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1.1 Background and Objectives

The National Transport Authority (the Authority) commissioned Millward Brown to conduct a survey in order to investigate the spend, motivation and travel habits of visitors to Dublin's city centre using different transport modes in order to assess the impact of each mode on shopping activities in the city centre. This information will feed into future planning strategies in relation to the different modes of transport in this area.

The research was conducted in October 2014 among residents of the Republic of Ireland aged 16+ on both Grafton Street and Henry Street. A total of 1,671 respondents were interviewed on the following topics:

- Purpose of visit to city centre
 - → Main purpose that day
 - → Any other reason that day
 - → Other visits past 4 weeks
- Main mode of transport used
- Spend that day (actual or expected)
- Length of stay in city centre
- Number of visits to the city centre in past 4 weeks
- Other details also captured
 - → Day of week
 - → Time of day
 - → Location of interview

From this information we are able to ascertain the purpose of visits, spend levels, length of stay and frequency of visits by mode of transport in order to provide feedback on the varying contribution levels of each mode of transport to shopping spend in Dublin city centre.

This report and our presentation deck (incorporated into this report) summarises this information for the Authority.



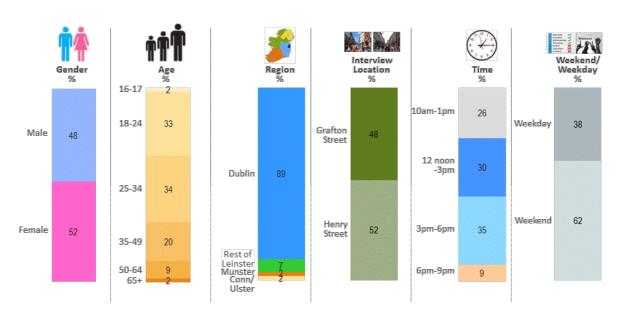
1.2 Research Approach

Millward Brown's trained interviewers conducted face-to-face surveys on street on Grafton Street and Henry Street using our handheld electronic devices to route through questions and capture responses electronically based on a questionnaire agreed in advance between Millward Brown researchers and the Authority.

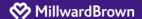
Interviewing was spread across the locations, day of week and time of day (from 10am to 9pm to avoid morning rush hour commuters) based on a sampling frame agreed with our statisticians in order to cover different range of visitors. Details of the overall sample interviewed in the survey are shown below.

Analysis of Respondents

Base: All (n=1,671)



All data captured was processed and verified by Millward Brown data processors and researchers and the results presented herein.



2. Analysis of Shopper Survey

2.1 Purpose of Visit

When asked what their main reason was for visiting the city centre that day, just under one in two (47%) stated their main motivation was for shopping purposes, with another fifth visiting for social or recreational purpose, and a similar figure were there for work. One in ten were on their way to/from school or college.

The Main Purpose of Visit to the City Centre

The primary reason for city visits is dominated by shopping, with work a distant second

Base: All (n=1,671)

MAIN PURPOSE





Q.1 What is the main purpose of your trip to the city centre today?



When asked what other reasons they had for visiting the city centre, over a third had an additional purpose. A further 14% of the sample were shopping as a secondary purpose resulting in 61% of respondents overall conducting some shopping on this visit. Other reasons for visits were similar increased by approximately 10 percentage points to 31% for social/recreational and for work.

Any Reasons for Visiting the City Centre

Shopping proves to be the main catalyst for visiting Dublin city centre, with about a third visiting for more than one reason

Base: All (n=1,671)

ANY REASONS





- Q.1 What is the main purpose of your trip to the city centre today?
- Q.2 Are there any other reasons for your trip to the city centre today?



Reasons for visiting the city centre differed by location with a more diverse range of motivations among those interviewed in Grafton Street, with half there for shopping, while on Henry Street three quarters were there for shopping with fewer respondents visiting for other reasons.

All Reasons for Coming to the City Centre by Location

Henry Street proves to be most popular location for shoppers, Grafton Street more mixed



- Q.1 What is the main purpose of your trip to the city centre today?
- Q.2 Are there any other reasons for your trip to the city centre today?



Motivation for visit also differed by weekday versus weekend (defined as Friday to Sunday), with shopping the main driver at both times, but more so for weekends, and social and recreational accounting for almost half of visits at weekends but only a third during weekday. As expected, working and education visits were higher for weekdays.

Any Reasons for Visiting the City Centre: How does it differ for Weekday Vs. Weekend

Base: All (n=1,671)

Sho	Weekday Opping	56%	
Soci	al/Recreatio	n 32 %	
	Working		
	School/College	19%	
	Other	3%	

Weekend Shopping	65%
Social/Recreation Working	47 %
School/College	6%
Other	2%

Q.1 What is the main purpose of your trip to the city centre today?

(Interviewing avoided manningrush hour period)

Q.2 Are there any other reasons for your trip to the city centre today?



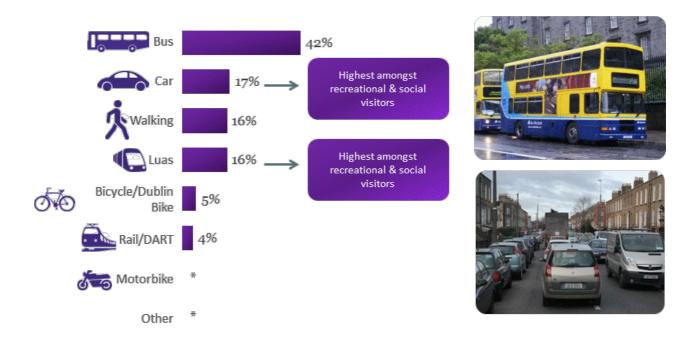
2.2 Modes of Transport

The main mode of transport used for getting to and from the city centre on the day of the survey was bus with four in ten (42%) travelling by this mode. The next most used mode is car at 17%, particularly among those on social recreational visits, followed closely by 16% walking and a similar proportion travelling by Luas, also most frequently used among social and recreational visitors. Only one in twenty travelled by bicycle/Dublin Bike and a slightly lower proportion by rail/Dart.

Main mode of Transport Used

Bus is the most frequently used method of transport to travel into the city

Base: All (n=1,671)



Q.3 What is the main made of transport you used to get into the city centre to day?

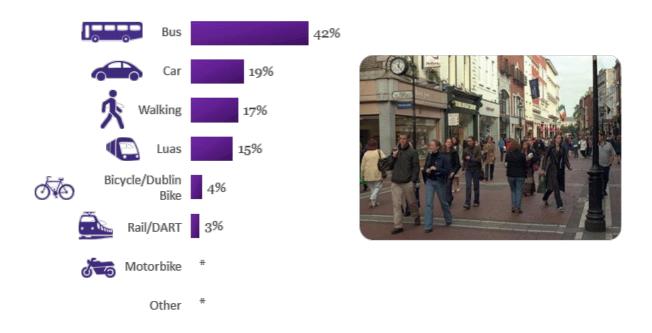


Transport modes used by Shoppers are similar to overall visitors with 42% travelling by bus and 19% travelling by car, with shoppers travelling by Luas and Walking at 15% and 17% respectively.

Main mode of Transport for Shoppers

Shoppers tend to travel mostly by bus, with two fifths using this method of transport

Base: All mentioning Shopping (n=1,027)



Q.3 What is the main mode of transport you used to get into the city centre to day?

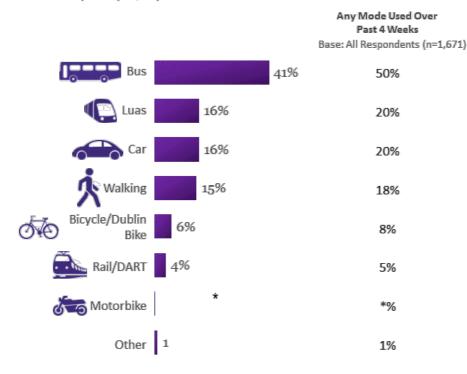


When prompted for main mode of transport over the past 4 weeks, bus remains the most frequently used among all respondents at 4 in 10 responses, well ahead of other modes with the Luas and car in a tie for second place at 16%, and walking at 15%. Furthermore, one in two had used the bus in the past 4 weeks for other visits to the city centre, a multiple of two and a half times of the next most frequented transport modes.

Main Mode of Transport over the Past 4 weeks

Bus is the most frequently used mode of transport to the city, with half of all visitors travelling by bus over the last month. Luas is also popular, as is the car

Base: All Responses (n=2,040)









Q.7 What is the main made of transport you used to get into the city centre over the past four weeks?

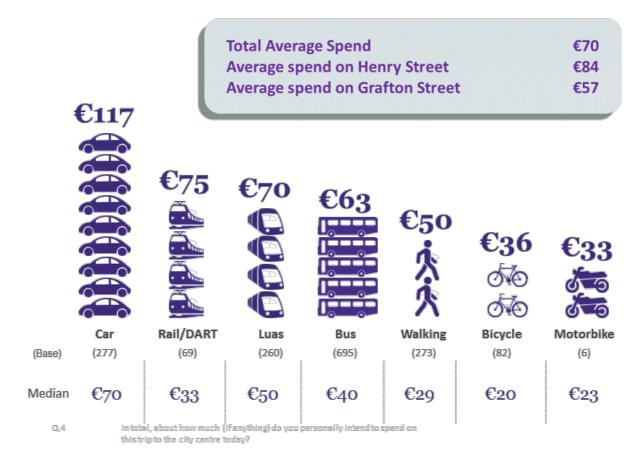


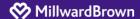
2.3 Spend During Visit

The average spend during this city centre visit is €70, with those on Henry Street spending more (€84) than those on Grafton Street (€57) with differences across modes of transport also evident. Those traveling into town by car spent the most on this single visit with those travelling by public transport, (Rail/DART, Luas, bus) spending between €63-€75 on average. The least spend was by those on motorbike (€33) or bicycle (€36).

Average Spend by Mode of Transport

Those travelling by car tend to spend the most when in the city centre, followed by those using rail services





Those visiting for shopping spend on average €95, compared to €70 for those on a social or recreational visit, while those working or attending school/college tend spend in the region of €20-€28.

Average Spend by Purpose of Visit

Shopping visitors are the highest spenders when making visits to the city, followed by social/recreational visitors



0.4

In total, about how much (if anything) do you personally intend to spend on this trip to the city centre today?



2.3.1 Contribution of each Mode of Transport to the City Centre Economy

In order to estimate the economic contribution of each mode of transport, we took the number of people who used each mode on the day of the survey, multiplied this by the average spend that day, and multiplied this result by the average number of times those people visited the city centre in the past 4 weeks. The results are set out below and show that Bus users account for 39% of spending in the city centre, rail and Luas users 20%, and Car users 18%.

All Respondents

Estimated Total Spend Over the Past 4 Weeks All Respondents

Base: All Respondents			於			Ø₩	₹
Main mode of transport today Base:		Rail/DART (69)	Walking (273)	Luas (260)	Bus (695)	Bicycle (82)	Motorbike (6*)
Average spend per mode of transport (today)		€75 *	€50 *	€70 *	€63 *	€36 ₩	€33 ₩
Times visited city for shopping in past 4 weeks (average)	2.64	3.99	6.61	3.85	4.00	4.10	3.50
Estimated Total spend Past 4 weeks (estimate)	€309	€299	€331	€270	€252	€148	€116
Total Spend X Total People (% contribution)	EXE EUO	€20,631 (5%)	€90,363 (20%)	€70,200	€175,140 (39%)	€12,136	€696 (<.5%)

*CAUTION: Small base size



We have also run the same estimates based on those who visited for shopping – i.e. those who did any shopping on their visit as either the main purpose or as a secondary purpose. We see a similar picture with bus users accounting for 36% of spending activity, compared to 20% for car users and 21% for visitors who walked.

Respondents who did Any Shopping

Estimated Total Spend Over the Past 4 Weeks Any Shopping

Base: Any Shopping (n=1,027)

			久			Ø₩
Main mode of transport today Base:		Rail/DART (36*)	Walking (175)	Luas (156)	Bus (433)	Bicycle (31*)
Average spend per mode of transport (today) €95.30	€141	€120 X	€69 X	€97 X	€84 *	€66 X
Times visited city for shopping in past 4 weeks (average)	2.79	3.64	6.81	4.05	3.82	5.03
Estimated Total spend Past 4 weeks (estimate)	€393	€437	€470	€393	€321	€332
Total Spend X Total People	€75,456 (20%)	€15,732 (4%)	€82,250 (21%)	€61,308 (16%)	€138,993 (36%)	€10,292 (3%)

^{*}CAUTION: Small base size

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A similar pattern emerges for those whose main reason for visiting is shopping, 34% of extrapolated spend is accounted for by bus users, 23% by walkers (visiting seven times in 4 weeks) and 21% car users (spending on average €137). This is followed by Luas (18%), and Rail/DART and bicycle each at 2%.

Respondents whose Main Purpose was Shopping

Estimated Total Spend Over the Past 4 Weeks Main Purpose Shoppers

Base: Main Purpose Shoppers (n=793)

			久			Ø₩
Main mode of transport today Base:	Car (160)	Rail/DART (16*)	Walking (134)	Luas (127)	Bus (335)	Bicycle (19*)
Average spend per mode of transport (today)	€137 *	€166 *	€71 X	€101 *	€86 X	€ ₅₃
Times visited city for shopping in past 4 weeks (average)	2.92	2.63	7.31	4.17	3.61	6.05
Estimated Total spend Past 4 weeks (estimate)	€400	€437	€519	€421	€310	€321
Total Spend X Total (€64,000 (21%)	€6,992 (2%)	€69,546 (23%)	€53,467 (18%)	€103,850 (34%)	€6,099 (2%)

^{*}CAUTION: Small base size

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Ra

When we focus on those who were only visiting for shopping purposes and for no other reason, so all spend should be on shopping, just over a third of the extrapolated revenue comes from those using the bus (34%), over a quarter from those walking (28%), less than one in five (19%) from car users, and 16% from Luas users.

Respondents who visited for Shopping Only

Estimated Total Spend Over the Past 4 Weeks Shoppers Only

ase: Shopping ONLY (n=572)			•			
			八			Ø₩
Main mode of transport today Base:		Rail/DART (12*)	Walking (113)	Luas (80)	Bus (233)	Bicycle (13*)
Average spend per mode of transport (today)	€137	€105	€71	€93	€84	€46
	X	X	X	X	X	X
Times visited city for shopping in past 4 weeks (average)	2.55	2.75	7.38	4.51	3.70	5.85
Estimated Total spend Past 4 weeks (estimate)	€349	€289	€524	€419	€311	€269
Total Spend X Total People	\sim T $_{1}$, $_{1}$, $_{1}$	€3,468 (2%)	€59,212 (28%)	€33,520	€72,463 (34%)	€3,497 (2%)

^{*}CAUTION: Small base size

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Overall Conclusions

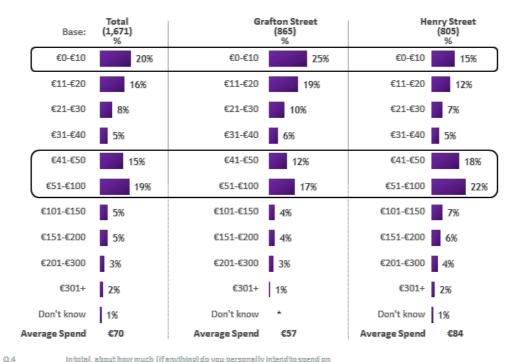
The above clearly demonstrates the importance of the bus as a mode of transport in delivering retail spend into the city centre with between 34% and 39% of spend accounted for by this mode. Across the above datasets, public transport in total accounts for between 52% and 59% of money spent in the city centre. The above data also demonstrates the importance of walking as a mode of transport for those accessing the city centre for shopping and other purposes, with between 20% and 28% of all money spent being spent by those getting to Grafton Street and Henry Street on foot. At 18% to 21% of spending activity, those accessing the city centre by car account for approximately 1 euro in every 5 euros spent.



Average spend in Henry Street out strips that of Grafton Street, on average €84 versus €57, particularly in the €40-€100 spend brackets. Grafton Street has a quarter of visitors spending less than €10.

Spend by Location of Interview

Visitors to Henry Street have a higher spend than those on Grafton Street



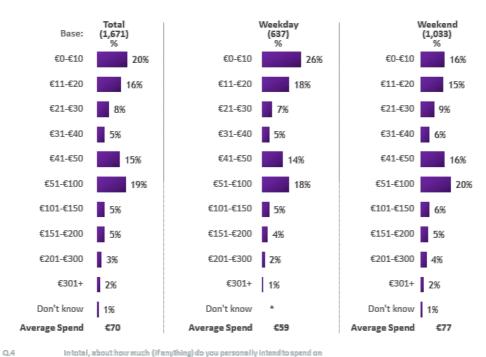
Intotal, about how much (ifanything) do you personally intend to spend on this trip to the city centre today?



Weekend visitors spend more than weekday visitors (€77 versus €59). Over a quarter (26%) of weekday visitors spend less than €10 whereas a fifth of weekend visitors (20%) spend €51-€100.

Spend Weekday vs. Weekend

Spend during the weekend is higher, with almost 4 in 10 spending over €50



Intotal, about how much (if anything) do you personally intend to spend on this trip to the city centre today?

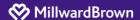


The highest spend is during 12-3pm at €77 with a higher proportion outlaying over €150, lower spends are after 3pm (€65).

Spend by Time of Day



In total, about how much (if anything) do you personally intend to spend on this trip to the city centre today?



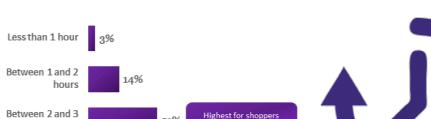
2.4 Details of Visit to City Centre

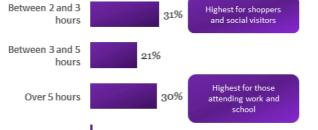
Base: All (n=1,671)

There are distinct patterns in terms of length of time spent in the city centre on this visit. Three in ten visited for between 2-3 hours, mainly for shopping or social visits and a similar proportion were in town for over 5 hours, accounted for by those working and going to school/college.

Length of stay in the City Centre

Three in ten plan to stay over five hours in the city, highest among those visiting for work or education





Q.6

Don't know

Approximately how long do you expect to spend in the city centre today?



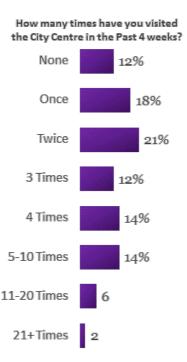
On average visitors made 4 visits in the past 4 weeks, averaging one visit per week for shopping. A fifth have visited twice and a similar level have visited more than 5 times.

Visits to the City Centre over the Past 4 Weeks

The average visitor come to the city centre once a week, with a fifth visiting fortnightly

Base: All (n=1,671)

Average
4 times
in past 4 weeks





0,5

Thinking back over the pastfour weeks, about how many times have you visited the city centre on a shopping trip?



The chart below demonstrates the differences in shopper profile between weekday and weekend shoppers. Compared to those visiting during the week, weekend visitors tend to have higher expenditure, slightly more have travelled by car, but fewer visited for work, with two thirds on a shopping spree.

Weekday vs. Weekend

Shopping and spend increases during the weekend

Base: All Weekday (n=637)

Weekday



56% are Shoppers

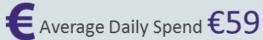


27% are Working



13% Travel by Car

16% Travelled Mostly by Car To the city over the last 4 weeks



Base: All Weekend (n=1,033)

Weekend



65% are Shoppers



17% are Working



19% Travel by Car

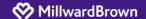
22% Travelled Mostly by Car To the city over the last 4 weeks



€ Average Daily Spend €77

Q.1 What is the main purpose of your trip to the city centre today?

Q.2 Are there any other reasons for your trip to the city centre today?



APPENDIX

Shopping Travel Behaviour Questionnaire –October 2014

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Good morning/afternoon/evening. My name is ______ and I am interviewing on behalf of Millward Brown, a market research company. We are conducting some research for the National Transport Authority on shopping in the city centre and I have a few short questions I would like to ask you, if you can spare a few minutes.

SECTION 1: PURPOSE OF VISIT/MODE OF TRANSPORT

Q.A Can I just check that you are living in Ireland

Yes ...1

No....2 - CLOSE AND DO NOT COUNT IN QUOTA

Q.1 What is the main purpose of your trip to the city centre today?

INTERVIEWER: DO NOT PROMPT. PROBE TO PRE-CODES IF NECESSARY

SCRIPTER: ASK ALL. SINGLE CODE ONLY

- 1: Shopping
- 2: Working/going to work
- 3: Attending school/college/other education
- 4: Social reasons (Meeting friends/family etc)
- 5: Recreational reasons (attending event/cultural institution/cinema/theatre etc)
- 6: Other (specify & code)
- Q.2 Are there any other reasons for your trip to the city centre today?

INTERVIEWER: DO NOT PROMPT. PROBE TO PRE-CODES IF NECESSARY

SCRIPTER: ASK ALL. MULTI CODES ALLOWED

- 1: Shopping
- 2: Working/going to work
- 3: Attending school/college/other education
- 4: Social reasons (Meeting friends/family etc)
- 5: Recreational reasons (attending event/cultural institution/cinema/theatre etc)
- 6: Other (specify & code)



Q.3 What is the main mode of transport you used to get into the city centre today?

INTERVIEWER: SHOW SCREEN. IF RESPONDENT USED MORE THAN ONE MODE OF TRANSPORT PROBE FOR MODE THAT COVERED THE LONGEST PART OF THE JOURNEY AND THEN CODE

SCRIPTER: ASK ALL. SINGLE CODE ONLY

- 1: Bus
- 2: Bicycle/Dublin Bike
- 3: Car
- 4: Luas
- 5: Motorbike
- 6: Rail/Dart
- 7: Walking
- 8: Other (Specify & Code)
- Q.4 In total, about how much (if anything) do you personally intend to spend on this trip to the city centre today? Please take everything into account including retail stores, supermarkets, convenience stores, restaurants, cafes, cinemas or gigs etc. Please include anything you have spent so far today and anything you plan to spend.

INTERVIEWER: RECORD AMOUNT. IF RESPONDENT MENTIONS A RANGE, PROBE FOR A SINGLE AMOUNT. IF REFUSED/DON'T KNOW, CODE AS 99

SCRIPTER: ASK ALL. OPEN BOX FOR RECORDING MONETARY AMOUNT

- Don't know/Refused
- Q.5 Thinking back over the past <u>four weeks</u>, about how many times have you visited the city centre on a shopping trip?

INTERVIEWER: RECORD NUMBER OF TRIPS. IF RESPONDENT CAN'T RECALL, CODE AS 99 SCRIPTER: ASK ALL. OPEN BOX FOR RECORDING NUMBER OF TRIPS.

1. Don't recall

Q.6 Approximately how long do you expect to spend in the ci	tv centre to	dav?
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INTERVIEWER: PROBE TO PRE-CODES

SCRIPTER: ASK ALL

- 1. Less than 1 hour
- 2. Between 1 and 2 hours
- 3. Between 2 and 3 hours
- 4. Between 3 and 5 hours
- 5. Over 5 hours
- 6. Don't know

Q.7 What is the main mode of transport you used to get into the city centre over the past four weeks? INTERVIEWER: SHOW SCREEN. IF RESPONDENT USED MORE THAN ONE MODE OF TRANSPORT PROBE FOR MODE(S) USED MOST FREQUENTLY

SCRIPTER: ASK ALL. MULTI CODES ALLOWED

- 1: Bus
- 2: Bicycle/Dublin Bike
- 3: Car
- 4: Luas
- 5: Motorbike
- 6: Rail/Dart
- 7: Walking
- 8: Other (Specify & Code)

SECTION 2 - CLASSIFICATION

Q.A Record Gender:

SCRIPTER ASK ALL

- 1: Male
- 2: Female

Q.B What age are you? State exact and code: ____

SCRIPTER ASK ALL

- 1: 16-17
- 2: 18-24
- 3: 25-34
- 4: 35-49
- 5: 50-64
- 6: 65+

Q.C What part of the country do you live in?

INTERVIEWER: RECORD INTO REGION BELOW

SCRIPTER ASK ALL

Dublin

Rest of Leinster

Munster

Connaught/Ulster

Q.D May I ask for your name please?

OPEN BOX

Q.Di May I also ask for your telephone number please?

OPEN BOX

Q.E Record the location of the interview.

- 1. Grafton Street
- 2. Henry Street

Q.F Record the day of the week.

- 1. Monday
- 2. Tuesday
- 3. Wednesday
- 4. Thursday
- 5. Friday
- 6. Saturday
- 7. Sunday

Q.G Record your shift time.

- 1. 10am 1pm
- 2. 12noon 3pm
- 3. 3pm 6pm
- 4. 6pm 9pm

THANK AND CLOSE