



Údarás
Náisiúnta Iompair
National Transport Authority

Dublin Transport Study

What people think of the proposed plans in the Dublin City Centre Transport Study
Final report July 2016



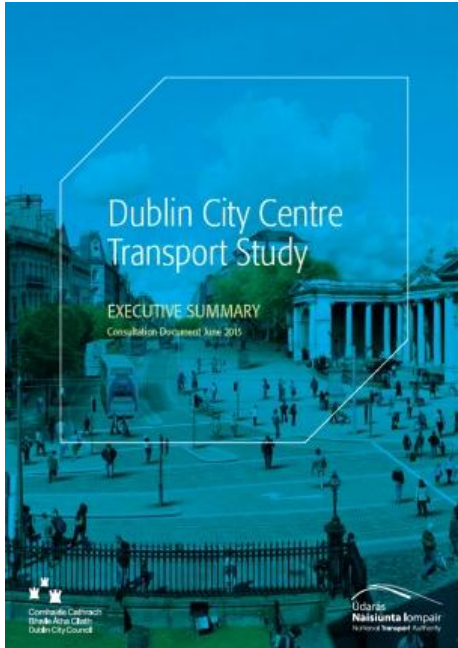
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1. Executive summary

Background and key objectives



The National Transport Authority and Dublin City Council have published a set of proposals to enhance overall movement in Dublin City Centre and to improve the attractiveness of the City Centre for shoppers, tourists, workers and residents.

The proposals include:

- creation of a new civic space and pedestrian plaza at College Green;
- LUAS Cross City, extending the Green Line and creating an interchange with the Red Line;
- introduction of a high-capacity Bus Rapid Transit (BRT) system;
- developing a high-quality cycle network in the city centre; and
- rationalisation of car parking access/egress arrangements.

What do Dubliners and visitors to the city think of these proposals?

How will these proposals affect the frequency people travel to the city centre for shopping purposes?

Research objectives

What do Dubliners and visitors to the city think of these proposals?

How would these proposals affect the frequency people travel to the city centre for shopping purposes?

Methodology

Six focus groups (n=48) with regular visitors to Dublin city centre

On-street interviews (n=400) with shoppers in the city centre

In-home interviews (n=517) with people living in Dublin

Key questions

- How do they usually travel to the city centre (private and/or public transport)?
- How often do they visit the city centre and why do they visit?
- What do they think of the proposals overall?
- What do they like/dislike about the proposals?
- If the proposals were to go ahead, will they visit the city centre more or less frequently?

In summary, what did the research tell us?



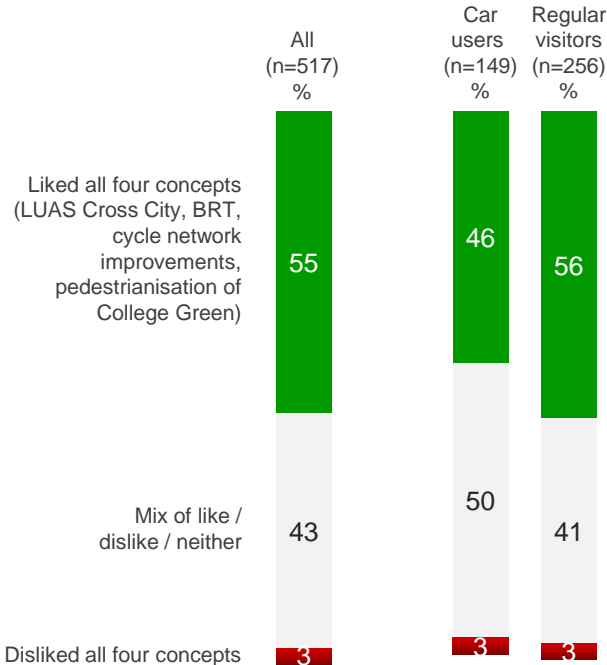
Overall, there is good support for the proposals, with the majority of people believing they will have a positive impact on the city centre, making it more accessible and attracting more visitors. The proposals are also likely to result in more frequent visits to the city centre.



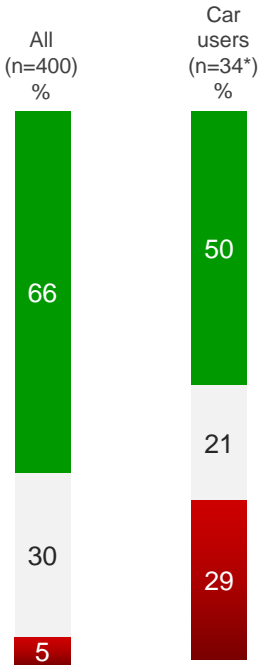
Only a small proportion expressed dislike of the proposals, with dislike higher amongst private transport (car) users. Concerns were also expressed about the disruption to the city centre during the construction phase and how long it would take to complete the proposals.

What did people think of the proposals?

**Dublin Region Study
(in-home surveys)**



**Dublin City Centre Study
(on-street surveys)**



* LOW BASE

Overall, the majority of people were in favour of the proposals

Both the in-home and on-street surveys revealed a majority of shoppers and visitors to the city centre in favour of the proposals, although car users were somewhat less supportive.

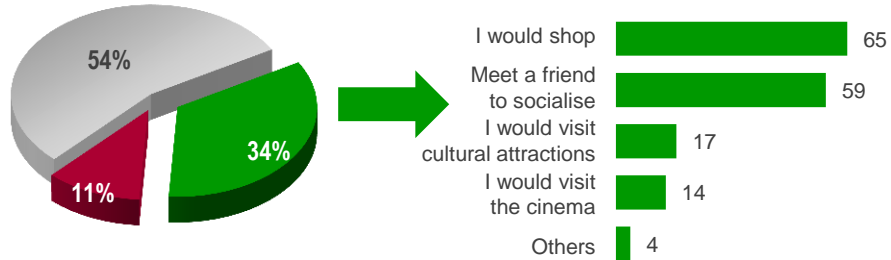
The vast majority believed the proposals would have a positive impact on the city centre, especially amongst young people, people with children and ABC1s in the in-home surveys and amongst cyclists, LUAS users and pedestrians in the on-street surveys.

Participants in the focus groups believed the proposed plans would make the city centre more accessible to public transport, pedestrians and cyclists and that they would attract more people to the area. It was also suggested that the proposals would be good for tourism and visiting tourists.

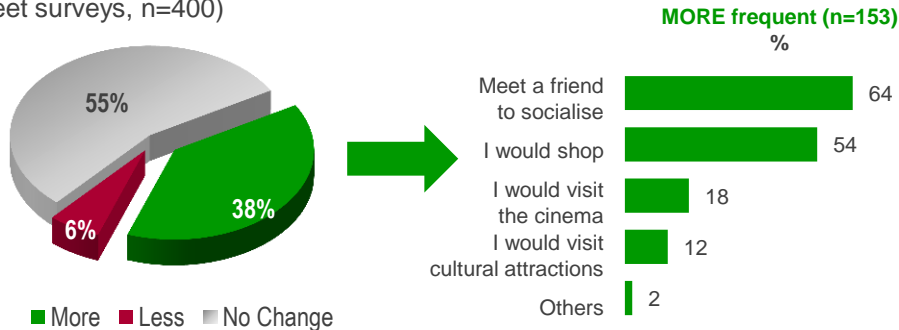
Would the proposals make people visit the city more often?

Likelihood to visit Dublin City Centre

Dublin Region Study
(in-home surveys, n=517)



Dublin City Centre Study
(on-street surveys, n=400)



The proposals would result in more frequent visits to the city centre, mainly for shopping and socialising

The majority of participants in the focus groups could see themselves coming into the city centre more frequently, especially to socialise in the new pedestrianised areas to people watch and soak up the atmosphere.

This was further supported by the findings from the surveys, with over one-third in each the in-home and on-street surveys stating they would visit the city more often. Young people were more likely to visit more frequently, while car-users were more likely to visit less frequently.

What concerns did people have about the proposals?

Given that an overall majority were supportive of the proposals, only a relatively small minority voiced concerns in relation to the proposals. Car users, who were also mainly supportive of the proposals, were somewhat more likely to raise concerns.

These concerns were explored in greater detail in the focus groups, with specific reference to the following:

With the increase in transport connections, will there be sufficient capacity to carry passengers?

Will travel on public transport become more expensive?

Concerns about distance to walk and carrying bags when shopping

Private transport users will need to learn new one-way routes around the city

Concerns specifically amongst older female drivers of being more restricted

How long will shoppers have to wait for public transport?

Will the proposals be delivered within a reasonable timeframe?



Effective communication during the construction and implementation phases of the proposals is critical

Plans need to be communicated **clearly** and **simply** and should highlight:

- Integrated system
- Removing congestion
- Frictionless experience



Plans need to be backed up with **assurance** to allay scepticism, with follow through on the following:

- Reliability
- Increased frequency
- Time it will take
- Fair price of connection and parking



Communications should be **less technical, clear** so that consumers can visualise the changes. They should also show an **understanding of consumer issues** and a **preferable solution** to what they are doing at present.

It is recommended the NTA monitors and evaluates the effectiveness of communications on an on-going basis, to ensure the manner in which they are delivered and the content both meets the expectations and needs of visitors to the city centre.



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2. Background and methodology

- **The National Transport Authority (NTA) and Dublin City Council have put forward the implementation of the ‘Dublin City Centre Transport Study’. As part of a full analysis of potential retail impact of implementing the series of proposals there is a need to better understand the likely consumer reactions to the proposals.**
- **This research has been commissioned to:**
 - obtain a better understanding of current consumer perceptions/behaviour of using public transport and triggers/ barriers to use;
 - gain feedback from Dublin residents and visitors to the city centre on their reactions to the proposed concepts and likely impact of the concepts on people’s propensity to visit the city centre; and
 - explore the thoughts and opinions of public transport / car users towards the various proposed traffic related interventions.
- **Methodology:**
 - six 1.5 hour **focus groups** (n=48 participants in total) conducted with a mix of public transport users and private car users, as well as a mix across socio-economic groups, age groups and location (north-side / south-side) (6th/7th April 2016);
 - n=400 **on-street face-to-face interviews** with shoppers in the city centre (excluding tourists and non-spending workers), conducted at Grafton Street, Henry Street and College Green from (7th to 23rd May 2016); and
 - n=517 **in-home face to face interviews** with Dublin residents (including Bray), conducted at respondents’ homes (10th to 31st May 2016)

Key areas of interest from the Dublin City Centre Transport Study



Pedestrianisation: at the centre of the concept is the pedestrianisation around College Green, along with Suffolk St and the top part of St Stephen's Green North. The secondary part of this concept is to make footpaths wider in some areas such as Westmoreland Street and D'Olier Street, to make pedestrian movement easier, safer and more comfortable. This will restrict transport in this area.

Bus: the NTA is working on improving bus services to provide additional capacity, more services and faster journey times for bus passengers. This will mean additional bus vehicles and assigning additional road space to bus use. Transfers between buses, trams and DART will be made easier and less costly. Better information and the use of technology will lead to decreased waiting times. In some instances these changes will restrict the use of the road by other traffic.



LUAS: work is currently underway on Luas Cross City, which connects the existing Red and Green Luas lines. This part of the plan, giving additional travel options and more Luas services, is designed to allow more people to travel into the heart of the City Centre by Luas.

Cycling: Dublin City Council and the NTA are planning to increase bicycle use by providing safer cycle lanes where the cyclist is separated from other vehicles. They are also looking to implement reduced speed limits on certain routes to encourage more people to cycle into and around Dublin city centre.





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3. Current modes of travel to the City Centre

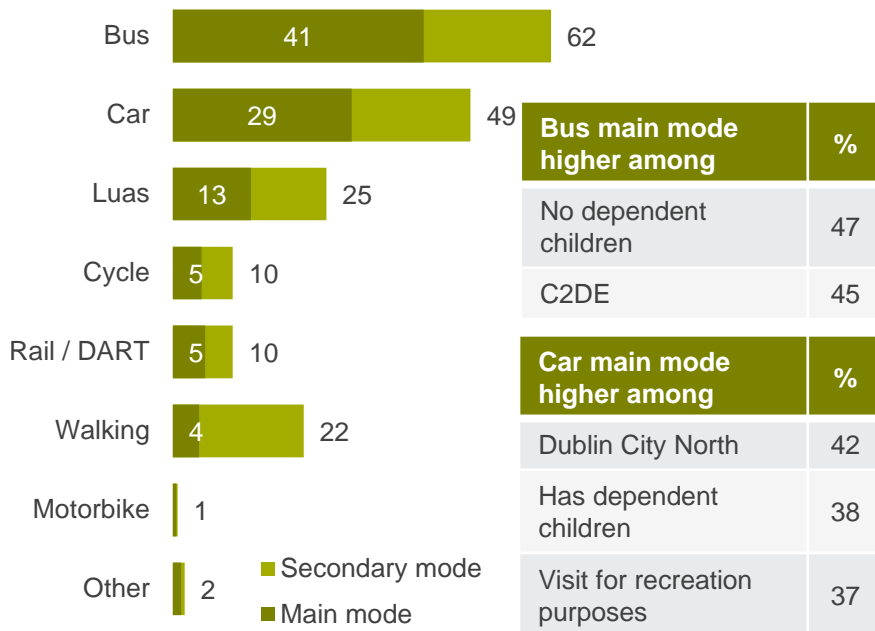
Mode of Transport: bus was the most popular form of transport for travelling to the City Centre

Dublin Region Study

(in-home surveys)

All who visit Dublin City Centre n=506

%

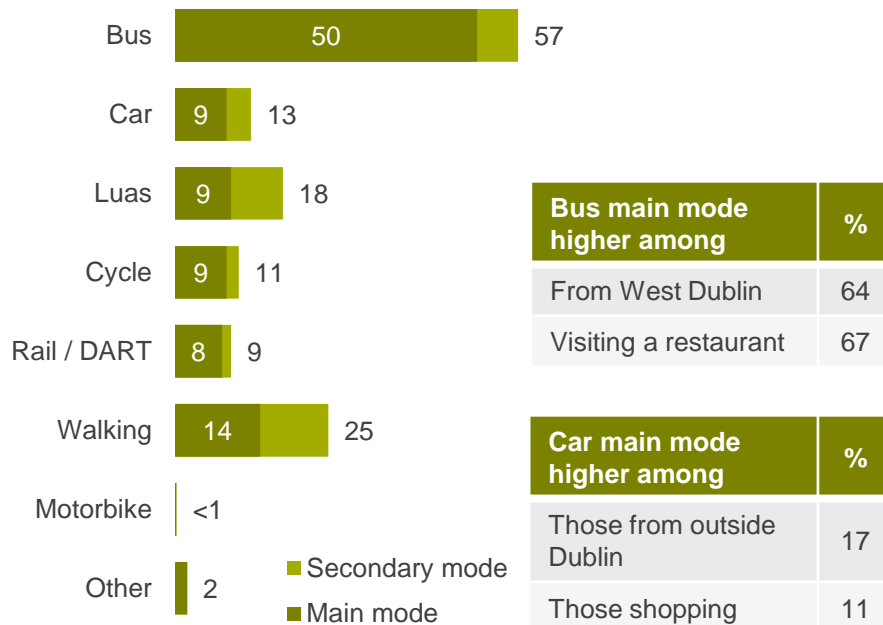


Dublin City Centre Study

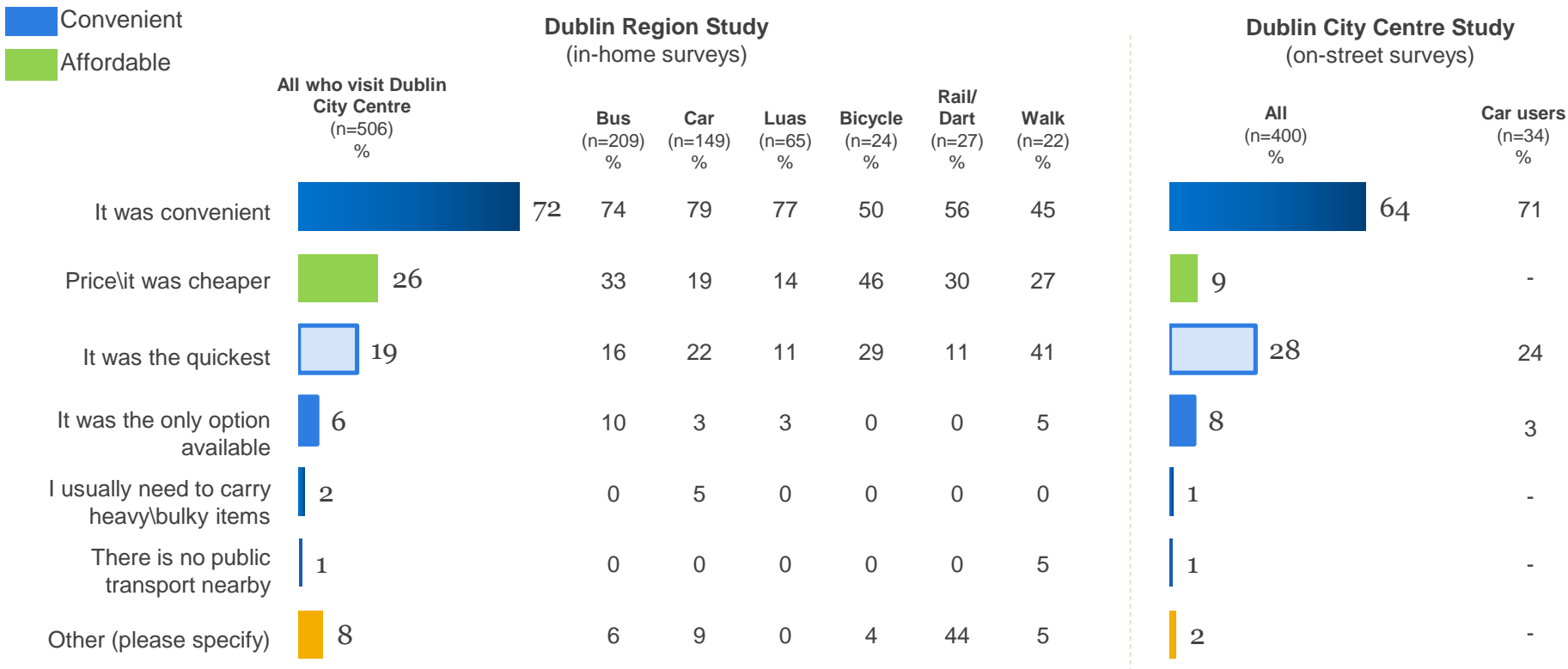
(on-street surveys)

All n=400

%



Reason for Choosing Mode of Transport: **convenience was the main reason for selecting a mode of transport into the City Centre**



Differences between drivers and public transport users



Drivers ...

- want convenience
- are impatient
- like the freedom of choosing their own schedule
- prefer to use the car when shopping or with the kids



Public transport users ...

- are younger, working in the city, would have a Leap Card
- tend to be more price sensitive
- are more aware of cost saving benefits of public transport
- are more in-sync with available technologies such as travel planner and Apps

Perceptions of public transport



Reliability



Expensive to use more
than one mode of
transport



Frequency

- Visitors to the city centre continue to have **some concerns** about the public transport system
- At times they can be fed up with the current offering due to a number of **frustrations**



Capacity



Connection/
Integration



Lack of bus corridors



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4. Current reasons for visiting the City Centre

For shopping ...

- Consumers gravitate towards certain **areas**;
 - South side:** Grafton Street, South William Street, Temple Bar
 - North side:** Jervis Shopping Centre, Henry Street, O'Connell Street
- Certain shops are **destinations** e.g. Arnotts, Brown Thomas – to buy specific products

For entertainment ...

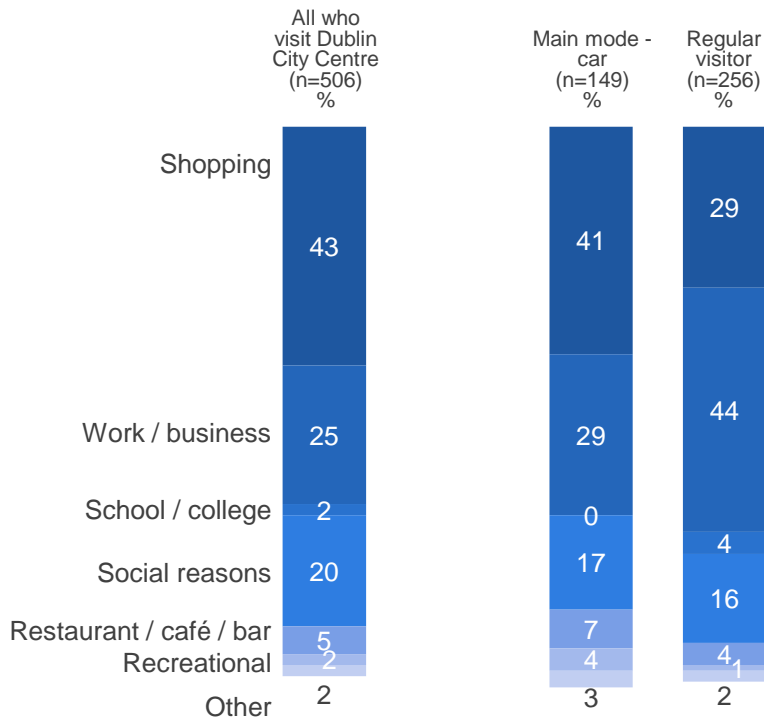
- Consumers come into town to socialise

For occasions ...

- **After work**
- At **weekends**
- Right after **pay day** when they have more disposable income
- Men are more likely to go into town with a **specific purpose** for shopping trips (in and out mentality)

Main purpose of your last trip to the city centre: shopping and work / business were the most commonly cited reasons for visiting the city centre

**Dublin Region Study
(in-home surveys)**

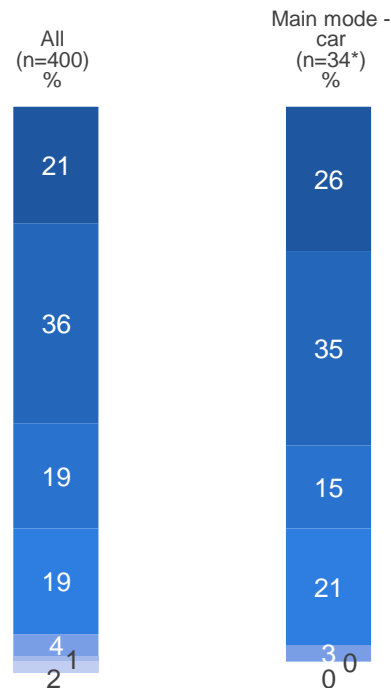


Shopping higher among	%
Luas users	62
Bus users	46

Work / business higher among	%
Walking	45
Bicycle users	42

Social reasons higher among	%
Males	28
Bicycle users	25

**Dublin City Centre Study
(on-street surveys)**



Shopping higher among	%
Car users	26
Females	25

Work / business higher among	%
Those with children	44
North Dublin	40

Social reasons higher among	%
Those visiting for 2-3 hours	92
Females	23

* LOW BASE
n<80

Main reasons for **enjoying** the city centre offering

Find all in town – it's not one shop and not the other, like in Dundrum no Dunnes but there is a Penney's



Browsability of town



Lots of variety ; small, unique shops & chains



Great place to meet up



Ability to find new places



Revel in the open air

I would normally be meeting someone for lunch because a lot of my friends are scattered everywhere, so town is a central point for everyone so I will always meet up in there.



Different feel - buzz



More spread out, sense of space



Can walk everywhere



Like the clientele

every other weekend there's a new restaurant or bar

Main reasons for **avoiding** the city centre

- Heavy traffic into the city centre, increasing the time it takes to get there and the hassle of navigating through the streets
- Expensive parking – there is no incentive to shop



Crowds



Traffic



Expensive parking



Weather



Too spread out



Security issues



Anti-social behaviour



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5. Reactions to concepts

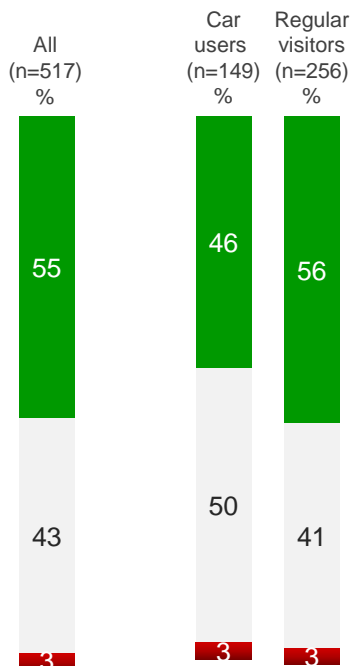
Consumers see the proposed plans as much needed improvements to the current City Centre situation



**More in line with other metropolitan cities
and very much welcomed initiative**

Overall reaction to concepts: a majority of shoppers and visitors to the City Centre were in favour of the proposals, although car users were somewhat less supportive.

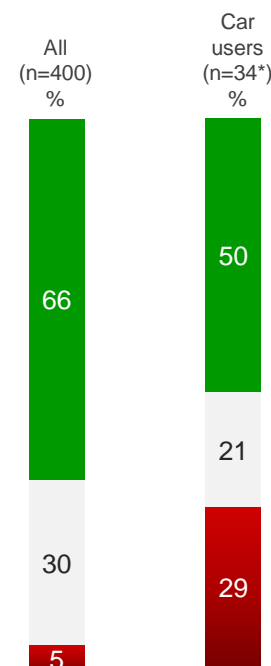
Dublin Region Study (in-home surveys)



Liked all higher among	%
Dublin Belgard*	92
Luas (main mode)*	69
Attending school / college / other education*	64
Cyclists*	63
Rail / DART (main mode)*	63
18-34	62

Disliked all higher among	%
Luas (main mode)*	8
Dublin City South	6
Visit 1-3 times per month	6

Dublin City Centre Study (on-street surveys)



Liked all higher among	%
Luas (main mode)*	81
C2DEF	74
Rail / DART*	71
Shopping	70
Walking (main mode)*	70

Disliked all higher among	%
Car (main mode)*	21
Paid for parking*	19
C2DEF	12

* LOW BASE
n<80

Bus proposal

Dublin Region
(in-home)
n=517
%

Dublin City Centre
(on-street)
n=400
%



Comments from focus group participants:

The big advantage of that is, it's very interchangeable because all the lines are linked.

I think the image (of the Swift bus) doesn't really tell, it's like look at this, it's a new bus, aw okay, but that (the map) tells you exactly how it's going to affect you as an individual

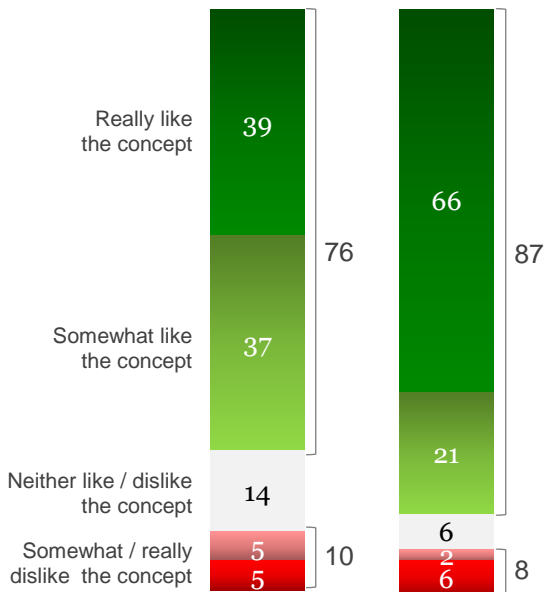
how would my new route look like now?

Overall reaction from the focus groups

- Overall positive response – will be good for Dublin City Centre, with shorter waiting times and everything is linked (good central interchanges)
- Map is a bit overwhelming – a lot of information to digest – perhaps make it easier like the lines on a tube map

Concerns expressed by focus group participants

- Need more frequent buses from the suburbs (unpopular routes) and bring them closer to the city centre then might have to connect
- Need to take into consideration people with disabilities and buggies – have more space for them



Luas Cross City proposal

Comments from focus group participants:

As long as they're regular enough, I don't mind, I can't stand waiting, I'm impatient

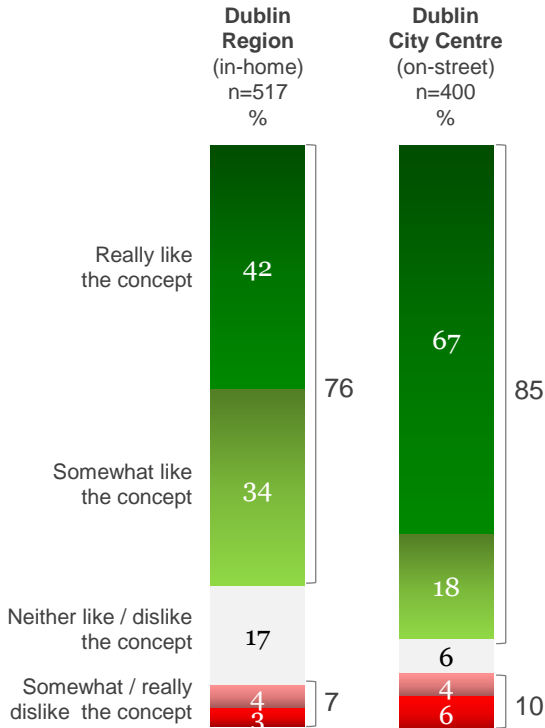


Overall reaction from the focus groups

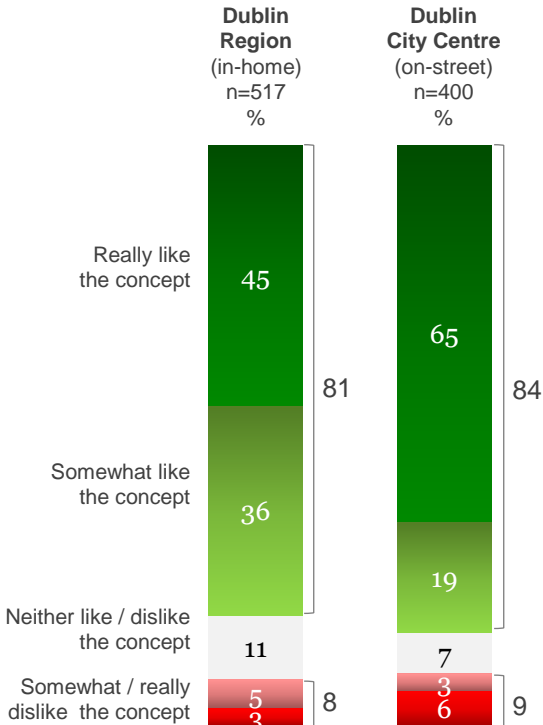
- Very enthusiastic response to Luas Cross City and people can't wait for the works to be completed
- They liked the map visual and that the north side was now connected

Concerns expressed by focus group participants

- Security needs to be increased if certain lines will be connected – associated with anti-social behaviour (drug addicts and juvenile delinquents)
- Will there be enough capacity?
- Frequency needs to be increased – associated with anti-social behaviour (drug addicts and juvenile delinquents)
- Would like if Luas catered for cyclists – carriage to put bikes (would encourage more people to use especially if live further away from Luas line will cycle to Luas stop to get on with bike)



Cycling proposal



Overall reaction from the focus groups

- Feel it will be safer for both drivers and cyclists
- See how this has worked in other European cities
- Idea of contra flow lanes was important – easier access
- Think segregated pathways are useful

Concerns expressed by focus group participants

- How will the storage system work? This needs to be secure and monitored
- Safety for cyclists is important



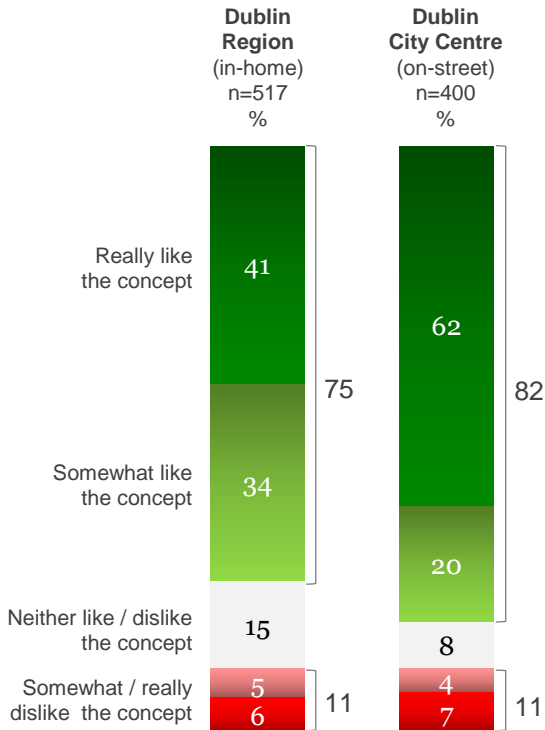
Comments from focus group participants:

the better segregated they are and the more set up they are, you're going to get more people using them

a big thing in Dublin at the moments, is bikes getting nicked.

If they're going to upgrade any bus system in Dublin is to bring in the accessibility to carry bikes like. It connects people who live that 20-25 minutes, 30 minutes bracket away from the bus stop, in to this and as well if you're going to make all this area pedestrianised, and like you can actually cycle through that, I think that would suit a lot of people and would open up the idea of people actually cycling into town a lot more.

Pedestrianisation proposal



Overall reaction from the focus groups

- Very positive response, with more central space for tourists and commuters
- Reminds them of other European cities and their open squares
- Can see this being a meeting spot
- Good for tourists
- Will reduce people congestion
- See it as an opportunity for an open air market

Concerns expressed by focus group participants

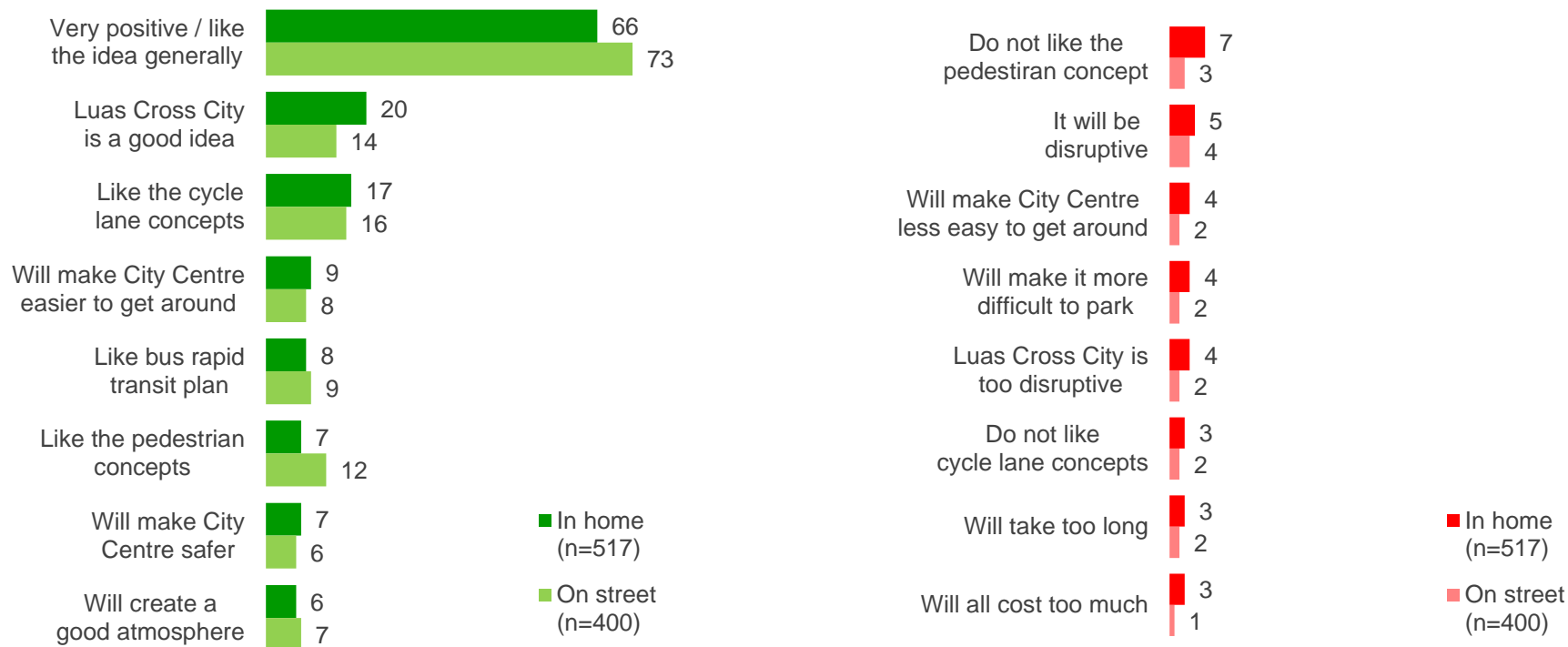
- Looks empty; add some benches, greenery to create ambience



Comments from focus group participants:

I know a lot of the squares in Europe, there'd be lots of coffee shops and restaurants and parks around them, but if there was nothing there, if it stays as it is, I don't know what the measurement was, but they'd have to kind of change the surround as well

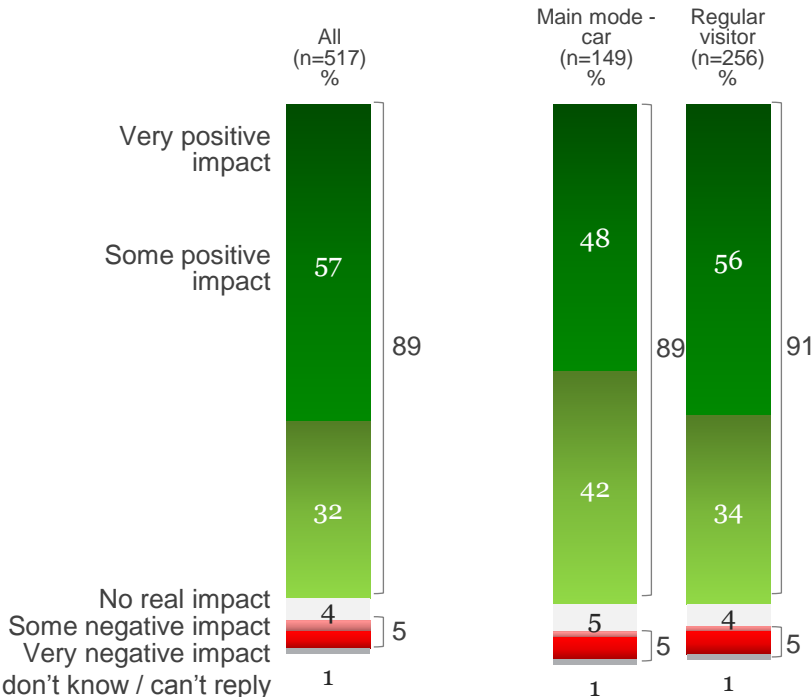
Overall impression of concepts: Generally positive feedback, some of the limited negative feedback towards the concepts were around the pedestrianisation concept and the disruptive impact



Impact on Dublin City Centre: Overall very positive feedback towards the impact these concepts would have on Dublin's city centre, although the proportion of car users in the on-street survey that disliked the concepts (21%) was notably higher relative to all on-street respondents that disliked them (8%)

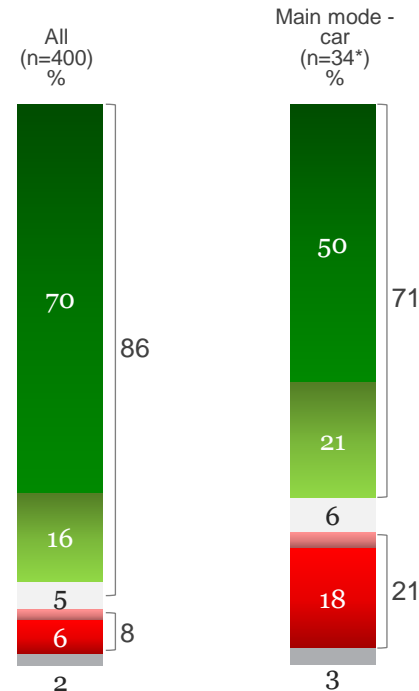
Dublin Region Study (in-home surveys)

Dublin City Centre Study (on-street surveys)



Positive higher among	%
18-34	95
ABC1	94
Dependent children	93

Negative higher among	%
Access to free parking in City Centre	11
Rail/DART (main mode)	7



Positive higher among	%
Pedestrians	96
Luas (main mode)	92
Cyclists	91

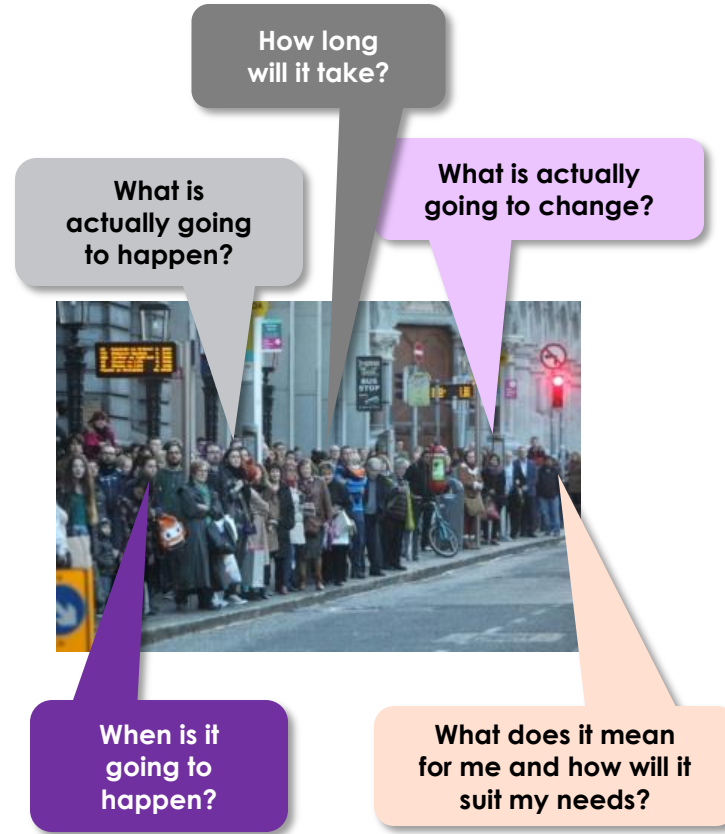
Negative higher among	%
Car (main mode)	21
Dublin West	18

* LOW BASE
n<80

Exploring people's concerns about the proposed plans in more depth, many were sceptical about the actual follow through

The focus group discussions allowed for a more detailed exploration of people's concerns about the proposed plans. The key issues highlighted during the discussions included:

- With the **increase** in **transport connections** that the **capacity** to carry passengers will be **insufficient**.
- Shoppers are not willing to **wait extended periods** of time for public transport. An accepted time would be within 10 minutes with a fast direct journey to the city.
- Feel **more restricted** (especially older female drivers).
- Without the car, having the hassle of **lugging shopping bags** around.
- **Don't like change** and **having to learn** new one way routes around the city.
- **Concerns** over **future public transport prices**, amid fears that exclusive **dependence** upon buses or trains would ultimately lead to **higher prices**.





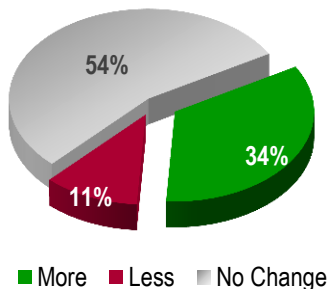
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6. Impact of proposals on propensity to visit the City Centre

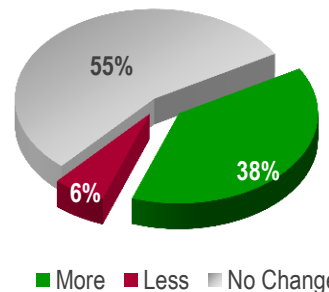
Likelihood to visit the City Centre: at least one-in-three said they would visit the City Centre more frequently, while no more than 11% said they would visit less frequently

Dublin Region Study (in-home surveys, n=517)

More frequently – higher among	%
Bray*	75
Dublin Belgard*	67
Walking*	45
Rail / DART (main mode)*	44
Recreation (reason for most recent visit)*	44
18-24	41
Luas (main mode)	40
Visits 1-3 times per month	40



Less frequently - higher among	%
Dublin City North	23
Uses free parking in City Centre	22
Pays for parking in City Centre	19
Dublin Belgard*	17
Cyclists*	17



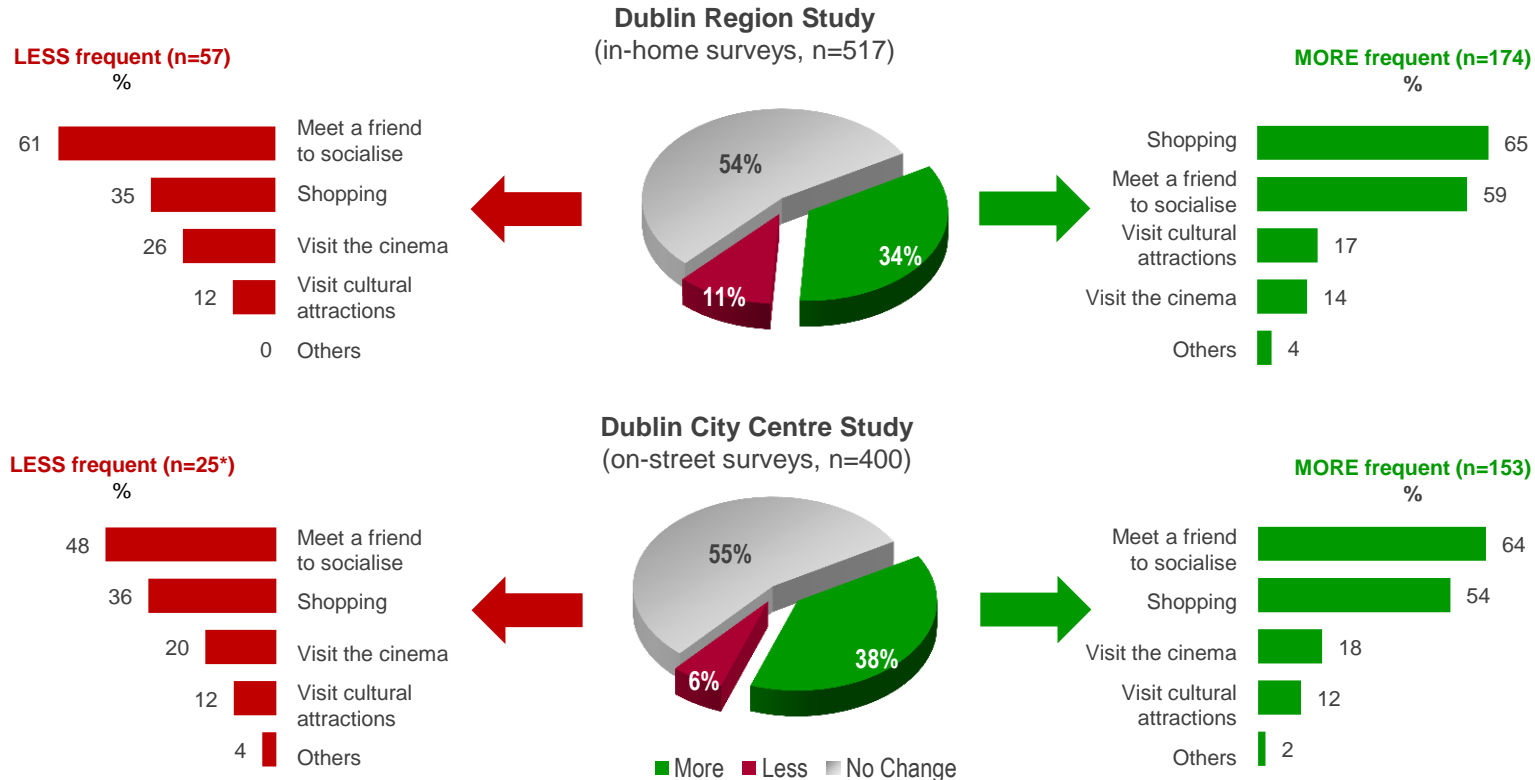
Less frequently - higher among	%
Visits 1-3 times per month*	23
Affordable (reason for choosing mode of travel)*	24
Paid for car parking*	23
Car*	15

Dublin City Centre Study (on-street surveys, n=400)

More frequently – higher among	%
Recreational reason (main purpose of visit)*	69
Kildare (travelled from)*	56
Spending less than 1hr in the city*	56
Visits 1-3 times per month*	54

* LOW BASE
(n<50)

Likelihood to visit the City Centre: shopping and meeting friends to socialise were the popular reasons to travel to the City Centre for those that said they would visit more frequently

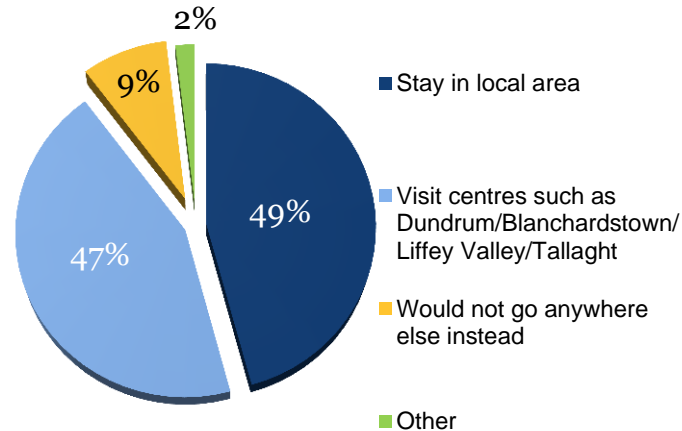


* LOW BASE
(n<50)

Q.7 (in-home) / Q.9 (on-street) If the proposed concepts were to go ahead, would you visit Dublin city centre MORE or LESS frequently?
Q.8a (in-home) / Q.10a (on-street) You said you would travel to the city MORE frequently. What would you be more likely to travel to the city centre for?
Q.8b (in-home) / Q.10b (on-street) You said you would travel to the city LESS frequently. What would you be less likely to travel to the city centre for?

Alternative destinations: Of those visiting Dublin City Centre less frequently as a result of the proposed concepts, staying in the local area (49%) and visiting suburban shopping centres (47%) were cited as the main alternative options

Dublin Region Study
(in-home surveys,
n=57)



Propensity to visit Dublin City Centre: focus group participants were generally more likely to visit Dublin City Centre more frequently as a result of the proposed concepts

If the plans as proposed were executed fully the majority of focus group participants could see themselves coming into the city centre **more frequently**, especially to **socalise** in the new pedestrianised areas (College Green, Suffolk Street, Saint Stephen's Green to Grafton Street) to people watch and soak up the **atmosphere**.





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7. Views on other related initiatives

Other initiatives related to the proposals

In the context of the overall proposals, reaction was sought to what people thought of the following additional proposals:

1. Changes to car parking access, including:

- changes in routes to access multi-storey car parks in the City Centre
- the addition of clear on-street signage for car parks
- introduction of a access map smartphone app providing details on the new routes

2. Expansion and associated rationalisation of City Centre taxi ranks (focus group participants only)

- plans to both expand and rationalise City Centre tax ranks

3. Proposed Luas Cross City fares (in-home surveys only)

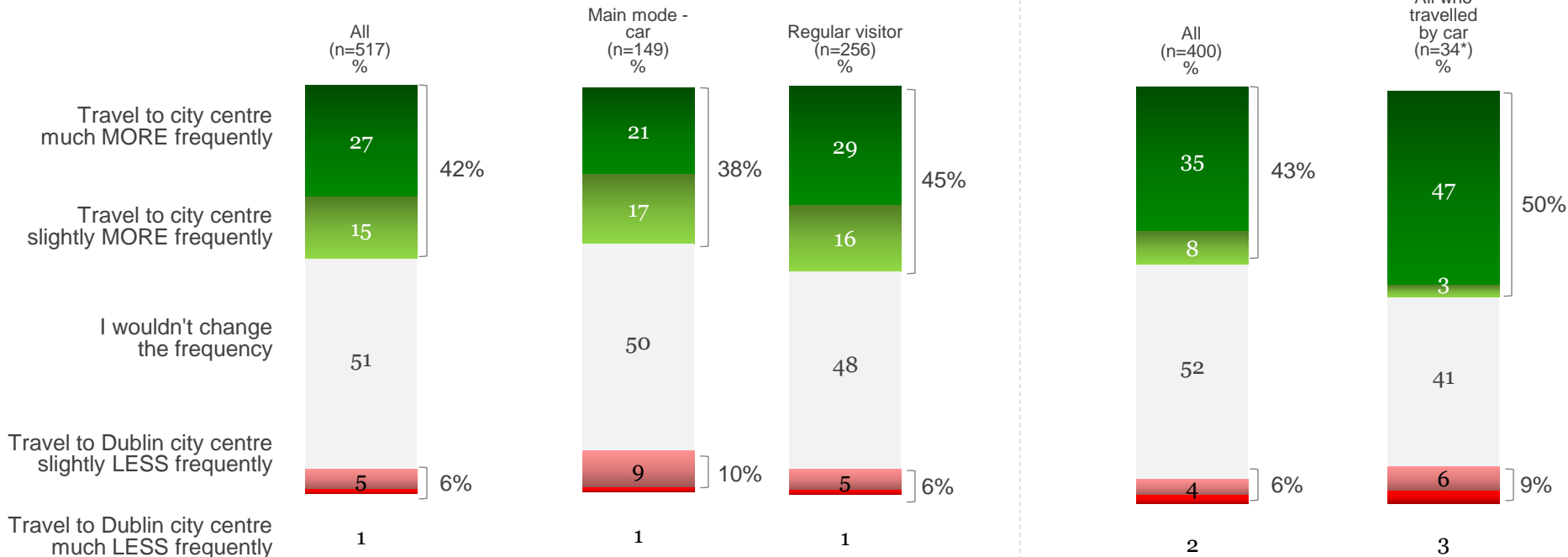
- introduction of a 50 cent fare across the City Centre
- free travel on the Luas across the City Centre available with a car parking ticket



Changes to car parking access: implementation of the car parking proposals would result in more frequent trips into the city centre

**Dublin Region Study
(in-home surveys)**

**Dublin City Centre Study
(on-street surveys)**



* LOW BASE

Changes to car parking access: people want car parks clearly signposted and highlighting availability

– free shuttle buses from satellite car parks into the City Centre were also suggested

Comments from focus group participants:

I think it would be a good idea to have car parks further out that would shuttle you into that area for free, because if it's going to be no go for private cars.



free shuttle bus from the car park, I think that's a good idea, you know the airport car parks, they ferry you from the car park to the airport for free

A more in-depth exploration of the car parking proposals was conducted with the participants of the focus groups.

Overall reaction:

- Clearly signpost car parks and availability further out so if it is full or reaching capacity you have other options open to you when arriving into the City Centre
- Free shuttle – happy to park further out and get as close to where you are going as possible using public transport shuttle
- Good for people making day trips from the country if there are satellite car parks with shuttles to bring them into the City Centre

Concerns

- How will I get to car park?
- Pushing cars out of town



Proposals for improving taxi rank provision: **focus group participants expressed low levels of interest in this proposal**

As part of the proposals, there are plans to both expand and rationalise City Centre tax ranks. Specifically, the study proposes that a review of tax rank provision will be undertaken, considering full-time or night-time only rank locations, as well as new opportunities such as the of off-street facilities (e.g. existing multi-storey car parks), as large scale taxi depots / ranks, operated in a similar fashion to the taxi facility successfully serving Dublin airport.



*Comments from
focus group
participants:*

This proposal formed part of the discussion with participants in the focus groups.

Overall reaction:

- Not too pushed either way
- Don't really use taxi ranks – tend to Hailo

Concerns

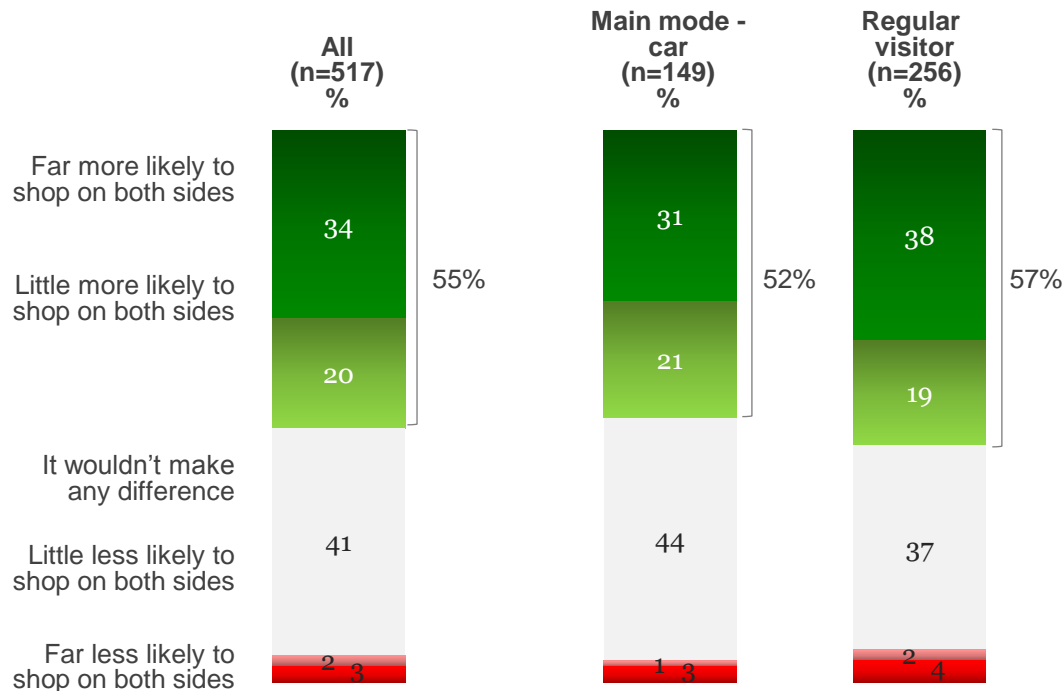
- Want a taxi immediately – come to them, don't want to wait

Come to me like, why bother going when they can come to you

And if all this... goes as planned, if it all works perfectly, then you're not going to need a taxi in town.

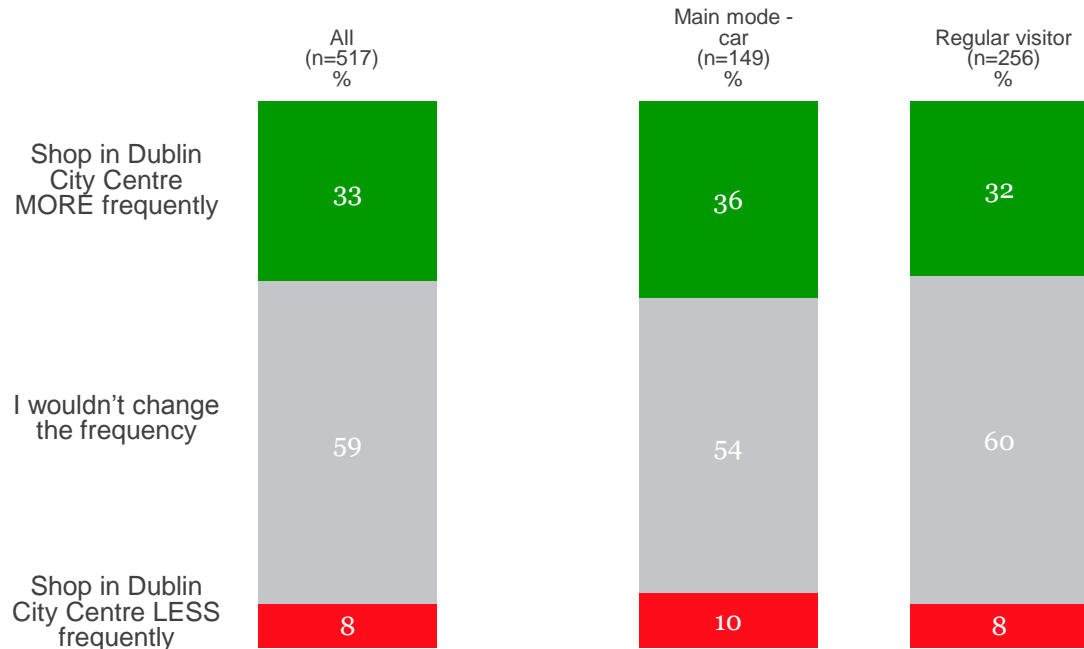
Introduction of a 50cent Luas Cross City fare: over half (55%) said they would be more likely to shop on both sides of the City Centre as a result

Dublin Region Study (in-home surveys)



Higher Among	%
Dublin Belgard	92
Rail/Dart (main mode)	81
Attending school / college / other education (reason for most recent visit)	73
Walking (main mode)	68
Recreation (reason for most recent visit)	67
18-34	65

Free travel on the Luas with a car parking ticket: **one third (33%)** said this initiative would encourage them to shop in Dublin City Centre more frequently



Higher Among	%
Recreational (reason for most recent visit)	48
Rail/Dart (main mode)	44
Shopping (reason for most recent visit)	39
18-34	39



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8. How to move forward

Communication and delivery: what to say and how to say it

- Plans need to be communicated **clearly** and **simply**.
Highlight the following

1. Integrated system
2. Removing congestion
3. Frictionless experience

- Plans need to be backed up with **assurance** to allay scepticism. **Follow through on the following**

1. Reliability
2. Increased frequency
3. Time it will take
4. Fair price of connection and parking

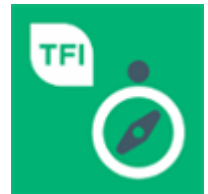
- Communications** should be ...

1. **Less technical** and more tailored to the average person
2. **Clear**, so consumers can **visualise** the changes; when using maps, simple maps, like those used for the underground networks in other countries, are preferred as they are less overwhelming
3. Show an understanding of consumer issues and a **preferable solution** to what they are doing at present

Comments from focus group participants

A lot of people when they view a new idea, they try to figure everything out in their own head like. From their own perspective.

Lack of awareness of journey planner app amongst focus group participants



Key issues to address arising from the focus groups

- People **need to be assured** that they can get as **close** to the shops/cafes by public transport, as they would in their car.
- Bus and rail operators could offer short term box **storage** at a centrally located area, which could be accessed by using the travel ticket.
- Commuters to the city centre would like to see the **exact routes** to be taken, along with **travel time** and **frequency**.
- **Show how** the alternative methods of travel are **better**.
- Communicating the **timelines** of when changes will be implemented and how they will **impact** people's routes into the city centre is key.
- Many users of GPS apps and Real Time Information Boards at bus stops anecdotally tell how the app/boards only seem to function correctly about 50% of the time. They would need to see **investment** in the current platform to achieve greater **reliability**.
- How will the **access** to the **car parks** work with the reconfiguration of city centre routes.
- Prices should be competitive and remain constant without **price hikes**.

Additional ideas/ thoughts

- Communicate that the Leap Card has a **daily usage cap** which is not widely known
- Promote a **carpool** idea for cars in the city centre
- **Place for bikes** on public transport like in other European and US cities
- Increased **security**
- **Extended hours** of service for public transport – bus to run as late as Luas or 24 hour public transport
- What is being done for the **North side**?



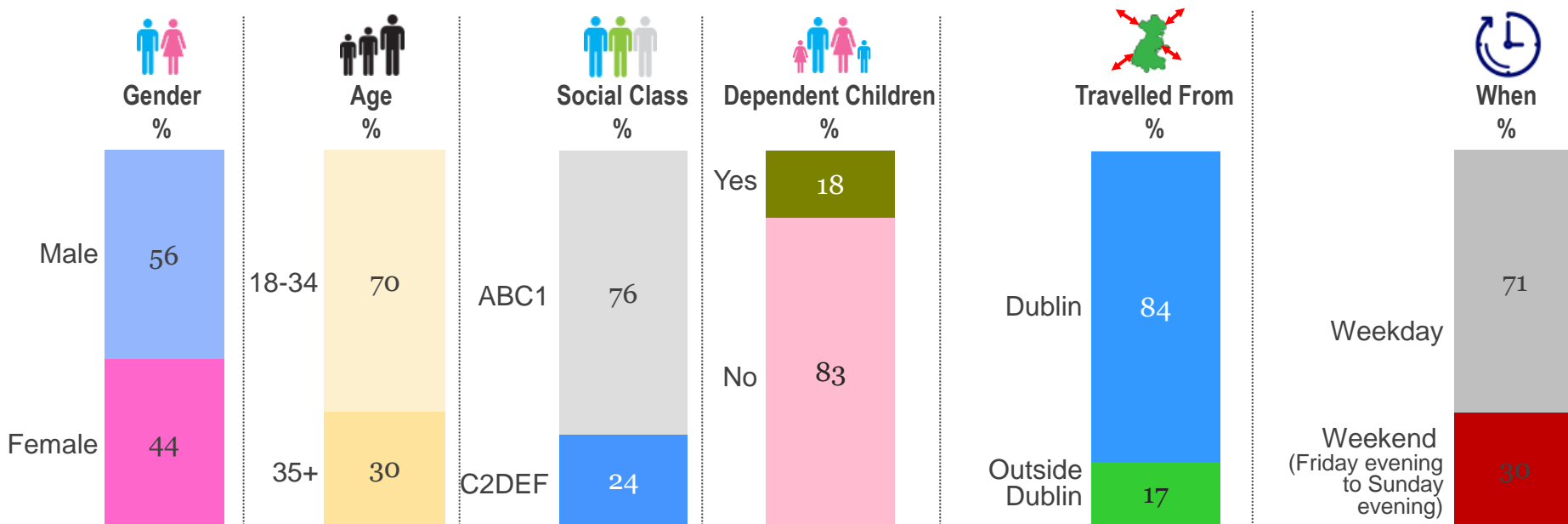


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9. Appendix

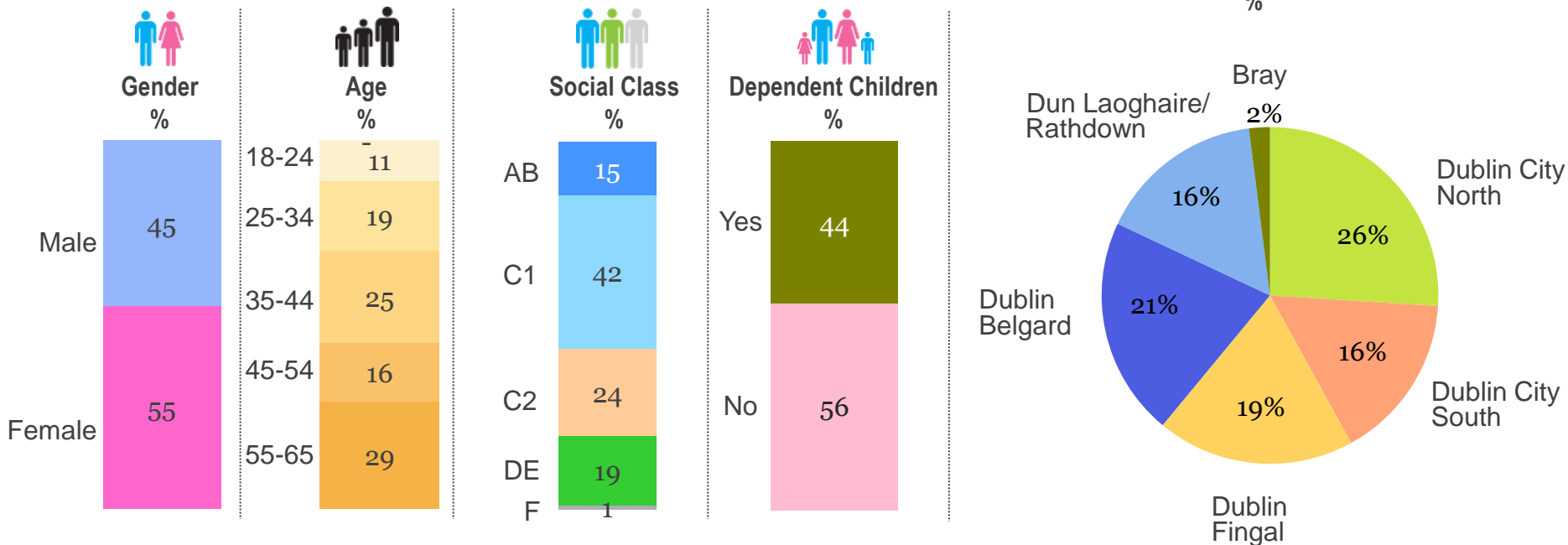
Who did we interview in the on-street surveys?

Base: All (n=400)



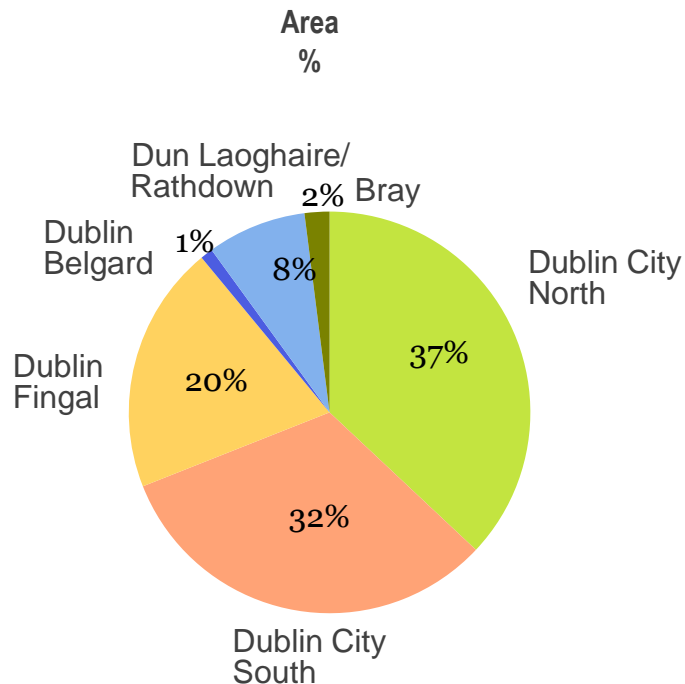
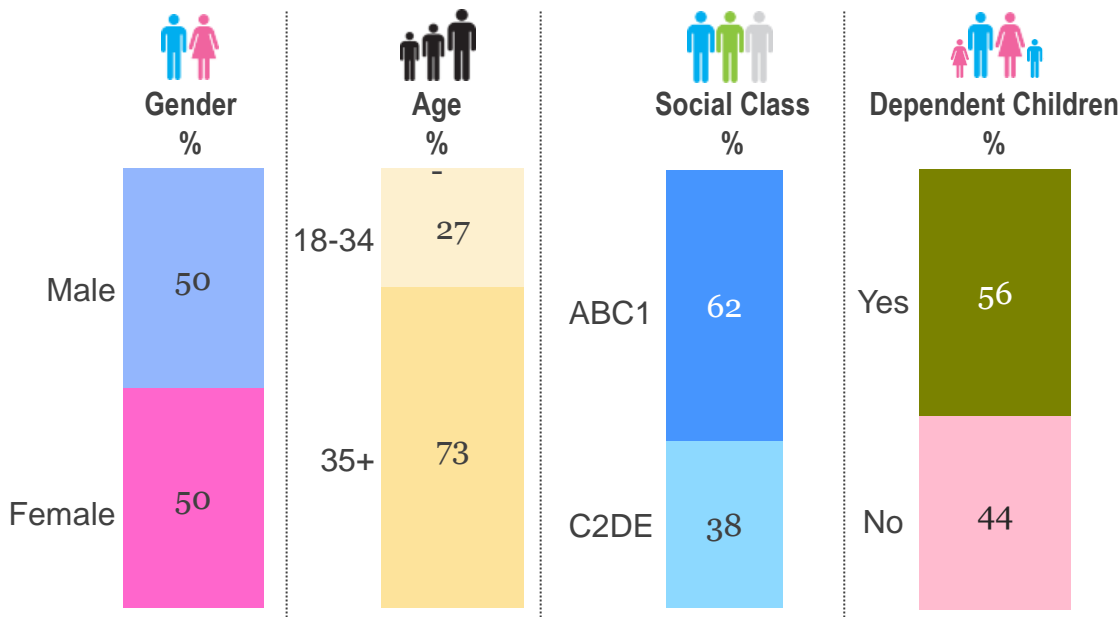
Who did we interview in the in-home surveys?

Base: All (n=517)



Profile of Car users from the in-home surveys

Base: All (n=149)





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