quickly run through what you should be getting from your accountant. The purpose of the stocktake is to get a closing value of stock at a certain period of time. This stock value is then used in conjunction with your purchases, sales, credits and any other internal stock movements so as to compare your Scanning Margin versus your Actual Margin. Or, your accountant may just give you one overall margin for your premises (but this is of little use to you as a good margin lies in the detail and stock losses will not be specific to a particular area).

Your scanning margin is the margin that you decide you can charge for certain stock departments which your Electronic Point of Sales (EPOS, your till system) will tell you that you have. For example, you may have a 33% margin on your Baby Department and then a 30% margin on your Fragrance department. But what if you have a problem with stock loss, shrinkage, staff theft, customer theft, inaccurate



what you are actually getting based on the Actual closing stock figure.

Your accountant should use the stocktake figures for each department to calculate the margin based on "Actual" closing stock figures. So if the Baby Department is then having an Actual margin of 31% against a scanning margin of 33% you have a loss in stock and a loss in sales revenues. Needless to say, this is not good.

If you undertake a stocktake once per year (which appears to be the case in over 80% of pharmacies) and then it takes 3 months (depending on the efficiency of your accountant) to get your year-end accounts, you then see that your operation is not performing in accordance with scanning margins. What can you do to rectify this situation? There is nothing that you can do. You have just been performing below scanning margin for the past year and didn't even know it.

Information is knowledge, knowledge allows you to make informed decisions about your business and to operate your business more effectively and profitably.

So back to our original question, what do Retailers do?

- Full stocktakes 2-4 times per year
- Combined with management accounts 2-4 times per year
- Regular updating of product prices and barcodes
- New products added to their stock file

and assigned to the correct departments

Why? So as to identify poor performing departments and make changes if required. What's measured is managed, and if something is amiss in your business then you need to know about it. Once you know, you will have confidence in your margins and can operate a more effective and profitable business going forward.

If a premises operates a live-stock system where purchases/deliveries are input directly into the EPOS then you can usually get the above information at the touch of a button. This, combined with a cycle counting system and variance analysis, ensures that stock losses are at a minimum. However, for a Live Stock system to succeed, you need to have excellent:

- Discipline to keep all deliveries, products and prices updated on arrival to pharmacy
- Staff procedures to ensure that all staff are aware of the importance of stock control
- Knowledge of your EPOS

There is always some department which is performing below expectations. As a business owner, wouldn't you like to know which department that is?

By Patrick McDermott, Managing Director of Stocktaking.ie,
Retail Excellence Ireland Supplier of the Year 2015.



RE-POSITIONING FOR POST-RECESSION GROWTH



Attribute to David Holland, Senior Manager, RSM Farrell Grant Sparks.

David is a Senior Manager in Corporate Finance, RSM Farrell Grant Sparks. For further information, please contact David at David.Holland@rsmfsgs.ie, or +353 1 418 2042.

DURING
RECESSIONARY
PERIODS,
CONSUMERS
TYPICALLY SHOP
MORE AT VALUE
RETAILERS

Recessions produce change. It takes time for consumers to restore their balance sheets and return to a normal level of spending. However, the recent recession appears to have brought about a longer lasting effect, whereby economic growth and consumer spending over the next several years will likely be lower.

Retailers and vendors need to develop new strategies to grow and prosper in this environment. The first step is to engage in an intense self-analysis. This includes consumer research to determine the wants and needs of target customers, increase the value proposition with new and differentiated merchandise, find a path to a more efficient sourcing and logistics structure, strengthen its brand, and implement a multichannel distribution network. Success will be tied to customer satisfaction.

Consumers are frequenting different distribution formats depending on the product. That decision (by the same consumer) is often based on several factors: price, fashion, quality or service oriented, or a combination. It is increasingly important to realise that a growing percentage of consumers are using a variety of channels to purchase from the same retailer, making transparency an important issue.

Technology is providing increased consumer data for both retailers and vendors. Analysis of this data will generally enhance their ability to focus on that consumer, whether it is through new initiatives such as store level marketing or better targeted merchandise

offerings. These should help achieve the goal of increased shopping frequency, conversion and average spend.

Consumer spending patterns have changed steadily for decades and will likely continue to evolve. Following years of an expanding affluent market and increased aspiration among consumers, the pendulum is now swinging in the other direction. The consumer is still buying, but more cautiously and with more focus on value, shifting to less expensive products, buying less clothing and eating out less often.

During recessionary periods, consumers typically shop more at value retailers, returning to preferred stores as the environment improves. However, there is evidence that some customers will be lost for good, buying less expensive versions of national or high-end brand products, replacing them with store brands, shopping regularly at discount and value-format stores or trading down to less expensive brands. In most cases, though, quality remains a high priority, which retailers can largely maintain in a variety of ways for this "new" consumer. Some retailers are also broadening price points with an increased offering at the lower end to maintain consumer appeal.

Retail owners and managers must now plan and execute adaptable strategies that have the historic driver of sales, innovation at their core.



INTERNAL THEFT & FRAUD - BE VIGILANT!



I want to firstly state that Retail employees are amazing! The vast majority offer an excellent experience to customers. They are friendly, helpful, well trained and are a credit to their employer.

As a HR Consultancy we do, however, tend to get more calls about the minority of employees who have no respect for their employer, or their colleagues, and engage in theft of goods or cash and unauthorised discounting to themselves, friends and family.

From single store, local retailers to national chains we have seen hundreds of employees disciplined, dismissed and prosecuted for being less than honest in their dealings with their retail employer. The highest figure a client has estimated an employee stole was €150,000 over 10 years.

In 2014, 73 employees were dismissed from our retail clients for this type of behaviour. The following are the 5 most common ways we see employees rip off their employers. We would encourage all Retailers to consider these carefully in relation to their workplace, their internal procedures and their security framework.

1. UNAUTHORISED DISCOUNTING

Do you have a clear and robust policy for staff purchases and/or permitted discounts? Are you happy that the policy is

actually practised in all stores or departments consistently? We have had experiences of employees taking phenomenal quantities of product using their discount which is clearly not all for personal use (e.g. 7 different sizes of shoe!). Be clear on whether you allow the discount for family or friends. Monitor damaged or waste stock, be it anything from clothing to food. Employees may think it is of no value so they will take it for themselves. Never allow employees serve themselves and insist that a receipt is attached to all purchases.

2. VOIDS/NO SALE

Monitor carefully, the use of any button on the till that allows it to be opened without a sale being processed. Fabricated refunds are a regular issue. Ensure that you have a strong refund policy and that the product being returned and refunded is fully traceable back to your stock! How do you know the product was sold in the first place? In 2014, the 2 most serious cases of refund fraud totalled more than €10,000 each.

3. LOYALTY SCHEME ABUSE

Many Retailers operate a customer loyalty scheme which offers incentives, or rewards, for large customer spend. It has been a regular scenario over the past few years that an employee will create an account, either in their own name or a false one, and if a customer does not have their own loyalty card, they will add the points for sales onto their own account. Large points or credits are amassed and the employee can cash these in periodically reaping the benefits themselves. Have a very clear policy, signed by all employees, outlining what is allowable or otherwise with regard to a loyalty scheme!

4. FAILURE TO SCAN

A customer approaches a till with 4 items.

INVESTIGATE WITH CAUTION.

Investigations into allegations of internal fraud or theft can become a criminal matter. Bear in mind always, there is a big difference between what an employer may know to be true and what an employer can prove to an independent judge in court, or tribunal at an unfair dismissals hearing. Always seek advice before letting an employee know you have a suspicion as you will want to ensure you have solid and irrefutable evidence before you make serious accusations which could cost an employee their jobs and possibly incur a criminal conviction.

Both Clare in REI and our office are available to you if you ever have any queries on identifying or investigating the types of scenario outlined above.

I want to reiterate that Retail employees are, in general, excellent. It is important, however, that employers remain diligent to ensure that the performance or reputation of the majority is not tarnished by the dishonesty of a few.

All are moved over the scanner and packed however the barcodes for 2 of the 4 items are turned up and are not recorded as part of the sale. In this scenario either the employee knows the customer and is deliberately only charging them for some of the items or the employee knows the price of the other 2, is charging the customer for all the items and then knows how much 'over' the till will be. Generally the employee will keep a record of this 'over' total and will pick a suitable time to pocket it when they feel they are not being watched.

5. CASHING UP & SAFE

Amazingly, an employee 'scam' can be as simple as walking to the safe, opening it and pocketing a few notes. This brazenness comes in the knowledge that the employer does not have a secure cash system or appropriate cctv and will not be able to ascertain who exactly took the money. Proper cash handling procedures are critical. If several people use the same till, count the money and lodge the money, how will it be possible for an Employer to determine when money went missing or who is responsible for it!





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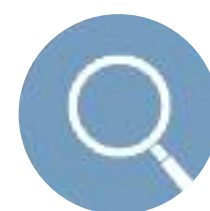
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**CUSTOMER
EXPERIENCE**

blow the *BUDGET* JEWELLERY



Over the past few issues our Mystery Shopper has reported on products as diverse as sausages, cheese slicers and training shoes. So, as a pre-Christmas treat, Retail Times in conjunction with **CREST Mystery Shopping** decided to blow the budget on a visit to three jewellers; and where else but in Ireland's answer to Bond Street – Dublin's own Grafton Street.

For comparability, the item requested in each store was an 18-carat yellow gold necklace. To define the object of desire as precisely as possible the Mystery Shopper brought along an attractive 20-inch gold coloured rope-style necklace of indeterminate value borrowed for the day.

All visits were carried out on Saturday, 22nd November, 2014.

BOODLES JEWELLERS

Grafton Street, Dublin 2

FIRST IMPRESSIONS: Theatrical version of a high-end jewellers. Tastefully restrained, widely-spaced displays with never a special sale price to spoil the image. Windows flanked by black Corinthian columns. Christmas greetings and coy innuendo ("Will you Boodle me?") lettered in handwriting-style across gleaming glass. Interior expertly lit to enhance the merchandise and strike a sparkle off the champagne flutes lined up along the drinks cabinet.

GREETING AND SERVICE: Immediate charming welcome with introductions all round from two, tall, dark, handsome chaps who could have been Freddy Eynesford-Hill from "My Fair Lady" and his understudy. Ushered to lovely pale leather armchair, offered a drink. After his opening lines the leading man suavely enquired if there was a particular expenditure figure we should be using as a guideline. The Mystery Shopper, not to be out-suaved, posited "a couple of thousand, or thereabouts". The understudy, having moved off-stage briefly now returned and rather spoiled the upper crust ambience by asking the same budget-related question.



EXPERTISE EXHIBITED: Boodles produce their own exclusive designs. Other than that, more friendliness than facts.

THE JEWELLER'S RECOMMENDATION: Roulette 18ct slim yellow gold chain with gold wheel pendant. Priced at €5,400. Extra links available at no additional cost.

GOOD POINTS, BAD POINTS: Indubitable classiness, or entertaining imitation thereof. Bloody expensive and no apparent attempt to stay anywhere near budget.

MYSTERY SHOPPER RATING: Seductive - if you love being spoiled (the Mystery Shopper does) and can say "no" (our Shopper once survived an all-day Maltese timeshare sales "event" with unlimited Cava).



JOHN BRERETON JEWELLERS

Grafton Street, Dublin 2

FIRST IMPRESSIONS: A lovely beige and dark brown corner-site frontage with lots of window space. Displays beautifully spot-lit against a honey-coloured backlighting. Inside, the ambience was old school and gentleman's clubby with deep leather armchairs, low polished table, air of quiet restraint and perfectly folded copy of "The Irish Times".

GREETING AND SERVICE: Although the half-dozen staff members (mostly male) narrowly outnumbered their customers the Mystery Shopper had time to try out an armchair and ruffle the Times' Sports Section. Service was offered after a minute or so, the scenario was listened to with politely contained interest and the sample piece eyed with politely restrained disdain. The staff member regretted that there was nothing similar in 18-carats on the premises but suggested the Mystery Shopper try their other store, across the Liffey in Capel Street, where there might be several close contenders..

EXPERTISE EXHIBITED: Necklaces with a twisted or coiled design are more difficult to repair than those with links that are, well, just linked.

THE JEWELLER'S RECOMMENDATION: The Mystery Shopper tried the phone call Grafton Street should have made. Capel Street suggested a 20-inch, 18ct gold chain – not a rope style but "heavy and attractive". No price available over the phone – "It's just arrived and I haven't really priced it yet, but come in and have a look. We can offer you excellent value."

GOOD POINTS, BAD POINTS: Lovely windows, comforting interior with great armchairs. No real effort to capture the customer.

MYSTERY SHOPPER RATING: Would you advise a prospective purchaser with €2,000-plus in their pocket to head across town without collecting contact details?



TIFFANY & CO. JEWELRY (SIC) STORE

Grafton Street, Dublin 2

FIRST IMPRESSIONS: Where is it? Our Mystery Shopper wandered the length of Grafton Street seeking an iconic New York frontage embellished with that evocative name. Phoned directory enquiries – no listing for Tiffany, Dublin. Standing perplexed on the corner near McDaid's, sorely tempted to nip in for a consoling beverage, assistance arrived from a proactive street trader – "D'ya want flowers, Love?". "Tiffany & Co?". "Yeah, it's in Brown Thomases - Flowers?". Sure enough, there it was. Through cosmetics into the hall of outrageously famous designers which included Prada, Gucci, Louis Vuitton, Hermes, Chanel and Tiffany. One bright boutique amongst the many. Strangely disappointing.

GREETING AND SERVICE: The greeting was warm and immediate from a well-dressed gentleman who turned out to have a thoroughly English name to go with his charming oriental smile and exquisite oriental manners. The scenario was presented – necklace, like this one, in 18-carat yellow gold; budget around €2,000.

Close examination of sample item, regretful head-shaking – an outdated design, unusual in Europe – then the smoothest possible introduction of a necklace in a totally different style. Handled so lovingly, described so reverently and sold so persuasively as to render the piece the Mystery Shopper had brought in an irrelevant half-forgotten memory.

EXPERTISE EXHIBITED: Spotted a hidden silk thread in the specimen necklace's construction. Correctly guessed its provenance as Australia – impressive!

THE JEWELLER'S RECOMMENDATION: Thin-linked 18ct gold chain with 18ct yellow gold key-shaped pendant. €2,070.

GOOD POINTS, BAD POINTS: Closest match in terms of budget and necklace length. Missed the expected mystique.

MYSTERY SHOPPER RATING: Nice shop, good service, goodish recommendation and respected the budget. Expected a bit more Holly Golightly.



WHY AUSTRALIAN RETAIL IS SET FOR SUCCESS, HOME AND AWAY

especially when it comes to effective brand implementation, and this is an area in which Australians excel – a fact borne out by the experiences of the Visual Thinking team as we embarked on what proved to be a highly productive eight days in-store. To me, it therefore comes as no surprise that Australia is an emerging international power in the world of retail.

When I visited Sydney for a fact-finding mission a few weeks prior, I was lucky enough to be present at the ribbon cutting ceremony to open the country's latest retail mall, namely, the remodelled Macquarie Centre in Macquarie. Located around 20 kilometres outside of Sydney's CBD (Central Business District) not far from the famous Macquarie University, the mall nestles in between the many corporate offices for global companies such as Fujitsu, AstraZeneca, Toshiba and others. As such, it serves local workers who have both the awareness of, and appetite for, the impressive mix of local and international brands that are found within.

Whilst the original mall has been established for some time (and was in need of an upgrade), this latest development phase has seen the addition of good improvements to the retail offer including the introduction of a smart new fashion avenue. Popular local brands are well represented, including a fully refurbished MYER department store. Outside of fashion, Woolworth's – Australia's leading national food retailer – has introduced its smart, new 'fresh' grocery concept to the mall, with a compact store to serve essential grocery needs.

Whilst the Macquarie Centre may not be Westfield owned, the significant impact that the Australian Mall developer Westfield Group has had on driving up both retail standards and consumer expectations cannot be underestimated – you only have to look at Stratford City and White City developments here in the UK, within what is arguably the world's most sophisticated retail market, to gain an appreciation of what I mean. It's an example of great sector leadership and the nation should rightly be proud to have

this accolade as part of its leading business exports.

The quality of this latest development is clearly a response to other malls within easy reach (and Westfield owned/managed), giving Australians great choice about where and when to shop and proving to the retail world that, if you want to take the biggest share of the consumer's dollars, you have to do much more than just set up shop. And that is something Australian brands are becoming all too conscious of – UK and Irish retailers beware. Over the next five years, I believe Australia will stand very proudly amongst other leading cities with a retail environment that is as good, if not better.

Anchoring this latest mall is a superb flagship store in the form of Australia's high-end department store chain, David Jones. Arranged over two floors the store offers an extensive range of beauty, apparel and home brands with a number of exclusive labels from around the world. UK brands are well represented including the likes of Phase Eight, Ted Baker, French Connection, Superdry and others.

IF YOU WANT TO TAKE THE BIGGEST SHARE OF THE CONSUMER'S DOLLARS, YOU HAVE TO DO MUCH MORE THAN SET UP SHOP

Many international fashion brands have also taken up big, new spaces within the Macquarie Centre including Uniqlo, with its second Sydney store. There is also a spacious presence for Spanish fashion brand Zara and its Swedish counterpart H&M, completing the list of entrants who have established a dominant scale.

Indeed, the foreign invasion of the Australian high street is certainly gathering pace, with many UK retailers eyeing the affinity that often well-travelled Australians have for European brands as



TYPO

a golden opportunity for growth. Earlier this year, Marks & Spencer announced it was gearing up for an Australian opening, with Sports Direct later making public its plans to open three flagship stores in the country. UK book and stationery chain WHSmith is also opening stores, whilst Topshop has been enjoying high street success Down Under for some time.



WOOLWORTHS

But it's not all one-way traffic. Here in the EU, Australian stationery retailer Smiggle, menswear retailer Industrie, and plus-size retailer Taking Shape, are all plotting their assault on our high streets. And what of other leading Australian retailers – could we soon witness a reverse influx? As an intelligent, forward-looking brand that has mastered the art of steady but continual evolution, Country Road began in the mid-1970s as a niche retailer for high-quality



UNIQLO

women's shirts, known for its bright colours and clean designs. Since then it has expanded into homewares and lifestyle, with its original ethos of good design and attention to detail having filtered through into its store concept. Already with overseas flagship in cities such as Cape Town in South Africa, it could well find success soon on Irish high streets too.

Only time will tell if the likes of Country Road, or other fashion specialists such as Sass and Bide, Trenery, Universal Store and Glassons believe that the potential rewards make the UK and Ireland markets worth exploring seriously. For many that may be eyeing these shores, the lower cost of doing business here – more affordable rent packages and reduced staff costs – may eventually prove too tempting to ignore. If that proves to be the case, then we may be set to enjoy retail experiences with a refreshing new character, that are as appealing as the Australian way of life. Are their retailers the biggest risk takers out there? No, but it is the nation's love of a straight-talking, more honest approach to shopping that may quickly win the hearts and minds of shoppers over here, as well as back home.

INDEED, THE FOREIGN INVASION OF THE AUSTRALIAN HIGH STREET IS CERTAINLY GATHERING PACE



RALPH LAUREN



SPORTSCRAFT



SAMBAG

IT COULD WELL FIND SUCCESS ON IRISH HIGH STREETS TOO

Karl McKeever, Managing Director, Visual Thinking

In recent weeks, I've made two whistle stop tours of Australia as part of a major brand transformation project, this time for one of the country's biggest and most successful retailers.

Of all the places that I visit around the world, the one thing you can be certain of when you arrive in the country is the warmth of the welcome. They are indeed remarkably friendly and enthusiastic hosts, although it would be wrong to mistake them for being laid-back easy-going types, not least when it comes to business. There is an intensity that sees many impatient for tomorrow to come. Indeed, Australians are at their best when it comes to their no-nonsense approach to making things happen.

I read recently about the wonderfully straight-talking campaign from the New South Wales government called "Don't be a tosser" which successfully encouraged Australians to stop littering. A retailer whom I visited took up this idea, embraced it and made it their own, suggesting that customers became 'tippers' instead.

Success in-store often comes down to clear communication,

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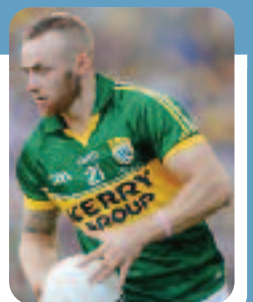
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