# Dublin City Centre Planned Shopper Report

# Objectives & Methodology

/ Research was conducted to gather the views of a representative sample of **Irish resident "planned shoppers" to Dublin City Centre** shopping areas and their **attitudes** to the National Transport Authorities (NTA) traffic management proposal in Dublin's city centre.

/ In particular is the need to understand the following:
  » **How travelled** into city centre today.
  » **Reason** for visit.
  » **Monetary spend** on shopping, entertainment, socialising, grab & go.
  » **Awareness** and **effect** of NTA's traffic management proposal

/ The findings from the survey will be used to provide robust **reliable** and **independent** evidence of consumer opinion on the topic in a submission to Government from Irish Parking Association.

/ **1,009** face-to-face on-street interviews were conduced between **24th June – 12th July 2015**.

/ **506** interviews were conducted in the **Grafton Street Area**, with the other **503** in the **Henry Street Area**.

/ Interviewing was conducted during the hours of **11am – 8pm** to allow for late night shopping and socialabilty.

/ Quotas were not set as selecting every 'nth' person will see demographics fall out naturally.

# Planned Shoppers

## DEFINITION

/ People who have made a specific trip into town for either a shopping or entertainment trip EXCLUDING those who travelled in for work or college.

/ This isolates those who make a decision to travel into town for shopping or entertainment, and who wouldn't otherwise already be there for work or college.

/ Planned shoppers = those that will be affected by any change to parking and access to the city centre.

# Excluded from this research are the following:
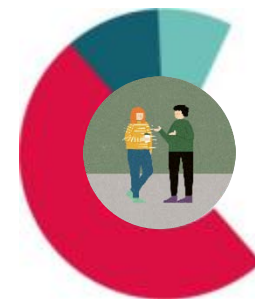
1.  **Tourists** – as they are likely taking public transport anyway and will be unlikely to be impacted by the NTA's traffic management proposal in Dublin City Centre.

2.  **Workers & students** – likelihood is that the NTA's proposed traffic management in Dublin City Centre will have little impact on their shop behaviour as they cannot change work location, and it is felt that including workers who happen to be in town during lunch over represents public transport usage.

3.  **Non-shoppers** or low ticket 'grab & go' shoppers e.g. sandwich. It is imperative we speak to those travelling for 'planned' shopping behaviour to establish potential impact of the NTA's traffic management proposal in Dublin City Centre.

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# Definition of Categories

**Shopping**

/ Purchase of a **good** or **item** of **greater value** than simply food or beverage – includes clothing, homeware, jewellery etc.

**Grab & Go food or drink**

/ '**Sustenance**' – smaller ticket item of food e.g. sandwiches, food to go, soft drinks, coffee etc. – items that are not consumed as a sit down offering.

**Socialising**

/ **Sit-down socialising** either with friends or relatives, or alone. Includes **drinks/lunch/dinner** etc.

**Entertainment**

/ Expenditure on **cinema**/**show**/**gig**, **gallery**, **museum** etc.
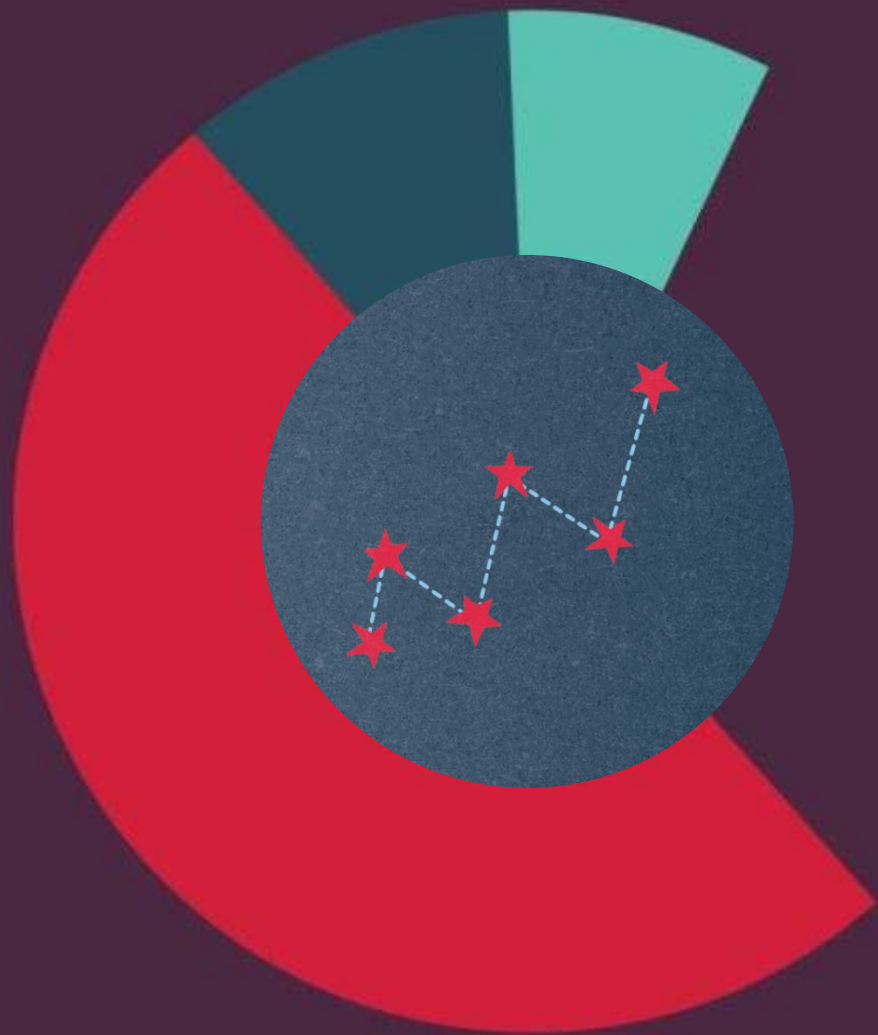
# Summary of Findings

# The Big Picture

1. Shoppers travelling by car represent almost a third (32%) of all planned shoppers in the city centre

2. The car is the most important mode of transport for revenue in the city centre – with shoppers arriving by car representing 41% of all planned Shoppers spend and spending 35% more in total than those visiting by bus.

3. Almost 3 in 5 planned shoppers who visit by car claim they would not have done so if they could not have travelled in by car. (10% of ALL planned shoppers stated they would definitely not have visited).

4. The potential impact of the traffic management proposal in Dublin city centre is for a 24% decline in overall shopping and entertainment revenue among planned shoppers.

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# Summary of Findings - I

1. The primary method of travelling into the City is either Bus or Car, each being used by 1 in 3. City split highlights a difference however as those travelling to Grafton street area more likely to use Car (33%), vs Bus (29%), while in Henry street Bus usage is highest at (38%) vs Car (32%).

2. Other modes of transport also used, however to a much lesser degree with 1 in 10 either walking, taking the Luas or taking rail/dart – these however have little difference based on City location.

3. Reliance on car parks is very high as 3 in 4 who travelled by car are using a paid for car park (converting to quarter of all planned shoppers to the city).

4. Planned shoppers using a car to come into town on average are bringing 2.3 people into town on each occasion.

5. Top reason for visiting the city today was for shopping at 88%. (Defined as the purchase of a goods or items of greater value than simply food or beverage – includes clothing, homeware, jewellery etc.).

6. Again there are slight differences in City location – Henry Street returns higher incidence of Shopping and Grab & Go. While Grafton street remains high for shopping, but over indexes on socialising, perhaps not surprising given the nature of restaurants and bars in this area.

7. Those travelling in via car today account for the highest incidence of shopping at 94%, compared to Bus which is slightly lower at 87%.

8. Other purpose of trip differences are evident among walkers, who are less likely to shop (perhaps due to having to carry bags) and higher incidence of socialising and entertainment (possibly the alcohol aspect).

9. Shopping is the biggest spend category in Dublin city, and to an even greater degree among those shopping in the Grafton Street Area. Spend is generally slightly lower for all categories in the Henry Street area.
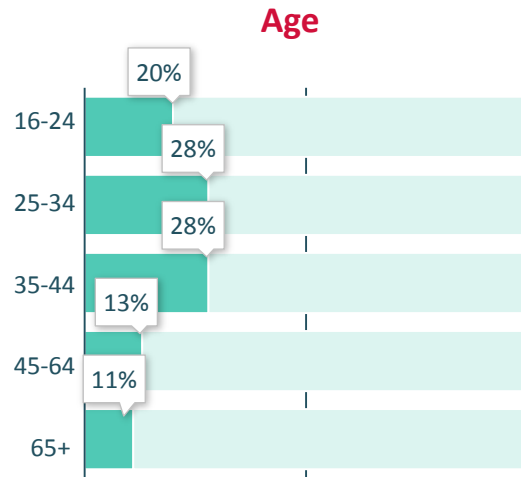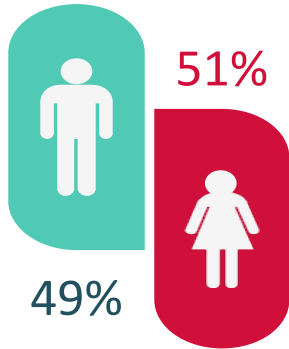
# Summary of Findings - II
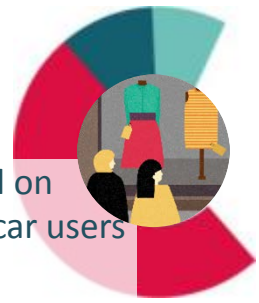
10.    Average spend is higher among the car user than any other transport type user. Car users spend on average €134 per visit, which is €40 more than the bus user at €94. In terms of the total spend car users spend on average 35% more than Bus users.

11.    This converts to a 41% share of total spend among planned shoppers in the city centre for the car user, versus 30% for the bus user – highlighting the importance of car users to the economic viability of the city centre shopping district.

12.    Total average number of trips to the City for a similar purpose in the past 4 weeks is 10. Visits among the car user is 7, while bus users are slightly higher at 11. Walkers account for the greatest number of visits at 20.

13.    In terms of timing, visits between weekday and weekend are equal, while those visiting on this occasion during the later time of 5-8pm have the highest number of visits in the past 4 weeks at 13.

14.    1 in 3 claim to be aware of the NTA's traffic management proposal in Dublin's city centre – however, depending on the transport type, awareness varies. Walkers have highest levels of awareness at 45%. However, arguably those most effected, the car user is slightly lower at 32%.

15.    The potential impact of introducing such an initiative is evident as almost 6 in 10 car users (or 19% of all planned shoppers) claim they would be unlikely to have come into the city if this had been in place.

16.    The impact of 59% of car users suggesting they would not travel is a 24% fall in overall "Planned Shopper" revenue.

17.    There is strong agreement that if such an initiative is put in place, transport links would need to be improved – equally so in both areas of the city.

18.    Just over half of all shoppers agree that no cars would make the city a better place to visit (primarily the non car user), while there are equal levels of concern over issues such the city becoming a ghost town and a belief that shops in the city will suffer.

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Sample Profile

# Sample Profile

(Base: All 'Planned' Shoppers in Dublin City – 1,009)

**51%** / **49%**

## Dependent Children

**35%**

## Age

- 16-24: 20%
- 25-34: 28%
- 35-44: 28%
- 45-64: 13%
- 65+: 11%

## Social Class

AB: **16%**

C1: **35%**

C2: **27%**

DE: **22%**

F: **1%**

## Martial Status

- Married/civil partnership: 45%
- Living as married/cohabiting: 9%
- Single: 42%
- Widowed/divorced/seperated: 5%

## Work Status

- Full time: 55%
- Part time: 12%
- Retired: 11%
- Unemployed: 8%
- Housewife: 5%
- Student: 8%

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11.
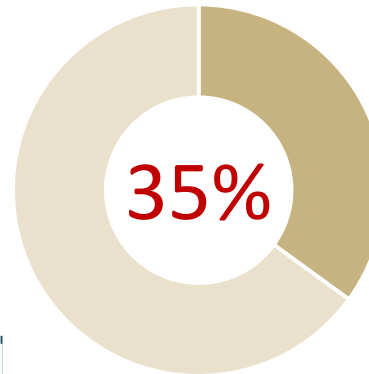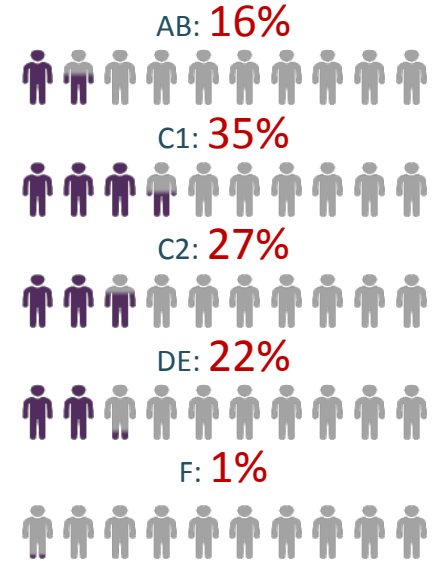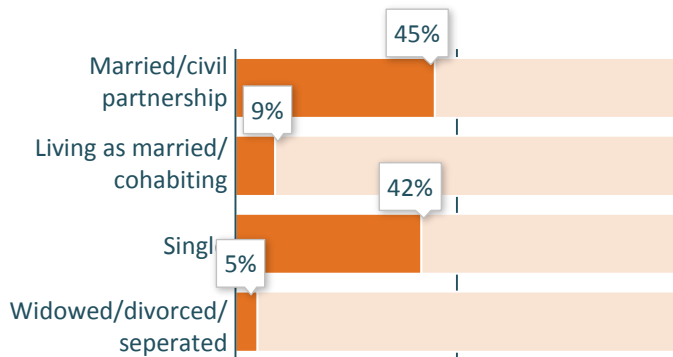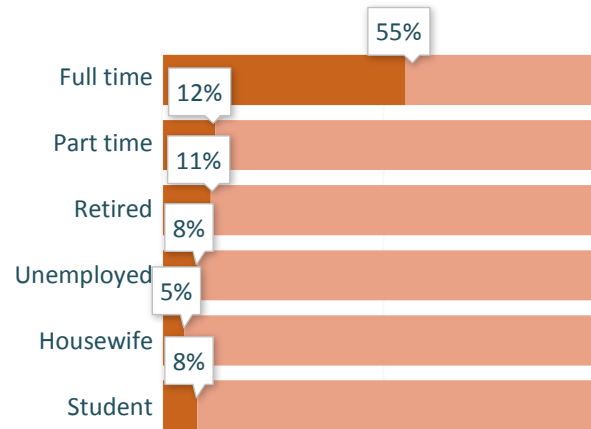
# Timing of Interviews

(Base: All 'Planned' Shoppers in Dublin City – 1,009)

| | % | | % | | % |
|---|---|---|---|---|---|
| Grafton Street | 50 | 11am-2pm | 37 | Weekday (Mon-Thurs) | 56 |
| Henry Street | 50 | 2-5pm | 49 | Weekend (Fri-Sun) | 44 |
| | | 5-8pm | 15 | | |
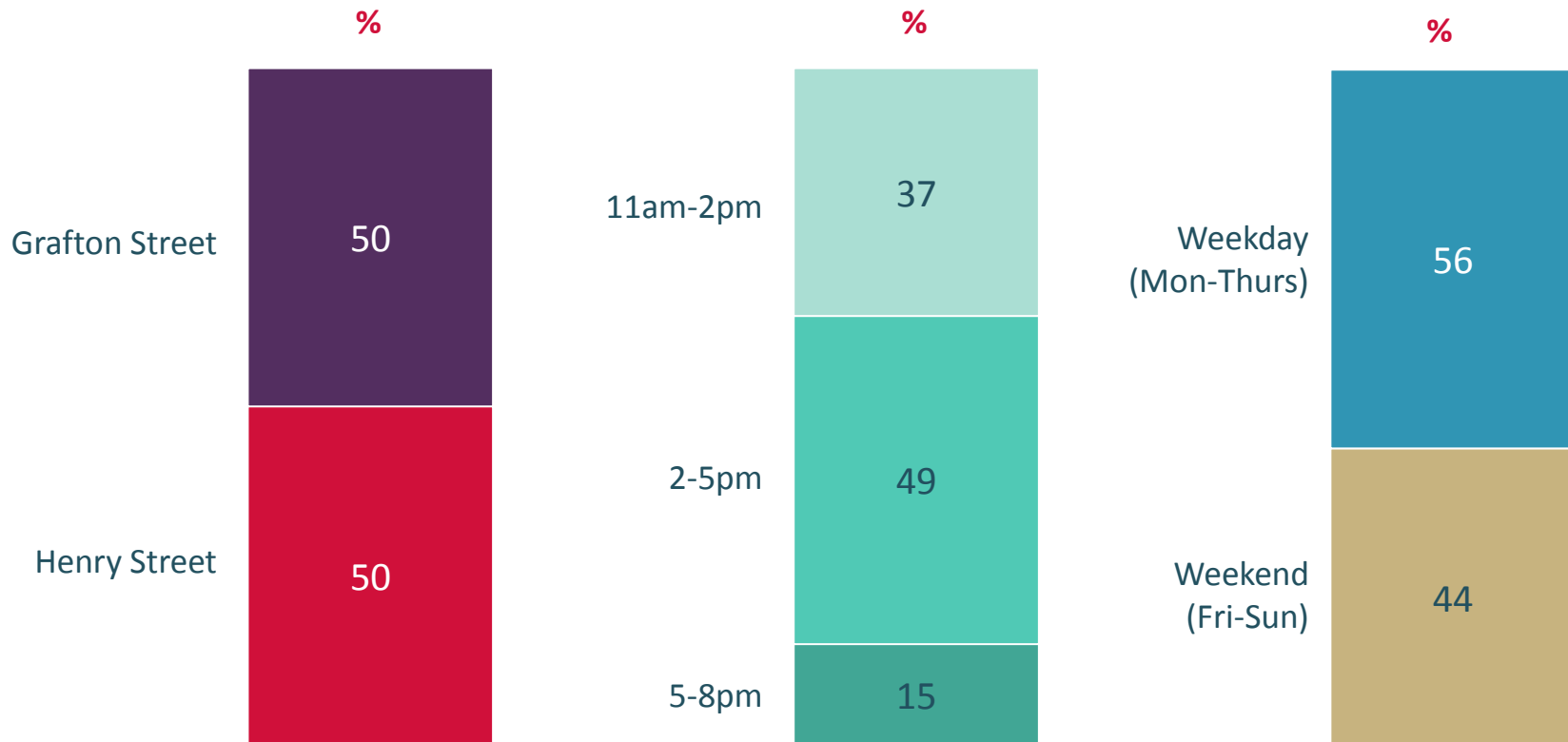
**Interviews were split across Grafton Street and Henry Street. Further splits of time and day of week were imposed.**

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12.

**Transport Type**

# Main Mode Of Transport Used To Get <u>Into The City Centre Today</u>

(Base: All 'Planned' Shoppers in Dublin City – 1,009)

*Q. What was your main mode of transport for getting into the city centre today?*

| | | |
|---|---|---|
| Bus | 🚌 | **34%** |
| Car | 🚗 | **32%** |
| Luas | 🚈 | **11%** |
| Walked | 🥾 | **11%** |
| Rail/Dart | 🚆 | **9%** |
| Bicycle | 🚲 | **3%** |
| Other | | **1%** |

**Bus and Car are by some distance, the main modes of transport used to get into the city. Further down the list are the Luas and Walking, both at 1 in 10.**

*(Q.2)*

# Main Mode Of Transport Used To Get <u>Into The City Centre Today</u>

(Base: All 'Planned' Shoppers in Dublin City – 1,009)

*Q. What was your main mode of transport for getting into the city centre today?*

## Grafton Street Area
(506)

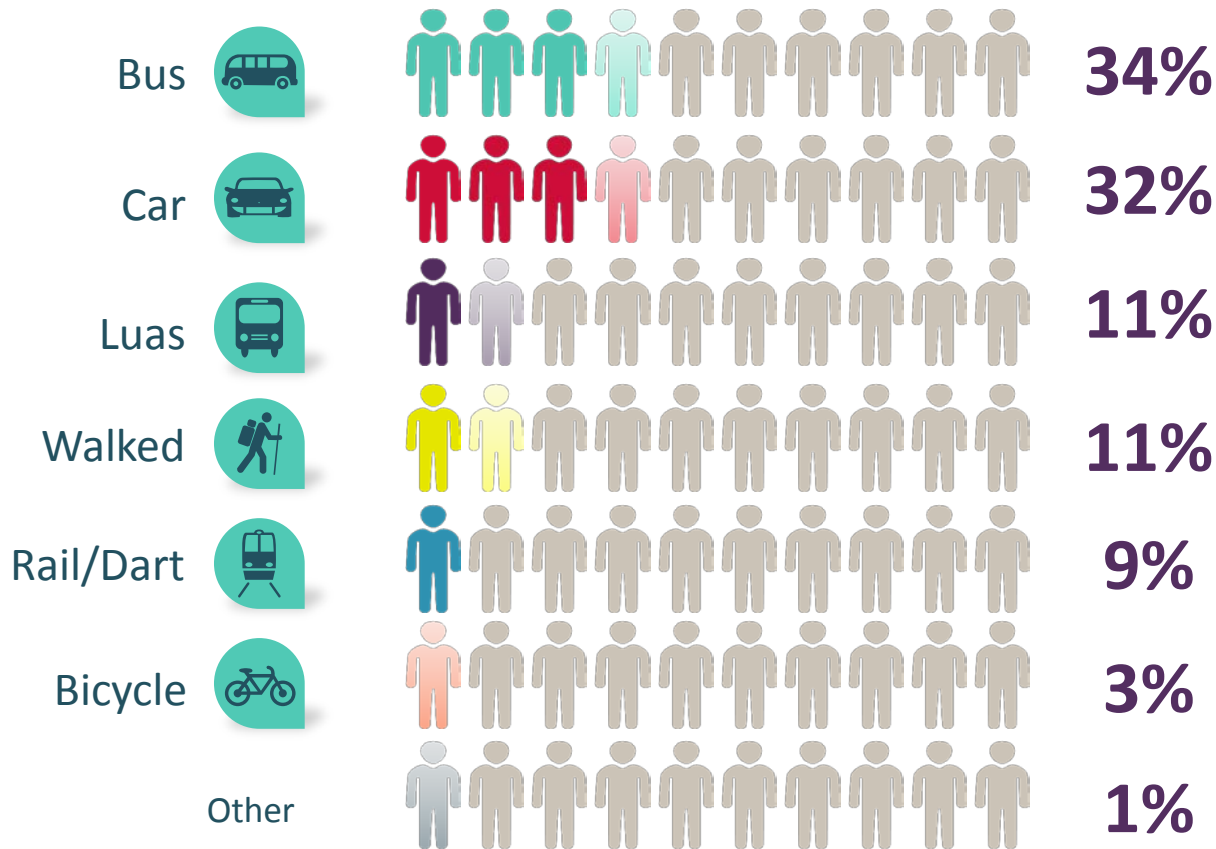| Mode | % |
|------|------|
| Bus | 29% |
| Car | 33% |
| Luas | 12% |
| Walked | 11% |
| Rail/Dart | 11% |
| Bicycle | 3% |
| Other | *% |

## Henry Street Area
(503)

| Mode | % |
|------|------|
| Bus | 38% |
| Car | 32% |
| Luas | 11% |
| Walked | 11% |
| Rail/Dart | 7% |
| Bicycle | 2% |
| Other | 1% |
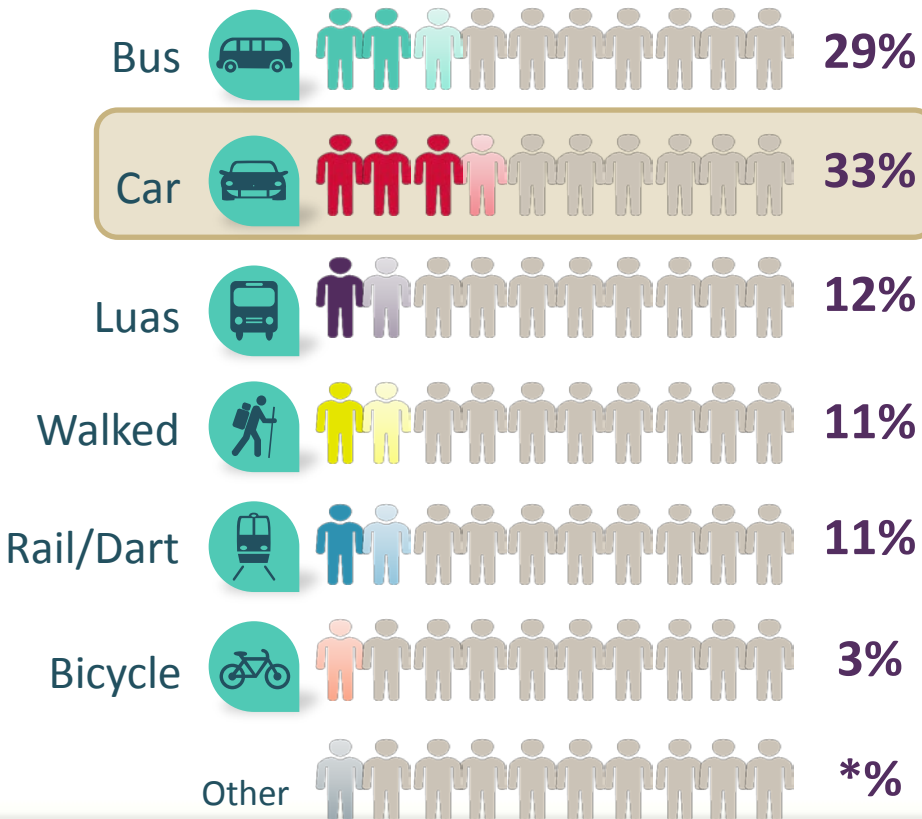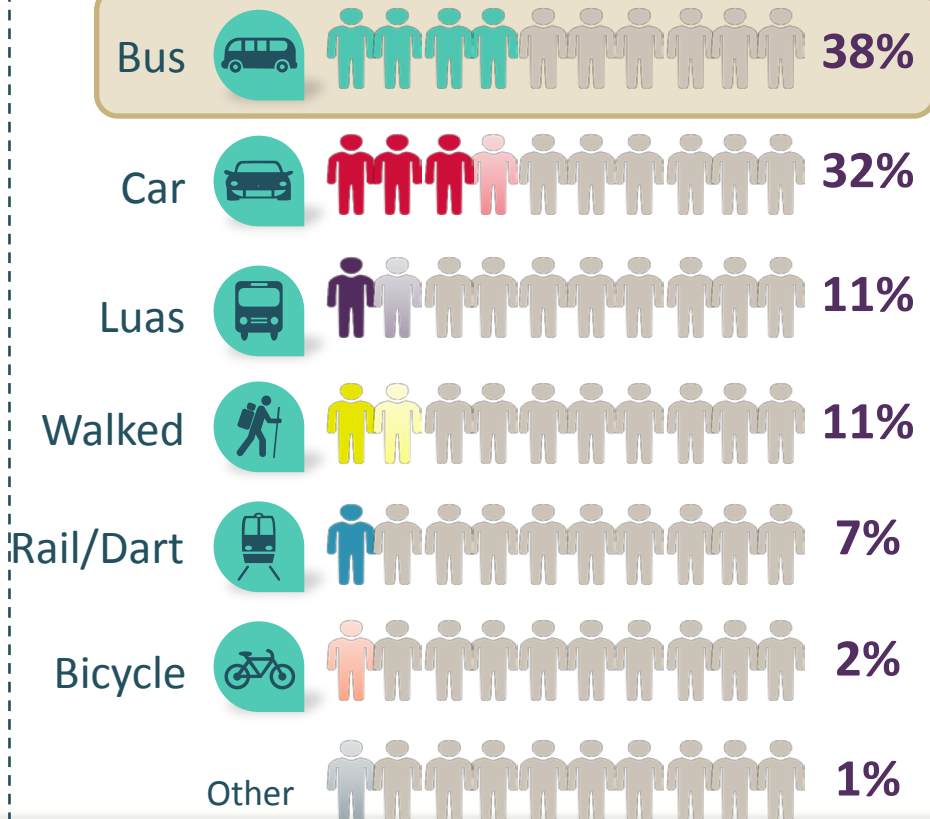
**While transport types are similar each side of the City, car has higher usage in Grafton Street area, while Henry street has higher bus usage.**

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*(Q.2)*

15.

# Where Parked Car

(Base: All Using Car Into City Centre Today –325)

*Q. Where did you park your car today?*

|  | Total Dublin City (325) % | Grafton Street Area (166) % | Henry Street Area (159) % |
|---|---|---|---|
| Paid for car park | 76 | 76 | 75 |
| On Street car parking | 20 | 19 | 21 |
| Office car park | 3 | 4 | 2 |
| Other | 1 | 1 | 1 |

**24% Of All planned shoppers in Dublin City**
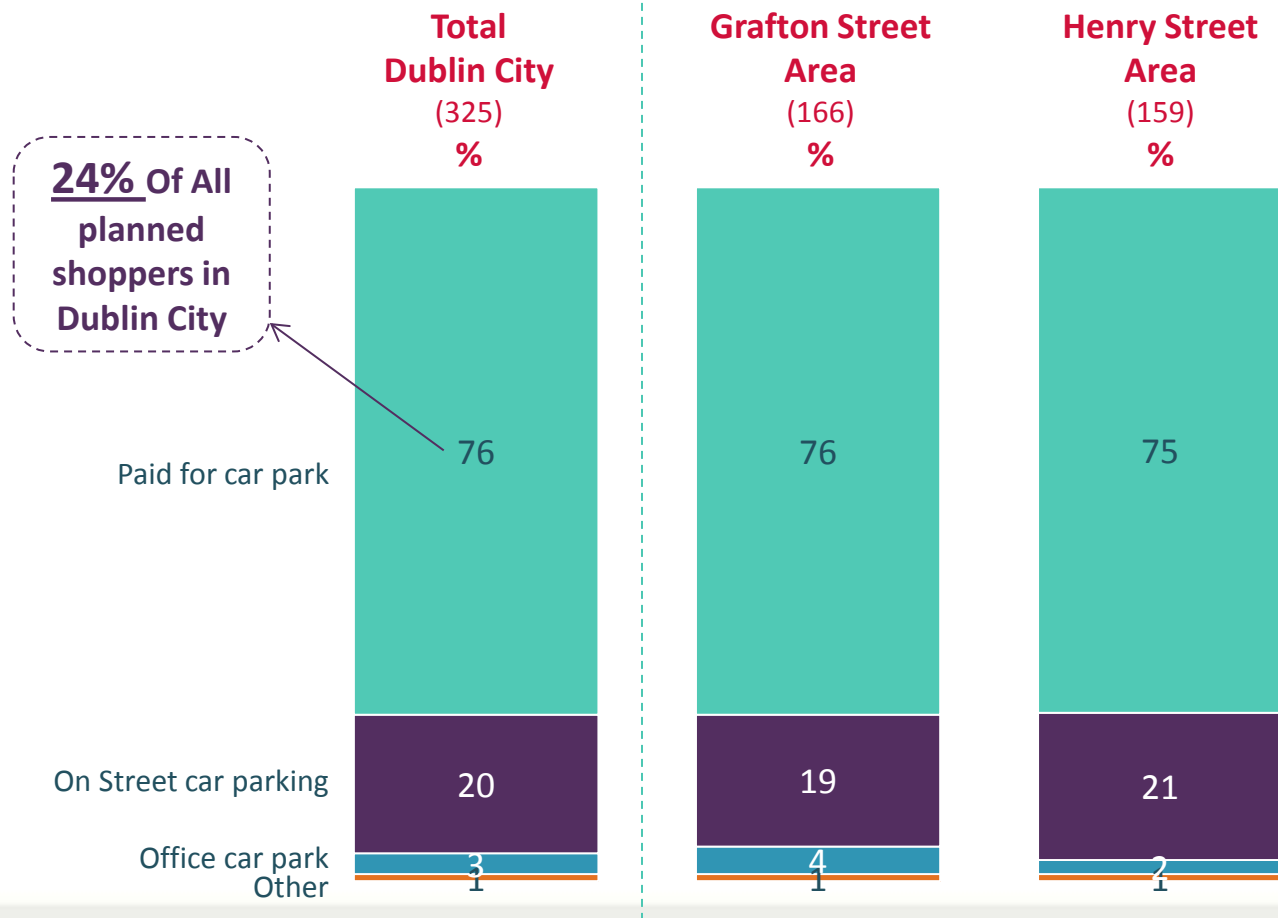
**Of those who drove into the city, 3 in 4 parked in a paid for car park – equally so both sides of the city. This converts to 24% of all planned shoppers using a paid for car park.**

*(Q.3a)*

16.

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# Number Accompanied In Car Including Self

(Base: All Using Car into City Centre Today –325)

*Q. How many people travelled in your car today including yourself?*

| | Total Dublin City (325) % | Grafton Street Area (166) % | Henry Street Area (159) % |
|---|---|---|---|
| Just myself | 20 | 15 | 26 |
| 2 people in total | 50 | 53 | 47 |
| 3-4 people | 28 | 31 | 25 |
| 5-7 people | 2 | 1 | 2 |
| **AVERAGE** | **2.3** | **2.4** | **2.2** |
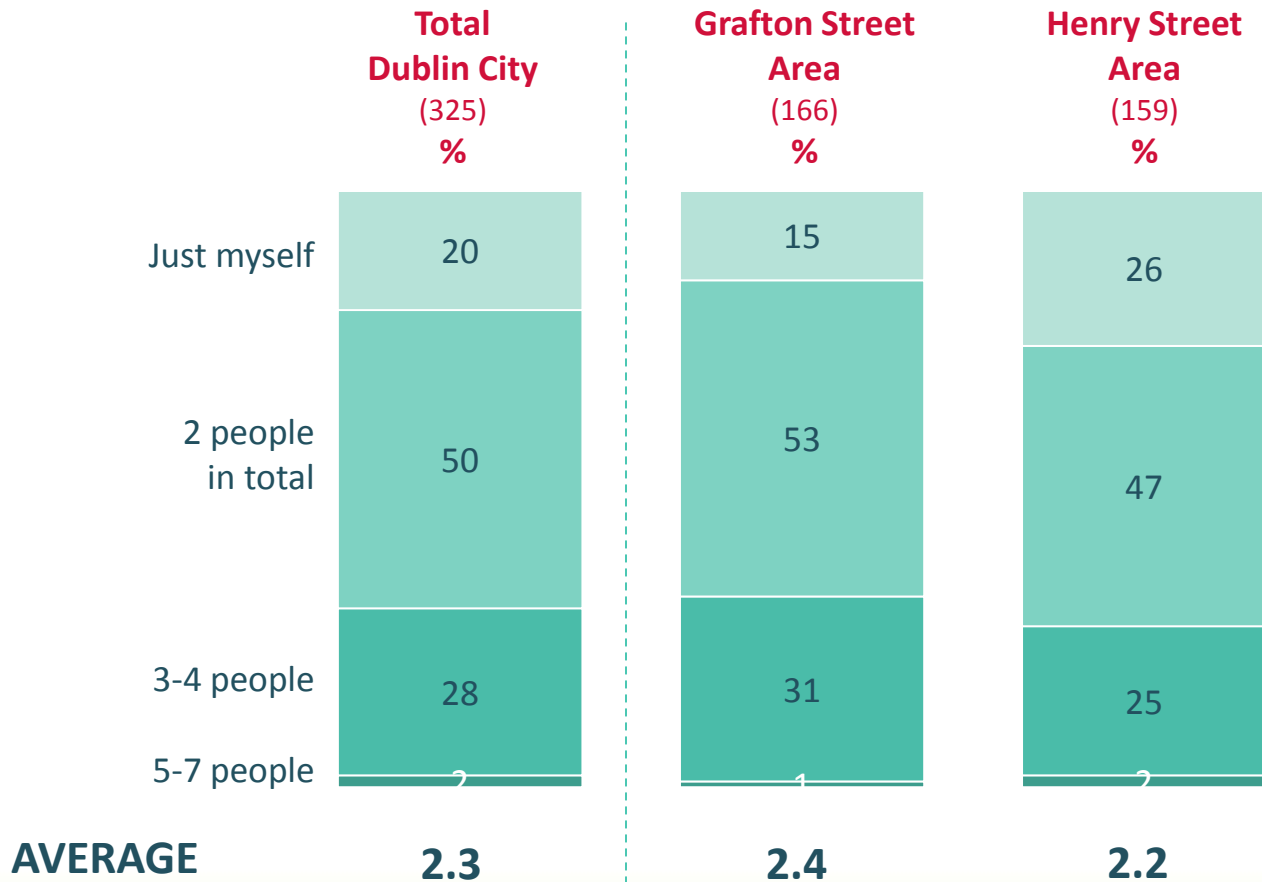
**While 1 in 5 claim they travelled alone, this is higher in Henry Street. Half claim they were accompanied with another person, which is higher in Grafton Street. On average cars coming to the city centre carry 2.3 people.**

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*(Q.3b)*

# Transport Type – Key Take Outs

1. Primary method of travelling into the City is either Bus or Car, each being used by 1 in 3.

2. City split highlights a difference however as those travelling to Grafton street area more likely to use Car (33%), vs Bus (29%), while in Henry street Bus usage is highest at (38%) vs Car (32%).

3. Other modes of transport also used, however to a much lesser degree with 1 in 10 either walking, taking the Luas or taking rail/dart – these however have little difference based on City location.

4. Reliance on car parks is also very high as 3 in 4 who travelled by car are using a paid for car park (converting to quarter of all planned shoppers to the city).

5. Planned shoppers using a car to come into town on average are bringing 2.3 people into town on each occasion.

# Purpose pf Trip

# Main Reason For Trip To City Today

(Base: All 'Planned' Shoppers in Dublin City – 1,009)

*Q. Can you tell me the main reason for your trip into the city today?*

| | Total Dublin City (1,009) % | Grafton Street Area (506) % | Henry Street Area (503) % |
|---|---|---|---|
| Shopping | 79 | 67 | 90 |
| Socialising/ meeting friends | 19 | 31 | 8 |
| Other | 2 | 3 | 1 |
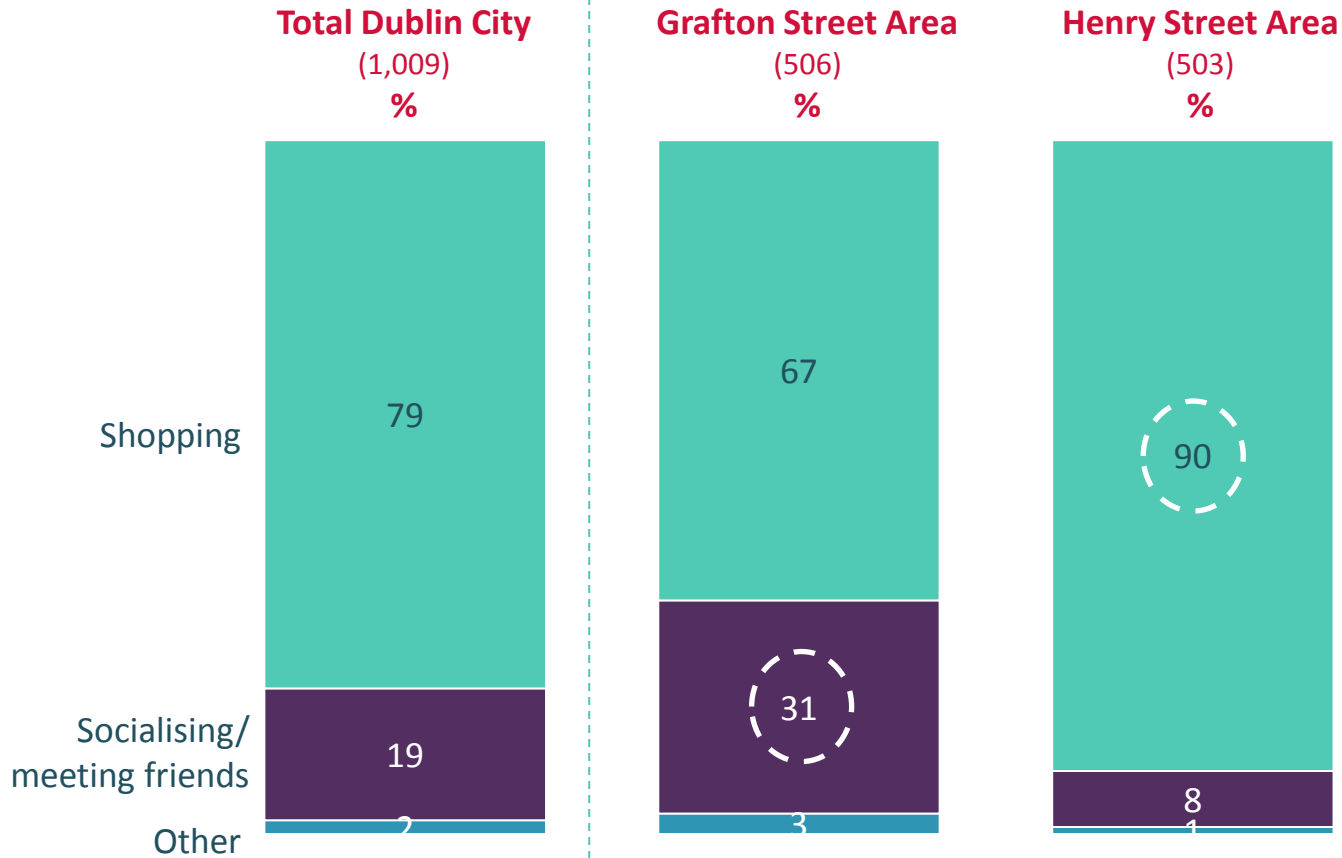
**Main purpose of trip is to shop – this is especially high in Henry Street, however this is due to a higher proportion in Grafton Street visiting for socialising.**

*(Q.S2)*

20.

# Any Purpose of Visit

(Base: All 'Planned' Shoppers in Dublin City – 1,009)

*Q. Did you any spend money on this visit to Dublin City centre for any of the following?*

| | Total Dublin City (1,009) % | Grafton Street Area (506) % | Henry Street Area (503) % |
|---|---|---|---|
| Shopping | 88 | 82 | 95 |
| Grab & Go food or drink | 43 | 39 | 48 |
| Socialising | 35 | 38 | 32 |
| Entertainment | 13 | 15 | 11 |

**Reason for visiting today is clearly for shopping, highest in Henry Street, which also shows higher levels of Grab & Go. Grafton Street however, while also high for shopping, has a greater pull towards the longer aspect of socialising.**

*(Q.1)*

21.

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# Any Purpose of Visit X Transport Type
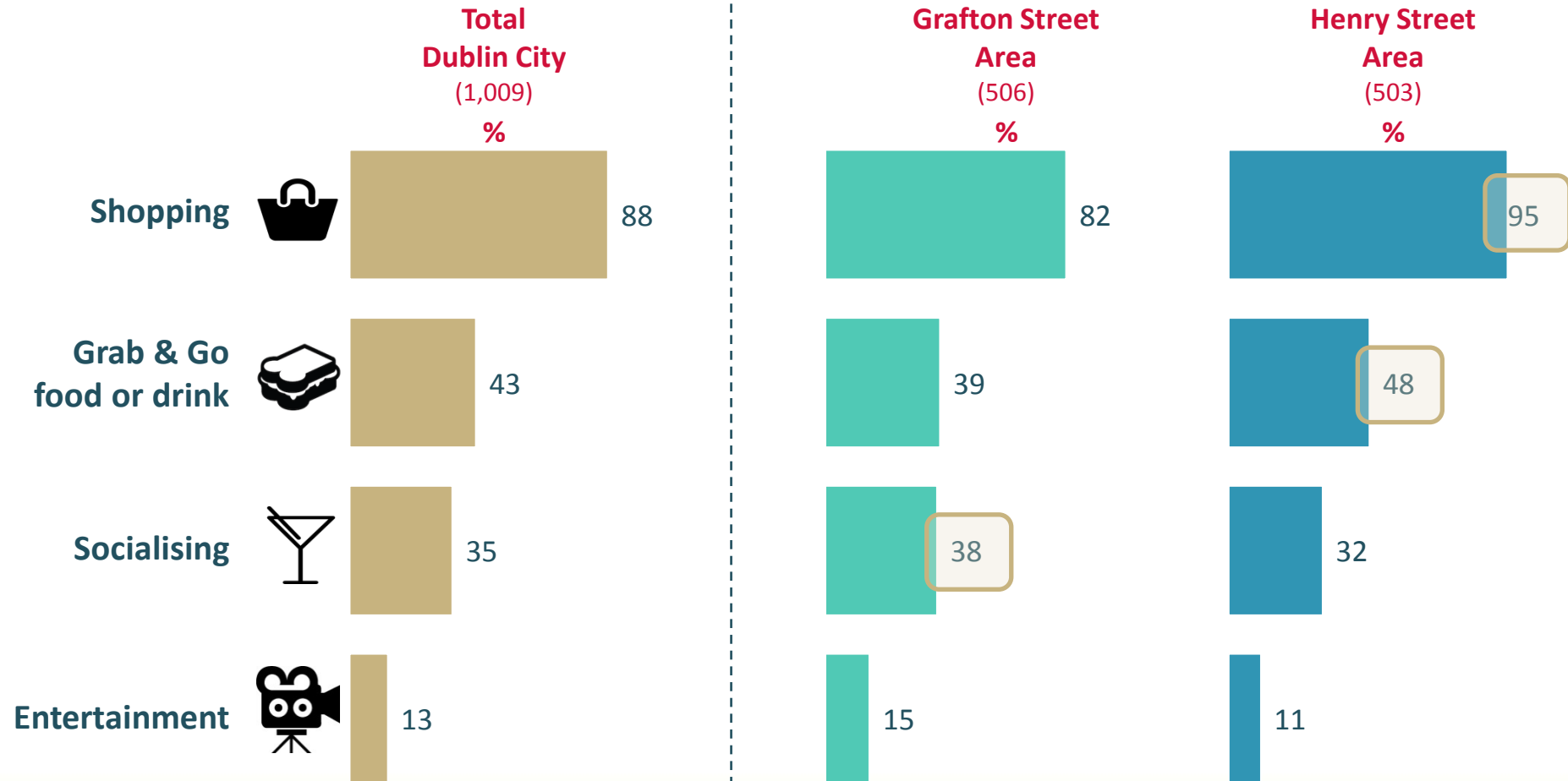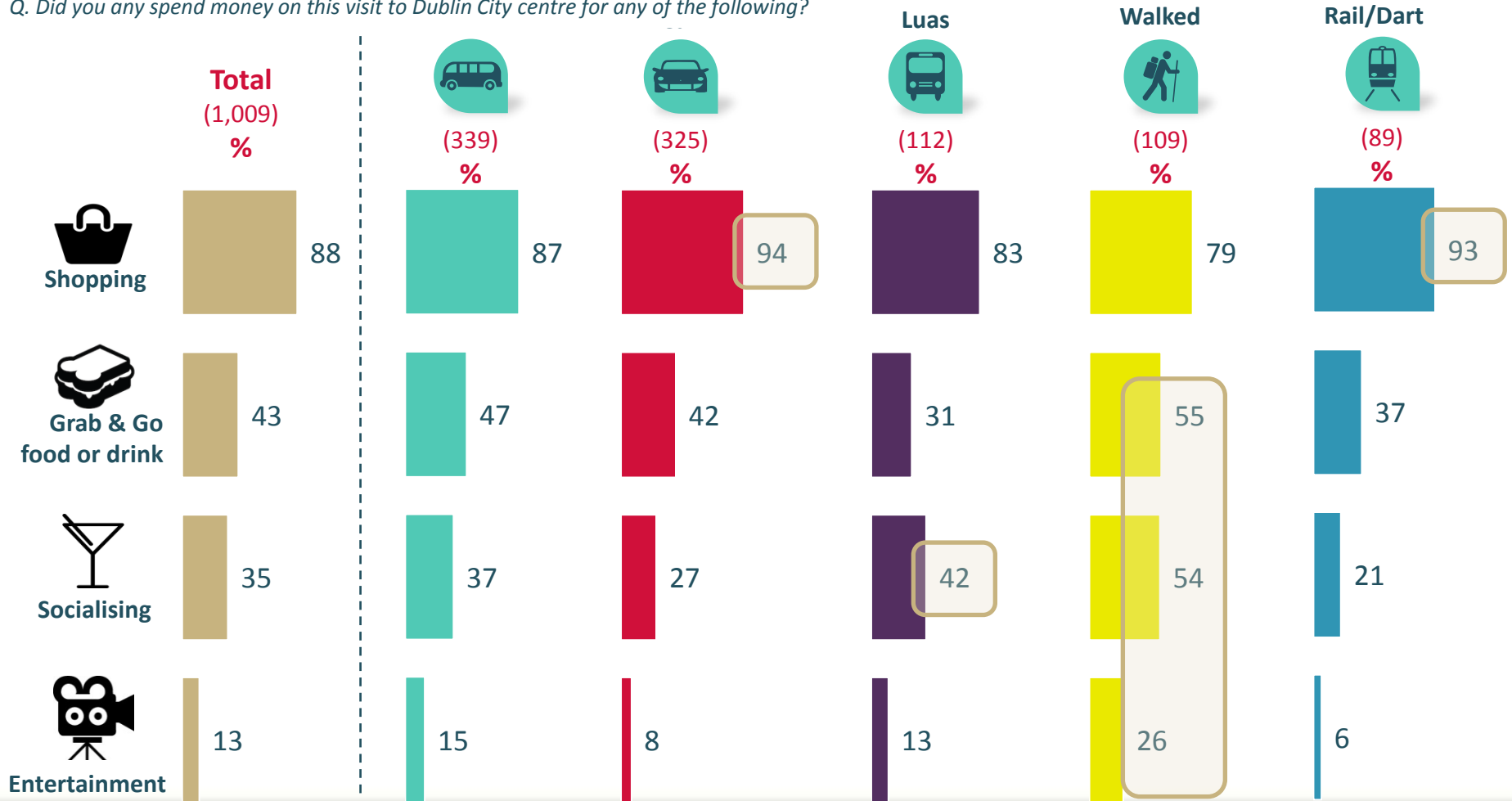
(Base: All 'Planned' Shoppers in Dublin City – 1,009)

*Q. Did you any spend money on this visit to Dublin City centre for any of the following?*

| | Total (1,009) % | 🚌 (339) % | 🚗 (325) % | Luas (112) % | Walked (109) % | Rail/Dart (89) % |
|---|---|---|---|---|---|---|
| 🛍️ Shopping | 88 | 87 | 94 | 83 | 79 | 93 |
| 🥪 Grab & Go food or drink | 43 | 47 | 42 | 31 | 55 | 37 |
| 🍸 Socialising | 35 | 37 | 27 | 42 | 54 | 21 |
| 🎥 Entertainment | 13 | 15 | 8 | 13 | 26 | 6 |

*Bicycle base too small to show n=26*

**Reason for trip varies depending on transport type. Car use is especially high for shopping, as is Rail/Dart. Walking is more likely when socialising or in the city for entertainment.**

*(Q.1)*

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# Purpose of Trip - Summary

1. Top reason for visiting the city today was for shopping at 88%. (Defined as the purchase of a goods or items of greater value than simply food or beverage – includes clothing, homeware, jewellery etc.).

2. Again there are slight difference in City location – Henry Street returns higher incidence of Shopping and Grab & Go. While Grafton street remains high for shopping, but over indexes on socialising, perhaps not surprising given the nature of restaurants and bars in this area.

3. Those travelling in via car today account for the highest incidence of shopping at 94%, compared to Bus which is slightly lower at 87%.

4. Other differences are evident among walkers, who are less likely to shop (perhaps due to having to carry bags) and higher incidence of socialising and entertainment (possibly the alcohol aspect).

**Spend**

# Actual Average Spend On Categories

(Base: All Planned shoppers in Dublin City who spent money in each category – 1,009)

*Q. Can you tell me roughly how much did you/ do you plan to spend IN TOTAL TODAY on this visit to Dublin City centre on each of the following categories?*

| | Total Dublin City (1,009) | Grafton Street Area (506) % | Henry Street Area (503) % |
|---|---|---|---|
| **Shopping** | €92 | €102 | €84 |
| **Grab & Go food or drink** | €17 | €18 | €17 |
| **Socialising** | €39 | €41 | €36 |
| **Entertainment** | €25 | €25 | €25 |

**Average spend by category shows show spend on shopping over twice that of socialising.  Grafton St shoppers spend 20% more than those in Henry St.**

*(Q.1)*

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25.

# Split of Spend On Categories among ALL VISITORS

(Base: All 'Planned' Shoppers in Dublin City – 1,009)

*Q. Can you tell me roughly how much did you/ do you plan to spend IN TOTAL TODAY on this visit to Dublin City centre on each of the following categories?*

**Total Dublin City**
(1,009)
%

**Grafton Street Area**
(506)
%

**Henry Street Area**
(503)
%

**Grab & Go food or drink**

**Socialising**

**Entertainment**

**Shopping** €81

€7

€14

€3

**Shopping** €83

€7

€16

€4

€79

€8

€11

€3
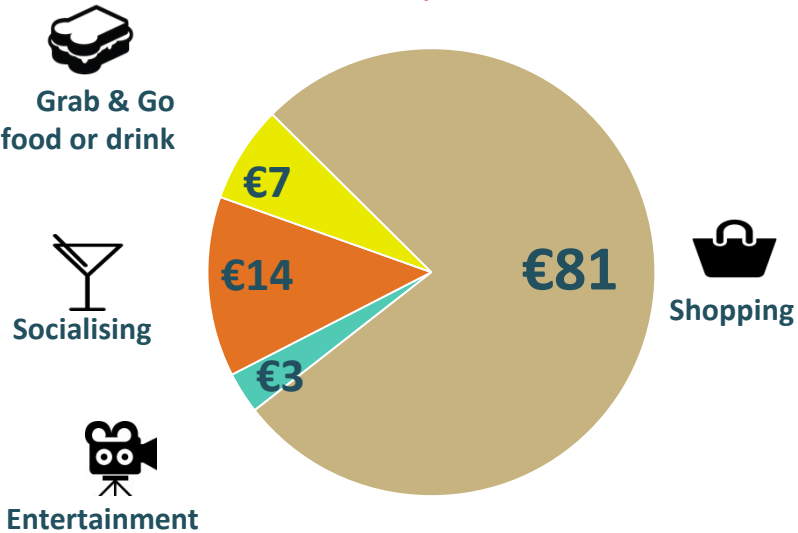
**Total Spend Today in City**

€105

€110

€101

*\* Averages calculated allocated a value of '0' to non-shoppers in each category*

**Not all people spend in all categories, so when we average spend across categories the average visitor spends slightly less, but the high proportion spent on shopping remain, as does the higher spend in Grafton St.**

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*(Q.1)*

26.

# Average Spend By Mode of Transport Used

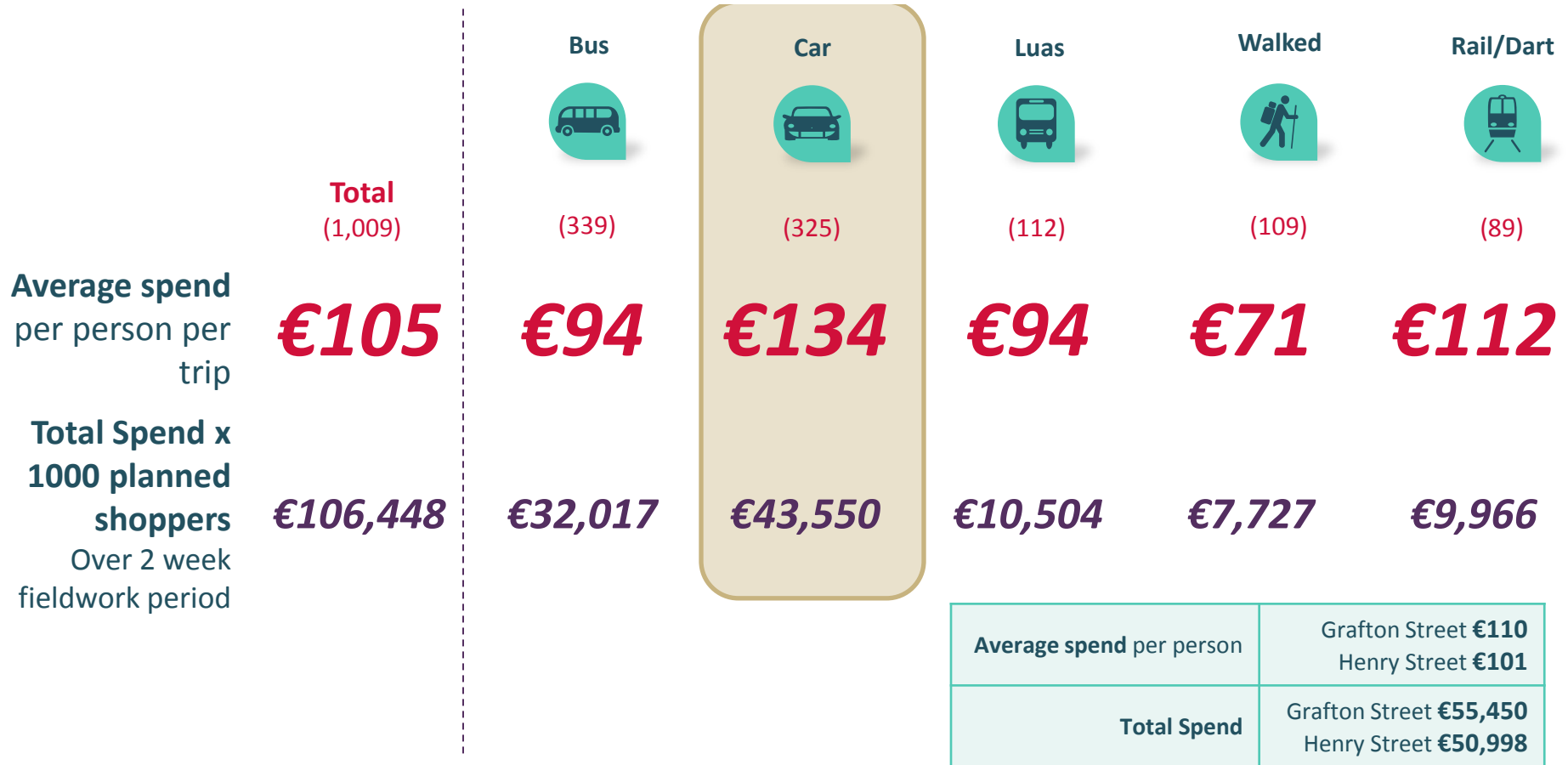(Base: All 'Planned' Shoppers in Dublin City – 1,009)

*Q. Can you tell me roughly how much did you/ do you plan to spend IN TOTAL TODAY on this visit to Dublin City centre on each of the following categories?*

| | **Total** (1,009) | **Bus** (339) | **Car** (325) | **Luas** (112) | **Walked** (109) | **Rail/Dart** (89) |
|---|---|---|---|---|---|---|
| **Average spend** per person per trip | **€105** | **€94** | **€134** | **€94** | **€71** | **€112** |
| **Total Spend x 1000 planned shoppers** Over 2 week fieldwork period | **€106,448** | **€32,017** | **€43,550** | **€10,504** | **€7,727** | **€9,966** |

| | |
|---|---|
| **Average spend** per person | Grafton Street **€110** Henry Street **€101** |
| **Total Spend** | Grafton Street **€55,450** Henry Street **€50,998** |

**Those travelling by car have the highest average spend among different transport users per person or 42% more per person than bus users. In terms of total spend, this converts to €11.5k or 35% more contribution to revenue than bus users.**

*\*Bicycle base too small to show n=26*

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*(Q.1)*

# Share of Spend in Town by Mode of Transport

(Base: All 'Planned' Shoppers in Dublin City – 1,009)

*Q. Can you tell me roughly how much did you/ do you plan to spend IN TOTAL TODAY on this visit to Dublin City centre on each of the following categories?*



Rail/Dart

Bicycle

Walked

Car

Luas

Bus

- Car: 41%
- Bus: 30%
- Luas: 10%
- Walked: 7%
- Rail/Dart: 9%
- Bicycle: 3%
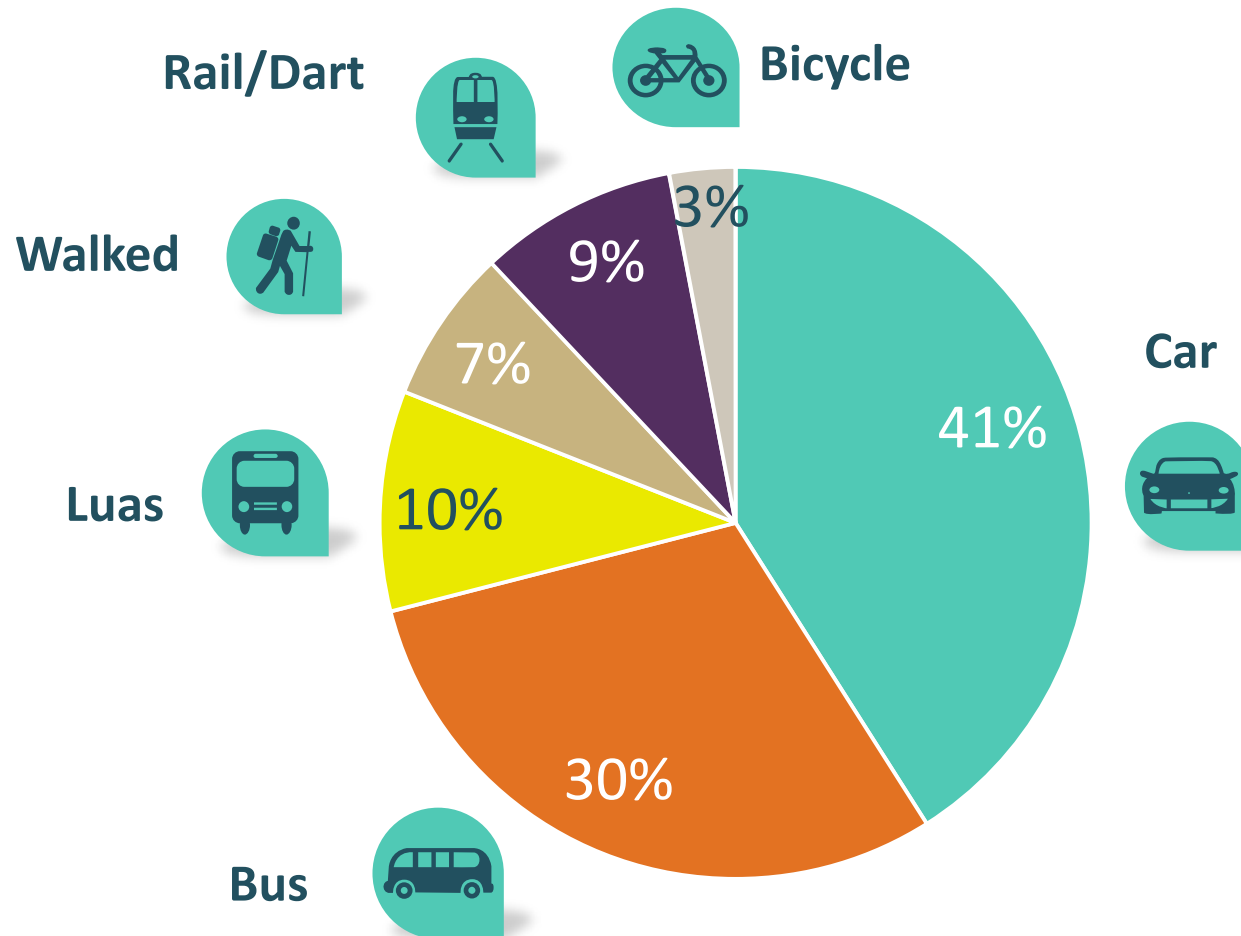
**Car accounts for the greatest share of spend – four times that of the Luas, or Rail/Dart user. The bus user account for the second highest share of spend.**

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# Average Spend On Categories – Day And Time Of Week

(Base: All 'Planned' Shoppers in Dublin City – 1,009)

*Q. Can you tell me roughly how much did you/ do you plan to spend IN TOTAL TODAY on this visit to Dublin City centre on each of the following categories?*

|  | **Total** (1,009) | **Total Weekday** (564) | **Total Weekend** (445) | **11am-2pm** (370) | **2-5pm** (491) | **5-8pm** (148) |
|---|---|---|---|---|---|---|
| **Average spend** per person | *€106* | *€96* | *€118* | *€105* | *€109* | *€95* |

**Average spend is highest at the Weekend, with later purchasing, after 5pm highlighting a lower average spend.**

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*(Q.1)*

# Spend - Summary

1. Shopping is the biggest spend category in Dublin city, and to an even greater degree among those shopping in the Grafton Street Area. Spend is generally slightly lower for all categories in the Henry Street area.

2. Average spend is higher among the car user than any other transport type user. Car users spend on average €134 per visit, which is €40 more than the bus user at €94.

3. In terms of the total spend car users spend on average 35% more than Bus users.

4. This converts to a 41% share of total spend among planned shoppers in the city centre for the car user, versus 30% for the bus user – highlighting the importance of car users to the economic viability of the city centre shopping district.
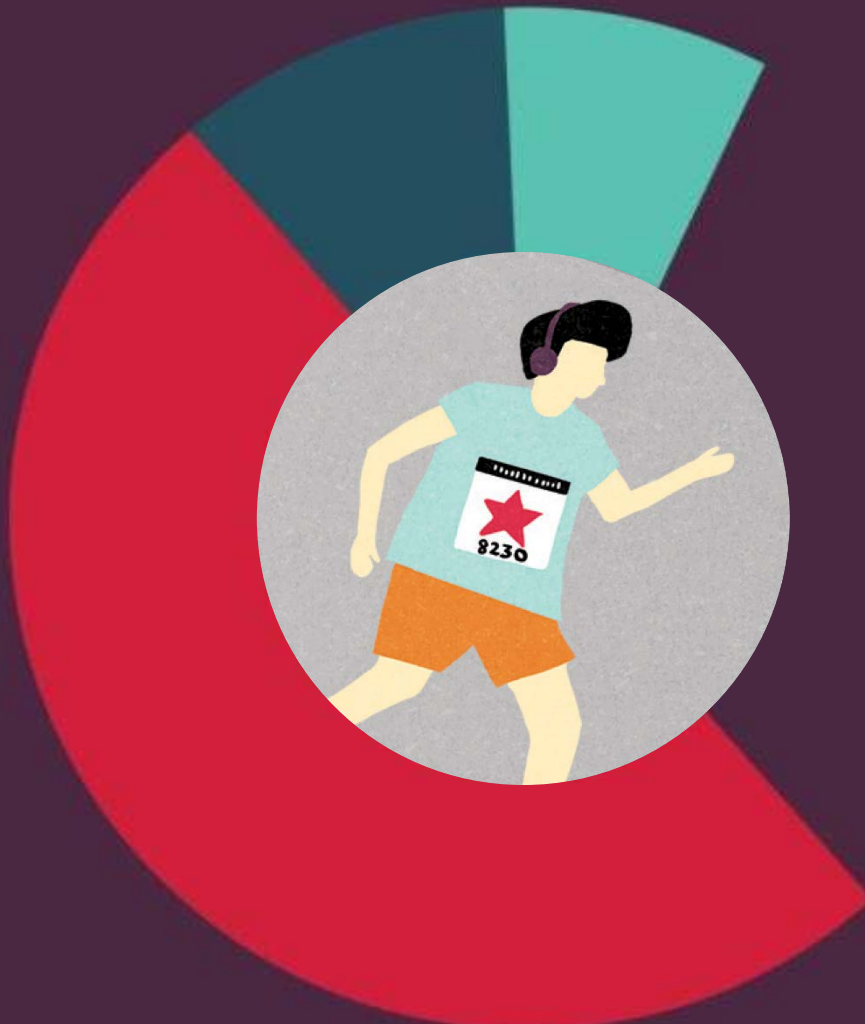
**Visits**

# Calculation of Total Spend Excludes Visits

/ While we asked respondent the number of visits to the City in the past 4 weeks, we have **NOT** included this in our calculation of spend.

/ Frequency of visit has already been taken into account as this survey was conducted among a random representative census of visitors to the City over a 2 week period.

/ This means more regular visitors to the City already have a higher chance of being interviewed in our sample than a less frequent visitor.

/ The spend captured in this survey is therefore representative of that time period as is, and does not require a multiplication of average spend by number of visits to capture total spend – this would effectively be double counting the spend amount.

**REDC**

# Total No. Of Visits Past 4 Weeks

(Base: All 'Planned' Shoppers in Dublin City – 1,009)

*Q. How many times have you visited the city centre in the past four weeks for each of these activities?*

| Average Visit | Grafton Street **10** Henry Street **10** | | | | | |
|---|---|---|---|---|---|---|

| | **Total** (1,009) | **Bus** (339) | **Car** (325) | **Luas** (112) | **Walked** (109) | **Rail/Dart** (89) |
|---|---|---|---|---|---|---|
| Average Visit | **10** | **11** | **7** | **9** | **20** | **7** |

| | **Total** (1,009) | **Total Weekday** (564) | **Total Weekend** (445) | **11am-2pm** (370) | **2-5pm** (491) | **5-8pm** (148) |
|---|---|---|---|---|---|---|
| Average Visit | **10** | **10** | **10** | **9** | **10** | **13** |

*Bicycle base too small to show n=26*

**The average planned shopper has visited the city centre 10 times in the past 4 weeks – significantly higher among those walking, while Car and Rail/Dart users are slightly lower at an average of 7.**

REDC

*(Q.4)*

33.

# Visits - Summary

1. Total average number of trips to the City for a similar purpose in the past 4 weeks is 10.

2. Visits among the car user is 7, while bus users are slightly higher at 11. Walkers account for the greatest number of visits at 20.

3. In terms of timing, visits between weekday and weekend are equal, while those visiting on this occasion during the later time of 5-8pm have the highest number of visits in the past 4 weeks at 13.

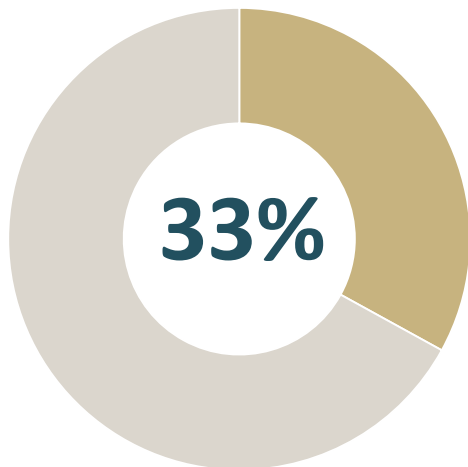# Attitudes Towards NTA's Traffic Management Proposal

# Awareness of NTA's Traffic Management Proposal

(Base: All 'Planned' Shoppers in Dublin City – 1,009)

*Q. Dublin City Council and the National Transport Authority have unveiled proposals to place a ban on private cars on parts of the north and south quays, and closing down city centre car parks and building a new facility at Heuston Station to discourage cars from entering the city centre; plus a complete ban on cars and taxis from College Green. Were you aware of these proposals before today?*
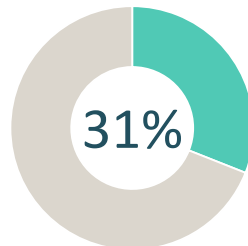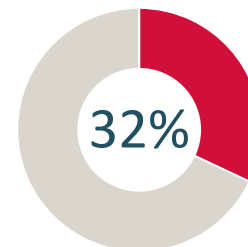
**Total Aware**

**Total**
(1,009)

**33%**

| Average Grafton Street | **36%** |
|---|---|
| Average Henry Street | **31%** |

**Bus**
(339)

**31%**

**Car**
(325)

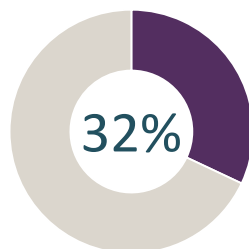**32%**

**Luas**
(112)

**32%**

**Walked**
(109)

**45%**

**Rail/Dart**
(89)

**37%**
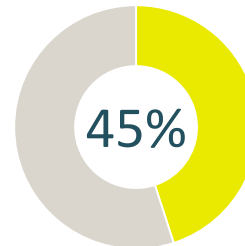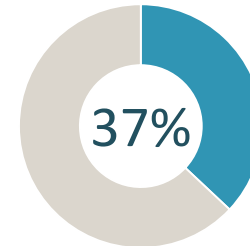
*Bicycle base too small to show n=26*

**1 in 3 are aware of the NTA's traffic management proposal for Dublin city centre – walkers are more aware than any other group while Bus and Car users are lowest.**
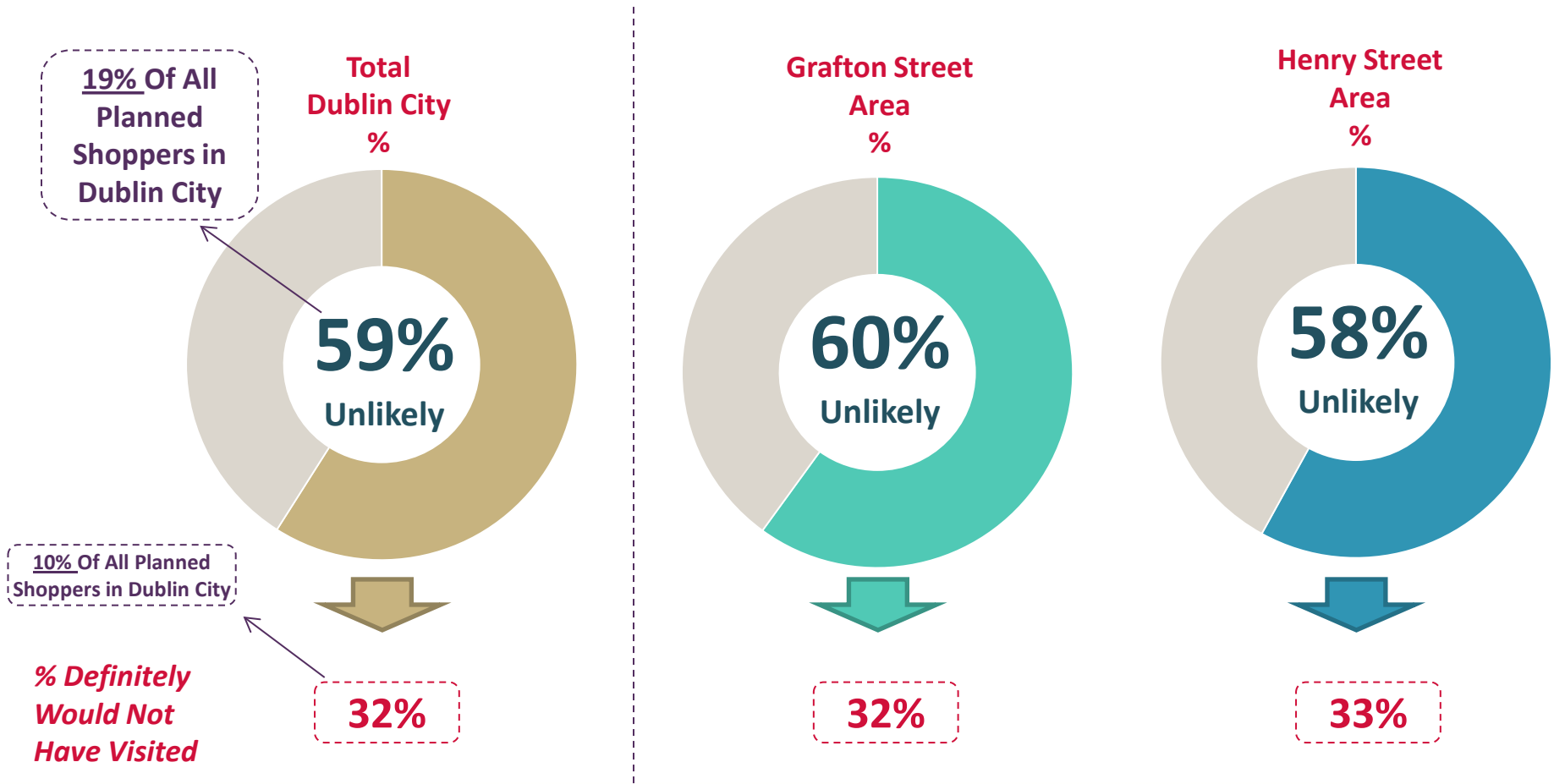
REDC

(Q.5)

# Likelihood To Have Visited City Centre Today If Car Was No Option

(base: All **Using Car** into City Centre Today – 325)

*Q. How likely, if at all, would you have been to visit the city centre today if you had not been able to drive into or park in town?*

**19% Of All Planned Shoppers in Dublin City**

### Total Dublin City %

**59%** Unlikely

**10% Of All Planned Shoppers in Dublin City**

*% Definitely Would Not Have Visited*

**32%**

### Grafton Street Area %

**60%** Unlikely

**32%**

### Henry Street Area %

**58%** Unlikely

**33%**

**6 in 10 car users claim they would not have come into Dublin city today if they could not take a car. This converts to 19% of all planned shoppers in Dublin City. A harsher measure is to look at definite, which is 1 in 3 car users, or 10% of all planned shoppers.**

*(Q.6)*

# Impact of Claimed Behaviour Change on City Centre Revenue

(Base: All 'Planned' Shoppers in Dublin City – 1,009)

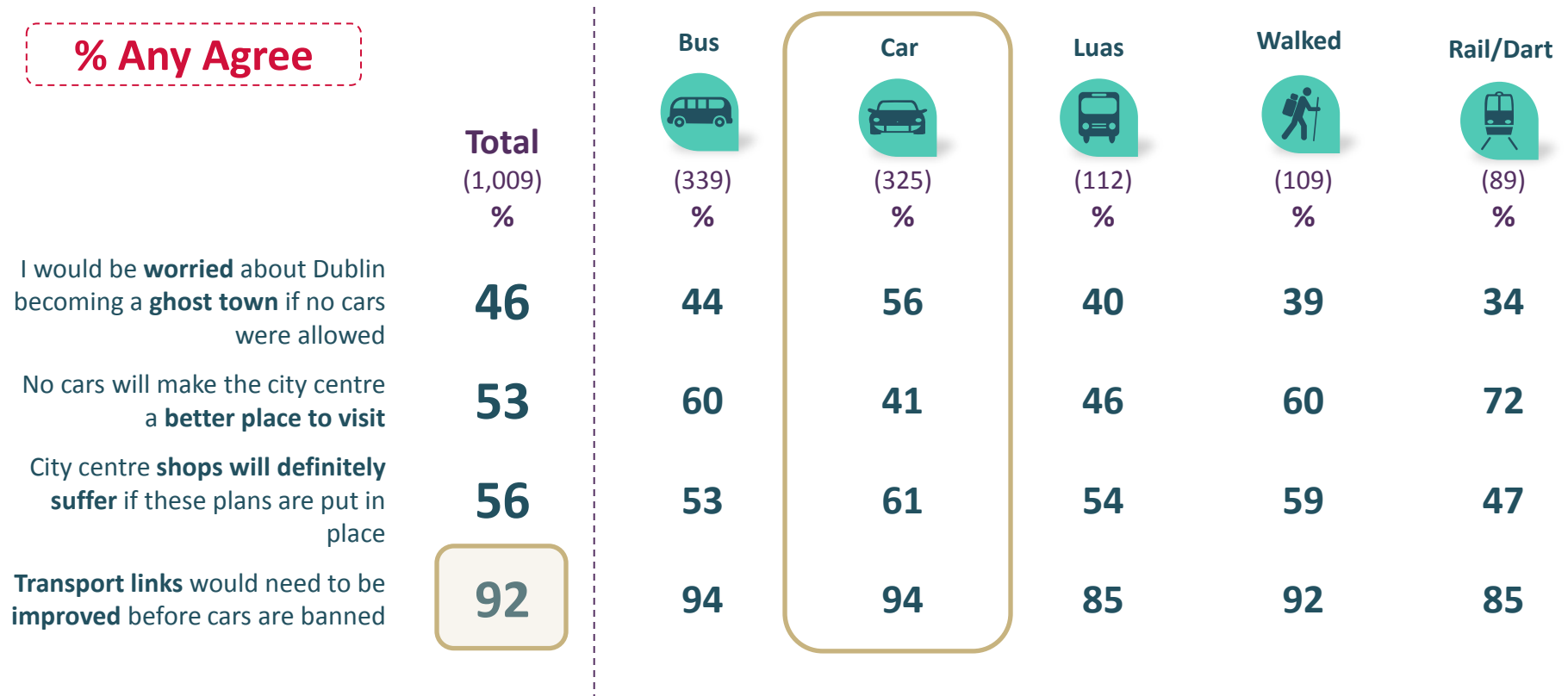| | Planned Shopper Revenue of 1000 visits | % Car Shoppers would not visit | Impact on Revenue assuming average spend per car shopper |
|---|---|---|---|
| Total CAR Revenue | €43,550 | 59% | -€25,695 |
| Total Revenue | €106,448 | | €80,753 |

Potential Impact

**-24%**

If all drivers who claim they would not visit the city centre follow through this could decrease overall spend in the city centre by at least 24%, before we take into account the fact that drivers on average bring more than one person per car.

# Attitudes Towards the NTA's Traffic Management Proposal

(Base: All 'Planned' Shoppers in Dublin City – 1,009)

*Q. Now I am going to read out some statements that other people have made about the traffic management proposals in Dublin City Centre. For each can you tell me to what extent you agree or disagree with that statement?*

**% Any Agree**

| | Total (1,009) % | Bus (339) % | Car (325) % | Luas (112) % | Walked (109) % | Rail/Dart (89) % |
|---|---|---|---|---|---|---|
| I would be **worried** about Dublin becoming a **ghost town** if no cars were allowed | 46 | 44 | 56 | 40 | 39 | 34 |
| No cars will make the city centre a **better place to visit** | 53 | 60 | 41 | 46 | 60 | 72 |
| City centre **shops will definitely suffer** if these plans are put in place | 56 | 53 | 61 | 54 | 59 | 47 |
| **Transport links** would need to be **improved** before cars are banned | 92 | 94 | 94 | 85 | 92 | 85 |

*Bicycle base too small to show n=26*

**Improved transport links are seen as essential by most transport users. Car users are less positively disposed to the proposal, while the Luas and Rail/Dart user appear less impacted.**

*(Q.7)*

**REDC**

39.

# Attitudes Towards the NTA's Traffic Management Proposal

(Base: All 'Planned' Shoppers in Dublin City – 1,009)

*Q. Now I am going to read out some statements that other people have made about the traffic management proposals in Dublin City Centre. For each can you tell me to what extent you agree or disagree with that statement?*

**% Any Agree**

|  | Total (1,009) % | Grafton Street (506) % | Henry Street (503) % |
|---|---|---|---|
| I would be **worried** about Dublin becoming a **ghost town** if no car were allowed | **46** | 45 | **48** |
| No cars will make the city centre a **better place to visit** | **53** | 58 | **48** |
| City centre **shops will definitely suffer** if these plans are put in place | **56** | 56 | 55 |
| **Transport links** would need to be **improved** before cars are banned | **92** | 91 | **93** |

**Attitudes towards the proposal are relatively similar both sides of the city, there is a higher sense that no cars will make the city centre a better place to visit among Grafton Street shoppers.**

**REDC**

*(Q.7)*

# Attitudes Towards the NTA's Traffic Management Proposal - Summary

1. 1 in 3 claim to be aware of the NTA's traffic management proposal in Dublin's city centre – however, depending on the transport type, awareness varies. Walkers have highest levels of awareness at 45%. However, arguably those most effected, the car user is slightly lower at 32%.

2. The potential impact of introducing such an initiative is evident as almost 6 in 10 car users (or 19% of all planned shoppers) claim they would be unlikely to have come into the city if this had been in place.

3. The impact of 59% of car users suggesting they would not travel is a 24% fall in overall "Planned Shopper" revenue.

4. There is strong agreement that if such an initiative is put in place, transport links would need to be improved – equally so in both areas of the city.

5. Just over half of all shoppers agree that no cars would make the city a better place to visit (primarily the non car user), while there are equal levels of concern over issues such the city becoming a ghost town and a belief that shops in the city will suffer.

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# THANK YOU

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