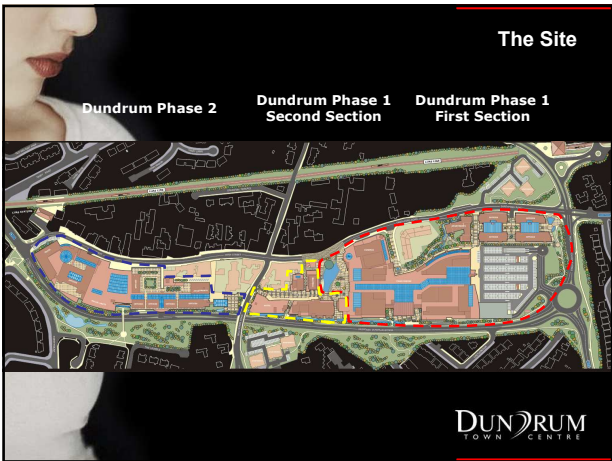


**The Scheme Phase 1 & 2**

First section of phase 1 opened March 3 <sup>rd</sup> 2005		Opening date of Phase 2 2008	
Retail	850,000 sq.ft.	Retail	330,000 sq.ft.
Offices	200,000 sq.ft.	Offices/Civic	18,000 sq.ft.
Leisure/Restaurants	200,000 sq.ft.	Leisure/Hotel	115,000 sq.ft.
Residential	70,000 sq.ft.	Residential	12,000 sq.ft.
Car Spaces	3400	Car Spaces	1500
<b>Total</b>	<b>1,320,000 sq.ft.</b>	<b>Total</b>	<b>475,000 sq.ft.</b>

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TOWN CENTRE





### Ireland Spend

- Adoption of Euro in Jan 2002 with 11 other member states
- GDP growth averaged over 10% pa from 1995-2000 source IMF
- GDP growth has averaged 5.8% pa since 2000 source IMF
- Unemployment rate less than 4.7% since 2000, and currently falling source IMF
- Higher workforce productivity than UK source EU Commission Sapir Rep.
- Private sector employment growth greater than public sector since 2000 Q3 source IMF



### Ireland Position in Europe

- Population of 4.1 million
- Fastest growing economy in Europe source FootFall
- Youngest population in Europe
- Over 14% more youthful population in the 16-44 age group compared to UK
- Most productive and skilled workforce in Europe source CSO
- GDP per capita 18.4% higher than EU average, higher than all other EU member states source Eurostat
- GDP per capita adjusted for purchasing power parity places Ireland in 2<sup>nd</sup> place compared to the UK at 12<sup>th</sup> place. Ireland GDP amounts to US \$33,716 compared to the UK at US \$24,000 source Deloitte 2005 Global Powers of Retailing



### Ireland Comparisons

- 2<sup>nd</sup> highest future available workforce in the world behind US ranked 1<sup>st</sup> source IMF
- Irish spent over €4.2 billion overseas in 2004 generated from just 1.2 million tourist compared to €4.1 billion from 6.6 million overseas tourists source CSO
- Retail sales per capita in Ireland (2000) are 20% above EU average source ICSC
- Irish overseas trips during Oct-Dec 2004 increased 10.8% on the previous year source CSO
- Total Entrepreneurial Activity – Ireland is in 4<sup>th</sup> position with 9% of the working age population engaged in the process of managing or creating a new business. The UK is in 8<sup>th</sup> place with 5% of the working age population source ICSC






### Dublin Spend

- On average over 34% more ABC1's in Dublin than UK average *source FootFall*
- Dublin has the second highest retail rental growth over the last 3 years averaging almost 10%, Milan first at 12%, Barcelona third at 8% and Madrid fourth at 4% *source ICSC*
- Over 10% of Grafton St and Henry St shoppers visit New York specifically for shopping trips *source FootFall*
- The volume of luxury goods sales within the clothing and footwear sector has increased 38.2% since Jan 2000 against 9.2% in clothing and footwear overall *source CSO*

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### Dublin Comparisons


- Greater Dublin population of 2.1 million
- Dublin population has 13.4% above national average disposable income representing €2,000 per head *source Irish Independent*
- Ireland is ranked 10th out of 17 European countries for maturity of retail markets, calculated by retail enterprise per capita and shopping centre floor space per capita. Italy is ranked 11th and Spain 14th *source ICSC*

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### Dundrum The Heart of Dublin


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### Dundrum Spend

- Phase 1 is already attracting 16 million visits pa
- Phase 1 & 2 will attract in excess of 20 million visits pa
- Total household expenditure in excess of €20 billion for the population within the 30 minute drive time of Dundrum
- Total household expenditure in excess of €40 billion for the population within the 60 minute drive time

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### Dundrum Comparison

- Dundrum will total 1.6 million sq. ft.
- Dundrum sales potential represents 4% of Ireland's total 2004 non food retail demand
- Dundrum represents 18% of Dublin's shopping population demand compared to 30% for the entire City Centre shopping district
- 69% of Dubliners agreed that they would utilise Dundrum's unique retail offer
- Dundrum is located at the centre of Ireland's 3 wealthiest states, Dublin, Kildare and Wicklow

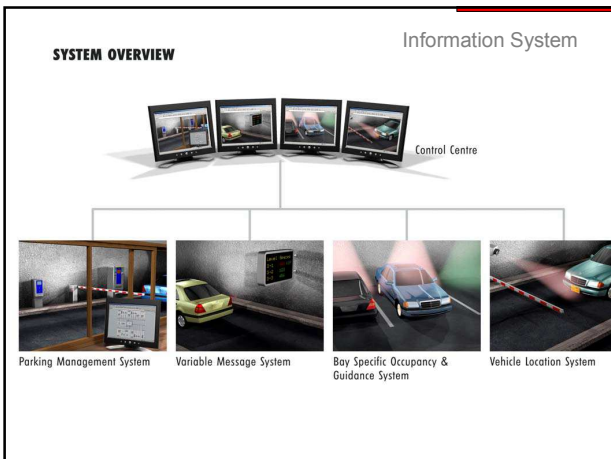
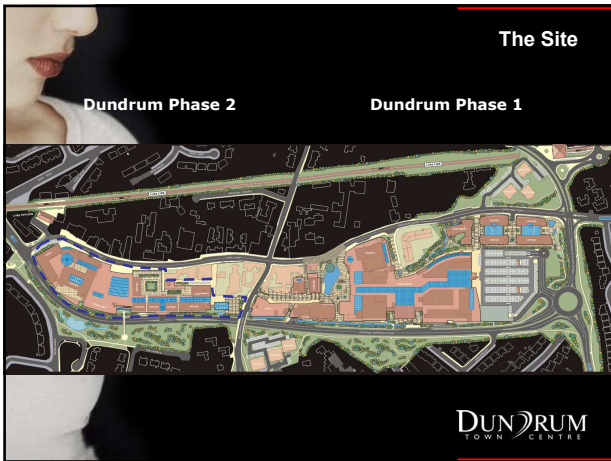
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### Dundrum Position in Europe

- Dundrum bought 12 'firsts' to Ireland in Phase 1 alone
- Dundrum will be one of Europe's largest shopping retail destinations
- 'Dundrum represents all the confidence and style of a new and prosperous Ireland' *source Vanity Fair*

**DUNDRUM**  
TOWN CENTRE



A Totally Integrated Solution

- Exterior VMS shows available spaces per floor
- Parking Management System issues the ticket
- Vehicle is guided through the centre by the Bay Detection System to available space
- Vehicle Location System tracks Vehicle to final destination area
- Touchscreens show location using reg plate
- Parker pays at the pay-station
- Pay-station prints location of parker on ticket
- Vehicle exits


DUNDRUM TOWN CENTRE



**State of the Art Parking Management System**

- 24 Pay-stations
- 11 Exit Lanes
- 10 Entrance Lanes
- 21 CCTV Camera Terminals
- 21 RFID Tag Readers
- 36 Intercom help points
- 30 Discount units
- 42 km of Cable


DUNDRUM TOWN CENTRE



**Variable Message System**

- 11 External Signs
- 21 Three Line
- 4 Two lines
- 18 Pay Station Signs
- 2 Double sided
- 1 Five Line
- 1 Gantry Sign
- 3 Perimeter Signs
- 6 km of Cable


DUNDRUM TOWN CENTRE



**Bay Specific Occupancy & Guidance System**

- 15 Level Signs
- 70 Aisle Guidance Signs
- 3200 Sensors
- 40 km of Cable

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**Vehicle Location System**


- 40 ANPR Cameras
- 20 km of Cable

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**Touch Screen Information System**

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**Touch Screen Information System**

Find Your Car  
Faigh Do Charr

Level 1

Your car is located in the Red Car Park, Level 1, Zone G

Welcome to Dundrum. Please choose a section from the menu

DUNDRUM TOWN CENTRE

