

Retail

TIMES

Q1 2019

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WELCOME



Well what a terrific night was had by all, at the Retail Excellence awards in November, in the beautiful Killarney, and a big congratulations to Jean McCabe and all her team at Willow, the 2019 National Store of the Year, a well-deserved winner.

There were many deserved winners on the night, and congratulations to you all, and as I have said before, it is not just the winning that counts it is the taking part and I strongly urge all of you to enter for next year's awards, and take the leap into the 10 pillars of retail, you will not be disappointed.

By the time this edition gets from the printer to your desk, it will be 2019, so may I wish all of you, on behalf of all the Board and the team here at Retail Excellence, a healthy and prosperous New Year. And I hope for those of you in the Christmas retail business you have had a successful trading period.

A couple of key dates for all your diaries, The Retail Excellence Management Development Programme, this powerful and effective initiative kicks off on the 6th of March, it will be run over 5 days throughout 2019 and ends in May, places are limited, so I strongly recommend you contact Helen O'Dowd, and get your bookings in.

The most important dates in the Irish Retail calendar will be the Retail Excellence Big Retreat, these are "must go" dates for all Irish retailers who want to see the future and learn how to take practical steps to keep their business ahead. Tuesday 21st and Wednesday 22nd May 2019, this is one thing that you must attend.

So what is in store for 2019, well if we knew that answer! Broadly all the indicators are that it will be another strong year for the Irish economy, with overall growth forecast at 5% to 6%, the Irish Construction industry continues to perform strongly, with growth forecast of around 10%, and the much talked about residential housing boom, is finally beginning to materialise. Unemployment at its lowest level for nearly a

decade and employment at its highest level ever. A double edge sword for every Irish Retailer, more customers, but who will delight them?

So, Brexit remains the big question mark, and I think we have all given up trying to predict what will happen next, however the world will continue to turn and whatever happens we will all find ways of solving whatever comes up.

Retail continues to pose many challenges, and it can depend on what sector you operate in, or more critically is where your business is located. What will always remain, is that people will need to buy things, both on a practical and on an emotional level, how and where they buy is changing rapidly, so the whole area of the "Omni channel" is here to stay. And we will all need to be on that train, and if you are not already, you had better start running!

There are real signs of continued growth in Irish retail, with many national, local and international retail businesses planning aggressive new openings, either with brand new concepts, or ambitious expansion plans. We here at Retail Excellence are passionate about retail and are here to help you unlock your potential, I urge you to get in touch, engage with our key events and you will not be disappointed.

Regards

JP Kennedy

*Managing Director, TileStyle
Chairman, Retail Excellence*

THE NEWS



Willow led the celebrations at the AIBMS Retail Excellence Awards

WILLOW WINS BIG AT RETAIL EXCELLENCE AWARDS

Willow, Ennis was announced as the National Store of the Year 2019 winner at the AIB Merchant Services Retail Excellence Awards. Other winners on the evening included Top5 stores Mellerick's Pharmacy, Fermoy, bambino's, Ennis, Shannon Duty Free and Fresh The Good Food Market, Grand Canal, Dublin. The Kilkenny Shop and Restaurant, Nassau Street won Best Restaurant and Coffee House, with the store manager Mary Keane winning Store Manager of the Year. Dollard & Co. won National Food and Wine Store of the Year, Applegreen Gorey winning National Forecourt, Petstop Carrickmines won National Pet Store, Nook & Cranny Portlaoise won National Gift Store, Casey's Furniture Limerick won National Home Interiors Store, Specsavers Dawson Street, Dublin won National Optician of the Year, Arboretum Carlow took home the National Garden Centre of the Year Award, while Harvey Norman Tallaght won National Electronic & Tech Store. Inglot's Niamh Cleary won the Rising Star of the Year

Award, while Fianna Fáil TD Dara Calleary won the inaugural Retail Industry Advocate Award. Ecommerce winners included Glanbia Connect - Website of the Year, Hale Vaping - New Website of the Year, Three - Digital - Campaign of the Year and Carrolls Irish Gifts won the Exporter of the Year Award. The evening also recognized Ireland's Friendliest Place 2019 and our congratulations goes to Slane in the royal county of Meath.

SHAWS GET INTO COFFEE AND FOOD

Shaws Department Stores and Sip Café have announced the recent opening of a new In Store Café in Shaws Waterford. Sip Café is conveniently located in the ground floor window at the Quay Door offering in store hospitality to the customer base with an extensive menu of barista crafted coffees and hot and cold food options. Jonathan Shaw, Chief Executive at Shaws Department Stores said: "We are thrilled with the addition of a Café to our Waterford store and the feedback from our loyal customers has been extremely positive, we have more exciting additions planned for this store in 2019."

ENTERPRISE IRELAND ONLINE PILOT SCHEME FOR RETAIL

Enterprise Ireland has recently launched an online pilot scheme for retailers who have international online potential. The €1.25m fund welcomed applications with a deadline of the end of the first week in December. It is understood that a significant number of Retail Excellence Members applied for the funding. Grants will range from €10,000 to €25,000. Commenting on the initiative David Fitzsimons, Group Chief Executive said: "We very much welcome this Enterprise Ireland scheme and know that it will launch many great retailers into international online trading activity. We thank Minister Heather Humphreys and the team in Enterprise Ireland for responding to what we see as a significant trading opportunity for Irish retailers. We understand that the programme is a pilot and have requested that when the scheme is extended it is made available to retailers with twenty or less fulltime employees".

EDDIE ROCKET'S BACKING BUMBLEANCE

Lucy Kennedy recently launched a very special Eddie's advent calendar with the proceeds being donate to BUMBLEance. BUMBLEance, which was launched in 2013, is the world's first interactive ambulance specially designed for children. It is fitted with the latest medical equipment and inter hospital communication systems. With every "Little Rockets" meal sold children will get a free advent calendar and asked to donate €4 to BUMBLEance by texting "STAR" to 50300. Each advent calendar has a free voucher for a return meal in Eddie Rocket's inside it. At the launch of Eddie Rocket's advent calendar, Lucy Kennedy said: "What could be a better cause than making the ambulance journey of a sick child more comfortable. That's why Eddie Rocket's is delighted to partner with BUMBLEance to raise as much money as possible."

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The new Sip Café in Shaws, Waterford



Ireland rugby stars Rob Kearney and Garry Ringrose officially opening the new Aldi store



Pat Breen was in attendance for the jobs announcement



Lucy Kennedy was on hand to launch the partnership

NEW ALDI FLAGSHIP AT FRASCATI SHOPPING CENTRE

Aldi has recently opened a new flagship store at the revamped Frascati Shopping Centre in the heart of Blackrock. Creating twenty new jobs, the new store follows the recent opening of Aldi Leixlip, as the retailer continues to invest in the greater Dublin area. Aldi will open a new store at Royal Canal Park early this year and has submitted planning applications for an additional store in Swords. Aldi's Frascati Shopping Centre

Store is part of its €160m store network investment. Aldi has committed €100m to constructing and opening 20 new stores by the end of 2019, while Project Fresh sees Aldi invest a further €60m in revamping the layout and design of all its 134 stores nationwide. Speaking at the store opening, Peter Flynn, Manager of Aldi's new Frascati Shopping Centre store said: "We are delighted to open our new flagship Frascati Shopping Centre store and look forward to welcoming many new customers from the local area."

IRISH TECHNOLOGY COMPANY ANNOUNCE 50 NEW JOBS

Positive ProStrategy Retail recently announced fifty new jobs as the Microsoft Gold Partner continues to win new business. Positive ProStrategy Retail (PPR) is the only Irish company to offer end to end Retail Solutions from front office (EPOS and store management) to back office (finance, supply chain, replenishment, etc) and unifying external channels such as web, social and mobile. Commenting on the news Damien

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'Johnston's have been fantastic to work with, manufacturing pioneering equipment for the store' **DONNIE CHRISTIAN LONDIS DCU**



Amazing Instore and Retail Excellence have teamed up to offer members an IMRO/PPI licence exempt music service. You can now have all the benefits of playing music in-store without the need for costly licence fees.

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The Amazing Stream €136.65 per year

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amazinginstore

Please Contact
Grant Thompson

Tel: +44 (0)191 603 0180

Email: sales@amazinginstore.com

Web: amazinginstore.com

O'Driscoll, PPR Retail Technology Director said: "The customer needs the experience they receive in store to be reflected throughout the entire retail estate, if you are excellent online you need to be excellent in store. Our Unified solution allows this process flow to be seamless and embedded."

LONDIS LEAD ON RETAIL TECHNOLOGY

Johnston Shopfitters recently completed the fit-out of the new Londis at DCU. Londis Ireland and BWG Foods oversaw the launch of Ireland's most technologically advanced and sustainable grocery store. This ambitious project in the heart of the Dublin City University campus, has truly been a labour of love for Johnston Shopfitters. The store includes revolutionary POS Tuning Shelf Management Systems and a state of the art Bewley's Coffee station.

ARDKEEN INVESTS IN SOLAR

Waterford grocer, Ardkeen Quality Food Store, is a well-known advocate of local and



Irish producers which comes with the additional eco-friendly benefit of lower food miles. However, this is not the store's only green initiative as Ardkeen views environmental sustainability as an essential ingredient to doing business responsibly and successfully and is accelerating the green transition with a comprehensive in-house Sustainability Programme. The most recent step forward in the plan is the installation of a 100KWp Solar PV Array consisting of 363

roof mounted panels, aided by SEAI funding. These panels will generate up to 100,000KWh of renewable electricity per annum resulting in a saving of 60,000kg of CO2 annually. The solar power technology is supplied and fitted by local company Enerpower, one of Ireland's leading renewable energy companies with over thirteen years experience in advanced energy technologies.

APPLEGREEN PARTNERS WITH FOODCLOUD

Applegreen has recently announced their

partnership with FoodCloud, the not for profits company which redistributed excess food to local charities. Over thirty-seven million meals have been redistributed by FoodCloud across Ireland and the UK since the company established in 2013. FoodCloud is Applegreen's most recent charitable partner. The retailer also works with Debra Ireland, Focus Ireland and The Irish Youth Foundation.

NEW PETMANIA FOR SANTRY

Former Miss World and pet lover Rosanna Davison recently opened Petmania's new state of the art Santry store at Gulliver's Retail Park. Kitted out with the latest in grooming equipment, the pet grooming studio will be open seven days a week and has the capacity to groom three hundred dogs a week. The modern features give a salon feel in terms of design, it also has large viewing windows, so customers can see the finishing touches being put on their dog. "This store revamp and the introduction of our new pet grooming studios is an important move for Petmania and one that we are very excited about. We are committed to offering the pets of Ireland and their parents the very best care and wellness options. The investment in this new store has been substantial and we are planning a roll-out across all twelve of our Irish stores." says Emily Miller, Marketing Manager with Petmania.




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FAST GROWING RETAILERS

THERE HAS BEEN LOTS OF RECENT MEDIA COMMENTARY ABOUT THE DEATH OF RETAIL. DEBENHAMS, HOUSE OF FRASER, CLERYS, SEARS AND THE LIKE. THESE BRANDS ARE REPORTED TO BE THE CANARY IN THE MINE, INDICATING ALL OTHER RETAIL WILL SOON DIE. THE TRUTH IS THAT THESE BRANDS ARE NOT A BELL WEATHER OF WHAT IS FACING THE RETAIL INDUSTRY. THEY ARE SIMPLY RETAILERS WHO DID NOT CHANGE WITH THE TIMES AND INVEST IN THEIR PROPOSITION.

David Fitzsimons investigates what is happening in retail and questions is it really facing a long and painful death?

In my role I get to speak to a lot of retailers each and every day. Each phone call is answered with a note of caution and concern. Is the caller at a point of terminal decline? At our annual Retail Retreat in May I sat back and listened to Blaine Callard, CEO Harvey Norman, expel the myth regarding the death of retail. He eloquently explained that retail is not dying, it is simply changing. Blaine pointed to how the media interpreted the decline of Toys R' Us as the death of retail. And yet Smyths Toys bought the majority of this business and will breath life and vitality back into its frail retail footprint. The truth is that bad retail is dying, brilliant retail is alive and well.

To prove the point to myself, one weekend in early September I studied our extensive membership database. The purpose was to step back and review what is really going on. As I surveyed the membership from Applegreen to Zara, I realised that the vast majority of retailers are alive and well. Yes, there are issues, our VAT rate is too high, Government does not support Ireland's largest industry enough, town centres need our love and attention, Brexit is a concern, but when all is said and done, there are many many retailers who will continue to live, breath and thrive.

The follow Monday morning I phoned Jim Mulqueen, Partner Corporate Finance in Grant Thornton. I explained that Retail Excellence would like to bring some fast-growing retailers together. I wanted to prove that retail was not dead. Ever the gentleman, Jim got it immediately. He offered to host a luncheon in the brand-new Grant Thornton HQ in Dublin. I put down the phone and got to work. The only rule which I had to abide by was that the Grant Thornton Boardroom could host a maximum of forty people, excluding some Grant Thornton and Retail Excellence executives, I had to keep the invitation list to thirty-five. I went back to the members database and realised that we had way more than thirty-five fast growing retail members. To make my task a little easier, I decided to only include town centre focussed retailers on the move. This would tick two boxes, prove that retail was alive and well and would also prove that the future of Irish towns is vibrant.

Thus, on Wednesday 21st November in the Grant Thornton Boardroom thirty-five fast growing retailers came together. Damian Gleeson and Jim Mulqueen of GT opened the meeting and then it was my turn to take to my feet. I surveyed the room and realised that retail has a very bright future. I asked everyone in attendance to tell me a little about their plans in Ireland. Here are just a few fast-growing retailers plans.





Jean McCabe, Willow, Jim Mulqueen, Grant Thornton and Jan Swarbrigg, Inglot



Inglot – Jane Swarbrigg

“Inglot is a cosmetic retail company on the move. We sell high quality make-up and accessories. We also provide services such as makeovers and beauty courses. We own the Irish and UK franchise for the Inglot global brand. I am incredibly bullish about the future of our retail business. The beauty sector is booming and while this brings some challenges and new competition, my job and that of the team is to accelerate our growth as quickly as possible. We currently have thirteen stores in Ireland and four in the UK but plan many more. We are planning stores in Manchester, Liverpool, Birmingham, Edinburgh, Cardiff and Bristol. We also plan significant expansion in Ireland and are currently looking at pharmacy concessions in such towns as Tralee, Sligo and Wexford. We are planning for fifteen new stores over the next three years.”

Gym+Coffee – Niall Horgan

“Gym+Coffee is an Irish owned and designed athleisure clothing company. We started out online in January 2017, the company expanded quickly and we opened two physical stores in Dublin in 2018. Gym+Coffee was created to produce high quality, comfortable activewear to match the growing lifestyle in Ireland. This lifestyle sees people becoming more active, health conscious and social. At Gym+Coffee, we wanted to be part of this movement and also to encourage it further we have focused on building a community passionate to Make Life Richer. In 2019 we plan to expand the business in a number of areas. Firstly, our product range will expand, and we have some incredible new products launching for Spring/Summer 2019, all made by the same

manufacturer as Lululemon. We are revamping our website and creating a new content hub that will further demonstrate our passion to encourage a community to Make Life Richer. We also will continue to expand internationally and aim to increase our international sales from 16% to 25% in 2019. Finally, in 2019 we will expand further with new Gym+Coffee physical locations. Over the next three years Gym+Coffee plans to open three to five more physical stores in Ireland and two international locations.”

PitaPit – John Nevin

“PitaPit is a Canadian originated concept started in 1995 and now has over 650 stores in twelve countries. It's a quick service

restaurant who's fresh thinking, healthy eating ethos and community focus makes it one of the fastest growing food franchises worldwide. PitaPit serves freshly grilled meats and flavour filled salads and zesty sauces in Mediterranean style pita breads. We own the Master Franchise for Ireland and have opened two corporate store restaurants in Ireland to act as flagships and training stores. The first of these stores opened in the Point Village, Dublin in November 2018 and our second store opened in December last in the Blanchardstown Centre. With a mix of sub franchising and further investment in our own corporate stores we expect to open a further three to five stores in 2019 and have twenty stores in Ireland by 2021. We expect to grow to fifty plus outlets by 2025.”





Willow – Jean McCabe

“Willow is a womenswear boutique which prides itself on providing a customer experience like no other. Housing brands from all over Europe over 2 floors, Willow has become a destination in the mid-west. Showcasing brands like Essential Antwerp, Ted Baker and Darling creates an eclectic mix of collections, at varying price points. Winner of “National Store of the Year 2019”, the instore experience is at the heart of Willow. Locations in Ennis & Galway city and online @willow.ie. We plan on expanding our bricks & mortar presence nationally, supported by the growth of our online platform. I’d say we will have one or two new stores in the next couple of years. Expansion is definitely on the horizon for Willow.”

Hale Vaping – Vincent Lynch

“We set up our Vaping business in 2014 by opening a small number of retail stores as well as leveraging some wholesale customer

accounts to start distributing our product range. Back then, the product range was quite narrow and there was a lot of uncertainty in general about vaping. We continued to open stores and grow distribution over the years. We are extremely proud of the fact that we have an Irish manufactured product,

produced in our state-of-the-art ISO standard factory in Carlow. In 2016 we engaged Bradley Brand to help us with a rebrand and ‘Hale’ was born. We are now the leading brand in Ireland with over 50 retail locations and distributing to over 1,800 convenience and forecourt locations.”



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Halloween HQ



Flying Tiger



Brian McGinn Flying Tiger Copenhagen and Derek Kelly Nourish

Halloween HQ – Declan Fagan

“We opened our first seasonal store on Patrick Street, Cork in 2012 to test the appetite for a stand-alone Halloween store. We created the brand ‘Halloween HQ’ in 2013 and opened thirteen stores in high profile locations across Ireland. We entered the UK market in 2015 by opening in Meadowhall, Sheffield. We entered a JV with ‘Calendar Club’ in 2016 to grow the business in both UK and Ireland. In 2017, we traded from over fifty stores in Ireland and UK. A company called ‘Amscan\Party City’, the largest company in the world in the party industry, had expressed interest in what we were doing from the early days. In December 2017, Calendar Club exited the business and Amscan became our new partner. They are a business that is listed on the New York stock exchange and has a ‘vertically integrated’ model of manufacturing, distribution and retail across the globe. They own over 900 permanent Party City stores in the US, Canada and Mexico. They also operate the temporary ‘Halloween City’ business which seasonally trades from approx. 300 locations. In 2018 Halloween HQ traded from 25 locations including Dundrum Town Centre, Blanchardstown SC, Liffey Valley SC, Grafton Street, Crescent Limerick, Patrick Street, Bluewater SC, Meadowhall SC and Metro Centre Newcastle. We employed over 300 staff during the season. We plan to grow the seasonal concept in Europe over the coming years through our own stores as well as a new franchise model.”

Flying Tiger Copenhagen – Mike Burke

“Flying Tiger is an on-trend retailer of Danish designed innovative gift and

homeware products. We have grown the business in Ireland to twenty six stores and plan a further ten in the next two to three years. The business trades well in Ireland and across Europe. Acting responsibly and with integrity is deeply engrained in Flying Tiger Copenhagen; it is part of our DNA to do things the right way. We strive to do things to an impeccable standard and make sure our products are produced in respect of ethical, social and environmental standards. We are very bullish about the future of Irish retail.”



Brian Fox Regatta
Niall Lawlor Sostere Green

Søstrene Grene – Niall & Heather Lawlor

“Søstrene Grene is a novel Danish retail format that specialises in unique and well-designed product ranges. We currently have nine stores on the island of Ireland and plan to open in five more locations in the near future. Today, Søstrene Grene is represented in many countries around the world. The aim is for the Søstrene Grene stores to continue to provide a refined and innovative product range, allowing for great finds and positive customer experiences.”

After our lunch event each retailer was sent a spreadsheet and asked to document the stores they will open in the next three years and their preferred locations. When I added up all of the locations, the grand total came to an impressive two hundred and forty new stores. Who said retail is dead?

The Fast-Growing Retail Network will meet again in February.

To join the Fast-Growing Retail Network, email David Fitzsimons at david@retailexcellence.ie

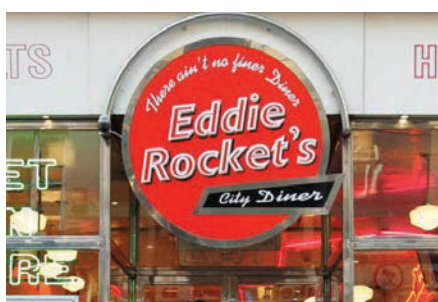


Søstrene Grene

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FAST GROWING RETAILER FACIAS





COLLABORATION DELIVERS

Christmas in Limerick



CHRISTMAS IN LIMERICK 2018 WITNESSED A UNIQUE COLLABORATION RESULTING IN THE DELIVERY OF THE BUSIEST AND BEST CHRISTMAS YET. LAURA RYAN, HEAD OF MARKETING AND COMMUNICATIONS AT LIMERICK CITY AND COUNTY COUNCIL EXPLAINS HOW COLLABORATION WITH KEY STAKEHOLDERS WORKED SO WELL.



Limerick City and County Council were very eager to deliver a Christmas that enhanced footfall and spend in the city. To that end we worked in partnership with Limerick Chamber and Retail Excellence Ireland to deliver the largest ever Christmas in Limerick event for 2018. More than 20,000 people attended the city's spectacular Light up Limerick event when the Christmas Lights were officially switched on by the Mayor and cervical check campaigner Vicky Phelan and her family.

This year the Council delivered a Christmas programme and integrated marketing campaign after consultation and sponsorship from retailers across Limerick including Limerick Chamber and Retail Excellence Ireland. As part of its six-week Christmas campaign, the Council funded the award winning Toots Christmas Train which has arrived in Limerick for the festive season. Starting at King John's Castle's Magical Christmas, Toots Christmas Train travelled around the city centre allowing families to experience the spectacular line up of festive events, traditional food and craft markets, exciting entertainment, trendy boutiques and the impressive display of Christmas lights.

A total of 100,000 Christmas in Limerick brochures featuring events from across Limerick and the details of all sponsors were

delivered direct mail to homes in the Mid-West via An Post with thousands more distributed across hotels, cafes and restaurants in Munster.

There's lots of free family fun contained in the guide, with details of Santa experiences, a colourful Gingerbread Kitchen and four free

'Christmas Unwrapped' shopping events featuring local gift ideas from stores in Limerick city centre.

Our Marketing and Communications team organised an extensive marketing campaign using the hashtag #christmasinlimerick. Local retailers were also encouraged to follow 'Christmas in Limerick' on Facebook, Twitter and on Instagram and to share their own festive initiatives with the digital team to promote across social media. A comprehensive Christmas in Limerick website www.limerick.ie featuring more than one hundred events across Limerick was also built with specific hotel deals, shopping and family fun sections.

We were delighted with the interest from retailers and the success of our campaign which showcases the very best of Limerick at Christmas time. Retailers promoted for free a wide range of gift ideas as part of our four 'Limerick Unwrapped' shopping events which took place on Fridays and Saturdays in early December. With so many people shopping online this Christmas, there's nothing like physically seeing an item and getting to try before you buy it. Limerick Unwrapped offered a great opportunity for shoppers to see the huge variety of gift options available in Limerick city stores in a

fun and festive environment. I'm delighted that so many local companies have come on board with us this year, especially Arthurs Quay Shopping Centre, King John's Castle operated by Shannon Heritage, Specsavers and Garvey's SuperValu.

Our aim was to highlight the packed calendar of events and the unique city centre atmosphere that make Limerick special at Christmas time.

Light Up Limerick kicked off more than a month of festivities and family friendly events across the city which include:

Toots Christmas Train - Hop on board the award winning 'Toots the Train' and travel through the heart of the city and experience the festive sights and sounds and the Christmas lights!

King John's Castle Magical Christmas - Why not visit Santa Claus and all his friends who have come to live within the magnificent castle walls for their weekends in December **The Gingerbread Factory and Santa's Postbox** at the Hunt Museum. You can make your own gingerbread while enjoying a hot chocolate before writing your all-important letter to Santa and posting it in the Big Green Post Box

Limerick on Ice at Arthur's Quay is a firm family favourite, so you can get out and practice your skating

Christmas at the Milk Market and the **Christmas Market** on Cruises Street - Soak up the atmosphere with local artisan traders showcasing the wonderful handmade craft, art, horticultural produce and seasonal treats **Musical Treats** sponsored by Savins. Bedford Row will be filled with festive cheer as colourful street performers and musicians entertain live from the vintage caravan stage **Limerick Unwrapped** - Join Celia Holman-Lee for some inspiration and gift ideas showcasing the best of fashion, jewellery, accessories and gifts from local Limerick stores.

Winter Busking Competition on Upper William Street. Sample some of the best sounds around as musicians and bands compete for one afternoon only.

As part of Christmas in Limerick hundreds of **additional free car parking** spaces were also provided with Park & Strides and Park & Rides available around the city. New sites this year include the Irish Rail Depot, Great National South Court Hotel in Raheen and University of Limerick.

Through collaboration Limerick enjoyed its most successful Christmas to date!

LISNEY

TO REVIEW OR NOT TO REVIEW

PART OF A RETAILER'S REMIT IS DEALING WITH PROPERTY MATTERS SUCH AS RENT REVIEWS, COMMERCIAL RATES AND DAY TO DAY PROPERTY MAINTENANCE. IT IS IMPORTANT TO BE AWARE OF THE TERMS OF YOUR LEASE AND ANY LEGISLATION SURROUNDING PROPERTY.



Emma Coffey, Divisional Director, Lisney

RENT REVIEWS

The introduction of legislation in 2009 prohibited upward only rent reviews in leases entered into after the 28th February 2010. Today, leases generally incorporate rent review clauses every five years. In theory, rents on review from this date are to market rent and therefore may not necessarily be higher than the passing rent. At this stage, we are well past the first round of rent reviews which took place in 2015. At that point in time, however, the retail market was slowly coming out of recession. Landlords and tenants may have allowed rent reviews to pass as informal abatements or concessions granted during the recession were removed. Roll onto 2018 and we are still coming across numerous cases where rent reviews are not

being triggered.

Retailers, perhaps having been used to upward only rent reviews in the past, are sometimes focused on business and allowing rent review dates to pass if notices are not received. In our experience, landlords are very familiar with the rent review process. They take advice on current market rental values in advance of rent reviews. If no notice has been served, it can be assumed that it is the landlord who is choosing to ignore it. Therefore, there may well be a case for a reduction in the rent on review.

specifically set out in the lease. Rent reviews therefore may not be triggered if the rent review dates defined by the lease have passed. If time is not of the essence, the right to review the rent usually continues indefinitely until that right time is called upon or the lease expires.

Even if you have been advised that there is a nil increase, it is worth triggering the rent review in order to agree a nil increase with the landlord and ensure both parties sign a rent review memorandum.

MARKET EVIDENCE

In a stagnant or falling market, landlords may wish to wait for more positive comparable evidence to become available before triggering the rent review.

There may be only a tight window within which to agree a nil increase or decrease before new, more positive market evidence is created and used to assist their case for uplift in rent.

RENT REVIEW NOTICE

If you are due a rent review or if a rent review date has recently passed, with no notice from your landlord, we strongly recommend that you take the time to review your lease. Each lease is drafted by a solicitor and therefore various nuances apply which may prevent the rent review from taking place. Following the introduction of the legislation, some solicitors representing landlords purposely worded leases in such a way as to prevent tenants from serving notices. The other important point to note is if "Time is of the Essence".

TIME IS OF THE ESSENCE

If time is of the essence or deemed to be so, then you must adhere to the time limits

CHANGING TRENDS

The prohibition of upward only rent reviews has resulted in landlord's taking a much more cautious approach to lettings. Increasingly, landlords will not agree long term lettings if they will negatively impact pending rent reviews. So while shops may appear fully let, retailers are often holding short term licence agreements while landlords wait for new market evidence to be created which can be used in future rent reviews. All of this is changing the nature and length of leases. There may be a greater place for more shorter or pop-up licence agreements in the future providing retailers the flexibility to try out a location before fully committing to a long term lease.

DE-RISK

WHILE MAXIMISING BUSINESS VALUE

RECENT FIGURES RELEASED BY THE CENTRAL STATISTICS OFFICE (CSO) SHOW THAT RETAIL SALES IN IRELAND CONTINUE TO INCREASE WITH VOLUMES AND VALUES IN SEPTEMBER 2018 UP 6.5% AND 5.8%, RESPECTIVELY, WHEN COMPARED TO THE SAME PERIOD IN 2017. AT A TIME WHEN CONSUMER SENTIMENT IS RELATIVELY STRONG, IT MAY BE TIME FOR RETAILERS TO LOOK INTERNALLY TO BUILD ON THIS POSITIVITY WITH A VIEW TO TURNING IT INTO REAL VALUE AND POTENTIALLY DEVELOPING AN EXIT STRATEGY FOR THE BUSINESS. WHAT ARE THE KEY PRE-TRANSACTION ACTIVITIES WHICH A BUSINESS OWNER CAN UNDERTAKE TO ENHANCE VALUE AND AT THE SAME TIME POTENTIALLY DE-RISK THE TRANSACTION FROM A PURCHASER'S PERSPECTIVE?

In the absence of a known purchaser it is difficult to address all of the potential concerns that a purchaser may have. In practical terms, determining an exit strategy is a means of running the business in a manner which will maximise value, achieve the owner's personal and financial goals while delivering a potentially higher return for a purchaser. In the first instance, a comprehensive and honest review of the business is required to understand its key components and how they impact on or contribute to value. In addition, an assessment of where the business stands relative to comparative companies who are perceived to be "best in class", or where the

company is compared to the market in general, is important. It may be difficult for an owner to be objective in this assessment and independent advice may be of benefit.

Regarding valuation, an owner's perception of value compared to actual value achievable may be very different so in assessing how to enhance exit value it is important to understand the value of the business today and how that typically gets realised in a sale of the business. This will highlight the areas to focus on to de-risk an exit and enhance ultimate value. Each business will have to adapt its strategies to suit its own particular circumstances but specific focus areas include:

1 Contracts – where relevant ensure there are signed contracts in place in relation to key relationships, particularly to do with suppliers, agencies, franchising, etc. Determine if there are onerous clauses which may become enforceable if the business is sold, what consents may be required and a clear strategy on how to best deliver such consents.

2 Employees – every business has key employees who are critical to the successful operation and growth

of the business. On an exit, key management have to be incentivised and motivated to deliver the necessary growth in the business which will ultimately enhance value. This can usually involve an enhanced role in the business going forward and potentially a share in any earn-out arrangement aligned with the owner's exit ambitions.

3 Financial information – ensure that financial information highlighting the performance of the business is readily available and in the right format. If you cannot demonstrate that you have a good control on the financials of the business, it will delay the process.

4 Move fast – deals are taking longer, diligence is more detailed, and funding approvals can be protracted. The longer it takes to complete the deal process, the riskier a successful outcome becomes.

5 Attractiveness – work out what makes the business attractive to a purchaser. Scale is critical and will lead to a higher value and a wider potential purchaser base. Appeal to an international audience will also drive value.

Business owners know better than anyone else the ins and out of the business, however sometimes it can take someone independent of the business to identify where all the value enhancement opportunities exist.



Jim Mulqueen,
Partner – Corporate
Finance, Grant
Thornton

New Year's *online*

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THE ECOMMERCE LANDSCAPE IS CONSTANTLY EVOLVING ON A DAILY BASIS WITH NEW TOOLS, TECHNOLOGIES AND INNOVATIVE IDEAS GENERATED TO ENHANCE THE CUSTOMER EXPERIENCE. 2019 WILL SEE EVEN MORE INTEGRATION BETWEEN BRICKS AND MORTAR RETAIL AND ECOMMERCE.

INSIGHTS FROM THE LATEST "REDC" REPORT STATE THAT 46% OF CONSUMERS BOUGHT IN-STORE AFTER RESEARCHING A PRODUCT ONLINE WHILE 53% BOUGHT FROM A WEBSITE WITH NO PHYSICAL STORE. IT IS ALL ABOUT CREATING A 360° CONSUMER CYCLE TO DRIVE ONLINE USER'S IN-STORE AND VICE-VERSA. IN RECENT TIMES, MANY DIGITALLY NATIVE BRANDS SUCH AS AMAZON HAVE OPENED A PHYSICAL RETAIL OUTLET AND FACEBOOK LAUNCHED A POP-UP SHOP AT MACY'S IN NEW YORK CITY.

SOCIAL MEDIA

According to the latest "Smart Insights" Global Digital Report, there are 3.196 billion social media users and 5.135 billion mobile phone users. The social media users have grown by 13% since the same period in 2017, thus highlighting the significant growth of these platforms such as Facebook, Instagram and Snapchat. Facebook and Instagram have ads that connect users directly to the retailer's website to purchase and there has been great uptake by many Irish retailers. During Cyber Week 2018 Snapchat launched an innovative shopping channel called "Shop and Cop". Huge discounts for limited time-periods were offered and this created a real sense of fun and excitement for shoppers. Snapchat trialled this with clothing fitness giant Gymshark and the results were staggering! The site could not handle the huge traffic and orders across the UK and USA were effected badly. The Shop and Cop channel stores user's card details once they make their first purchase through a streamlined checkout process. All other purchases then go through one channel instead of having to open multiple tabs. In 2019, we will see increases in social media purchases as retailers integrate one-click checkout process through the likes of PayPal and Amazon Pay.

VOICE ASSISTANTS

Traditionally millennials and Generation Z are perceived as the main users of technology but times are changing. Over the years, the way we interact with the world around us has changed considerably. Where once physical

interactions ruled, we now value digital, virtual and simulated experiences. The best-known examples are virtual assistants offered through a mobile or smart home device, such as Siri, Google Home or Alexa. These assistants know your preferences, user history and shopping habits. They use that information to interact with you on a more personal level, which can create brand loyalty and encourage repeat shoppers.

All of the above assistants will work on improving existing interactions with more humanized connections. Kantar's research predicts that the visuals presented by products such as Amazon Echo and Google Home will help overcome the barrier for shopping online with voice assistants and eliminate the present uncertainty of using voice to order goods without being able to see the products on the screen.

ONLINE GROCERIES EXPANSION

Amazon bought Whole Foods for \$13.7 billion in 2017, causing a lot of uncertainty in the global grocery market. The deal was strategic and based on insights into a growing grocery market. This market will continue to expand in 2019 as larger retailers align their offerings to enhance the customer experience. Amazon offers exclusive in-store discounts to their "Prime" members to try create an effective omni-channel experience. Amazon has also taken over the in-store displays in Whole Foods reducing costly services from third party organisations. One of the biggest advantages of the takeover was the wealth of customer data obtained from the venture. Amazon gained

invaluable insights into shopper behaviours and purchasing habits that now enables Amazon to target their customers much more efficiently with a 360° shopping cycle. Another point to note is that Amazon has an incredible delivery service and it will be very interesting to see if they take over the entire Whole Foods logistical operations.

AUGMENTED REALITY

In 2013 when IKEA first started implementing augmented reality (AR), it seemed as if it would take off. Showing digital information such as product images, video and text over the physical world provides a fantastic opportunity for retailers. This innovation however has been slow to catch on but 2019 will see further developments in this technology. Certain retailers are paving the way in this space such as TopShop with their augmented reality mirrors in dressing rooms enabling consumers to switch the colours of the items they are wearing.

Converse launched their AR sampler app allowing shoppers to virtually try on shoes then send pictures to their friends / family on Facebook or by text. L'Oréal has embraced AR by enabling people to virtually test what a product might look like on their face from the comfort of their own home through a smartphone device. This creates a fun consumer experience while providing L'Oréal with valuable data into shopper habits and insights into what products shoppers are using together.



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THE NEWS

PORTWEST CROWNED EXPORTER OF THE YEAR

Leading safety clothing and personal protective equipment (PPE) manufacturers Portwest were announced as Exporter of the Year 2018 at the prestigious Export Industry Awards, which took place recently. The event recognises achievements of companies working in the export industry in Ireland. Comedian Mario Rosenstock was MC at the black-tie event attended by six hundred export industry professionals, representatives from over twenty-five embassies, diplomats, applicants and awards guests. "We were both surprised and delighted to win this award."

said Harry Hughes, CEO of Portwest, who accepted the award on behalf of the Westport based family business, "It represents the exceptional hard work and commitment from our excellent staff worldwide." This tops off an exceptional year for Portwest where Harry Hughes reached the finals of the Ernst & Young World Entrepreneur of the Year.

ALCOHOL REGULATIONS COMMENCE IN NOVEMBER 2019

Minister for Health, Simon Harris TD has recently signed the order to bring the Public Health Alcohol Bill into operation. The legislation will come into effect in November

2019. The legislation will control alcohol sales and place restrictions on alcohol advertising. Retailers will be required to separate alcohol products from all other products and implement a barrier system to decrease visibility of the product. The legislation will also place restrictions on alcohol advertising, banning cinema advertising and advertising within two hundred meters of a school, crèche or local authority playground.

GLANBIA ACQUIRES SLIMFAST

Glanbia PLC has announced their intention to acquire the weight management and wellness brand SlimFast for a fee reported to be €350million. SlimFast is distributed through food, pharmacy and club channels primarily in the US and UK markets. Glanbia plans to distribute the SlimFast product range through its performance nutrition channel. The deal is expected to close in the coming weeks and is subject to regulatory approval.

COFFEEANGEL ENJOYS PINERGY SMART BUSINESS

Energy provider Pinergy recently installed their Smart Business offering with coffee group Coffeeangel. The solution offers businesses the opportunity to control all energy usage across its five locations in Dublin. Karl Purdy, founder of Coffeeangel said: "After people, one of our biggest costs in the business is electricity, as this is required for grinding and brewing coffee. With the new Pinergy Smart Business solution we can monitor and compare energy usage across each of our five shops using clever data analytics and insights gathered."

BUTLERS CHOCOLATES WINS EMIRATES CONTRACT

Emirates and chocolate business Butlers Chocolates have agreed a deal that sees Ireland's favorite chocolate brand being served on board Emirates flights. The deal is



Celebrations at Portwest

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Some of the Londis DCU team at the launch of the store

estimated to equate to fifty thousand Butlers luxury chocolate bars being served on Emirates flights every month. Commenting on the deal Karl Marnane, Sales Director with Butlers said: "The visibility this partnership affords Butlers provides a huge boost to our global strategy".

IRELAND'S 'QUEEN OF PRINTS' CLOSES THE DOORS TO HER BUSINESS

One of Ireland's most successful fashion and textile designers shocked the fashion world by announcing the closure of her retail and online business. Orla Kiely started her business by making bags on her dining room table with her husband Dermott Rowan and grew the business, famous for her stem graphic, to the point where she had flagships in New York and London and stores in Seoul and Tokyo. Kiely was bestowed with an OBE

and even had her image on an Irish postage stamp! While her retail and online businesses are now in voluntary liquidation, Orla Kiely's Home & Design licensing agreement will not be affected and accessories and homewares will stay on the market. In a licensing arrangement the designer designs the product while manufacturing, market and selling is done by another company. Designers then get a percentage of the sale without getting involved in all other costs.

ICELAND OPENS 26TH STORE IN IRELAND

Frozen food specialist Iceland opened its 26th Irish store in Redmond Square recently. This is the company's second branch to open in Wexford with Gorey already trading successfully since August 2017. The new store, spanning almost 8,000sq ft, will bring

25 new jobs to Wexford. Iceland, while best known for its frozen products, also offers a complete grocery and fresh range.

IRISH BUTCHER BUYS UK CHAIN

Well known Irish meat entrepreneur Tom Cribbin has bought a substantial part of UK butchers chain Crawshaw for a figure in the region of €1.57m. Tom Cribbin, who controls a company called Loughanure, previously operated a chain of butcher stores in Ireland under the brand 'Cribbin Family Butchers'. Mr. Cribbin bought nineteen stores and a Rotherham production facility after Crawshaw fell into administration in October after it failed to secure emergency funding. The former Westmeath Senior Mens' Gaelic Football Manager has now secured 240 jobs.



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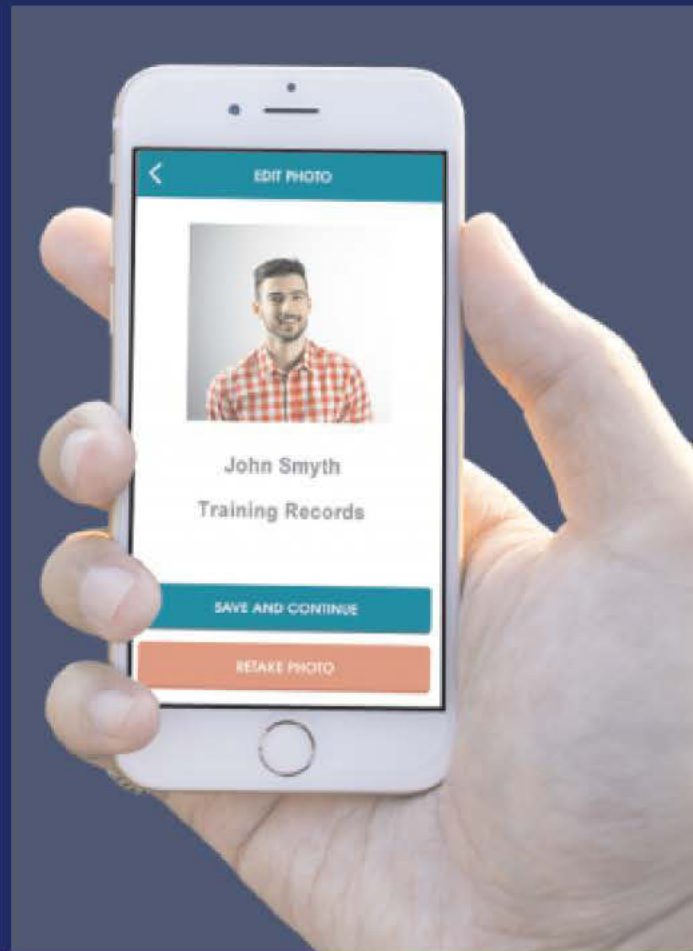
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the *numbers*



1

Coca Cola – Ireland's most popular brand for the 14th year in a row

The average euro spend per person in Ireland on Black Friday 2017

300

77

The percentage of Irish online customers who are happy to pay for same day/next day delivery

The percentage of Irish consumers who say it is important to shop local

59

38

The percentage of 25-34 year olds who shop online weekly



The average number of minutes it takes for a male to get bored when shopping

26

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KEY DATES FOR YOUR

2019

DIARY

RETAIL MANAGEMENT DEVELOPMENT PROGRAMME

You should never underestimate the value of investing in your team. Thus, why not increase your staff retention rates by affording key team members the opportunity to attend the Retail Excellence Management Development Programme. You are winning on the double as your store managers, supervisors and team members with potential will return to store with a strengthened knowledge of running the business and increased competence and confidence in themselves. The programme structure alternates between foundation retail topics led by retail expert James Burke and contributions from external specialist speakers. Time management, KPIs, sales growth strategies, monitoring and improving store performance and how to lead a first-class service culture are just some of the topics covered. This programme will only be run once this year so don't miss the opportunity! For further information, go to www.retailexcellence.ie or to request a copy of the brochure, contact me at Helen@retailexcellence.ie | 065 6846 927.

RETAIL RETREAT

This year's Retail Retreat will be held again in Citywest Convention Centre on 21st & 22nd May. Retail Excellence has another two action packed days planned where you can hear from the best of Irish and global retail experts. Speaking to Retail Times recently, Helen O'Dowd, Head of Learning & Events said 'We had an unprecedented number of delegates attend last year's Retreat and the feedback was overwhelming. Almost 2,000 delegates attended over the two days and



Blaine Callard, CEO
Harvey Norman Ireland

learned how to elevate the performance of both their stores and websites to a new level by hearing speakers such as Blaine Callard, CEO Harvey Norman, Jean McCabe, Willow (winner of National Store of the Year 2019), Alan Coleman, Wolfgang Digital and many more. The Expo housed 250 of Ireland's best suppliers to the retail industry and we have already received a large number of bookings for the Expo in May.' Full details of the Retail Retreat will be available in Q1 on www.retailexcellence.ie.

OTHER UPCOMING EVENTS

When Retail Times enquired what else is happening this year, Helen O'Dowd explained that we have lots of other exciting events lined up for the rest of the year such

as the eCommerce Conference in Dublin on Tuesday 1st October. Delegates will gain expert tips from world-class eCommerce experts who will cover almost every aspect of online while also showcasing Ireland's leading eCommerce partners. The annual Budget Briefing in The Kilkenny Shop Restaurant (winner of National Restaurant & Coffee House of the Year) and of course, the ever-popular Retail Excellence Awards!' Helen continued 'We will keep our Members and Partners informed on our regular updates and all information will be available on our website as it becomes available throughout the year. We encourage all retailers who want to further develop their business, website and team to book in for events as they unfold on www.retailexcellence.ie.

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EXPERT HARDWARE

MARK 50TH STORE WITH THE LAUNCH OF BRAND AMBASSADOR

These are exciting times at the Expert Hardware Group. The company has continued their impressive growth by recently adding two new stores to the group. Clarke's Builders Providers Templemore and Kehoe's Hardware Enniscorthy bringing the group's numbers to fifty stores and further announcements are expected in the very near future. Expert Hardware Group CEO, Gerry Fallon said: "We are delighted to welcome both Paddy Clarke and Jody Kehoe as valued members of our group as we continue our drive to support the independent hardware retailers around the country. Kehoe's Enniscorthy who are our 50th store is undertaking a large redevelopment, branding, and expansion of their current store which we expect to be completed in the next few months. This is a huge milestone in our group's development and a credit to the Directors and their fellow members for all their work and dedication. Working closely with our new Business Development Manager, Eddie Devine, we have developed a strategic two-year plan which is proving very successful even at this early stage. We are in discussions with a number of other independents at the moment who want access to all the growing number of benefits available to our member stores."

Brent Pope has recently been announced as the new Brand Ambassador to the Expert Hardware Group. Brent is one of Ireland's best known and respected media personalities and is widely recognised across Ireland for being one of RTE's highly

respected rugby analysts since 1993 as well as publishing six children's books for various charities and a best-selling autobiography. He is an accomplished business and motivational speaker, not to mention a keen DIY enthusiast.

Brent said "I am delighted to be asked to be the new Expert Hardware Ambassador because it reflects all the values I respect in business. It is about supporting local businesses that have local expertise and are at the heart of the community. The ethos of Expert Hardware is one of support, sharing expertise and recognising the importance of the personal touch, something that seems a rarity these days." Brent will feature in a new integrated campaign for The Expert Hardware Group which will run across TV, print and online channels as well as in store.

"We choose Brent as our Brand Ambassador as he has real interest in DIY and all things hands on. Brent will help us with our new TV campaigns designed to inspire men and women across the nation, as Brent puts it, go down to your local Expert Hardware and "Get in, Get out and Get on with it." By providing the right products and expert knowledge, we are committed to helping consumers complete their paint & DIY projects successfully in one trip to our stores. We look forward to working with Brent over the coming months and years to come." Said Alan Grant Director of The Expert Hardware Group.



Becci Harrison, Fishers of Newtownmountkennedy and Jean McCabe, Willow with An Taoiseach Leo Varadkar at the launch of Small Business Saturday

PUBLIC AFFAIRS

IN RETAIL

BUDGET 2019 – A MISSED OPPORTUNITY FOR RETAIL

Some announcements in terms of infrastructure, housing, tax reductions and the new Online Retail Scheme were to be welcomed however Budget 2019 represented a missed opportunity for Government to adequately support the largest private industry employer in Ireland – Retail. Modest reductions in USC, the increase in welfare payments and the restoration of the Christmas bonus represents a plan by Government to increase consumer sentiment and spend. Whilst such initiatives may lead to an increase in consumer spend, where this spend goes is critical to the industry we represent. "With the huge growth in online purchases by Irish consumers from outside the EU we sought extra protections to ensure parity of tax treatment for retailers in Ireland from Distance Sellers" said Tommy English, Retail Excellence Public Affairs Executive. Currently the Revenue Commissioners are tasked with collecting VAT and duties on parcels being delivered to Irish consumers but it is physically impossible for them to intercept €14 million worth every day. This is a missed opportunity given the extra funds it could have generated and been subsequently redistributed.

ONLINE RETAIL SCHEME

In Budget 2019, Minister for Business Enterprise and Innovation Heather Humphreys doubled the investment in the Online Retail Scheme to €1.25m to support the digital online capability of retailers in Ireland. We have been advocating for such supports and for Government to recognise

the export potential of the industry is most welcome. That said, we have brought concerns raised by retailers that the minimum twenty full time employee threshold is hampering many smaller businesses from competing for this fund.

SMALL BUSINESS SATURDAY

In November, Retail Excellence and An Taoiseach, Leo Varadkar TD launched the 5th annual Small Business Saturday awareness campaign to support local retailers across Ireland. The campaign, which was launched at Government buildings with local retailers Jean McCabe of National Store of the Year, Willow and Becci Fisher from Fisher's of Newmount Kennedy.



AN EVENING WITH MARTINA FITZGERALD

We hosted a successful Women in Retail event with RTÉ Political correspondent Martina Fitzgerald in November. Martina offered some unique insight into the challenges faced by women both in politics and professional life.

CROSS-PARTY GROUP ON RETAIL

The Cross-Party Group on Retail has met on

numerous occasions in 2018 to discuss the pertinent issues affecting the industry. Chaired by Deputy Dara Calleary, the group involves members from each political party and none who swap their party-political jersey to champion the causes most important to retailers across Ireland.

ALLIANCE FOR INSURANCE REFORM

Retail Excellence is a member of the Alliance for Insurance Reform working actively for fair and more affordable premiums for our Members - visit: www.insurancereform.ie for more information.

VAT ON HEALTH FOOD SUPPLEMENTS

Retail Excellence has been working with our members in the Irish Association of Health Stores in their campaign to retain the historic 0% VAT rate on health food supplements. In November we held a very productive meeting on the issue with members of the Cross-Party Oireachtas Group on Retail in Leinster House which resulted in the retention of the zero VAT rate.

DARA CALLEARY NAMED RETAIL ADVOCATE OF THE YEAR 2019

Congratulations to Dara Calleary TD on winning the inaugural Retail Advocate of the Year Award for 2019. The award recognised the Top5 advocates for the industry at National level. Finalists also included Senator Paudie Coffey from Waterford, Kerry TD Michael Healy-Rae and Limerick Deputies Jan O'Sullivan and Maurice Quinlivan.

The logo for RAS Stocktaking Solutions features the word 'ras' in a bold, lowercase font with a yellow dot over the 'a'. To the right, 'STOCKTAKING SOLUTIONS' is written in a smaller, uppercase font. Below the logo, the text 'SUPPORTING RETAILERS TO DELIVER STOCK INTEGRITY FOR OVER 50 YEARS' is displayed. Further down, the tagline 'Asset focused . Solution based . Relationship led' is shown. At the bottom, the address '88 Harcourt Street, Dublin 2, D02 DK18 | Tel +352 387 223 4455 | www.retailassetsolutions.com' is provided. The entire advertisement is framed by a decorative border of hexagons containing various retail-related images like produce, a barcode, and store interiors.



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EMPLOYMENT LAW AND HR ISSUES

Peninsula is a trusted Retail Excellence partner which has been providing employment law, HR and health & safety advice to small businesses since 1983. While Peninsula's first specialism was employment law, the company's services have since expanded to include HR, health & safety, insurance and employee wellbeing. Peninsula partners enjoy the peace of mind that comes with having 24-hour access to a team of HR experts.

In this article, Peninsula's HR expert Moira Grassick takes a look at the 4 most important employment law and HR issues to look out for in 2019.

1 BREXIT

The nature of Ireland's future trading relationship with the UK post-Brexit remains unclear. Employers across the island of Ireland will be hoping for a smooth transition period with minimal disruption and uncertainty to protect both business and employment. If there is a Brexit-related downturn in business, employment law risks surrounding termination of employment are likely to increase both north and south of the border.

2 PAYE MODERNISATION

From January 1st, 2019 employers will have

to engage in real-time reporting of PAYE which means employee pay and deductions need to be calculated and reported as they are paid. PAYE modernisation may represent a particular challenge for rural employers with limited broadband. Revenue expects to increase its tax take by up to €50 million through PAYE modernisation. Accountancy body ACCA has called for the extra revenue to be distributed to SME employers to help with software and training costs.

3 HARASSMENT IN THE WORKPLACE/#METOO

The recent walkout by Google employees reflects how movements such as #MeToo and #TimesUp are putting pressure on employers to adhere to their stated values. Pay inequality and discrimination are simply no longer tolerated in the contemporary workplace. Modern employees, particularly in

times of low unemployment, demand a commitment from their employers to adhere to values the organisation professes to hold. This trend may represent an opportunity for employers with a strong commitment to social and environmental values to differentiate themselves in an increasingly complicated employment market.

4 NEW EMPLOYMENT LEGISLATION ON THE WAY

The Employment (Miscellaneous Provisions) Bill 2017 (the Bill) was passed by the Dáil during the summer. If enacted in its current draft, the new law would require employers to provide core terms of employment within 5 days of employment commencing. A breach of this requirement will be a criminal offence. The proposed introduction of 'banded hours' contracts will impact any employer who employs part-time or variable hours' employees. Employers may also face criminal liability if they incorrectly designate an employee as self-employed. The expansion of criminal liability for employment law breaches is the most worrying aspect of the Bill. Peninsula is actively lobbying to have criminal liability removed from the Bill as it now passes through the houses of the Oireachtas. If the Bill is enacted, employers will need to review their employment practices and adjust them where necessary once the Bill becomes law.

Need advice on how to prepare your workplace for the challenges ahead in 2019? Get started by calling the Peninsula 24-hour advice line on 1890 300 010 (ROI) or 0800 917 0771 (NI).



Moira Grassick,
Associate Director, Peninsula

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JAMcard

Launches in Ireland

The JAM Card is a new card and app that allows people with intellectual difficulties, autism and communication barriers to ask for “Just A Minute of Patience” when they need it. It was the idea of participants from the NOW Group, a Belfast based social enterprise that supports people with intellectual difficulties and autism, who wanted a discreet way of telling customer service staff they needed a minute of patience when counting out change or ordering food.

The credit card sized cards says, ‘Just A Minute’ on one side and there is a choice of four messages on the reverse – ‘Please be patient, I have a learning difficulty / autism / condition / dementia’. It is also available as an app for smartphones.

There are over 13,000 JAM Card users and feedback demonstrates that 70% of users confirm that the

JAM Card had ‘made things easier’ for them and that people who see the card have responded positively, with over 91% being ‘helpful’ or ‘very helpful’. Users of the JAM Card have reported they feel more confident when accessing businesses since they began using the app, one commented “It takes the worry out of going out. It explains what I sometimes can’t.”

NOW Group have recently launched training for businesses to become JAM Card Friendly throughout Ireland. The training equips staff members with the knowledge they need to provide an excellent experience to all customers, once an organisation has completed the training they are provided with marketing materials to tell stakeholders they are trained and welcome JAM Card holders. Visit www.jamcard.org to find out more.

Just a minute
We welcome JAM Card holders

NOW
www.nowgroup.org





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THREE NEW-YEAR PLANNING TIPS FOR BUSY RETAIL OWNERS

With the uncertainty of Brexit, the impact of disruptive technology and the increase of e-commerce, there are a lot of balls in the air for retail business owners to consider as we start the New Year. It is a useful time to dig out your business and personal plans to ensure that you are on track to meet both your long and short-term goals for 2019. The following are three tips to help you get started.

1. Business plan

• Cash is king

Stress test your financial forecasts to ensure you have sufficient cash to meet your needs in the event of a debtor default or an unexpected increase in your cost base resulting from the current turmoil.

• Diversification

Ensure you have sufficient diversification in your business model to cover a concentration risk in terms of customers, regions and products.

2. Protection

• Keyman and shareholder insurance

Insurance only becomes valuable when and if the event insured against occurs. It is only then that the real value of the premiums is highlighted. These types of policies are designed to inject cash into the company to help deal with the loss of a key person.

• Backstop / rainy day fund

When times are good, put aside a pool of assets that will meet the day-to-day expenses should fortunes change. Segregate this capital from the business to ensure that it is protected in the event of an unforeseen event.

3. Succession planning

From a tax perspective there are a few reliefs that allow the assets to pass to the next generation

tax efficiently. Meeting the conditions for these reliefs and avoiding any Revenue tax avoidance rules requires careful planning. Some sensible structures to consider are:

• Separate investment company

Having a separate investment company / partnership can achieve the same outcome as the holding company but from an estate planning perspective, it creates a separate pool of assets. It can also ensure the effective transfer of the business to the next generation as many of the tax reliefs only apply to trading assets.

• Pension

The pension structure is an alternative to the above and can bring additional benefits such as tax-free growth, creditor protection for trust-based schemes, and the creation of another pool of assets that can assist with the equalisation of estates for the next generation.

Summary

For time-poor business owners, finding the opportunity to address these issues is often the biggest challenge. By working with your key advisers in a coordinated way, you can delegate the production of a personal financial plan which overlays a business plan. This strategy should allow you to act as a CEO of your overall wealth and ensure you'll meet your and your family's objectives.



Brian Walsh is a Director of Financial Planning in Davy Private Clients. He works with company owners and their advisors to ensure that any investment strategy is considered in conjunction with an overall financial plan and is structured in a tax efficient manner.

Please note that this article is general in nature and is not intended to constitute tax, financial or legal advice. It does not take account of your financial situation or investment objectives. Davy does not provide tax or legal advice, nor accept liability for it. Prior to making any decision which may have tax, legal or other financial implications, you should seek independent professional advice. There are risks associated with putting any financial plan in place. The value of investments may go down as well as up.

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WHY OFFER YOUR CUSTOMERS EXPRESS SHIPPING OPTION?

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 - 68% OF MILLENNIAL'S WOULD CHOOSE RETAILERS BASED ON DELIVERY OPTIONS
 - CUSTOMERS CHOOSING EXPRESS DELIVERY OPTION HAVE A HIGHER BASKET VALUE (UP TO 70% HIGHER)
 - COMPANIES THAT OFFER INTERNATIONAL EXPRESS SHIPPING GROW 1.6 TIMES FASTER THAN THOSE WHO DON'T
 - EXPERIENCE GREATER CUSTOMER LOYALTY, 20% INCREASE IN RETURNING CUSTOMERS AFTER USING EXPRESS DELIVERY
-

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SUPPLIER DIRECTORY



STAR	CATEGORY OF COMPANY	COMPANY	ACCOUNT MANAGER	CONTACT INFORMATION	REFEREES
	Address Capture Software	Autoaddress	Conor Moules +353 (0) 1 514 3439	info@autoaddress.ie www.autoaddress.ie	Bank of Ireland, Fastway Couriers, Musgrave Group
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	Advertising Planning, Procurement & Monitoring Technology	Buy Media	Fergal O'Connor +353 (0) 87 245 0064	fergal@buymedia.ie www.buymedia.ie	Ashford Castle, Pamex Ltd
	AI & Machine Learning, Data Science and Analytics	Rubikloud Technologies Inc	Brian MacMahon +353 (0) 87 273 4119	brian.macmahon@rubikloud.com www.rubikloud.com	Retail Excellence
	Auctioneer	Lisney	Emma Coffey +353 (0) 1 638 2700	ecoffey@lisney.com www.lisney.com	Irish Times, Ionet Ltd
★	Audit, Tax, Advisory Services	Grant Thornton	Damian Gleeson +353 (0) 61 607 993	damian.gleeson@ie.gt.com www.granthornton.ie	Carrolls Irish Gifts, Retail Excellence Ireland
	Automated Design	Tweak	Shane Corcoran +353 (0) 66 979 1455	shane@tweak.com, www.tweak.com	Bewleys, Savills
	Branding, Store Design, E-Commerce	Bradley Brand and Design	Andrew Bradley +353 (0) 86 258 4368	andrew@bradleybrand.ie www.bradleybrand.ie	Fields Jewellers, Kay's Kitchen, Keelings's
	Branding, Store Design, E-Commerce	IDEA	Ciaran Flanagan +353 (0) 1 250 0050	info@idea.ie www.idea.ie	Bord Bia, Insomnia
	Broadcast Media	Sky Media Ireland	Gareth Genockey +353 (0) 1 614 7611	gareth.genockey@sky.ie www.skymedia.ie	Albany Home Décor
	Business Training, Coaching & Mentoring	Action Coach Business Coaching	Paul Fagan +353 (0) 1 891 6220	ireland@actioncoach.com www.actioncoachireland.com	Gerry Browne Jewellers, The Italian Tile & Stone Studio
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	Cash Handling Systems	Glory Global	David O'Meara +353 (0) 1 467 0542	david.omeara@glory-global.com www.glory-global.com	Musgrave Group
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	Cash Processing Solutions	SUZOHAPP	Tom Weafer +353 (0) 1 801 4077	tweafer@scancoin.ie www.suzohapp.com	Retail Excellence
	CCTV & Video Analytics	Multisys Ltd	Eoghan Carroll +353 (0) 87 249 6381	Eoghan.carroll@multisys.ie www.multisys.ie	Born Fashions, Smyths Toys
★	Connected Retail Solutions	MJ Flood Technology	Keith Hanley +353 (0) 1 466 3526	khanley@mjt.ie www.mjt.ie	Applegreen, Three
	Connected Retail Solutions	Fujitsu	Caragh O'Carroll +353 (0) 86 804 4099	caragh.o.carroll@ie.fujitsu.com www.fujitsu.com	Premier Lotteries, Topaz
	Connected Retail Solutions	KALPRO	Claire Nally +353 (0) 86 041 2998	Claire.nally@kalpro.ie www.kalpro.ie	Retail Excellence
	Construction - Design, Supply, Install, Test and Maintain Lifts & Escalators	Infinity Lifts Ltd	Sin��ad Carmody +353 (0) 65 7050111	info@infinitylifts.ie www.infinitylifts.ie	Ecco Shoes, Sports Direct
★	Consumer Finance	Flexi-Fi and Flexirent	PJ Byrne +353 (0) 83 448 8820	pj.byrne@flexigroup.com.au www.flexifi.com www.flexirent.ie	Compu b, Harvey Norman
	Consumer Market Research & Training Consultancy	Customer Perceptions Ltd & Optimum Results Ltd	Emma Harte +353 (0) 42 93 39911	emma.harte@customerperceptions.ie www.customerperceptions.ie	DAA, RAI
	Convenience Foods	Kepak	Sean Cunningham +353 (0) 86 044 0673	sean.cunningham@kepak.com www.kepak.com	Centra, SuperValu
	Creative Services, Print Media, Retail Environments, Technology	The Smart Group	Tom Ryan +353 (0) 86 780 1626	tom@thesmartgroup.ie www.thesmartgroup.ie	Euronics, FromMe2You
	Customer Service Platform	Pubble	Shane O'Leary +353 (0) 87 684 3811	shane@pubble.co www.pubble.io	Horkans Lifestyle and Garden Centres Tony Kealys
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	Digital Marketing Agency	Wolfgang Digital	Alan Coleman +353 (0) 1 663 8020	alan@wolfgangdigital.com www.wolfgangdigital.com	iClothing, McElhinneys
	Digital Marketing and Web Design	Ebow	David Douglas +353 (0) 1 478 9090	daviddouglas@ebow.ie www.ebow.ie	Great Outdoors, Peter Mark
	Display Solutions, Shop Fittings, Mannequins	Equipashop	Julian Lewis +44 (0) 28 9079 9990	julian@equipashop.com www.equipashop.com	Lifestyle Sports
	Distributor of Vtac LED Lighting	Fitzpatrick Wholesale	Eoin Fitzpatrick +353 (0) 1 450 8300	eoin@fitzpatrickwholesale.ie www.fitzpatrickwholesale.ie	Carroll's Irish Gifts, Banba Toymaster
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	E-Commerce & Customer Analytics	Conjura	Diarmuid Galvin +353 87 293 8096	diarmuid@conjura.com www.conjura.com	EZ Living, Learn Signal
	E-Commerce Performance Marketing	Ve Interactive Ireland Ltd	Robbie Dobbyn +353 85 877 2873	robbie.dobbyn@ve.com www.ve.com	Argento, 53 Degrees North
	Employee Time & Attendance Software	Elephant Smart Business	Linda O'Reilly +353 (0) 87 698 2135	linda@elephantsmartbusiness.com www.elephantsmartbusiness.com	Five Guys, Fresh The Good Food Market
	Employee Time Recording Systems	Timepoint	Colin Ryan +353 (0) 21 423 2865	colin@timepoint.ie www.timepoint.ie	Applegreen, Musgrave Group, Tiger
	Employer Relations Department	Welfare (INTREO)	Caitriona Bracken +353 (0) 1 6732 741	Caitriona.Bracken@welfare.ie www.welfare.ie	Retail Excellence
	Employment Law, HR, Health & Safety Services	Peninsula Business Services (Ireland) Limited	Advisory Number 1890 300 010	info@peninsula-ie.com www.peninsulagrouplimited.com	Retail Excellence
	Energy Procurement	Exemplar Energy	Jonathan Fitzpatrick +353 (0) 87 276 8778	jonathan@exemplarenergy.ie www.exemplarenergy.ie	Arboretum Home and Garden Centre, Shaws Department Stores
	Energy Services	Pineryg	Colm Foley +353 (0) 1 524 2825	colm@pinergy.ie www.pineryg.ie	Aramark, DNG
	Energy Supplier	Flogas Natural Gas	Robert Irwin +353 (0) 41 98 31 041	rirwin@flogas.ie www.flogas.ie	Carmac Retail Ltd, Musgrave Wholesale Partners Ireland

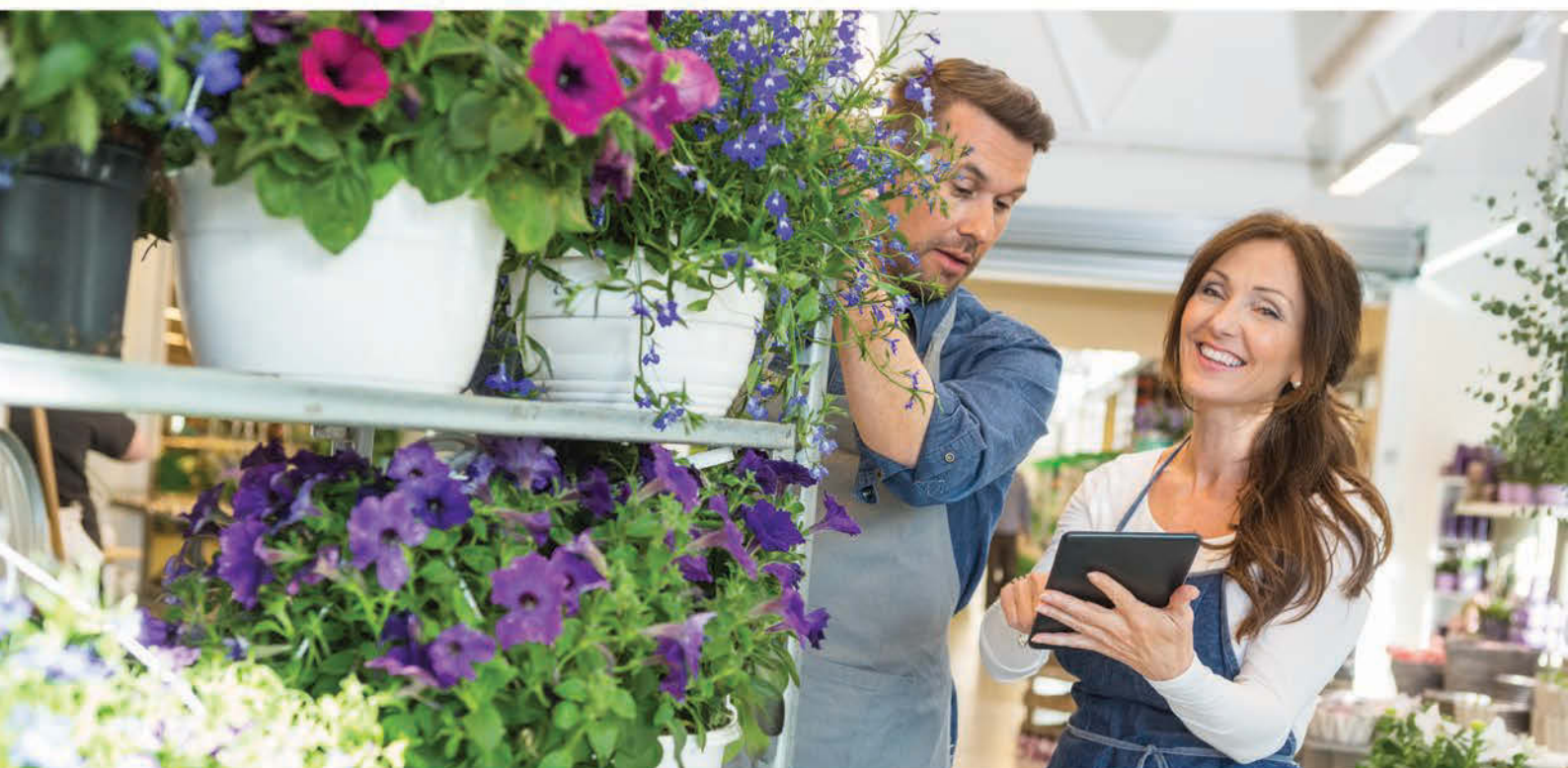
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	EPOS and Integrated E-Commerce	Positive Systems Solutions	Damien O'Driscoll +353 (0) 1 629 6058	damien@pss.ie www.pss.ie	Conns Cameras, Croom Cycles
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	EPOS Solutions	Touchstore	John Cassidy +353 (0) 61 225 655	johnc@touchstore.ie www.touchstore.ie	Inglot, McCabes Pharmacy Group
	EPOS Solutions	Retail Integration Limited	Patrick Heslin +353 (0) 1 429 6800	patrick@retail-int.com www.retail-int.com	Mothercare, O'Briens Wine, Beer and Spirits
	EPOS Systems, Payment Solutions	CBE	Seamus McHugh 1890 373 000	seamusmcHugh@cbe.ie www.cbe.ie	CH Chemists, Paul Byron Shoes
	EPOS, Mobile Retail And Payments	Eirpoint	Niall Cannon +353 (0) 65 686 8880	ncannon@eirpoint.com www.eirpoint.ie	Dubarry Ireland, Patrick Bourke Menswear
	ERP Solutions	Intact Software	Mark McArdle +353 (0) 42 933 7142	mark.mcardle@intactsoftware.com www.intactsoftware.ie	Brett Supplies, Tilestyle
	ERP Solutions	TRC Solutions	Steven Maguire +353 (0) 1 296 3155	smaguire@trcsolutions.ie www.trc-solutions.com	Carroll's Irish Gifts, Horkans Lifestyle & Garden Centres
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	Facilities Management	Grosvenor Services	Marianne Lambert +353 (0) 87 980 3377	mlambert@grosvenorservices.com www.grosvenorservices.com	Kildare Village, Westfield Shopping Centre
	Feedback Management/ Customer Experience Software	CX Index	David Heneghan +353 (0) 86 171 7022	david@cxindex.com www.cxindex.com	Musgrave Group, Selfridges Group
	Financial Services	Grid Finance	Andrea Linehan +353 (0) 85 192 4047	andrea@grid.finance www.gridfinance.ie	Blueface, Independent Finance Providers of Ireland
	Financial Services	Linked Finance	Tom O'Reilly +353 (0) 1 531 2293	tom@linkedfinance.com www.linkedfinance.com	Chopped, Mr Price
	Flexible Funding	SBCI - Strategic Banking Corporation of Ireland	Gillian Evans +353 (0) 1 238 5052	Gillian.evans@sbc.gov.ie www.sbc.gov.ie	Retail Excellence
	Football Counting, Digital Signage and Loss Prevention	Detectag Retail Services Ltd	John Dempsey +353 (0) 86 243 7100	john.dempsey@retailservices.ie www.retailservices.ie	An Post, Eir, Meteor
	Free Recruitment Service	EmploymentFocus - Focus Ireland	Catherine Murphy +353 (0) 1 878 6514	employmentfocus@focusireland.ie www.focusireland.ie	Retail Excellence
★	Gift voucher and Gift Card Solutions	FromMe2You Gift Card	John Wall +353 (0) 87 666 6795	John.wall@me2you.ie www.me2you.ie	Fields Jewellers, Harvey Norman
	Gift Voucher and Gift Card Solutions	Love2shop / Park Retail Limited	Robert O'Donnell +353 (0) 1 294 4090	robert.odonnell@love2shop.ie www.love2shop.ie	Argos, Debenhams, Heaton's
	Graphic Design, Printing, Delivery	Sooner Than Later	Mark Finney +353 (0) 1 284 4777	mark@soonerthanlater.com www.soonerthanlater.com	Domino's Pizza, The Suitable Clothing Company
	HACCP Paperless Management, Temperature Monitoring	Kelsius	Ciaran Gallagher +353 (0) 83 855 4404	ciaran.gallagher@kelsius.com www.kelsius.com	Centra Carmore, SuperValu Cunningham's
★	Hot Beverage Business Solutions	Bewley's Tea & Coffee Ltd	Hugh Healy +353 (0) 1 533 4717	Hugh.Healy@Bewleys.com www.bewleys.com	Butlers Chocolates, Supermacs
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	Human Resources Solution	Strandum Ltd	Brendan Carney +353 (0) 1 899 1900	bcarney@strandum.com www.strandum.com	O'Callaghan Hotels, Topaz
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	Insurance Broker, Pensions, Actuarial and Risk Management Consultancy	Willis Towers Watson	John Golden +353 (0) 86 419 7561	John.golden@willis.ie www.willis.ie	Sam McCauley Chemists
	Insurance Products	FBD Insurance	Patrick Carey +353 (0) 86 815 4193	Patrick.Carey@FBD.ie www.fbd.ie	Retail Excellence
	IT - Domain and Hosting Services	Blacknight	Michele Neylon +353 (0) 59 918 3072	michele@blacknight.com www.blacknight.com	Irish Pumps and Valves Ltd, The Cool Bean Company
	IT Security	Radius Technologies	Jerry Buckley 1890 592500	jerryb@radius.ie www.radius.ie	Ardkeen Stores, Electricity
★	Legal Services	Maples and Calder	Kevin Harnett +353 (0) 1 619 2036	kevin.harnett@maplesandcalder.com www.maplesandcalder.com	Harvey Norman
★	Licence Exempt Music Provider	Amazing Media	Grant Thompson +44 (0)191 603 0180	grant.thompson@amazing-media.com www.amazinginstore.com	Woodies
	Logistics - Express Delivery	DHL Express Ireland Ltd	Ciaran Hynes +353 (0) 86 197 0085	Ciaran.hynes@dhl.com www.dhl.ie	Carroll's Irish Gifts, Eurostyle
	Loyalty Software	LoyLap	Barry Bruen +353 (0) 86 192 9868	barry@loylap.com www.loylap.com	Press Up Entertainment Group, The Bannatyne Group
	Marketing Automation	Pointy	Cathal D'Arcy +353 (0) 83 045 1817	cathal@pointy.com www.pointy.com	Blackrock Cellar, Expert Hardware
	Material Handling Equipment and Service Provider	Capcon Ltd	Rory Comerford +353 (0)85 133 4323	rory@capcon.ie www.capcon.ie	Glanbia, Musgrave Retail Partners
	Messaging & Loyalty	ZinMobi	Brian Stephenson +353 (0) 86 777 5558	brian@zinmobi.com www.zinmobi.com	Musgrave Group, Shaws Department Stores
	Mystery Shopping, Store Assessments	Crest Mystery Shopping Ireland	Michele Cawley +353 (0) 65 684 6927	michele@crestireland.com www.crestireland.com	Harvey Norman
	Omni-Channel Retail Solutions	ProStrategy	Joe Kelly +353 (0) 1 429 1977	jkelly@prostrategy.ie www.prostrategy.ie	Allcare Pharmacy Group, Casey's Furniture, Ecco Shoes
★	Online Training Solutions	Olive Media	Robbie Glynn +353 (0) 86 144 9012	rglynn@olivemedia.co www.olivemedia.com	Tesco Ireland
	Packaging Recycling & Recovery Compliance	Repak Ltd	Mark Hayden +353 (0) 1 467 0190	mark.hayden@repak.ie www.repak.ie	Musgrave Group, O Birds Foodmarket Ltd
★	Parcel Delivery Service	DPD	Tim Dare +353 (0) 906 420 500	tim.dare@dpd.ie www.dpd.ie	Harvey Norman
	Parcel Delivery Service	Nightline Logistics Group	Orla Sheils +353 (0) 86 249 5597	osheils@parcelmotel.com	Opening Minds, Safety Care www.nightline-delivers.com
★	Payment Solutions	AIB Merchant Services	Mark Patterson +353 (0) 86 189 3681	Mark.Patterson@aibms.com www.aibms.com	Born Clothing, Brook Foods
★	Personal Wealth Management	Davy Group	Kevin Doherty +353 (0) 1 614 8778	kevin.doherty@davy.ie www.davy.ie	Retail Excellence

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	Personalised Retail Packaging	Delpac Ltd	Maria O' Grady +353 (0) 66 947 9298	maria@delpac.ie www.delpac.ie	Arnotts, Patrick Bourke Menswear
	Personalised Retail Packaging	JJ O'Toole Ltd	Vicki O'Toole +353 (0) 61 229 333	info@jtoole.ie www.jtoole.ie	Arboretum Home and Garden Centre, Newbridge Silverware
	Personalized Shopping Experiences	Nosto Solutions UK Ltd	Chloe Pascal +44 (0) 844 484 9625	chloe.pascal@nosto.com www.nosto.com	Euronics, Vaughan Shoes
	PR Consultancy	Red Flag Consulting	Deirdre Grant +353 (0) 86 048 4279	deirdre.grant@thisisredflag.com www.thisisredflag.com	Retail Excellence
	Print and Design	Kingdom Printers Ltd	David Keane 066 712 1136	dave@kingdomprinters.net www.kingdomprinters.net	Retail Excellence
	Print, Packaging, Display	McGowans Print	David Fogarty +353 (0) 1 410 6783	dave@mcgowansprint.com www.mcgowansprint.com	Butlers Chocolates, Lidl
	Recruitment	Eden Recruitment	Peter Kelly +353 (0) 1 474 4544	peter.kelly@edenrecruitment.ie www.edenrecruitment.ie	McCabes Pharmacy Group, Musgrave Group
★	Recruitment	Excel Recruitment	Barry Whelan +353 (0) 1 814 8747	barry@excelrecruitment.com www.excelrecruitment.ie	Kilkenny Group, Topaz
	Recruitment	Head Hunt International	Tom Guilfoyle +353 (0) 87 760 6690	tg@headhuntinternational.com www.headhuntinternational.com	Best Menswear, Supermacs
	Recruitment	PJ Personnel	Clare Byrne +353 (0) 87 362 8119	clare.byrne@pjpersonnel.ie www.pjpersonnel.ie	Graces's Eurospar, Rooneys SuperValu
	Recruitment	Wallace Myers International	Shane Casserly +353 (0) 1 619 1828	shane@wallacemyers.ie www.wallacemyers.ie	Homestore & More, Lidl
	Recruitment & Training	Noel Group	Valerie O'Connell +353 (0) 86 022 5044	valerie.oconnell@noel.ie www.noelgroup.ie	Retail Excellence
	Recruitment Platform	Jobbio	Beth McEntee +353 (0) 1 440 4900	beth@jobbio.com www.jobbio.com	Ecco Shoes, McCabes Pharmacy Group
	Recruitment Platform	Rezoomo	Audrey Spillane +353 (0) 87 149 9077	audrey.spillane@rezoomo.com www.rezoomo.com	Applegreen, Costcutter, Insomnia
	Renewable Energy - Solar, LED, Battery Storage, Lighting	Local Power Ltd	Pat Smith +353 (0) 86 261 3374	info@localpower.ie www.localpower.ie	John Cahill Fashions, Kavanaghs Pharmacy
★	Retail And Multi-Channel Software Solutions	K3 Retail	Mark Bryans +353 (0) 1 820 8321	mark.bryans@k3btg.com www.k3retail.ie	DAA, Woodies
	Retail Design	Maria O'Neill Retail Design & Associates	Maria O'Neill +353 (0) 87 250 7964	mariaoneillretaildesign@gmail.com, www.mariaoneilldesign.com	Gino's Italian Ice Cream, Stafford's Bakery
	Retail Lighting Specialists	Pro-Light Design & Technology Ltd	Paul Hanlon +353 (0) 1 2962607	Paul.Hanlon@pro-light.ie www.pro-light.ie	Donnybrook Fair, Ladbroke's
	Risk Management Solutions	Seachange Ltd	Paul Cummins +353 (0) 87 052 24 95	paul.cummins@seachange-intl.com www.seachange.ie	Applegreen, McCabes Pharmacy Group
	Security and Electronic equipment service	MTS Security	Gerry Scully + 353 (0) 818 365538	gerry.scully@mtssecurity.ie www.mtssecurity.ie	BWG, Topaz
	Security Services	Mercury Security Management Ltd	Frank Cullen +353 (0) 1 861 2130	fcullen@mercurysecurity.biz www.mercurysecurity.ie	Elverys Intersport, Harvey Norman
	Security Tagging, Footfall Counting	Virtek	Vincent McKeown +353 (0) 1 885 1718	vmckeown@virtek-irl.com www.virtek-irl.com	Centra Dromiskin, Willow
	Shopfitting and Retail Design	McCabe Meenaghan Associates	Barry McCabe +353 (0) 87 293 1173	barry@mdg.ie www.mdg.ie	Arboretum Home and Garden, McCabes Pharmacy
	Shopfitting and Retail Design	Store Design Shopfitting Ltd	Paul Ryan +353 (0) 1 413 1350	pryan@storedesign.ie info@storedesign.ie d.mckeever@storedesign.ie www.storedesign.ie	Fallers Jewellers, Patrick Bourke Menswear
	Shopfitting and Retail Design	Storefit Shopfitters	Eamonn Brien +353 (0) 21 4344544	eamonn.brien@storefit.com www.storefit.com	Ecco Shoes, Sam McCauley Chemists
	Shopfitting and Retail Design	Shop Equipment Ltd	Martin Hendricken +353 (0) 87 284 6464	mhendricken@sel.ie www.shopequipment.ie	Garvey Group, Woodies DIY
	Software as a Service	Real World Analytics	Conall Lavery +353 (0) 1 693 1433	conall.lavery@realworldanalytics.com www.realworldanalytics.com	Kilkenny Group, Meaghers Pharmacy
	Specialist Entrance Matting Provider	Footfall Ltd	Ger Halloran +353 (0) 86 235 3515	ger@footfall.ie www.footfall.ie	Dunnes Stores, Musgrave Group
	Stocktaking Service	Stocktaking.ie	Patrick McDermott +353 (0) 87 138 9813 Sharon Kelly +353 (0) 86 389 9542	info@stocktaking.ie sharonk@stocktaking.ie www.stocktaking.ie	Carraig Donn, Elverys, Tiger Stores
	Stocktaking Service	TakeStock	Bernard Brown +353 (0) 1 77 55 242	bernard.brown@wecount.ie www.wecount.ie	Joyce's Supermarket, Musgrave group
★	Stocktaking Service	Retail & Asset Solutions	Colm Roche +353 (0) 87 781 3678	colm.roche@retailassetsolutions.com www.retailassetsolutions.com	B&Q, DAA, Lloyds
	Stocktaking, Merchandising & Retail Services	RGIS Inventory Specialists Ltd	Marcin Dettlaff +353 (0) 87 1272698	MDettlaff@RGIS.com www.rgis.ie	Lifestyle Sports, Tesco Ireland
	Store Design Fitting	DDC Group	Ashley Gardiner +353 (0) 1 401 3050	ashley@ddcshopfit.ie www.ddcshopfit.ie	Ebay, IKEA
★	Store Design, Display Solutions	Johnston Shopfitters	Shane Brennan +353 (0) 86 244 0714 Andrew Johnston +353 (0) 1 419 0419	sbrennan@johnston-shopfitters.com ajohnston@johnston-shopfitters.com www.johnston-shopfitters.com	Caroll's Irish Gifts, Easons, Meaghers Pharmacy Group
	Tax & Custom Administration	Revenue	Press Office +353 (1) 858 9235	www.revenue.ie	Retail Excellence
	Tax Free Shopping	Fexco Tax Free	Lisa Murphy +353 (0) 86 021 8192	lmurphy@fexco.com www.shoptaxfree.com	Guinness Storehouse, Newbridge Silverware
	Technology Consultancy	Keytree Ltd	Adrian Slater +44 (0) 203 691 2936	Adrian.slater@keytree.co.uk www.keytree.co.uk	Dyson
	Vat Refund provider	Premier Tax Free	Tracey Despard +353 (0) 86 855 5292	Tracey.despard@premiertaxfree.com www.premiertaxfree.com	Caroll's Irish Gifts, Ecco Shoes
	Video Production and Graphic Design	Another Avenue	Sharyn Mitchell +353 (0) 1 660 1588	sharyn@anotheravenue.com www.anotheravenue.com	Retail Excellence Ireland, Sky Ireland

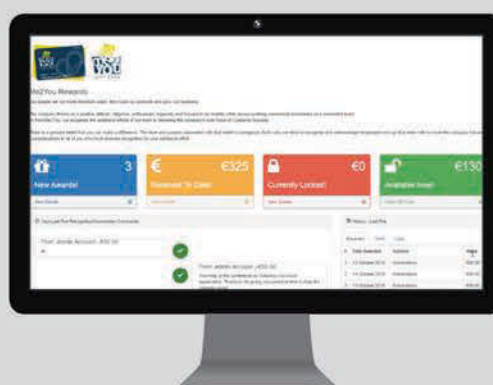
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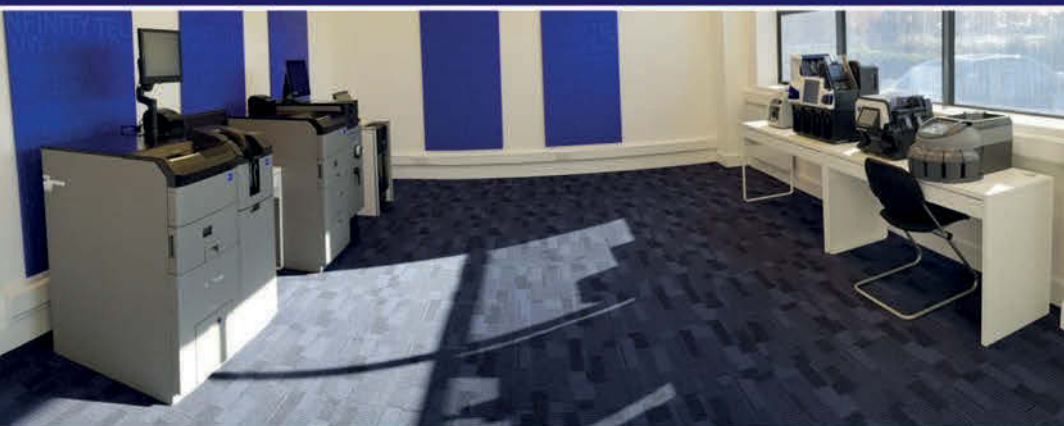
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