2003

Dublin Visitor Survey 2003

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Acknowledgements

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Executive summary

This report represents a joint research initiative by the Faculty of Tourism and Food and the Tourism Research Centre at the Dublin Institute of Technology together with Fáilte Ireland. It highlights the principal findings from a visitor survey on the characteristics and attitudes of tourists visiting Dublin city. In addition it presents an in-depth analysis of the city break market into Dublin, one of the city's most rapidly growing tourism segments.

Executive Summary

The key objectives of the survey is to improve the quality of urban tourism information within a Dublin city context and to provide those engaged in a wide range of tourism activities within Dublin city with the necessary information to make management decisions.

Five locations were used as survey points across Dublin City so as to achieve geographical spread and ensure a variation and range of types of tourist facility. All out of state visitor types to the city have been included but domestic travellers excluded.

In the first instance a visitor profile is provided. This serves to outline a sample of the key characteristics of Dublin City out of state visitors. The main findings reveal:

- The British Market remains the biggest single market for Dublin (53%) followed by Mainland European (25%) and North America (17%).
- One third (32%) of out of state visitors to Dublin city could be described as white collar/public service employees while the second most significant groupings are senior executives (25%).
- Just under half (48%) of those visiting Dublin City are with a partner, 18% are with a group of friends, 17% are families, 10% are alone and 4% are with a group.

Visitors exhibit interesting patterns in relation to holiday taking behaviour:

- The majority surveyed (80%) are visiting the city for holiday purposes.
- 78% stay up to 4 nights in Dublin which is similar to the 2002 period.

Choice of accommodation among Dublin City visitors exhibits the following interesting patterns:

- The most popular types of accommodation were moderate quality (3 Star) hotel accommodation (45%), Bed & Breakfast (16%), Staying with Friends and Family (11%), Youth Hostels (9%), Luxury, Superior Hotel (6%), Guest House (6%) and Budget Hotel (6%).
- Accommodation is generally booked (33%) 1-4 weeks in advance of arrival. Over a third booked on the internet (36%), 22% used travel agents and 15% booked directly with accommodation providers. Internet usage for booking purposes has increased significantly since 2002.

Executive summary

Use of mode of transport to Dublin city shows patterns which are important for consideration by transport managers.

- Eighty-six percent of out of state visitors to Dublin city arrive by air. This is directly comparable with the 2002 survey period.
- Fifty one percent of respondents booked their transport to the city through the internet, 27% through travel agent, 10% directly with transport provider, 5% third party, 2% tour operator, 1% part of an organised group, 1% direct with local tourist office and 1% did not book.

The major influencing factors affecting the decision to visit Dublin City have important implications for those engaged in marketing tourism. Advice from friends and relatives influences 25% while inexpensive airfares play an important role for 20%.

Overall visitors to Dublin feel that the people in Dublin are friendly and hospitable, that Dublin is a safe city, there is a good supply of visitor attractions and restaurants and they are also of the opinion that Dublin has a rich cultural life.

Fifty seven percent of visitors to Dublin felt that prices were too high, this figure represents a significant increase of 22% on the 2002 study. Sixty eight percent of respondents felt that prices in Dublin were similar to prices in other major cities, 21% found Dublin more expensive and 7% found the capital less expensive. The top 3 expensive items in Dublin as perceived by visitors are food (27%), drink (21%) and accommodation (10%). The principal inexpensive item was transport (16%).

The top three most important activities considered by visitors when deciding to visit Dublin were, sights/attractions (48%), culture/history (15%) and going out in the evening to pub/bar (7%).

Dublin received an average overall satisfaction rating of 8.4 out of a possible 10 which compares to 8 in 2002.

In terms of the city break market segment the following represents some of the principal findings:

- City break visitors have a more localised travel pattern than other forms of urban tourism with 79% coming from the UK.
- 74% of all city break trips last 4 days or less.
- The two main sources of information used by city break visitors are the internet and guide books.
- Inexpensive airfares are a major influencing factor (32%) in deciding to visit Dublin.
- City break trips tend to be of a short duration but have quite an even seasonal spread compared to other forms of urban tourism.
- City break visitors have a very high tendency to book their travel (66%) and their accommodation (46%) online.

Tourism in Dublin

Introduction

This report presents the findings from the Dublin Visitor Survey conducted over a twelve-month period from the beginning of January to the end of December 2003[1]. This is a joint project between Fáilte Ireland, Tourism Research Centre led by the Faculty of Tourism and Food at the Dublin Institute of Technology.

The key objectives of the survey are:

- To improve the quality of urban tourism information from a Dublin context;
- To provide a more detailed understanding of the leisure tourism market, and visitors' perceptions of Dublin, its facilities and services;
- To provide those engaged in a wide range of tourism activities within Dublin with the necessary information to make management decisions.
- To establish a database which can be utilised in urban tourism research in the future to measure urban tourism developments in Dublin City.

Methodology

One thousand visitor surveys were completed between the beginning of January to the end of December 2003 (targeting out of state leisure tourists primarily). Five survey points were used across Dublin City so as to achieve geographical spread and to ensure an appropriate variety and range of tourist facilities were covered. The locations used were:

- Book of Kells, Trinity College
- St. Patrick's Cathedral
- Guinness Storehouse
- The Dublin Writer's Museum
- Temple Bar

The survey includes a set of core questions relating to:

- Visitor Profile Issues
- Holiday Type
- Expenditure
- Accommodation
- Types of Information used prior to and on arrival in the city
- Transport issues
- Decision making influencing factors
- Activities

[1] Previous studies took place between April and March. This report is based on surveys carried out between January and December.

Tourism in Dublin

The Value of Tourism

In Ireland

During the early months of the 2003 uncertainty emerged in relation to international travel due to the continued threat of terrorism and the Iraqi conflict. However, 2003 did not materialise as the crisis year many had feared. The total number of visitors to Ireland in 2003 was 6.178 million – an increase of almost 4.4% - just short of the peak reached in 2000. Irish markets continued to increase, growth was strongest from Mainland Europe and North America. The number of Mainland European tourists to Ireland in 2003 exceeded the number recorded in 2000.

However, the growth in tourism revenues was modest. For example the home market, recorded further growth particularly within the paid accommodation sector with hotels continuing to gain share.

Visitors from North America who use coach tours are travelling less than other tourist segments. British tourists are now spending less time in Ireland than before and as a result are less inclined to travel to other regions in Ireland. Special interest tourism pursuits and general outdoor activities are heavily reliant on certain European markets which have been weaker over recent years. These trends have contributed to the eastern part of the country recording a stronger performance than the western regions in 2003.

An additional concern at national level is the fact that Ireland is to be perceived to be expensive.

In Dublin

After a slow start in 2003, Dublin attracted 3.6 million tourists during the year, this is an increase of 121,000 on the number of tourists visiting Dublin during 2002. The total tourism revenue amounted to €1,220 million which is a decrease of €48 million on the figure in 2002 (€1,268 million).

At the launch of Fáilte Ireland's Tourism Plans 2004 it was highlighted Dublin resides in 4th place in the league of most visited European cities after London, Paris and Rome.

According to the Horwath Bastow Charleton Ireland and Northern Ireland Hotel Industry Survey, the increase in the number of visitors arriving in Dublin is having a positive effect on the Dublin hotel industry. Dublin emerged as the strongest growth market in 2003 with a 9% increase in average room rates being recorded. Dublin hotels also experienced an increase of 1.5% in occupancy and 1.7% in profitability before tax. However overall room yields are down.

Throughout the year a number of changes have occurred with Dublin's transport system including the DART Upgrade and construction of the LUAS. Construction and road works have had an impact on the capital during 2003. These changes will help to make city centre and neighbouring suburb visitor attractions/activities more accessible to visitors to Dublin.

Challenges for Dublin in 2004 as highlighted by Fáilte Ireland include the weakening of the euro against the sterling, the transparency of euro, the perception of Dublin as being expensive and transport difficulties.

Tourism in Dublin

Main findings of the Survey

The main findings of this survey centre on the analysis of 1,000 valid questionnaires.

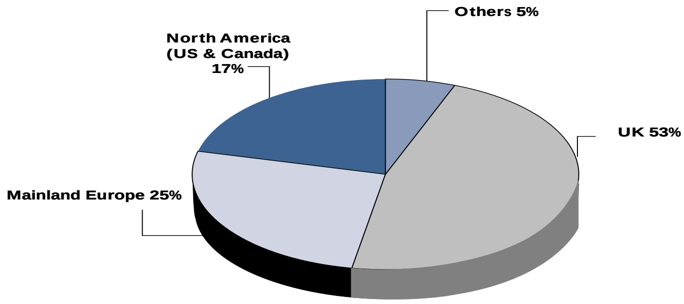
The data is presented under the following headings:

Visitor Profile

Just half (53%) of the interviewees were UK visitors to Dublin while Europe accounted for 25%, North America (USA and Canada) accounted for 17%, and Others 5% (Figure 1)[2].

The majority of the European market were Germans (4%), French (4%) and Italian (4%), Scandinavian (3%), Dutch (3%) and Belgians (2%). The remaining overseas visitors, approximately 5%, visit from Australia (3%), Japan (0.4%) and other (2%).

Figure 1: Visitor Profile



The remaining out of state visitors, approximately 5%, come from what is known as the Rest of the World, which in the case of this survey, includes Australia (3%), Japan (0.1%) and other (2%).

Working Status

Thirty two percent of out of state visitors to Dublin could be described as white-collar worker/civil servants while the second most significant grouping are senior executives/senior civil servants (25%). Also of significance are students (12%) and pensioners (12%)

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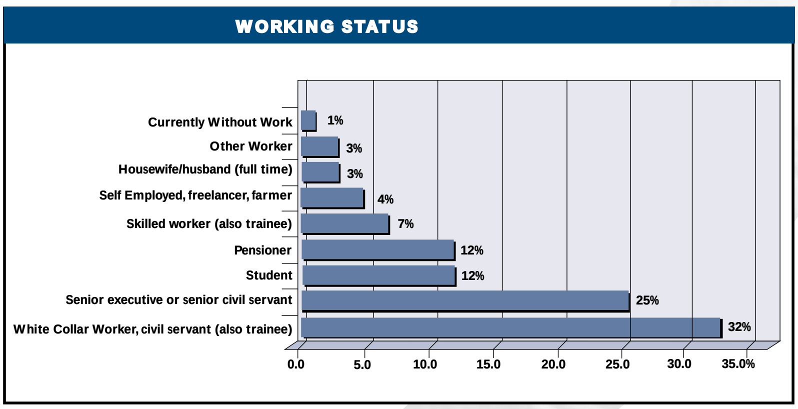
Figure 2: Working Status

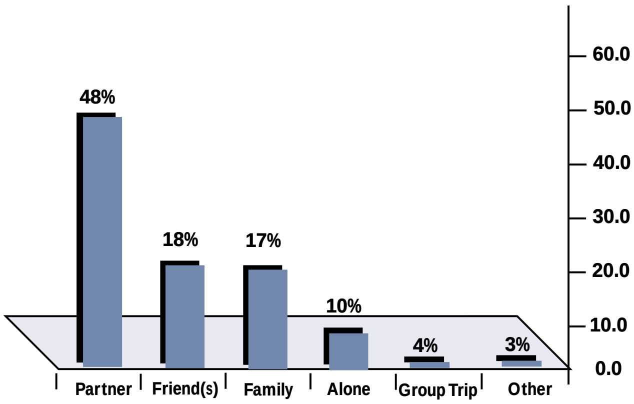


[2] These percentages are not comparable with Fáilte Ireland's Regional Fact Card figures as these interviews took place at a smaller number of Dublin's visitor attractions.

Tourism in Dublin

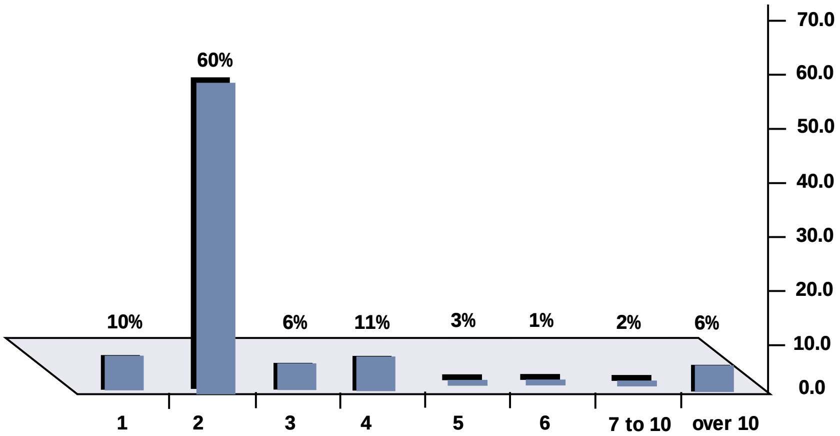
Party Composition and Party size

Figure 3: Party composition



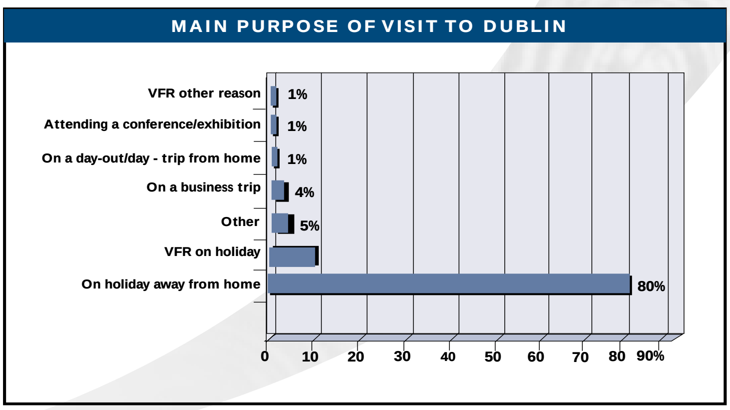
Almost half of the respondents (48%) visited Dublin with a partner, 18% were with friend(s) and 17% were families (Figure 3).

Figure 4: Party size



The most common party size amongst the visitors to Dublin was two persons (60%). Eleven percent were in a group of 4, 10% were travelling alone, 6% were in a group of 3 and a further 6% were in a group of more than 10 people (Figure 4).

Figure 5: Main Purpose of Visit to Dublin



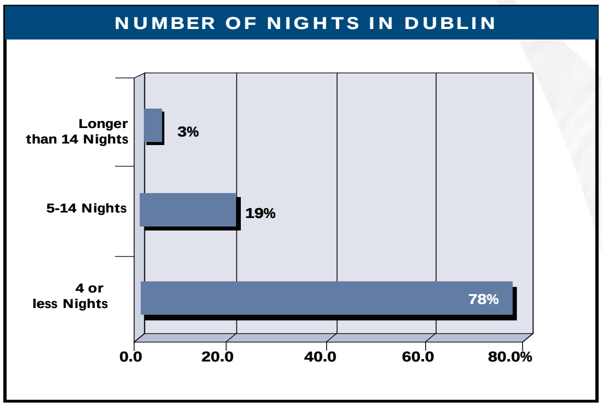
Type of Visit

The majority of visitors surveyed (80%) identified holidays as the primary reason for visiting Dublin (Figure 5). Visiting family, friends and relatives is an important additional variable which has decreased in significance in recent years.

Tourism in Dublin

More than three quarters of those surveyed (78%) stayed 4 nights or less in Dublin (Figure 6). Nineteen percent stayed in the capital for 5 to 14 nights, while 3% stayed for longer than 14 nights. The average length of stay in Dublin was 3 nights during 2003.

Figure 6: Number of Nights in Dublin



Gender and Age

Fifty four percent of those interviewed were female while 46% were male while 44% of those surveyed were under the age of 54.

Expenses

Table 1: Average Daily Expenditure

Expenses	€
Accommodation	49
Meals, snack & drinks	35
Tourist Shopping	22
Entertainment	17
Miscellaneous items	4
Total	125

Table 1 shows the average daily expenditure of visitors to Dublin was €125, with €49 spent on accommodation,€35 on meals, snacks and drinks, €22 on tourist shopping, €17 on entertainment and €4 was spent on miscellaneous items. These figures are based on amounts spent per person per day.

Accommodation Used

Table 2: Accommodation Used

Type of Accommodation	2003	2002
Moderate Quality Hotel	45%	37%
Bed & Breakfast	16%	15%
Staying with Friends & Relatives	11%	12%
Youth Hostel	9%	13%
Luxury, Superior Hotel	6%	7%
Guest House	6%	5%
Budget Hotel	6%	8%
Other	3%	3%
University/College	2%	1%
Rented House/Apartment	1%	2%
Tourist Caravan/tent	0.4%	0.2%
Static Caravan/Tent	0.1%	0.1%
Second Home	0%	0.2%

Of those surveyed, 45% showed a preference for a moderate quality hotel, 16% stayed in bed & breakfast, 11% stayed with friends and relatives, 9% in youth hostels, 6% in a luxury superior hotel (4-5 Star), 6% in Guest Houses, 6% in standard/budget hotel, 3% used other types of accommodation and 2% stayed in university or college accommodation.

When 2002 and 2003 are compared overall the percentage of visitors to Dublin staying in moderate quality hotels has increased by 8%, those staying in bed & breakfast has increased by 1% while there has been a decrease of visitors staying in youth hostels (-4%) and standard/budget hotel (-2%). Table 2 summarises these findings.

Booking Accommodation

Ninety two percent of the respondents booked their accommodation in advance of travel and the primary method of booking was through the internet (36%) or with a travel agent (22%) (Table 3).

Table 3: Method of booking Accommodation in Dublin

Method of Booking	2003	2002
Internet	36%	25%
Travel Agent	22%	26%
Directly with Accommodation	15%	13%
Staying with Friends and Relatives	10%	11%
Third Party	8%	9%
Did not Book	3%	6%
Tour Operator	2%	2%
Organised Group	1%	4%
Directly with Transport Provider	1%	1%
Directly with Local Tourist Office	1%	1%
Other	1%	2%

When compared with the previous year, there has been an increase (+11%) in the number of those using the internet as a method of booking accommodation while there has been a decrease in the number of respondents using travel agents (-4%) and organised groups (-3%).

Those visiting in Dublin for holiday purposes preferred to book accommodation through the internet (40%) while those visiting Dublin for business purposes, attending a conference/exhibition and 'other' purposes, accommodation prefer to book through a third party (Table 4).

Table 4: Method of Booking Accommodation by Purpose of Visit

Purpose of Visit	Holiday	VFR (Hol)	VFR Other	Bus.	Conf/Exhib	Other
Internet	40%	16%	25%	22%	0%	26%
Travel Agent	24%	5%	25%	22%	14%	14%
Direct with Accommodation	16%	12%	0%	5%	29%	14%
Staying with Friends & Relatives	5%	55%	50%	2%	14%	2%
Third Party	5%	5%	0%	37%	43%	36%
Did not Book	3%	4%	0%	5%	0%	2%
Tour Operator	2%	0%	0%	2%	0%	2%
Organised Group	1%	0%	0%	5%	0%	4%
Direct with Transport Provider	1%	1%	0%	0%	0%	0%

Tourism in Dublin

Variations exist in relation to accommodation booking behaviour within the key markets. Booking accommodation through the internet is a popular method particularly with the British and North American markets while using travel agents as a method of booking accommodation is most popular with the German and French markets.

When method of booking accommodation is broken down by type of holiday, the internet is the most popular method for booking short breaks (48% of respondents) while travel agents tend to be more popular for booking main holidays (36%). The internet is also a popular method of booking accommodation for main (27%) and secondary holidays (33%).

Transport

Table 5: Main type(s) Of Access Transport Used to Dublin

Type of Transport	2003	2002
Plane	86%	85%
Boat/Ferry	11%	9%
Public Bus/Coach	5%	4%
Hired Car/Van	4%	2%
Private Car/Van	3%	4%
Train	2%	4%
Private Bus/Coach	2%	1%
Walked/hitch hiked	1%	1%
Other	1%	-

The vast majority (86%) of out of state visitors arrive by air, with just 11% arriving by boat/ferry. Little major change occurred in relation to the key forms of transport between 2003 and 2002 apart from the 2% increase of visitors using the boat/ferry as a method of arriving to Dublin (Table 5).

Table 6: Method of Booking Transport to Dublin by Key Markets

Nationality	All	UK	N. America	Germany	France
Internet	51%	61%	38%	27%	48%
Travel Agent	27%	18%	35%	51%	20%
Direct with Transport Provider	10%	10%	9%	12%	13%
Third Party	5%	4%	5%	5%	13%
Tour Operator	2%	2%	4%	5%	3%
Part of Organised Group	1%	1%	4%	-	-
Did not Book	1%	1%	1%	-	-
Direct with Local Tourist Office	1%	-	2%	-	3%
Other	1%	2%	1%	-	3%
Friends and Relatives	0.1%	0.5%	-	-	-

Table 6 illustrates methods of booking transport used by the different markets to Dublin. Booking transport through the internet is a very popular method with the UK (61%), North American (38%) and French (48%) markets. While using a travel agent is more popular with the German (51%) market. The French (13%) and German (12%) markets are more likely to book directly with a transport provider than the British (10%) or North American (9%) markets.

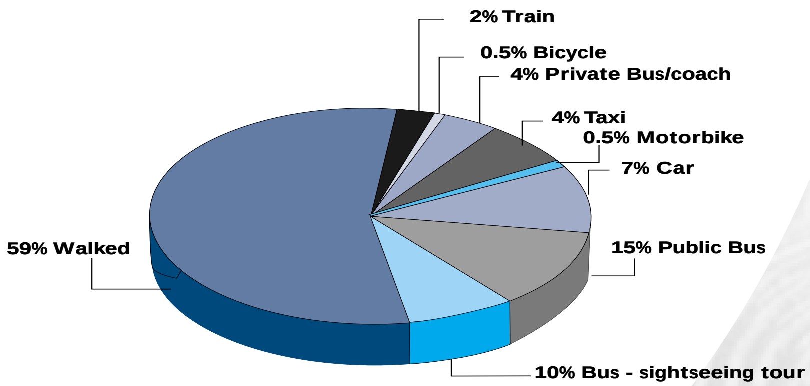
Tourism
in Dublin

Table 7: How Holiday Type Reflects Method of Booking Transport

Method of Booking	Main Holiday	Secondary Holiday	Short Break	Other
Internet	35%	52%	68%	25%
Travel Agent	47%	24%	13%	22%
Direct with Transport Operator	8%	13%	10%	9%
Third Party	2%	4%	4%	32%
Tour Operator	3%	4%	1%	1%
Organised Group	2%	1%	0.5%	5%
Did not Book	-	-	1%	-
Direct with Accommodation	1%	1%	1%	1%
Other	1%	1%	1%	3%
Visiting Friends & Relatives	1%	1%	-	1%
Direct with Local Tourist Office	-	-	0.5%	-

There are variations between the different methods of booking transport by holiday types (Table 7). When booking transport for main holiday, travel agents (47%) are most popular while the internet is popular for secondary holidays (52%) and short breaks (68%). 'Other' methods of booking transport mainly relate to persons visiting Dublin for business and conferences and the majority of these book transport through a third party.

Figure 7: Main Forms of Transport Used Most often within Dublin



Once in Dublin most visitors use more than one form of transport when travelling within the city. Figure 7 highlights walking (59%) was the most popular means of getting around the city. Public bus was the next most frequently used form (15%), followed by bus sightseeing tour (10%) and car (7%).

Major Factors Influencing the Decision to choose Dublin

The three most popular influences on visitors to Dublin were advice from friends and relatives (25% - a decrease of 4% in 2002), and inexpensive airfares (20% - an 11% increase in 2002), previous visit, 17%, curiosity of visit Dublin 16% and visiting friends and family. There has been an increase in visitors who were influenced by inexpensive airfares (+11%). Ryanair's new routes and the launch of Aer Lingus as a low fares airline would have contributed to this.

In March two extra influences were added to this particular question, these included inexpensive ferry fares and inexpensive accommodation. Out of the 1000 questionnaires 825 respondents were asked whether these additional influences had an effect on their decision to visit Dublin. Two percent of respondents were influenced to visit Dublin by inexpensive ferry fares and 2% were influenced by inexpensive accommodation (Table 8).*

Table 8: Primary Factors Affecting the Decision to Visit Dublin

Motivating Factors	2003	2002
Advice from Friends and Relatives	25%	29%
Inexpensive Airfares	20%	9%
Previous Visit	17%	17%
Curiosity to visit Dublin/never been to Dublin before	16%	10%
Visiting friends and relatives	10%	8%
Culture/history	6%	4%
Business	4%	3%
Internet Site	5%	3%
Ancestors	4%	3%
Guide Books	4%	3%
Educational purposes	3%	2%
Tourist Brochures	3%	2%
TV Programmes	2%	1%
Travel Agent Advice	2%	1%
Magazines/Newspaper Advertising	2%	3%
Magazines/Newspapers Articles	2%	3%
Tourist Information Centre	1%	1%
Irish Tourist Board	1%	0.5%
TV Advertising	1%	1%
Radio programmes	0.5%	1%
Inexpensive ferry fare	2%	N/A
Inexpensive accommodation	2%	N/A

* Note: Analysis refers to 'A major influence' only and does not include 'Some influence'
Information Sources used before and arriving in Dublin
Out of 1,000 questionnaires 825 respondents were asked to identify sources of information used before and after arriving in Dublin.
This question was introduced during March 2003. Some respondents gave more than one response.

Tourism in Dublin

Information used before arriving in Dublin

In relation to sources of information used before arriving in Dublin, the internet (31%), guide books (28%) and information from Friends/Family (20%) were the most popular sources (Table 9). Respondents were also asked to identify websites they visited before arriving in Dublin. Nine percent carried out general searches on the internet, 4% accessed the Dublin Tourism website and another 4% accessed F·ilte Ireland's website. Interviewees were asked to specify what guide books they used before arriving in Dublin. Taken as a percentage of the total population surveyed, the five most popular guide books used before arriving in Dublin were Lonely Planet (10%), Rough Guide (3%), Eyewitness (2%), Rick Steeves (2%) and Frommers (1%). Other sources used before arriving in Dublin include previous visit, library books, TV programmes, DVD's, maps and newspapers.

Table 9: Information sources before arriving in Dublin

Information Sources	No. of responses	% of responses
Internet	377	31%
Guide Books	345	28%
Friends/Family	248	20%
Brochures/leaflets from Dublin/Irish tourist Board	103	8%
Travel Agents/Tour Operators	82	7%
Other Sources	38	3%
Group leader/organiser	26	2%

Information used during their visit

During their stay in Dublin, the majority of visitors to Dublin used brochures/leaflets (48%), while 26% used guide books and a further 12% used 'other' sources (Table 10). Taken as a percentage of the total population surveyed, the five most popular guide books used after arriving in Dublin were Lonely Planet (4%), Rough Guide (1%), Eyewitness (1%), Rick Steeves (1%) and Frommers (0.5%). Other sources of information used during visit to Dublin include leaflets in accommodation, maps, books, people, previous visit and at the airport.

Table 10: Information sources after arriving in Dublin

Information Sources	No. of responses	% of responses
Brochures/leaflets from Dublin/Irish tourist Board	281	48%
Guide Books	154	26%
Other Sources	70	12%
Friends/Family	53	9%
Group leader/organiser	13	2%
Internet	12	2%
Travel Agents/Tour Operators	4	1%

Tourism
in Dublin

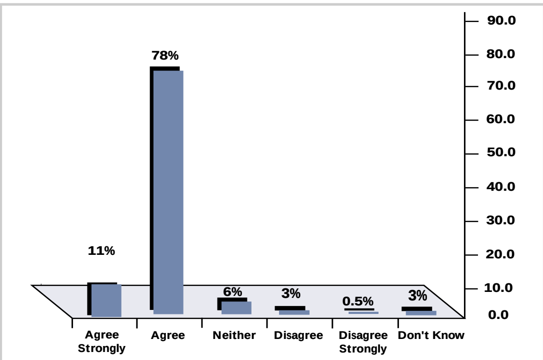
Attitudes Towards Dublin

Visitors were asked to comment on a series of attitudinal statements about specific aspects of Dublin and state to what extent they agreed or disagreed on a six-point scale (1 being agree strongly, 5 being disagree strongly and 6 don't know).

Safe City

Figure 8 illustrates 89% of visitors to Dublin felt that the city was a safe place to visit. This is a decrease of more than five percentage points from the previous year. Almost 4% of visitors felt Dublin was not a safe city.

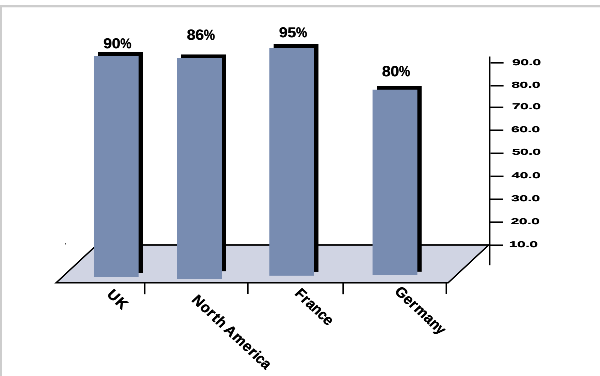
Figure 8: It's a safe place to visit



"It's a safe place to visit"

When broken down by nationality 95% of the French market were of the opinion that Dublin was a safe city to visit, 90% and 86% of the British and North American markets respectively were of the same opinion, while 80% of the German market felt safe visiting the capital (Figure 9).

Figure 9: Agreement that Dublin is a safe city broken down by nationality

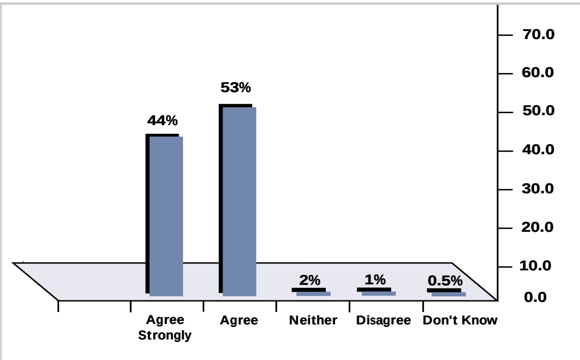


Tourism in Dublin

Céad Mile Fáilte

Visitor attitude towards the friendliness of the people in Dublin continues to be very positive. Ninety seven percent agreed that the people were friendly and hospitable, this figure represents an increase of 1% on last years percentage (96%) (Figure 10). In terms of nationality breakdown, all nationalities agree with this statement.

Figure 10: The people are friendly and hospitable

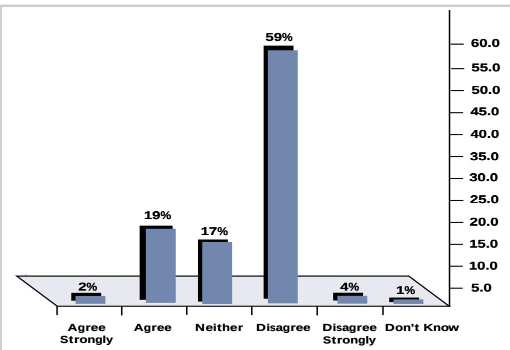


"The people are friendly and hospitable"

Dublin and it's Litter

Figure 11 highlights over one in five respondents (21%) felt that Dublin is a dirty city. This represents a slight increase from the previous year. German visitors in particular were most critical, with 27% agreeing with the statement.

Figure 11: Dublin is a dirty city



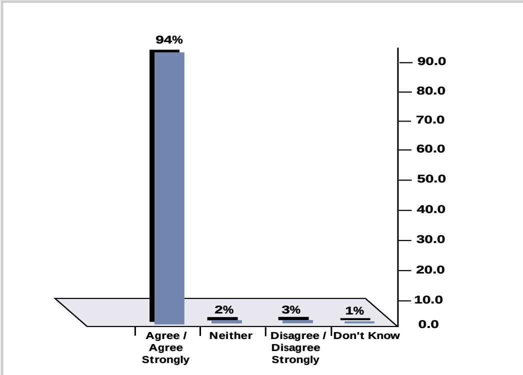
"Dublin is a dirty city"

Tourism in Dublin

Things to do in Dublin

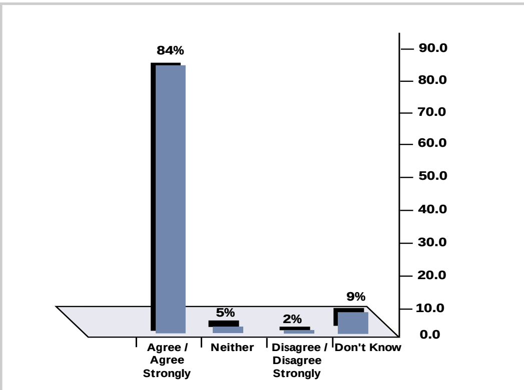
There was general agreement among visitors that the city has a wide range of attractions (94%), plenty of good restaurants (84%) and quite a good nightlife (63%). When 2003 and 2002 information is compared, agreement that Dublin has a good variety of attractions has increased by 6% while the percentage of visitors who agree that there is plenty of restaurants has increased by 3%.

Figure 12: It has a good variety of visitors attractions



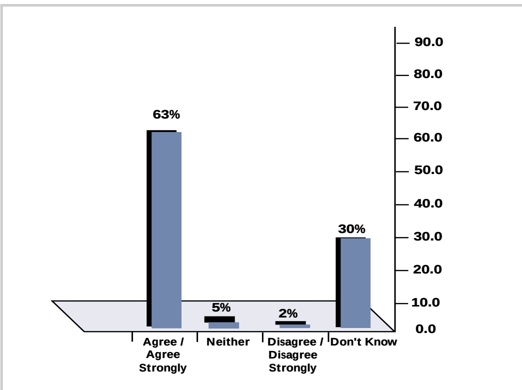
"It has a good variety of visitor attractions"

Figure 13: Plenty of good restaurants available



"Plenty of good restaurants available"

Figure 14: It has a good nightlife



"It has a good nightlife"

Activities Engaged In By Tourists

Visitors were asked to state which activities they had done or had planned to do during their stay in Dublin. From a list of 14 activities, the five most popular with respondents were as follows:

1. 'Visiting sights and attractions'
2. 'Walking around the city'
3. 'Go to restaurants in the evening'
4. 'Go to pubs/bars in the evening'
5. 'Shopping'

Activities engaged by the different markets

Table 11 shows the most popular activities broken down by main markets to Dublin.

Table 11: Summary of most popular activities broken down by main markets to Dublin

Activities	UK	North America	Germany	France
Visiting sights and attractions	98%	99%	61%	85%
Walking around the city	92%	92%	95%	90%
Go to restaurants in the evening	91%	82%	72%	97%
Go to pubs/bars in the evening	84%	77%	77%	100%
Shopping	75%	78%	85%	61%

When broken down by nationalities visiting sights and attractions was most popular with the North American and UK markets, walking around the city was most popular with the Germans while going to restaurants and pubs/bars was preferred by the French market.

Overall percentages have remained the same as previous years however the percentage of visitors to Dublin who take part in shopping has increased by 9% and the percentage of those visiting museums has also increased (6%).

Table 12: Activity most important when deciding to visit Dublin

Activity	No. of responses	% of responses
Visiting sights/attractions	327	48%
Culture/history	105	15%
Go out in the evening to pub/bar	46	7%
Visiting museums	37	5%
Visiting family/friends	37	5%
Walking around the city	29	4%
Shopping	23	3%
All activities are important	14	2%
Special Olympics, Ancestors, Business, Go out in the evening to restaurant, Going to concerts and Take an excursion out of the city	37	5%
Go on a organised tour, Going to the theatre, Relaxing, Taking part in a sporting activity, Touring, Visiting exhibitions, Watching sporting event and None in particular	30	2%

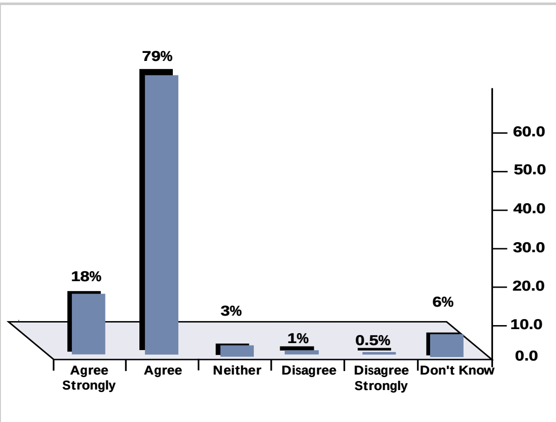
Tourism in Dublin

Respondents visiting Dublin were asked to identify the activity most important when deciding to visit Dublin. Some respondents gave more than one response. The top three most important activities when deciding to visit Dublin include visiting sights and attractions (48%), culture/history activities (15%) while 7% felt going out in the evening to the pub was also important (Table 12).

Cultural Image

Dublin continues to be positively perceived from a cultural standpoint, with a high percentage of visitors (94%) seeing the city as possessing a rich cultural life (an increase of 5% on 2002 figure). In terms of nationality breakdown, French, British and North American visitors were more likely to agree that Dublin is a cultural city (98%, 95% & 94%), respectively (Fig 15).

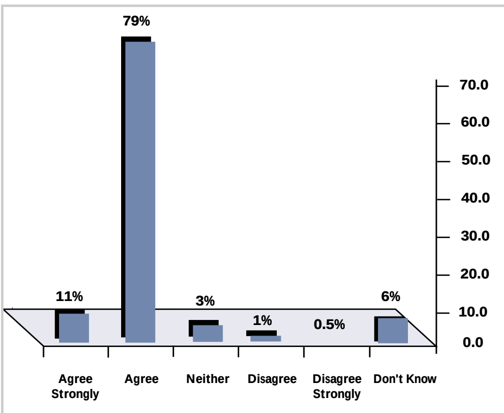
Figure 15: Dublin has a rich cultural life



"Dublin has a rich cultural life"

The city's cultural image is re-emphasised by the fact that 90% of the visitors to Dublin felt that Dublin had a good stock of museums (Figure 16).

Figure 16: There are lot of museums to visit



"There are a lot of museums to visit"

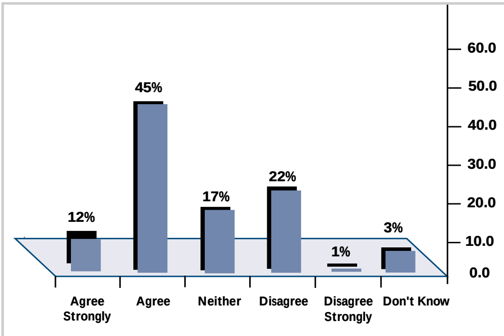
Tourism in Dublin

Prices in Dublin

Figure 17 illustrates 57% of visitors to Dublin felt that prices were too high. This is a significant increase of 22% on the 2002 study. This may be due to the increasing transparency of the euro and unfavourable strength of the euro against the dollar.

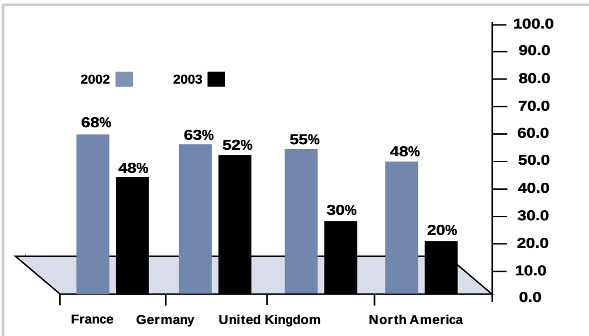
Figure 17: Prices are too expensive

"Prices are too expensive"



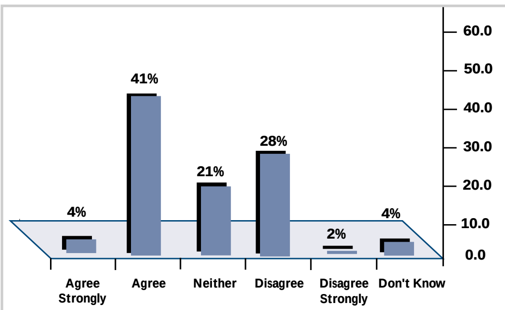
Of Dublin's main markets, French visitors were most likely to view prices in the city as been too high (68%), while visitors from North America proved least likely at 48% (Fig. 18).

Figure 18: Prices are too expensive by nationality 2002 and 2003



Less than half (45%) of visitors to the capital feel that Dublin offers good value for money to visitors (Figure 19). This figure is significantly down from previous years (17%) and represents a concern.

Figure 19: "Good Value for Money"

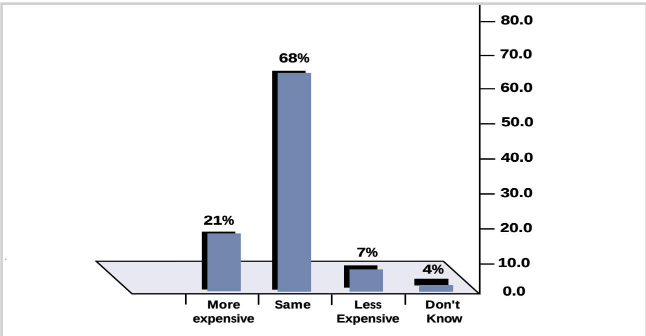


"Good value for money"

Relative Value

Respondents were asked to highlight how Dublin compares to other major cities they had visited and specify items they found expensive and inexpensive. These questions were added to the original questionnaire from the end of March and 845 responses were obtained.

Figure 20: How Dublin compares to other major cities visited



Although 57% felt prices were too high (as seen in Figure 17 previously), reassuringly only 21% felt they were more expensive than other major cities visited. Sixty eight percent of respondents (576) were of the opinion that prices in Dublin were similar to prices in other major cities they had visited (Figure 20).

Figure 21: Items considered relatively expensive

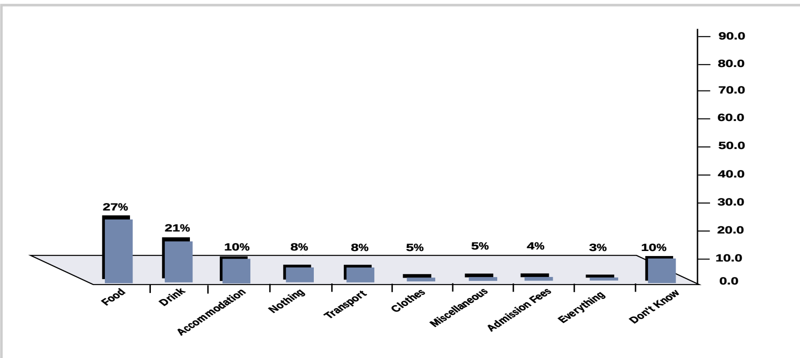
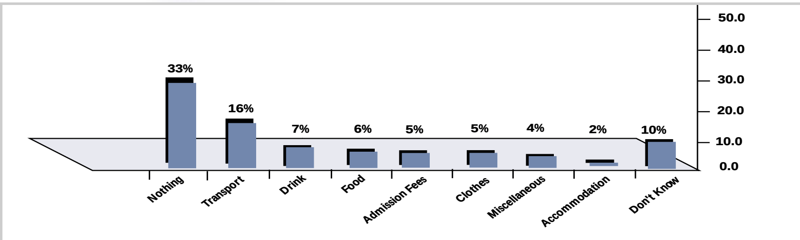


Figure 21 highlights the key items of concern in relation to expense include food (27%), drink (21%), accommodation (10%) and transport (8%). Transport includes car hire, taxis, petrol, parking and general transport costs. A further 5% listed miscellaneous items such as, cost of living, souvenirs, jewellery, cigarettes, books, euro exchange rate, high street shopping and music to be relatively expensive.

Tourism
in Dublin

Figure 22: Items considered relatively cheap



As Figure 22 shows 33% of respondents were of the opinion that nothing was cheap in Dublin. The greatest percentage found transport (16%) (this includes taxis, hop on hop off bus tours, car hire, petrol and general transport) to be relatively cheap. A further 4% were of the opinion that miscellaneous items were cheap, these included souvenirs, cigarettes, jewellery, CDs, books and student discounts.

Table 13: Top ten more expensive cities visited

	Number of responses	% of respondents
London	454	40%
Paris	194	17%
New York City	117	10%
Rome	36	3%
San Francisco	20	2%
Venice	19	2%
Tokyo	18	2%
Oslo	17	1%
Stockholm	14	1%
Amsterdam	14	1%

When asked to compare Dublin with other cities they had visited 40% of respondents felt London was more expensive, 17% felt Paris was more expensive and 10% found New York City more expensive (Table 13).

Table 14: Top ten less expensive cities visited

	Number of respondents	% of respondents
Prague	69	7%
Barcelona	59	6%
Madrid	44	5%
Berlin	42	4%
Glasgow	36	4%
Paris	14	4%
Edinburgh	30	3%
Rome	30	3%
Amsterdam	23	2%
Lisbon	20	2%

Comparing Dublin with other cities in terms of cheapness, 7% of respondents were of the opinion that Prague was cheaper than Dublin, 6% thought Barcelona was less expensive than Dublin, 5% Madrid, 4% Berlin, 4% Glasgow, 4% Paris, 3% Edinburgh, 3% Rome, 2% Amsterdam and 2% Lisbon (Table 14). Interesting most of these cities would be considered close competitors of Dublin in terms of visitors.

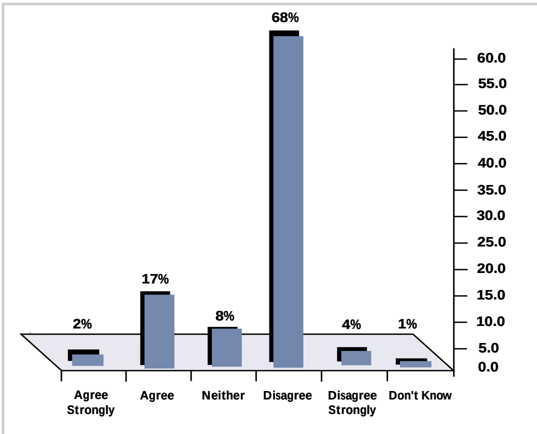
Tourism in Dublin

Crowded City

People's perception of Dublin as a crowded city seems to be changing. Nineteen percent of respondents agree that Dublin is too crowded for sightseeing (Figure 23). This represents an increase of 7% on last years results. The large amount of construction and road works carried out in the capital throughout 2003 may have contributed to this increase and street paving.

"It's too crowded for sightseeing"

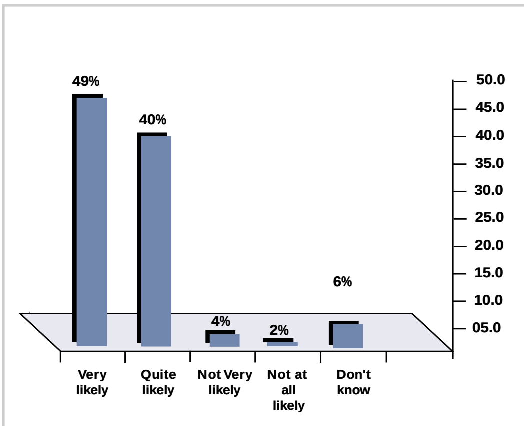
Figure 23: It's too crowded for sightseeing



Likelihood of Returning

A high proportion of respondents (89%) expressed a likelihood to visit Dublin again in the future (Figure 24). The comparable figure for 2002 was 78%.

Figure 24: Likelihood of returning



Overall Rating of Dublin

Dublin received an average overall rating of 8.4 out of a possible 10, compared to 8 in 2002. This shows a continued high level of satisfaction with the city amongst visitors.

Tourism in Dublin

City Break Tourism in Dublin

This section presents the findings from an analysis of one of the city's most rapidly growing tourism segments - the city break market. A city break is defined as a trip of more than one night, which involves the majority of the stay taking place in an urban setting (Mintel, 2000). People travelling to cities for leisure/holidaymaking purposes (as opposed to business, study or other non leisure purposes) has become an increasingly common phenomenon. This growth has helped to popularise and regenerate many European cities that previously were not considered holiday destinations. There are a number of reasons for this growth, including the following;

- the expansion of low-cost/no-frills airlines has made a wide range of city destinations accessible at significantly lower prices.
- an increase in the tendency to take secondary and supplementary holidays for shorter periods
- the general increase in people's personal disposable income
- increased availability of flexible city break packages by specialist operators
- increased promotion and distribution by individual city product providers

Dublin as a city break destination

Irish tourism has been marked by a significant increase in the volume of short break holidays from overseas. This market increased by 37% between 1996 and 2000 (Mintel Report, 2002). The rapid growth in short breaks can mostly be attributed to the rising popularity of Dublin as a city break destination. This popularity has been achieved through a combination of increased low cost flights to Dublin, significant inner city regeneration programmes, improved accommodation stock and the successful positioning of the city as a fun and fashionable destination.

City break visitors to Dublin were examined in detail for this study. The city break cohort was extracted by selecting those respondents who stated Dublin city was their only destination on this trip and the main purpose was leisure. In order to examine this market segment properly, it was decided to compare it with another visitor type. Only by doing this could the distinctiveness of the city break market be clearly seen.

It was decided to compare city breakers with people who were visiting Dublin as part of their main holiday, as it was felt this would provide a good point of contrast. Having separated both city break visitors and main holiday visitors it was possible to run comparisons under various headings. This proved very useful in identifying particular characteristics and behaviour patterns in the market. These are illustrated in the following findings.

Visitor Origin

Due mainly to the supplementary and short stay nature of the trips involved, the city break market has traditionally been characterised by a more localised travel pattern compared to other forms of urban tourism. This trend is reflected in the survey findings which show city break visitors overwhelmingly drawn from the UK. This contrasts strongly with visitors to Dublin on their main holiday who show a much wider range of visitor origin (Table 15).

Tourism in Dublin

Table 15: Visitor Profile

	City Break Visitors	Main Holiday Visitor
UK	79%	27%
North America	3%	30%
France	4%	3%
Germany	2%	6%

Length of Trip

In general people tend to visit cities for short durations (Table 16). Visitors can grasp the attractions of a large city in a few days, (usually between 2 and 3 days) and small cities in a matter of hours. Cities generally do not aggressively target the long holidaymaker with the exception of major capitals like London and Paris.

The majority of city breaks in Europe are taken domestically and have a duration of under one week. However comparisons on a country-by-country basis do show variations. For example the UK market in particular has a tendency to take shorter city breaks with 85% staying one week or under, while the Germans have the highest propensity for taking long city breaks. City breakers also tend to be multiple holiday takers with the city break often being supplementary or additional to a main holiday. As one would expect, these holidays tend to be of a shorter duration. The Dublin visitor survey shows this trend, with nearly three quarters of all city break trips to Dublin lasting 4 nights or less.

Table 16: Duration of visit in Dublin

	City Break trip	Main Holiday Trip
4 nights or less	74%	4%
7 nights or less	90%	20%
14 nights or less	98%	68%

Timing of Visit

Research shows that a city break trip is often chosen as a second or supplemental holiday and this is often reflected in the timing of the trip (outside of peak season). This pattern is evident in the results from the Dublin visitor survey which show a very even distribution of trip taking throughout the year (Table 17). This compares starkly with the main holiday figures which demonstrate a much higher degree of seasonality.

Table 17: Month of arrival

	City Break Visitors	Main Holiday Visitor
Spring (March/April/May)	29%	17%
Summer (June/July/August)	32%	67%
Autumn (Sept./Oct./Nov.)	20%	15%
Winter (Dec./Jan./Feb.)	20%	1.9%

Executive summary

Party Composition

Research shows that a high proportion of urban tourists and short break tourists travel without children or come from childless households. The Dublin survey results support this view with just 16% of city breakers travelling with a family. The majority of city break visitors travel in couples with a partner (57%) (Table 18).

Table 18: Party composition

	City Break Visitors	Main Holiday Visitor
With Partner	57%	48%
With Friend(s)	18%	14%
With Family	16%	26%
Alone	8%	7%
With Group	2%	6%

Influencing Factors for Visiting Dublin

Three factors in particular were expressed as being a major influence for visiting Dublin, cheap airfare, advice from friends and relatives, and a previous visit (Table 19). The influence of a cheap airfare is of particular significance as it contrasts so considerably with the main holiday visitors who show very little influence from this factor.

Table 19: Primary factors affecting the decision to visit Dublin

	City Break Visitors	Main Holiday Visitor
Cheap Airfare	32%	7%
Advice from Friends/Relatives	28%	25%
Previous Visit	25%	10%

The main sources of information utilised by city break visitors were, the internet, guide books, and friends and family. These same sources were heavily used by main holiday visitors as well, although their reliance on guide books was stronger (Table 20).

Table 20: Information sources

	City Break Visitors	Main Holiday Visitor
Internet	34%	27%
Guide Book	26%	31%
Friends/Relatives	24%	17%
Brochures	6%	11%
Travel Agent / Tour Op.	5%	9%

Booking Behaviour

City breaks are generally not complicated holidays and are normally made up of just a few components (usually transport and accommodation). This makes 'doing it yourself' more appealing in terms of searching for information and making bookings. The Dublin visitor survey results highlight this trend by showing the importance of the internet in making city break bookings.

Tables 21 and 22 show how city break visitors are almost twice as likely to book their transport and accommodation through the internet, as main holiday visitors. Conversely they are significantly less likely to book through an intermediary, unlike main holiday visitors who still rely heavily on travel agents to book their trips.

Table 21: Method of Booking Transport

	City Break Visitor	Main Holiday Visitor
Internet	66%	34%
Travel Agent	19%	47%
Direct with Accommodation	8%	8%

Table 22: Method of Booking Accommodation

	City Break Visitor	Main Holiday Visitor
Internet	46%	27%
Travel Agent	17%	37%
Direct with Accommodation	14%	15%

In addition the timing of bookings for city break visitors is of particular note. Over half of all this cohort made their bookings less than four weeks before departure. This contrasts with just one in three main holiday visitors (Table 23).

Table 23: Timing of Booking

	City Break Visitor	Main Holiday Visitor
4 weeks or less before trip	51%	34%
5-12 weeks before trip	28%	31%
More than 12 weeks	6%	17%

Conclusion

The city break has become an established part of the multifaceted urban tourism phenomenon of recent decades. The above findings offer a general insight into the tendencies of the city break consumer to Dublin and hopefully provide a base to help marketers and product suppliers to better understand this dynamic and valuable market sector.

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