2009

Dublin Visitor Survey 2009

Gerard Dunne

Technological University Dublin, gerard.dunne@tudublin.ie

Sheila Flanagan

Recommended Citation

Dunne, G. & Flanagan, S. (2009). Dublin Visitor Survey 2009. Dublin: Technological University Dublin.

Dublin Visitor Survey
2009 Report
Final Draft

Prepared for:

Dublin Tourism & **Dublin Institute of Technology**

Acknowledgements

The authors would like to extend their appreciation to our industry research partners in Dublin Tourism for their support in relation to this report.

The authors would also like to extend our appreciation to the managers and staff of the visitor attractions who facilitated the operation of surveying on site. These are The Book of Kells, Guinness Storehouse, Dublin Writer's Museum, St. Patrick's Cathedral, National Gallery of Ireland, Dublin City Gallery The Hugh Lane and The Old Jameson Distillery.

To the surveyors involved in the research collection and staff of the School of Hospitality Management and Tourism, Dublin Institute of Technology who assisted in the implementation of this research, we express our gratitude.

Executive Summary

This report represents a joint research initiative by Dublin Tourism and the School of Hospitality Management and Tourism at the Dublin Institute of Technology. Now in its tenth year of collation, the study has been conducted annually since 1999 and has amassed a wealth of rich data over the years. This report highlights the principal 2009 findings from the annual visitor survey including the characteristics and attitudes of out-of-state tourists visiting Dublin City. A separate summary report commemorating the tenth year of the research will also be published and will highlight some interesting trends over that period.

The key objectives of the survey are 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.

Eight locations were used in 2009 as survey points across Dublin City to achieve geographical spread and ensure a variation and range of tourist facilities. All out-of-state visitor types to the city were included but domestic travellers were excluded.

To highlight the range of topics covered in the report and to capture some of the noteworthy points from the research, a list of five questions arising from the findings of Dublin Visitor Survey (DVS) 2009 Report are posed below:

1. Is Dublin an unattractive destination for families travelling with young children?
2. Why did visitors spend more nights in Dublin in 2009 than previous years?
3. Why do first time visitors represent a lower proportion of overall visitors to Dublin in 2009?
4. Why did the majority of visitors in 2009 think Dublin is a safe, clean and uncrowded city?
5. Why did fewer visitors think that prices in Dublin were too high in 2009 and more visitors feel that Dublin offers good value for money?

The Dublin Visitor Survey 2009 Report does not necessarily hold the answers to these questions, but it contains data that may offer insights into some of these issues. The profile of 2009 respondents was as follows:

- The British market remained the biggest single market for Dublin (40%), followed by Mainland European (38%), North America (17%) and Rest of World (5%).
- Almost one third (32%) of those visiting Dublin were with a group of friends and 31% were with a partner.

Visitors exhibited interesting patterns in relation to holiday taking behaviour:

- Three of four respondents (77%) were visiting the city on a holiday away from home.
- Sixty-five percent stayed up to 4 nights in Dublin and the average length of stay in Dublin was 4.4 nights

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

- The most popular types of accommodation were hotels (51%), staying with friends and relatives (13%), guest house (12%) and hostels (12%).
- Accommodation is generally booked 1-4 weeks in advance of arrival (35%). Sixty-two percent booked on the Internet and 4% did not book in advance of arriving in Dublin. Interestingly, in the DVS 1999 Report only 5% of visitors booked via the Internet, which represents a difference of 57% when compared with findings from 2009.

Patterns of interest for transport managers in Dublin include:

- Ninety-six percent of out-of-state visitors to Dublin arrived by air up from 85% in 2002
- Eighty-three percent of respondents booked their transport to the city on the Internet and the next most popular method was directly with the travel operator-offline (5%). The Internet only accounted for 4% of transport bookings in 1999.
- Walking was the most popular means of getting around (72%), followed by car (8%) and sightseeing tour bus (7%).

The major influencing factors affecting the decision to visit Dublin have important implications for those engaged in marketing tourism. Advice from friends and relatives played an important role, accounting for 25% of responses, followed by inexpensive airfares (22%) and the experience of a previous visit also played a role (20%).

The top four most important activities considered by visitors when deciding to visit Dublin were: visiting friends and relatives (13%), culture/history (9%), attractions (9%) and sightseeing (9%).

Overall visitors to Dublin feel that people in Dublin are friendly and hospitable, that Dublin is a safe city, there is a good supply of visitor attractions and restaurants and the city has a rich cultural life. However there have been some interesting trends in recent years.

Just under half of visitors (48%) felt that prices were too high. This figure represents a slight decrease of 3% on the 2008 study. There has also been an increase in the percentage of respondents who feel that Dublin offers good value for money (up by 19% since the 2008 study).

Dublin received a high overall satisfaction rating (8.9 out of a possible 10), which compares favourably with a score of 8 in 1999.

Table of Contents

Page Number

Page Number

List of Figures

Page Number

List of Tables

Page Number

1.0 Introduction

This report presents the findings from the annual Dublin Visitor Survey (DVS) conducted from January to August 2009. This project is undertaken by Dublin Tourism and the School of Hospitality Management and Tourism at the Dublin Institute of Technology. The study has been conducted annually since 1999 and longitudinal analyses are made throughout the report, where appropriate.

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 on a temporal basis;
- To provide up to date information and profiles of visitors to Dublin, which can be utilised by a wide range of groups who have dealings with these visitors before, during and after the course of their stay.

1.1 Methodology

Seven hundred visitor surveys were completed between January and August 2009. Over the past 9 years, a sample of 1,000 surveys were collected from January to December each year. Due to economic circumstances, the data collection was curtailed in 2009 and as a result 700 surveys were collected from January to August. The smaller sample in 2009 and the absence of data from September to December (inclusive) must be considered when making comparative analysis with previous years. However, 700 respondents represents a valid and robust sample size from a statistical perspective.

A number of survey points were used across Dublin City 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
- Temple Bar
- National Gallery of Ireland
- Dublin Writer's Museum
- Dublin City Gallery The Hugh Lane
- Old Jameson Distillery

The survey includes a set of core questions relating to:

- Visitor profile
- Holiday type
- Expenditure
- Accommodation
- Major factors influencing the decision to choose Dublin
- Information sources used before and after arrival in Dublin
- Activities engaged in while in Dublin
- Attitudes towards Dublin

Surveys were conducted with visitors who were not living, working or studying in the Republic of Ireland and only with respondents who confirmed they were spending at least one night away from their normal place of residence. Visitors from Northern Ireland are included in the study providing they fulfil these criteria.

1.2 Irish Tourism in 2009

In order to set the DVS 2009 Report in context, it is useful to look at tourism in Ireland during that year. 2009 was a difficult year for tourism with economic conditions in the key markets and the weakness of the dollar and sterling contributing to a drop in numbers and revenue from Britain and North America. The number of overseas visitors travelling to Ireland fell in total by 12%.

Tourism revenue declined by almost 17% in 2009 to €5.2 billion – its lowest level since 2004, reflecting difficult trading conditions in key overseas markets, most notably Britain and the United States and intense price competition within the accommodation sector, particularly hotels.

Whilst the focus of the DVS is on out of state visitors to Dublin, it is also prudent to look at the domestic tourism market demand in 2009. Demand for leisure trips by Irish residents declined by about 5%. This market also suffered from the economic slowdown and the poor weather during 2009, particularly over the summer months.

The drop in tourism demand created by the economic recession and the resulting increased competition has led to significant discounting by tourism operators and a renewed critical focus on costs and sustainability.

1.3 Dublin Tourism in 2010

The Irish tourism industry is anxious and concerned about the challenges to be faced in 2010. Indications for 2010 are that it will be another tough year for Irish tourism as many key markets continue to battle adverse economic conditions.

- The prospects for some markets, such as Germany and other key Continental European markets appear relatively favourable and growth is expected in 2010.
- Larger traditional markets including Britain and the United States will remain challenging, regardless of exchange rates.
- Home market prospects remain unclear although consumer research indicates further potential as Irish people cut back on foreign trips.

However, it should be noted that the tourism industry has proved to be resilient in the past and while it is exposed to external economic cycles, the demand dynamic differs from other consumer spending patterns and therefore the potential exists even in an economic downturn to deliver results. The quality of Ireland's tourism product is at an all time high and is well placed to capitalise on opportunities. However, the tourism industry cannot be complacent and needs to be proactive as indicated by the findings in this report, for example, in relation to perception of value for money in Dublin.

2.0 Main findings of the Survey

The main findings of this survey centre on the analysis of 700 valid questionnaires. Please note that in some Figures/Tables the total may not add up to 100% due to rounding. Furthermore respondents were given the option to make multiple responses to some questions. In these instances, the total number of *responses* is recorded and findings are presented as a percentage of this number.

2.1 Out-of-State Visitor Profile

This section provides a profile of out-of-state visitors to Dublin in 2009.

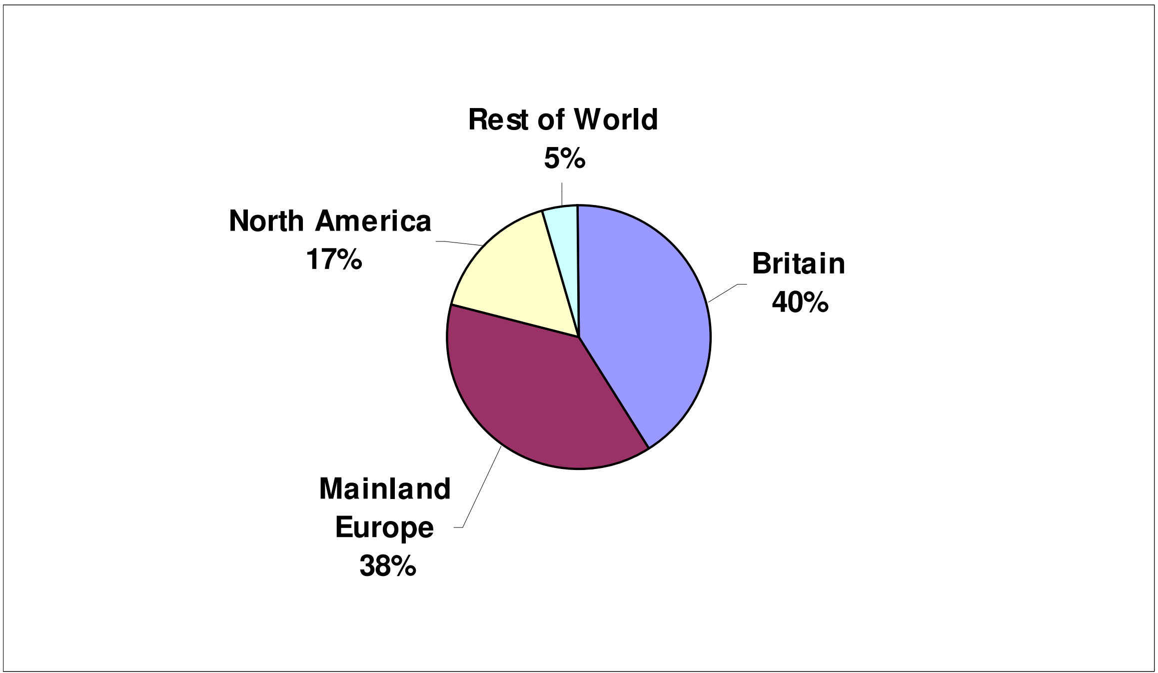
2.1.1 Country of Residence

To ensure a representative sample of out-of-state visitors to Dublin, a breakdown of visitors' country of residence is identified at the start of each year using the Central Statistics Office (CSO) Country of Residence Survey and Fáilte Ireland's Survey of Travellers (Fáilte Ireland Fact Card). For ease of reporting, countries are grouped into four main categories as seen in Figure 1.

The breakdown of visitors is based on most recent statistics available at the start of each year and in the case of this report, are sourced from 2007 Dublin region tourism facts. In previous DVS reports, national statistics were considered but this report is based on Dublin regional information because this data was seen as being more reflective of out-of-state visitors to Dublin. The impact of this change in approach is a slight shift in the market breakdown of respondents in 2008 and 2009 (Table 1) and while this must be borne in mind when making longitudinal comparisons, it aims to strengthen the relevancy and accuracy of the findings.

The main group of respondents were visitors from Britain (40%), while Mainland Europe accounted for 38%, North America (USA and Canada) accounted for 17% and Rest of World 5% of respondents (Figure 1).

Figure 1: Country of Residence



Number of respondents = 700

The majority of Mainland Europe respondents were from Germany (6%), France (5%), Italy (4%) and Spain (4%). Rest of World respondents were mainly from Australia and Korea.

The growth of the Mainland Europe market is quite significant particularly as it emphasises the lesser reliance on the British market.

Table 1: DVS Market Breakdown of Respondents 2003 – 2009

	2003**	2004**	2005**	2006**	2007**	2008*	2009*
Britain	53%	55%	55%	52%	51%	46%	40%
Mainland Europe	25%	24%	23%	28%	28%	33%	38%
North America	17%	15%	17%	15%	16%	16%	17%
Rest of World	5%	6%	5%	5%	5%	5%	5%

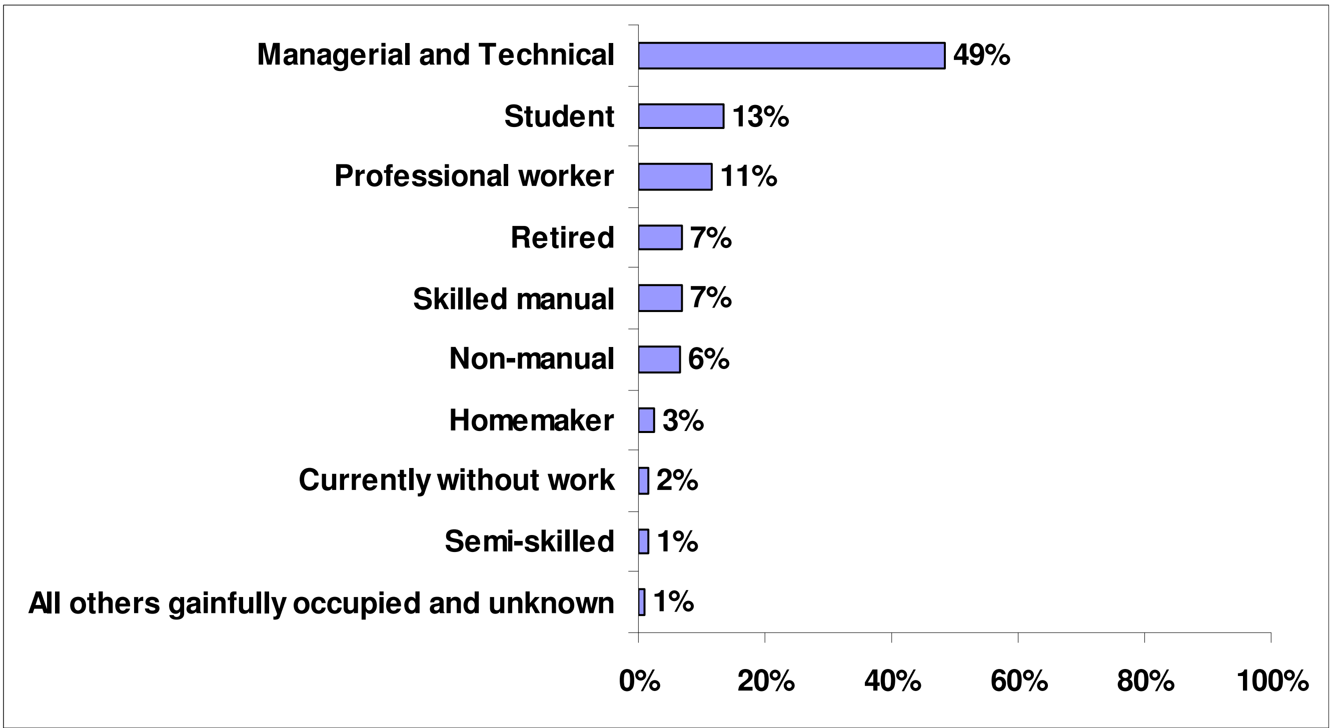
* Based on Dublin regional statistics
** Based on national statistics

The regional statistics also identify when visitors arrive and surveys are collected accordingly to reflect the seasonal influx of visitors.

2.1.2 Working Status

Respondents were asked their occupation and this was categorised based on the Central Statistics Office (CSO) Social Classification System. Almost half of the 2009 respondents (49%) work in the managerial and technical area, while professional workers account for 11%, skilled manual (7%), non-manual (6%), semi-skilled (1%) and all others gainfully occupied and unknown (1%) (Figure 2). Respondents not in full time employment include students (13%), retired people (7%), homemakers (3%) and respondents without work at the time of surveying (2%).

Figure 2: Employment Status/Level of Occupation



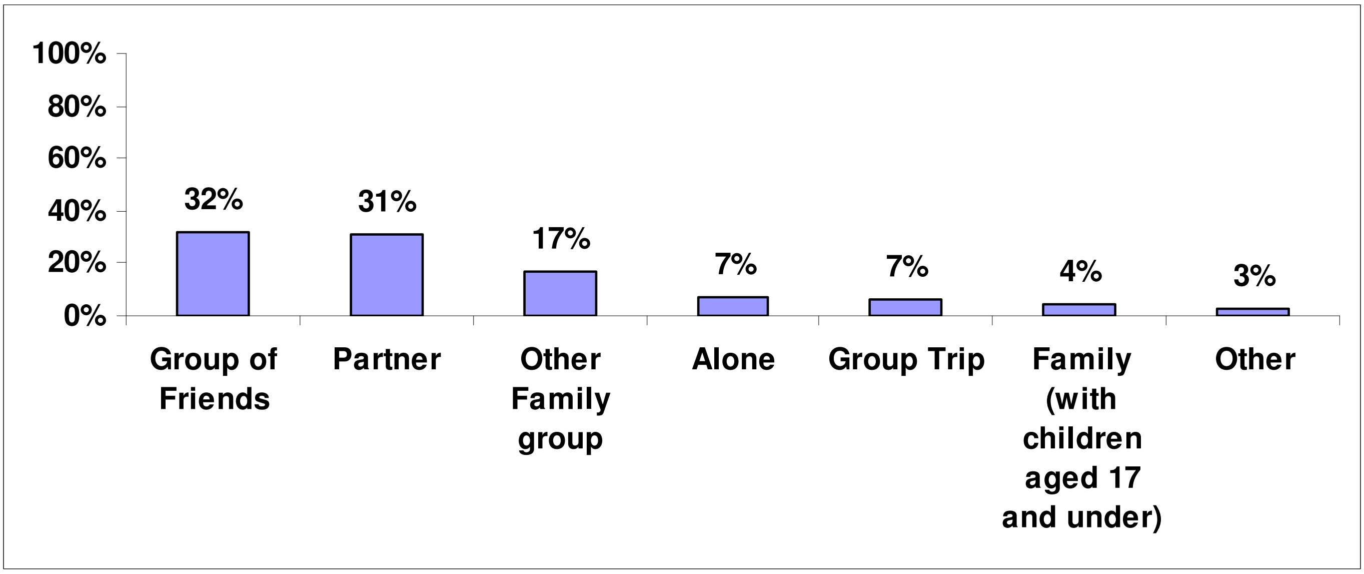
Number of respondents = 700

2.1.3 Group Composition

The most common group compositions among respondents were as follows: travelling with a group of friends (32%), with a partner (31%), other family group (17%) and alone (7%) (Figure 3). Seven percent of respondents were part of a group trip, 4% were in a family group (with children aged 17 and under) and 3% were in an 'other' type of group.

Figure 3 suggests that Dublin does not attract many families groups, particularly families with children aged 17 and under, reinforcing a trend that has been apparent in DVS findings in recent years.

Figure 3: Group Composition

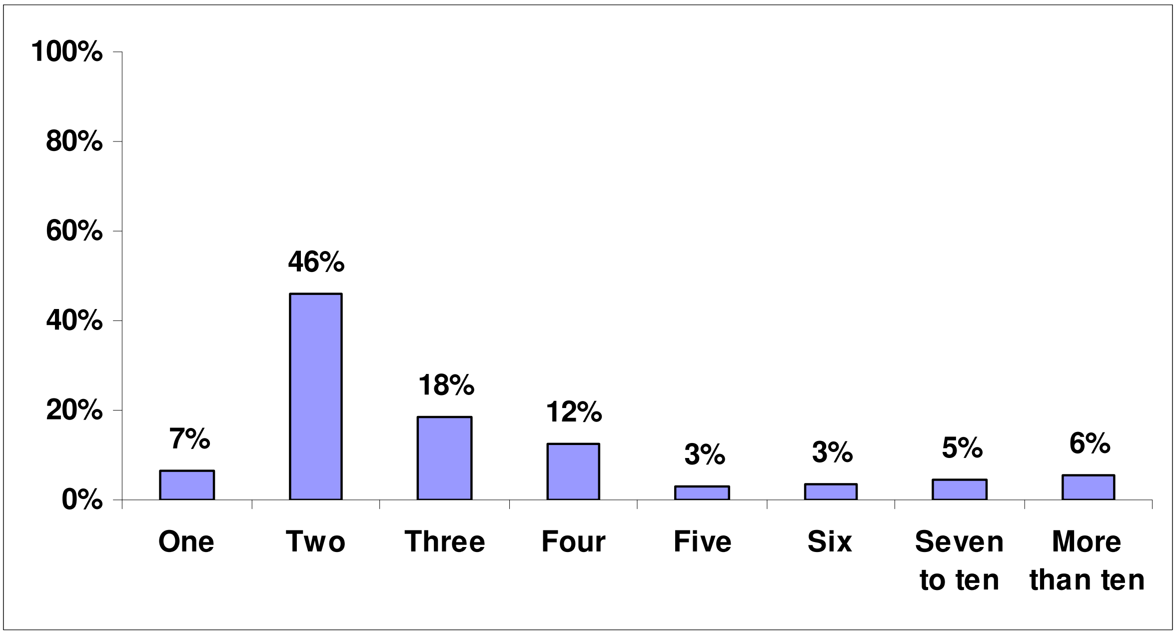


Number of respondents = 700

2.1.4 Group Size

The majority of respondents were travelling in a group of two people (46%), 30% in a group of three or four and the remaining 17% were in a group of five or more (Figure 4). Seven percent were travelling alone.

Figure 4: Group Size



Number of respondents = 700

Table 2 indicates that a group of two remained the most common size among visitors to Dublin over the past seven years, despite dropping 14% from 60% since 2003. Group sizes that have increased over this period are groups comprised of: three (up 12%), four (up 1%) and seven to ten (up 2.5%) people. There have been decreases in groups of one (down 3%) and groups of five and more than ten have remained consistent at 3% and 6% respectively.

Table 2: Group Size 2003 – 2009

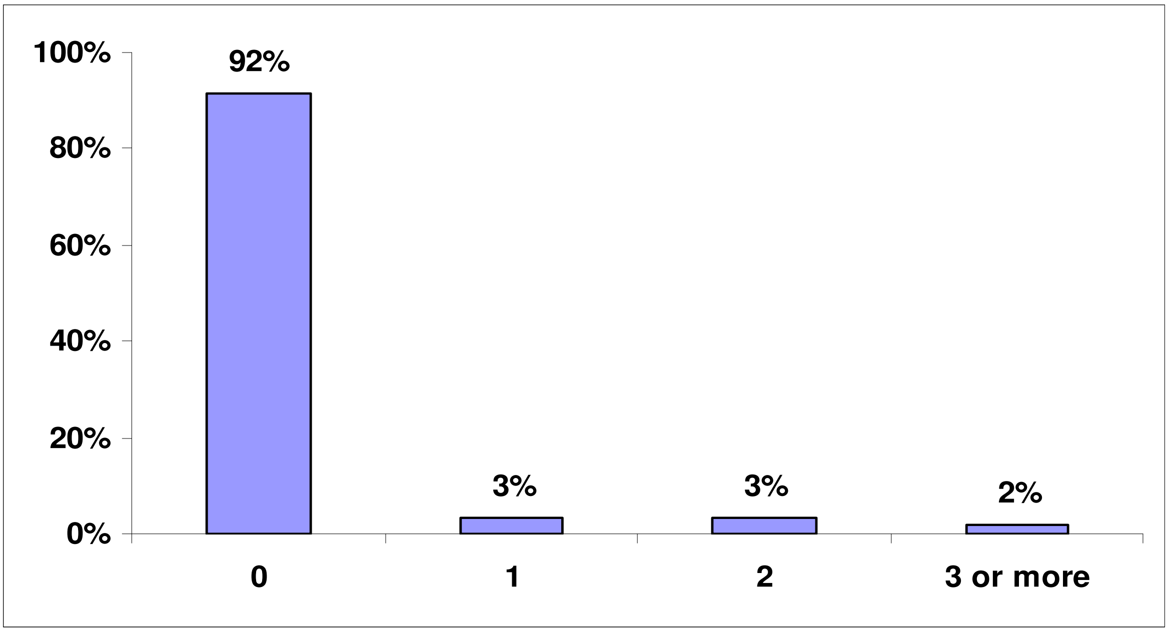
	2003	2004	2005	2006	2007	2008	2009	Average 2003-2009
One	10%	11%	11%	10%	11%	13%	7%	10%
Two	60%	50%	43%	51%	48%	42%	46%	49%
Three	6%	11%	12%	9%	8%	12%	18%	11%
Four	11%	12%	13%	9%	13%	12%	12%	12%
Five	3%	3%	3%	3%	3%	5%	3%	3%
Six	1%	2%	4%	6%	4%	3%	3%	3%
Seven to ten	2.50%	3.50%	5.50%	3.50%	5%	3%	5%	4%
More than ten	6%	8%	9%	8.50%	7%	10%	6%	8%

2.1.5 Number of Children Travelling in the Group

Ninety two percent of respondents were travelling without children (Figure 5), while respondents travelling with one and two children represented just 3% each. The remaining 2% of respondents were travelling with three or more children.

This finding may indicate that Dublin is not perceived as a 'family destination'.

Figure 5: Number of Children Travelling in the Group

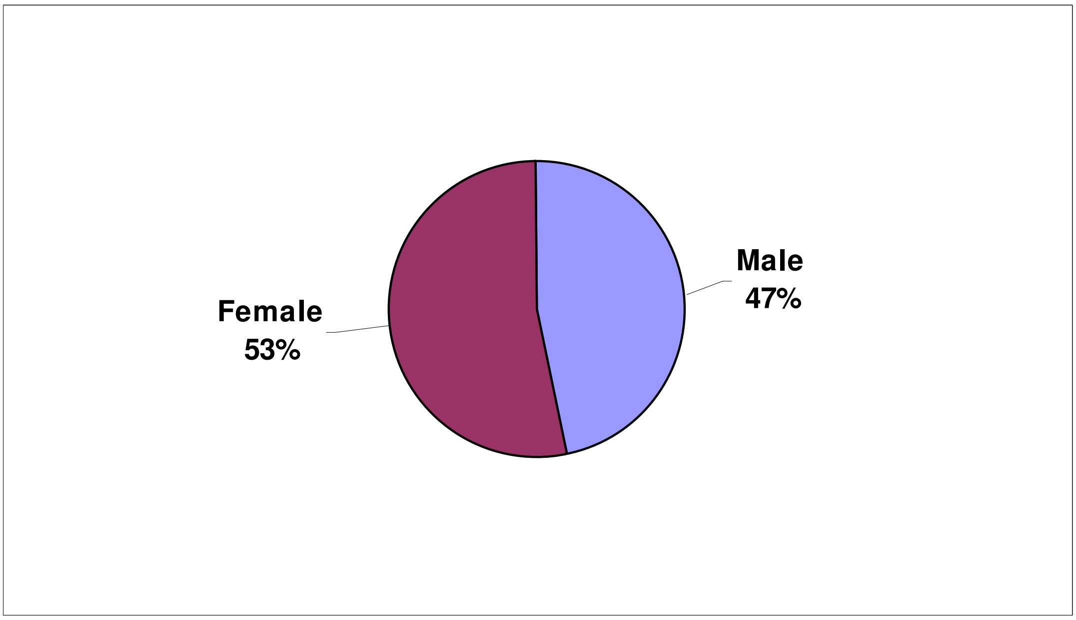


Number of respondents = 700

2.1.6 Gender

Fifty-three percent of those interviewed were female and 47% were male (Figure 6).

Figure 6: Gender

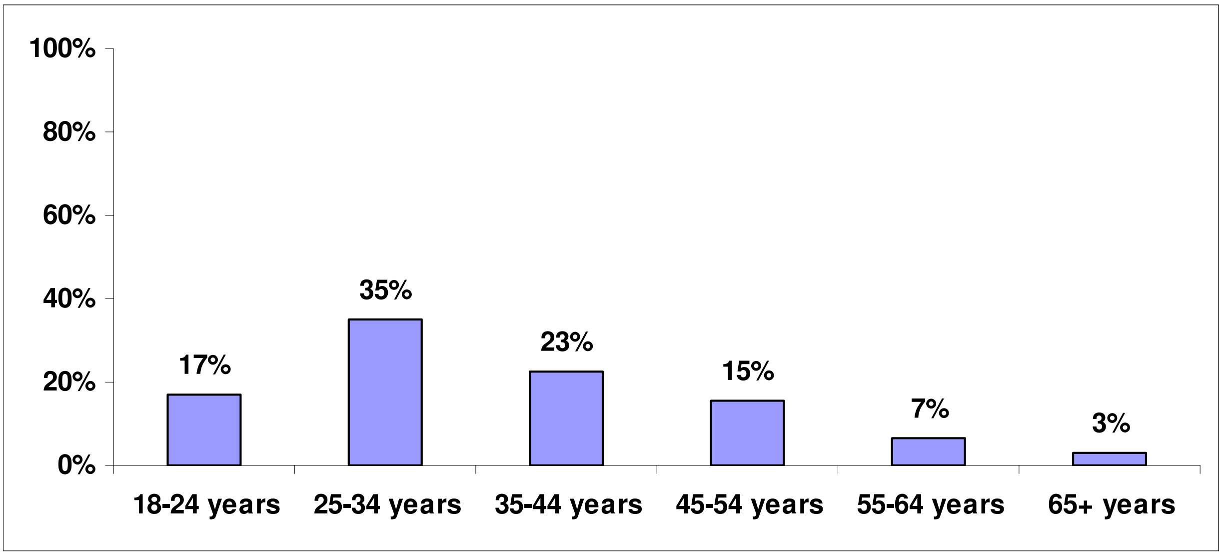


Number of respondents = 700

2.1.7 Age

Figure 7 shows the breakdown of respondents by standard age range groupings. Over half of respondents (52%) were aged between 18 and 34. Thirty-eight percent were aged between 35 and 54 while the remaining 10% were aged 55 or over.

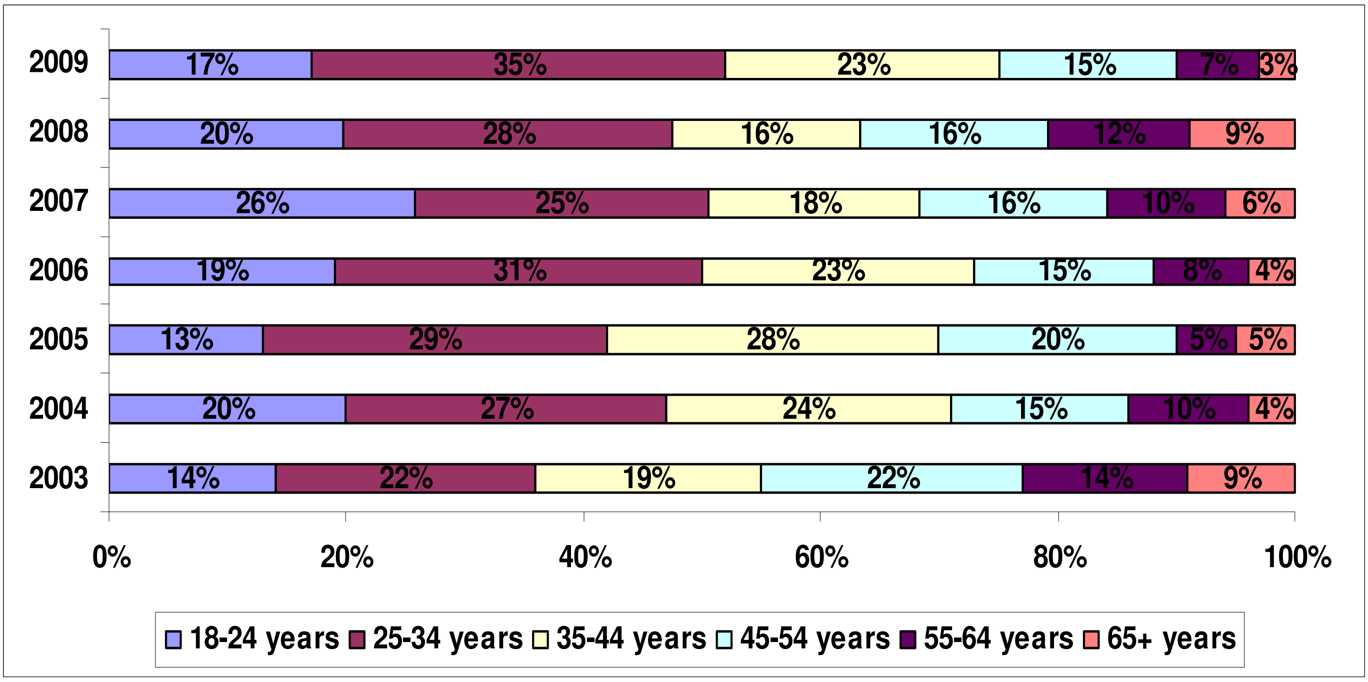
Figure 7: Age of Respondents



Number of respondents = 700

Figure 8 depicts the age range of respondents from 2003 to 2009. It is worth noting that in 2009, there was a slight shift back to previous years of less respondents aged 55 or older (down to 10% from 21% in 2008). A related result is an increase in the 18-34 year old respondents in 2009 compared to 2008 (up 4%).

Figure 8: Age of Respondents 2003 – 2009



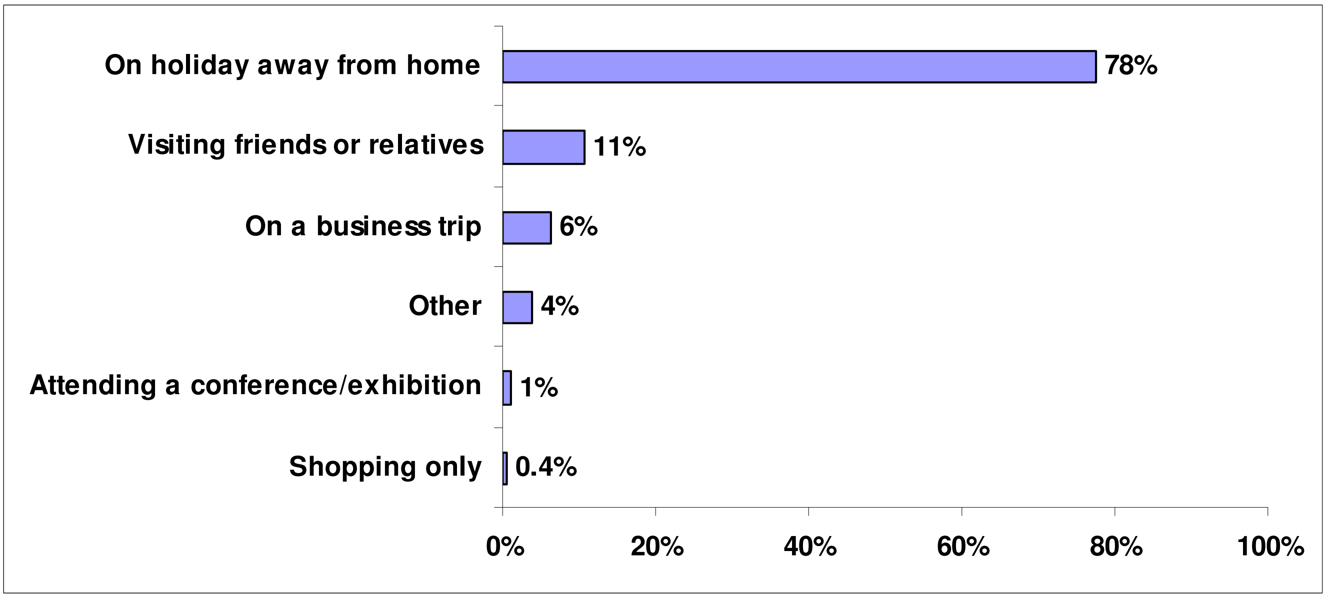
2.2 Purpose and Type of Visit

This section presents information in relation to purpose of visit and type of trip to Dublin.

2.2.1 Main Purpose of Visit to Dublin

The vast majority of visitors surveyed (78%) identified a holiday away from home as the primary reason for visiting Dublin (Figure 9). Visiting friends or relatives (VFR) (11%) is also an important purpose for the trip. The aim of the research is to survey leisure visitors but respondents who are in Dublin for business purposes are included as long as they are also participating in leisure activities, which is always the case given the survey locations used.

Figure 9: Main Purpose of Visit to Dublin

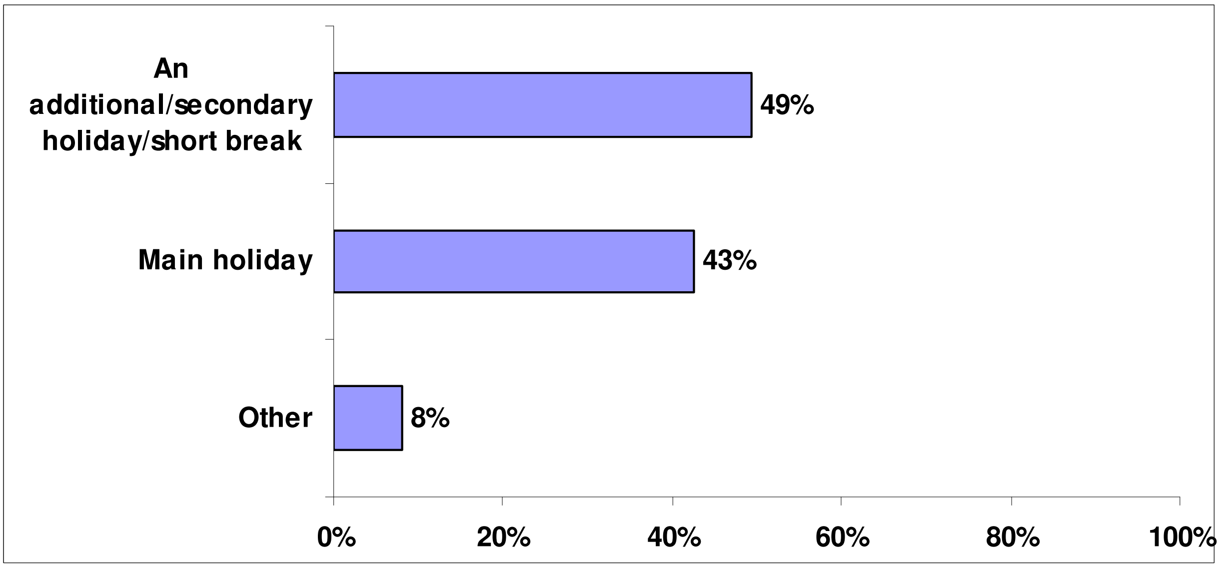


Number of respondents =700

2.2.2 Description of Holiday

On in two respondents (49%) described their holiday as an 'additional/secondary holiday/short break' (Figure 10). Forty-three percent indicated it was a main holiday and 8% revealed they were on an 'other' type of holiday.

Figure 10: Description of Holiday



Number of respondents = 700

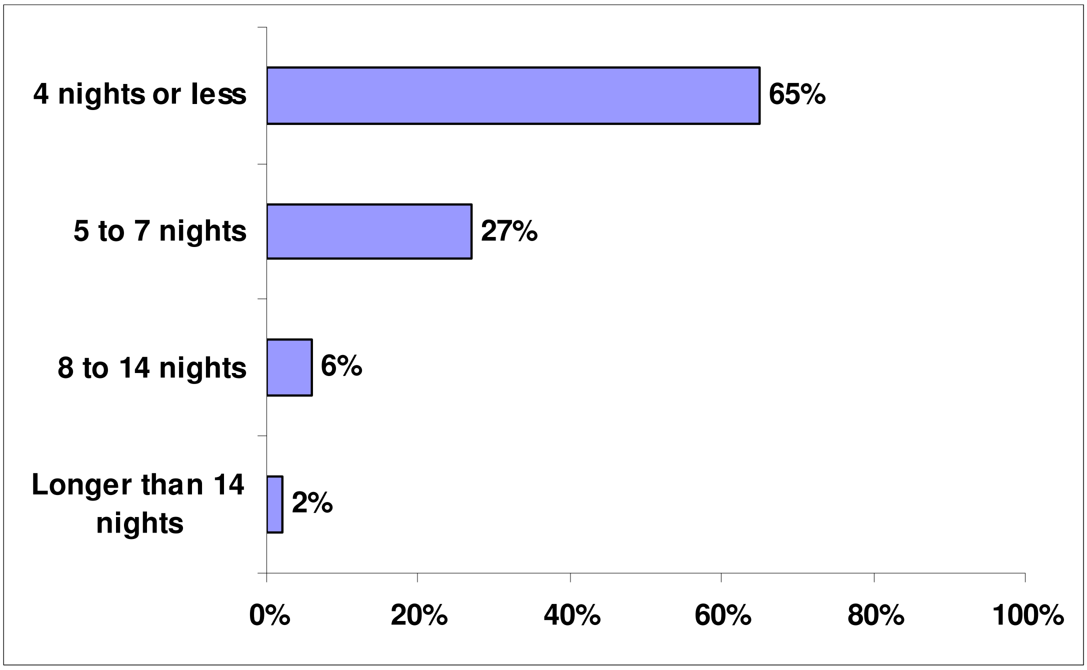
2.3 Duration of Trip

This section presents details on the length of the trip away from home.

2.3.1 Number of Nights in Dublin

Two out of three of those surveyed (65%) stayed up to 4 nights in Dublin (Figure 11). Twenty-seven percent stayed in the capital between 5 and 7 nights, 6% stayed between 8 and 14 nights and 2% stayed longer than 14 nights.

Figure 11: Number of Nights in Dublin



Number of respondents = 700

Table 3 illustrates that in 2009 there was a continued decrease from 2008 in the number of respondents who spent 4 nights or less in Dublin (down 3%). Respondents tended to stay longer in Dublin in 2009 than in any of the previous six years.

Table 3: Number of Nights in Dublin 2003 - 2009

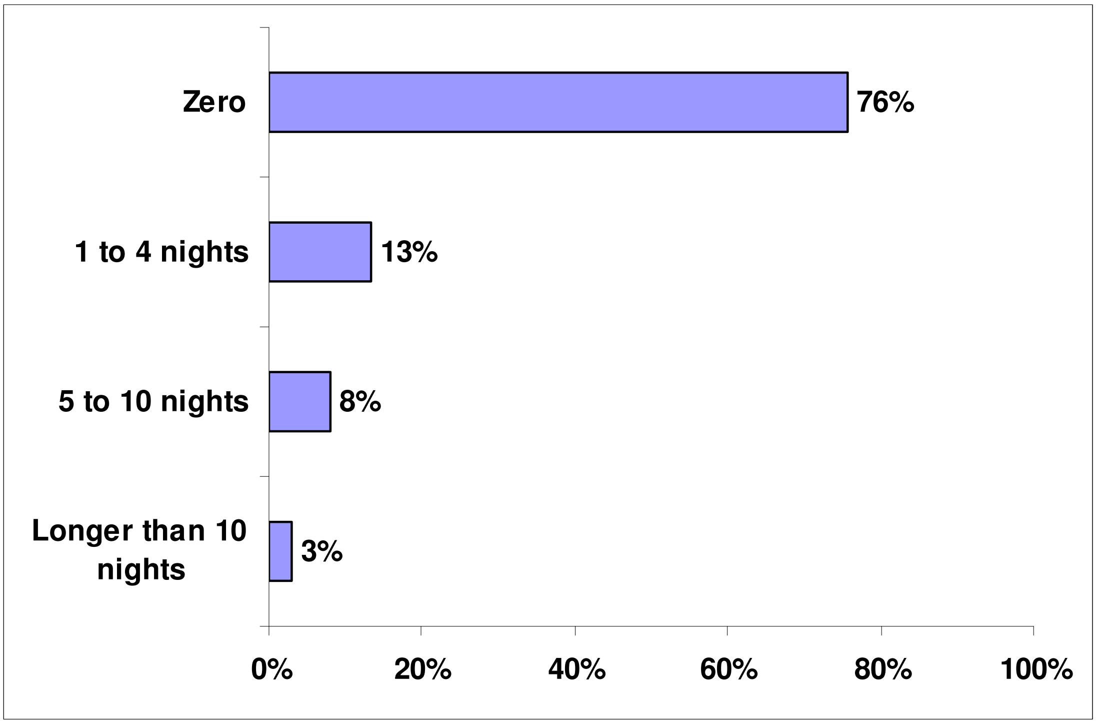
Number of nights	2003	2004	2005	2006	2007	2008	2009	Average 2003-2009
4 nights or less	78%	80%	84%	73%	78%	68%	65%	75%
5-7 nights	15%	14%	11%	22%	17%	26%	27%	19%
8-14 nights	5%	4%	4%	3%	3%	5%	6%	4%
Longer than 14 nights	3%	2%	1%	2%	1%	2%	2%	2%

The average length of stay in Dublin in 2009 was 4.4 nights, emphasising the importance of the short break market. This compares with 4.3 nights in 2008 and 3.9 nights in 2007, which highlights the positive trend in Table 3 of respondents spending more nights in Dublin in 2009. This may indicate a lengthening of the short break market into Dublin or of Dublin being increasingly seen as a main destination in its own right.

2.3.2 Number of Nights in Other Parts of the Republic of Ireland

Over three quarter (76%) of respondents stayed only in Dublin on their trip, while the remaining 24% spent at least one night in other parts of the Republic of Ireland (Figure 12).

Figure 12: Number of Nights in Other Parts of the Republic of Ireland



Number of respondents = 700

Of those who did overnight in other parts of the Republic of Ireland, the majority of respondents were from North America (36%), followed by Mainland Europe (35%), Britain (20%) and Rest of World (9%).

Table 4 shows that there has been a continuous increase in the number of respondents spending zero nights in other parts of the Republic of Ireland (up 23%) since 2003. This may be linked with Table 2 in that respondents who are not travelling around the country are spending more time in Dublin, hence the increase number of nights spent in Dublin.

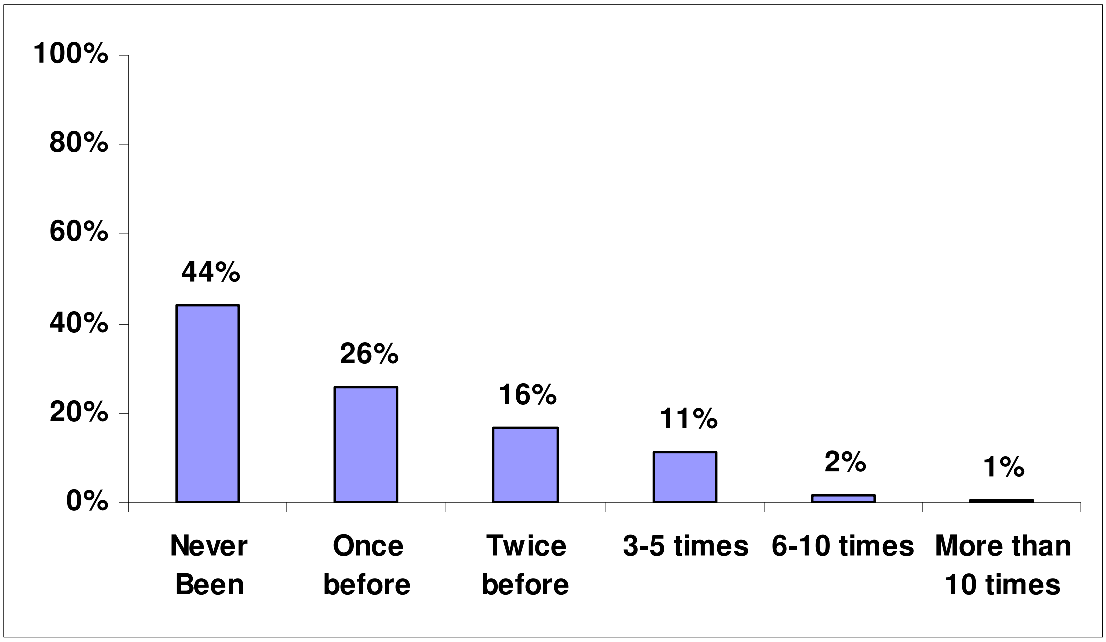
Table 4: Number of Nights in other parts of the Republic of Ireland 2003 – 2009

Number of nights	2003	2004	2005	2006	2007	2008	2009	Average 2003-2009
Zero	53%	65%	66%	66%	69%	70%	76%	66%
1-4 nights	12%	12%	10%	10%	13%	11%	13%	12%
5-10 nights	24%	16%	17%	17%	14%	13%	8%	16%
Longer than 10 nights	11%	7%	8%	7%	4%	7%	3%	7%

2.4 Previous Visits to Dublin

Forty-four percent of respondents had never visited Dublin previously, 53% had been to Dublin between one and five times, 2% had been between six and ten times, while 1% of respondents had been to Dublin more than ten times (Figure 13).

Figure 13: Previous Visits to Dublin



Number of respondents = 700

Table 5 shows that Dublin continues to attract first time visitors (44% in 2009), which is a positive indication of the attractiveness of Dublin as a destination. However, the most important trend in Table 5 is the increase in repeat visitors (across all ranges) that indicates satisfaction from a previous visit. Repeat visitors are very valuable to a destination and Dublin is performing well in this context.

Table 5: Previous Visits to Dublin 2004 – 2009

	2004	2005	2006	2007	2008	2009	Average 2004-2009
Never been	56%	59%	62%	67%	57%	44%	58%
Once before	22%	16%	8%	13%	21%	26%	18%
Twice before	8%	9%	12%	10%	12%	16%	11%
3-5 times	9%	10%	10%	6%	8%	11%	9%
6-10 times	3%	5%	5%	3%	2%	2%	3%
More than 10 times	2%	2%	3%	1%	0.2%	1%	2%

3.0 Expenditure

Respondents were asked to indicate the amount spent per person per day on a range of specified items comprising: accommodation, food, drinks, shopping, entertainment and other miscellaneous items. Table 6 shows the average daily expenditure of respondents in 2009.

Please note that these are reported, not actual, expenditure figures, based on figures provided by respondents.

Table 6: Average Daily Expenditure per Person per Day

	2009
Accommodation	€48
Food	€30
Drinks	€31
Shopping	€50
Entertainment	€28
Other	€18
Total	**€205**

In 2008, the reported average expenditure per person per day was €268, which had been a significant increase from the 2007 finding of €191.

Based on the reported daily spend and considering the average number of nights in Dublin in 2009 was 4.4, it can be estimated that the average expenditure per person per trip was approximately €902.

4.0 Accommodation

Fifty-one percent of respondents stayed in hotels, 13% with friends and relatives, 12% in guest houses, 12% in hostels, 5% in bed and breakfast accommodation, 3% in rented houses/apartments, 1% other types of accommodation, 1% indicated they used university/college accommodation and 1% second homes (Table 7).

It is interesting to note the increase in 2009 in hotel usage (up 3% from 2008). The main areas to lose out from this increase over the same period hostels (down 2%), bed and breakfasts (down 3%) and other types of accommodation (down 1%).

Table 7: Accommodation Used (%) 2002 – 2009

Type of Accommodation	2002	2003	2004	2005	2006	2007	2008	2009	Average 2002-2009
Hotel	52	57	58	56	61	54	48	51	55
Staying with Friends & Relatives	12	11	10	13	10	10	13	13	12
Guest House	5	6	5	13	9	5	12	12	8
Hostel	13	9	13	9	11	18	14	12	12
Bed & Breakfast	15	16	13	6	5	7	8	5	9
Rented House/Apartment	2	1	1	2	2	2	3	3	2
Other	3	3.5	2.5	1	1.5	2	2	1	2
University/College	1	2	1	0.5	1	2	1	1	1
Second Home	-	-	-	-	-	-	-	1	0

4.1 How Accommodation was Booked

In 2009, the primary method of booking accommodation was through the Internet (62%), followed by directly with accommodation offline (12%), travel agent (4%), organised group (3%), other methods (2%) and tour operator (1%) (Table 8). People staying with friends and relatives accounted for 12% of respondents and a further 4% had not booked accommodation in advance of arriving in Dublin.

The increasing usage of the Internet as a method of booking accommodation from 2002 to 2009 is paralleled with the decrease in the usage of travel agents and other methods.

Table 8: Method of Booking Accommodation in Dublin (%) 2002 – 2009

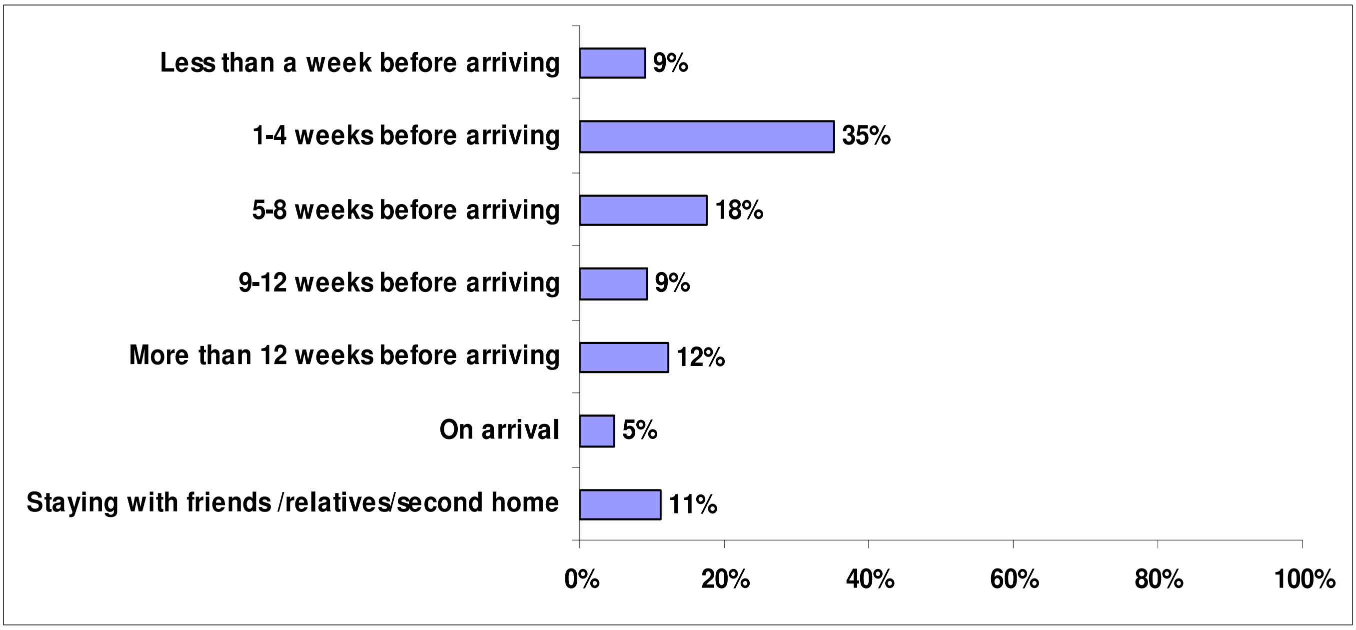
Method of Booking	2002	2003	2004	2005	2006	2007	2008	2009	Average 2002-2009
Internet	25	36	50	54	65	69	58	62	52
Staying with Friends and Relatives	11	10	7	12	10	7	9	12	10
Directly with accommodation offline	13	15	8	11	7	4	9	12	10
Did not Book	6	3	5	2	1	4	9	4	4
Travel Agent	26	22	16	8	11	8	4	4	12
Organised Group	4	1	4	4	4	3	4	3	3
Other	11	9	7	5.5	2.5	3	3	2	5
Tour Operator	2	2	3	3	1	2	4	1	2
Directly with Local Tourist Office	1	1	1	0.5	0.5	0.3	1	0.1	1

4.2 When Accommodation was Booked

Figure 14 indicates that 9% of respondents booked their accommodation in Dublin less than a week before arriving, 35% of respondents booked 1-4 weeks before arriving and 18% booked 5-8 weeks before arriving. The remaining 21% booked more than 9 weeks before arriving. Three percent of respondents booked on arrival and 11% were staying with friends or relatives or in a second home.

This information provides an insight into buying behaviour of visitors and highlights the window of opportunity for selling accommodation in Dublin.

Figure 14: When did you Book your Accommodation in Dublin?



Number of respondents = 700

5.0 Transport

The vast majority (96%) of out-of-state visitors to Dublin in 2009 arrived by air, while just 2% arrived by boat/ferry (Table 9). In the DVS 1999 Report, 84% arrived by air and 17% arrived by boat/ferry.

All types of access transport have decreased in usage since 2002, except for plane (up by 11% over that period). This highlights the reliance of Dublin on air transport.

Table 9: Main Type(s) of Access Transport Used to Dublin (%) 2002 – 2009

Type of Transport	2002	2003	2004	2005	2006	2007	2008	2009	Average 2002-2009
Plane	85	86	85	91	95	94	94	96	91
Boat/Ferry	9	11	8	6	2	3	3	2	6
Private Car/Van	4	3	2	1	1	1	1	1	2
Train	4	2	3	1	0.5	1	1	1	2
Hired Car/Van	2	4	-	1	0.5	1	0.5	0	1
Public Bus/Coach	4	5	1	0.5	0.5	0.4	0.1	0.3	1
Private Bus/Coach	1	2	1	0.5	0.5	0.2	0.1	0.1	1

5.1 How Transport was Booked

The Internet (83%) was the main method of booking transport to Dublin in 2009 (Table 10). Interestingly, the Rest of World respondents showed the highest Internet booking rate (94%).

It is also interesting to point out that the Internet increased 2% from the 2008 study as a method of booking transport while in 1999 it only accounted for 4% of bookings, highlighting the exponential growth of this booking method over the years.

Table 10: Method of Booking Transport to Dublin by Key Markets (%)

	Average across all Markets		Britain	Mainland Europe	North America	Rest of World
Internet	83%		84%	80%	86%	94%
Directly with the travel operator- offline	5%		7%	4%	0%	0%
Travel Agent	4%		2%	4%	7%	6%
Did not book	3%		4%	3%	3%	0%
Part of an organised tour	3%		2%	4%	2%	0%
Tour operator	2%		0%	3%	2%	0%
Other	1%		1%	1%	0%	0%
			288	264	116	32

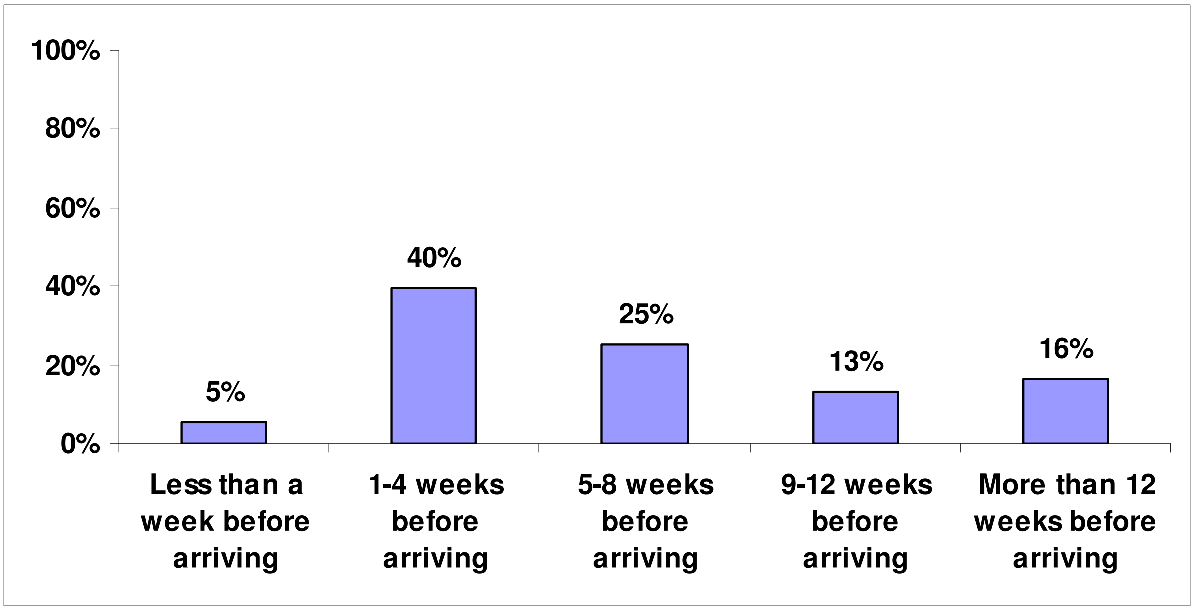
Number of total respondents = 700

5.2 When Travel was Booked

Figure 15 indicates that 5% of respondents booked their travel to Dublin less than a week before arriving, 40% booked 1-4 weeks before arriving and 25% booked 5-8 weeks before arriving. The remaining 29% booked more than 9 weeks before arriving.

These findings show close correlations with the pattern of when accommodation was booked and highlight the short lead time for both.

Figure 15: When did you book your Transport to Dublin?



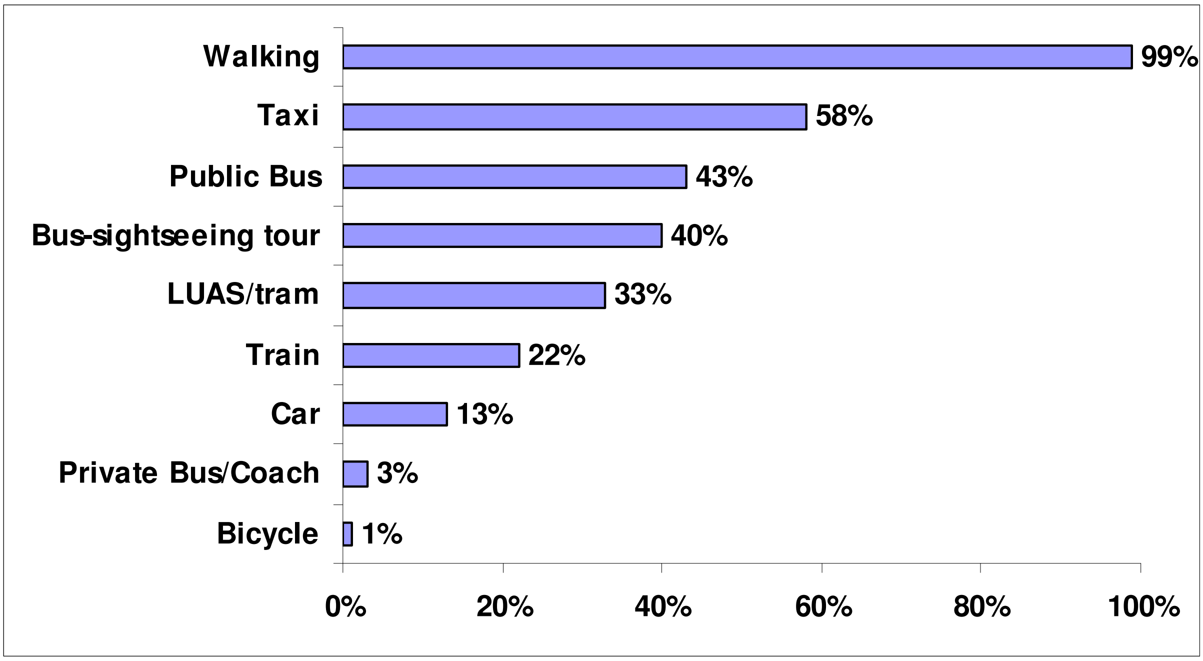
Number of respondents = 700

5.3 Forms of Transport used to get Around Dublin

Respondents were presented with a number of forms of transport and asked to indicate which ones they had already used to get around the city. Once in Dublin, most respondents used more than one form of transport when travelling within the city. Figure 16 presents the percentage of respondents who answered yes in relation to each form of transport.

Figure 16 highlights that most respondents (99%) walked around Dublin and over half (58%) also used taxis. Forty-three percent used public buses, 40% had taken the bus-sightseeing tour and one third (33%) used the LUAS/tram. The train was used by 22% of respondents, car by 13% and private bus/coach by 3%. The bicycle was only used by 1% of respondents.

Figure 16: Forms of Transport used to get around Dublin

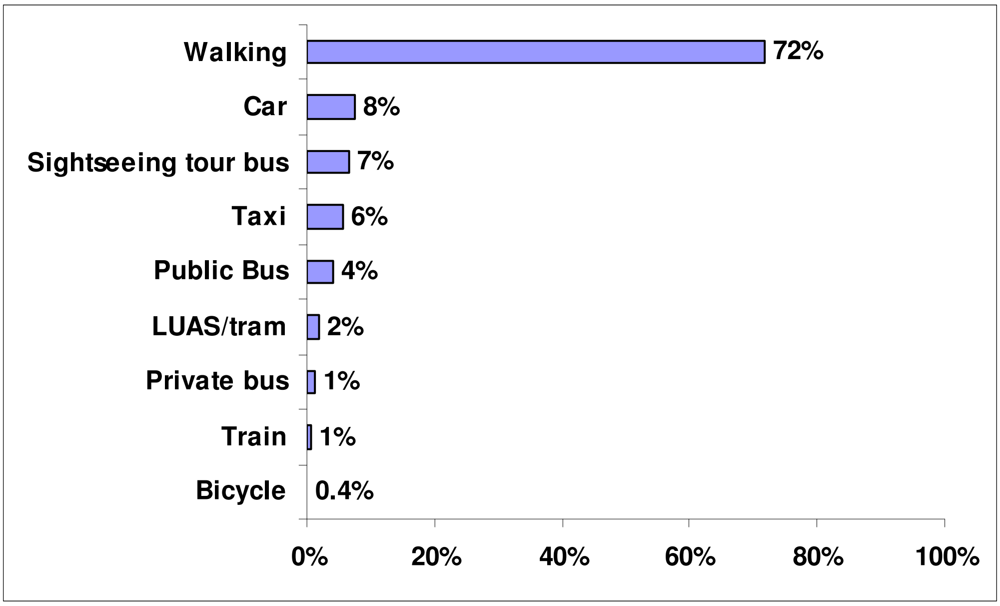


Number of respondents = 700

5.4 Form of Transport used most often within Dublin

Respondents were asked to indicate the form of transport used most often within Dublin. Figure 17 highlights walking (72%) as the most popular means of getting around. Car (8%) and sightseeing tour bus (7%) were the next most frequent responses, followed by taxi (6%), public bus (4%), LUAS/tram (2%), private bus (1%), train (1%) and bicycle (0.4%).

Figure 17: Form of Transport used Most Often within Dublin



Number of respondents = 700

Table 11 indicates the categories that increased their ranking as the 'most often used' form of transport from 2008 to 2009 are sightseeing tour bus (up 3%), car (up 2%), taxi (up 1%), LUAS/tram (up 1%) and bicycle (up 0.4%).

Forms of transport that decreased over the same period were public bus (down 3%) and private bus (down 3%). Walking and the train ratings remained the same.

Table 11: Form of Transport used Most Often within Dublin 2003 – 2009

Form of Transport	2003	2004	2005	2006	2007	2008	2009	Average 2003-2009
Walking	59%	45%	38%	54%	57%	72%	72%	57%
Car	7%	5%	20%	10%	9%	6%	8%	9%
Sightseeing tour bus	4%	12%	13%	8%	5%	4%	7%	8%
Taxi	10%	5%	6%	4%	4%	5%	6%	6%
Public bus	15%	11%	20%	16%	18%	7%	4%	13%
LUAS/tram	-	-	0.50%	3%	2%	1%	2%	1%
Private bus	4%	3%	2%	3%	4%	4%	1%	3%
Train	2%	2%	1%	2%	1%	1%	1%	1%
Bicycle	-	-	-	-	-	-	0.4%	0.1%
Don't know/no reply	-	17%	-	-	-	0.3%	-	2%

6.0 Major Factors Influencing the Decision to Visit Dublin

Table 12 highlights the top five 'major influences' affecting decisions to visit Dublin in 2009 from a list of eleven factors and tracks the results for each since 2002. The top five factors have remained consistent over this period but their position has changed as set out in Table 12.

In 2009, advice from friends and relatives accounted for 25%, inexpensive airfare (22%), previous visit (20%), Internet site (12%) and other (8%).

It is interesting to note that the three categories to increase since 2008 were inexpensive airfare (up 13%), previous visit (up 3%) and Internet site (up 5%). The other two categories experienced decreases in the same period: advice from friends and relatives (down 2%) and other factors (down 7%).

Some of the other major influences specified by respondents in 2009 includes: inexpensive accommodation (5%), read something about Dublin (2%) and advice from a travel agent (2%).

Table 12: Primary Factors Described as 'A Major Influence' in Decision to Visit Dublin

	2002	2003	2004	2005	2006	2007	2008	2009	Average 2002-2009
Advice from friends and relatives	29%	25%	37%	44%	48%	26%	27%	25%	33%
Inexpensive airfare	9%	20%	19%	26%	42%	29%	9%	22%	22%
Previous visit	17%	17%	26%	31%	32%	19%	17%	20%	22%
Internet site	3%	5%	17%	28%	23%	23%	7%	12%	15%
Other	-	-	24%	21%	40%	9%	15%	8%	15%

Or as per Gerry's suggestion, just show 2002 and 2009?

	2002	2009
Advice from friends and relatives	29%	25%
Inexpensive airfare	9%	22%
Previous visit	17%	20%
Internet site	3%	12%
Other	-	8%

7.0 Information Sources

Respondents were asked to indicate the sources of information used both before arriving and during their visit to the city. Some respondents gave more than one response.

7.1 Information Sources before Arriving in Dublin

In relation to sources of information used before arriving in Dublin, accessing the Internet (32%), obtaining information from friends/relatives (25%), visited Dublin before (23%) and guidebooks (13%) were the most popular sources (Table 13).

There were 55 responses to specific Internet websites used by respondents as sources of information before arriving in Dublin. The top websites specified were:

- www.visitdublin.com (25%)
- www.tripadvisor.com (9%)
- www.google.com (9%)
- www.wikipedia.com (7%).

In 2008, the most popular from 185 responses were:

- www.google.com (45%)
- www.visitdublin.com (19%)

Interestingly, www.ryanair.com was the most popular website specified in 2007 (26%) but it only accounted for 2% of responses in 2008 and 2009.

Lonely Planet was the most frequently specified guidebook, accounting for 30% of the 37 responses in this category. The second most frequently specified guidebook was the AA travel guide (16%), followed by DK – Eyewitness (14%).

Table 13: Information Sources before Arriving in Dublin

Information sources before arriving in Dublin	% of responses
Accessed the Internet	32
Obtained information from friends/relatives	25
Visited Dublin before	23
Guide books	13
Travel agent/tour operator	4
Information from accommodation	1
Brochures/leaflets from Fáilte Ireland/Tourism Ireland	1
Group leader/organiser	1
Brochures/leaflets from Dublin Tourism	1
Other Sources	1

Number of responses = 1166

Table 14 tracks the trend in information sources used before arriving in Dublin from 2003 to 2009. It is interesting to note that although the usage of the Internet as a source has increased by 1% over this period, it has remained at 32% in 2009, the same as in 2008, having declined from a high of 44% in 2005. Information from friends/family decreased by 2% and guidebooks also decreased as a source of information (down 4%) since 2008.

The continued significance of information from friends/family highlights that word of mouth is still a very important information source for visitors to Dublin.

Table 14: Information Sources before Arriving in Dublin 2003 – 2009

Information sources before arriving in Dublin	% of responses						
	2003	2004	2005	2006	2007	2008	2009
Internet	31	36	44	40	34	32	32
Information from Friends/Family	20	21	24	26	28	27	25
Been before*	-	-	-	-	-	-	22
Guidebooks	28	25	18	22	25	17	13
Travel Agents/Tour Operators	7	7	9	5	2	9	4
Brochures/leaflets from Fáilte Ireland/ Tourism Ireland / Dublin Tourism	8	5	4	3	9	5	2
Group leader/organiser	2	3	1	1	2	5	1
Other Sources	3	4	0.5	3	1	7	1

* The 'been before' option was only added in 2009 after it was a regular unprompted response in previous years

7.2 Information Sources after Arriving in Dublin

During their stay in Dublin, the majority of respondents sourced information from the Internet (23%), information from accommodation (22%), guide books (16%) and information from friends/relatives (14%) (Table 15).

Table 15: Information Sources after Arriving in Dublin

Information sources before arriving in Dublin	% of responses
Accessed the Internet	23
Information from accommodation	22
Guide books	16
Obtained information from friends/relatives	14
Brochures/leaflets from Dublin Tourism	9
Brochures/leaflets from Fáilte Ireland/Tourism Ireland	9
Visited Dublin before	5
Travel agent/tour operator	1
Group leader/organiser	1
Other Sources	1

Number of responses = 937

Table 16 tracks the trend in information sources used after arriving in Dublin from 2003 to 2009. The major changes to occur in 2009 are the increases since 2008 in Internet (up 19%) and information from accommodation (up 22%). The main source to lose out over the same period is brochures/leaflets from a range of agencies (down 30%).

The increase in Internet sources in 2009 may be as a result of visitors using mobile technology to access information after arriving in Dublin. This may also explain the large decrease in respondents who sourced information from brochures/leaflets as these visitors may have accessed this information using a soft copy online.

Table 16: Information Sources after Arriving in Dublin 2003 – 2009

Information sources after arriving in Dublin	% of responses						
	2003	2004	2005	2006	2007	2008	2009
Internet	2	6	8	-	5	4	23
Information from accommodation	-	-	1	17	-	-	22
Brochures/leaflets from Fáilte Ireland / Tourism Ireland / Dublin Tourism	48	26	27	47	52	48	18
Guidebooks	26	43	44	25	25	16	16
Friends/family	9	8	12	2	10	11	14
Visited Dublin before	-	-	-	-	-	-	5
Group leader/organiser	2	8	5	-	4	5	1
Travel Agents/Tour Operators	1	4	1	-	2	4	1
Other	12	5	1	10	3	12	1

Other examples of sources specified by respondents included information from the Dublin Pass, taxi driver, on the bus and the Dublin visitor map.

8.0 Activities Engaged in while in Dublin

Respondents were presented with a range of activities and asked to indicate those they had undertaken or planned to partake in during their stay in Dublin. From a list of twelve activities the five most popular were:

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

These activities have continuously been in the top five from 2003-2009, although the order has varied during this period.

Table 17 depicts the extent to which main markets to Dublin engaged in activities. The North American market was the most active across all activities – rating either the average or above the average for each activity.

Table 17: Activities Engaged in by Main Markets to Dublin

	Average across all Markets	Britain	Mainland Europe	North America	Rest of World
Visiting sights/attractions	98%	98%	98%	100%	94%
Walking around the city	97%	98%	96%	97%	94%
Visit pubs/bars	95%	95%	94%	98%	91%
Dine in restaurants	92%	94%	91%	96%	84%
Shopping	80%	75%	83%	86%	72%
No. of Respondents	**700**	**288**	**264**	**116**	**32**

8.1 Activity most Important when Deciding to visit Dublin

Respondents were asked to identify the activity most important when deciding to visit Dublin. Some respondents gave more than one unprompted answer resulting in 961 responses. The top seven unprompted activities were grouped together as follows:

- Visiting friends and relatives (13%)
- Culture/history (9%)
- Attractions (9%)
- Sightseeing (9%)
- Pubs/nightlife (5%)
- Business/work (5%)
- New experience/first time visitor (5%)

Table 18: Activity Most Important when Deciding to Visit Dublin

Activity	% of responses
Visiting Friends and Relatives (VFR)	13%
Culture/history	9%
Attractions	9%
Sightseeing	9%
Pubs/nightlife	5%
Business/work	5%
New experience/first time visitor	5%

Number of responses = 961

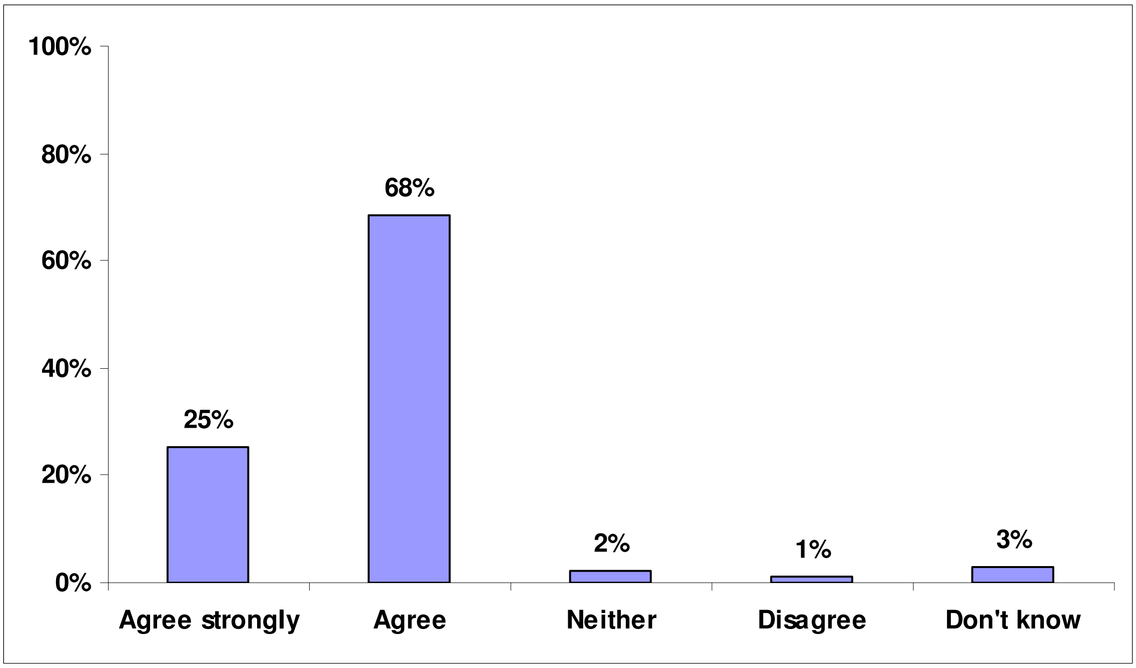
9.0 Attitudes Towards Dublin

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

9.1 Dublin is a Safe Place to Visit

Figure 18 illustrates 93% of respondents to Dublin in 2009 felt the city was a safe place to visit. This is an increase of 2% from the previous year (Figure 19). Only 1% of respondents felt Dublin was not a safe city, which is the same score as in 2008.

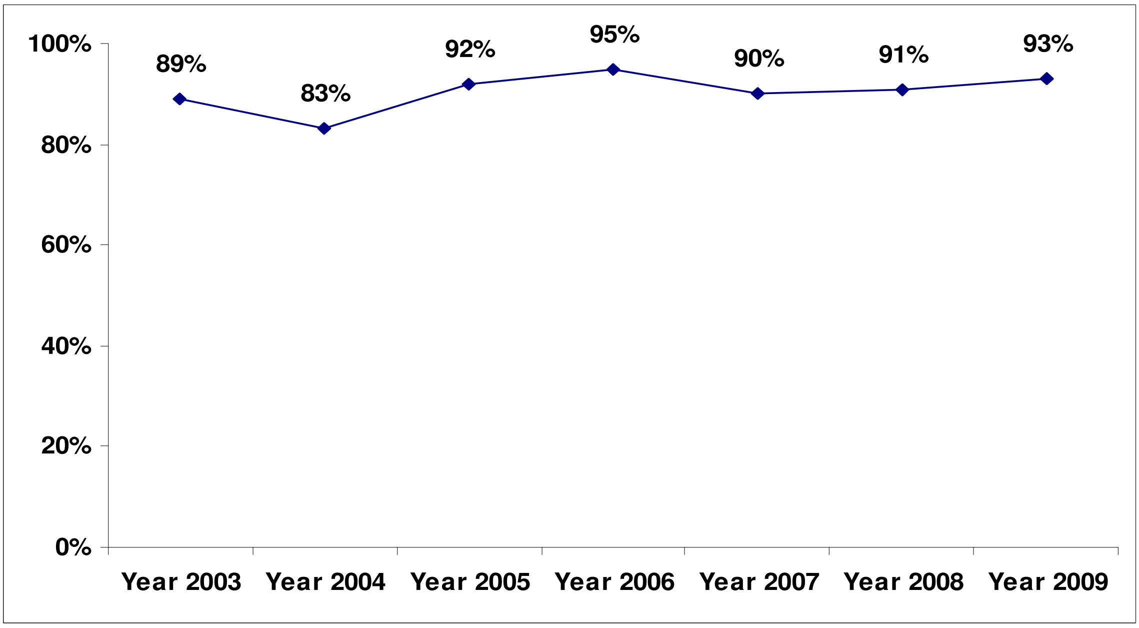
Figure 18: "It is a Safe Place to visit"



Number of respondents = 700

Figure 19 indicates a positive trend over the years, after a blip in 2004.

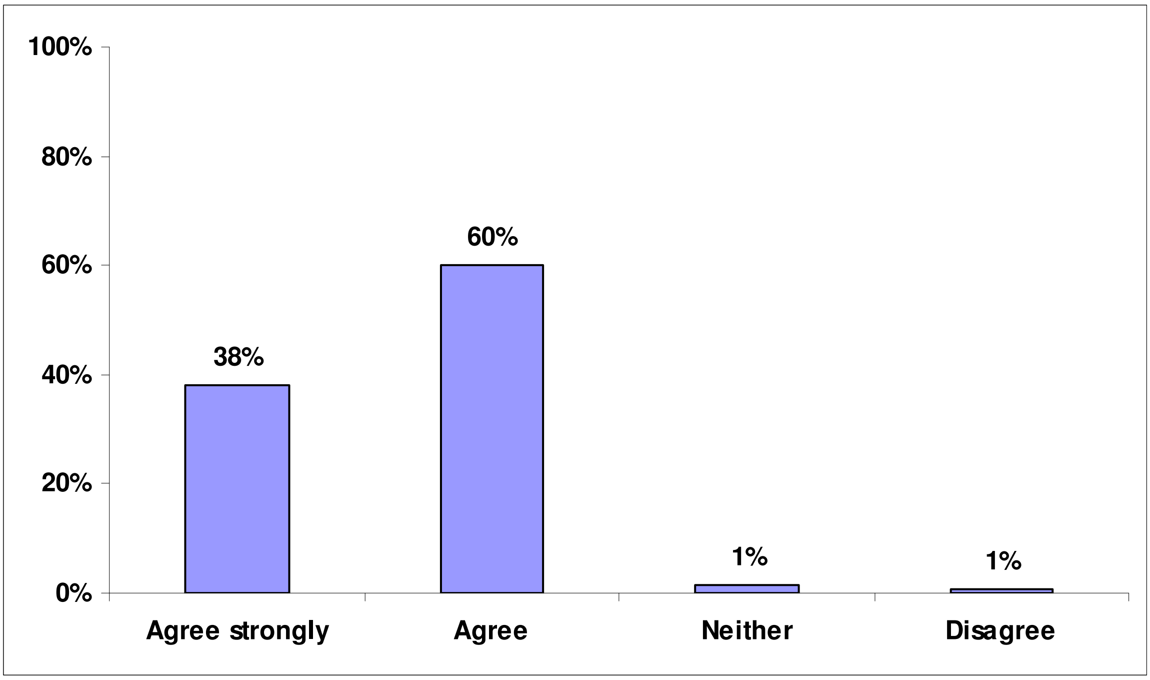
Figure 19: "It is a Safe Place to Visit" Agree Strongly/Agree 2003 – 2009



9.2 Céad Míle Fáilte – Friendly and Hospitable People

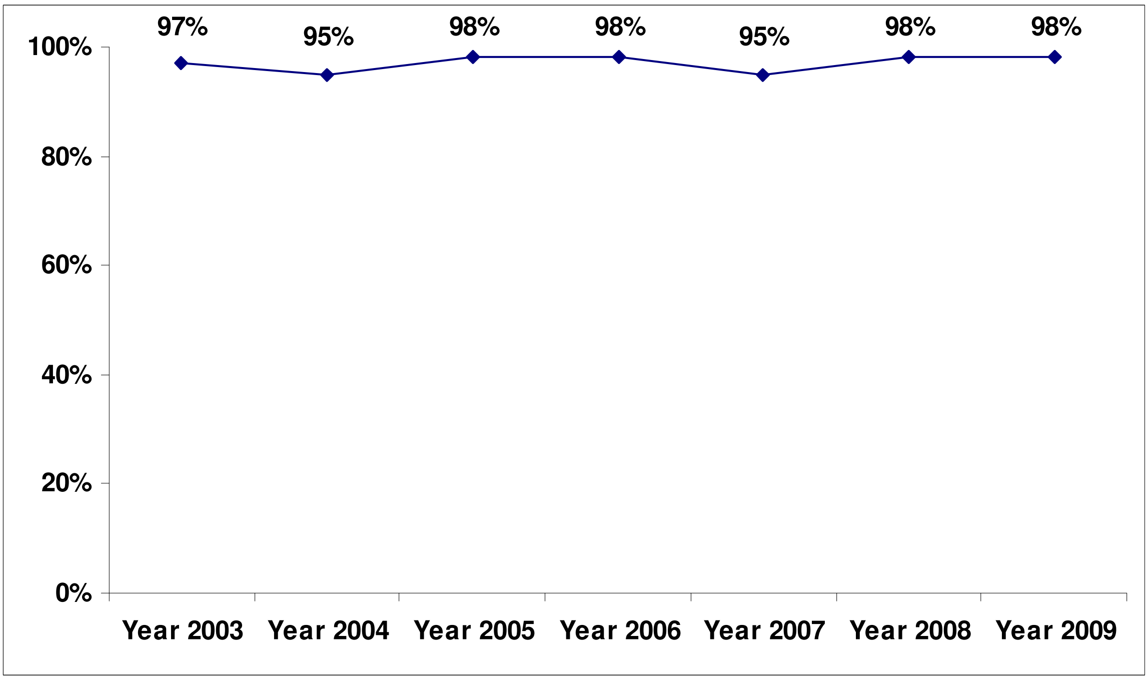
Visitor attitude towards the friendliness of the people in Dublin continues to be very positive (Figure 20). Ninety-eight percent were of the opinion the people were friendly and hospitable; this is consistent with the finding from 2008 (Figure 21) and is a very positive outcome and challenges the criticism of a "Frosty Fáilte" for out-of-state visitors as tourism grew in Ireland. The agreement level was consistent across all markets.

Figure 20: "The People are Friendly and Hospitable"



Number of respondents = 700

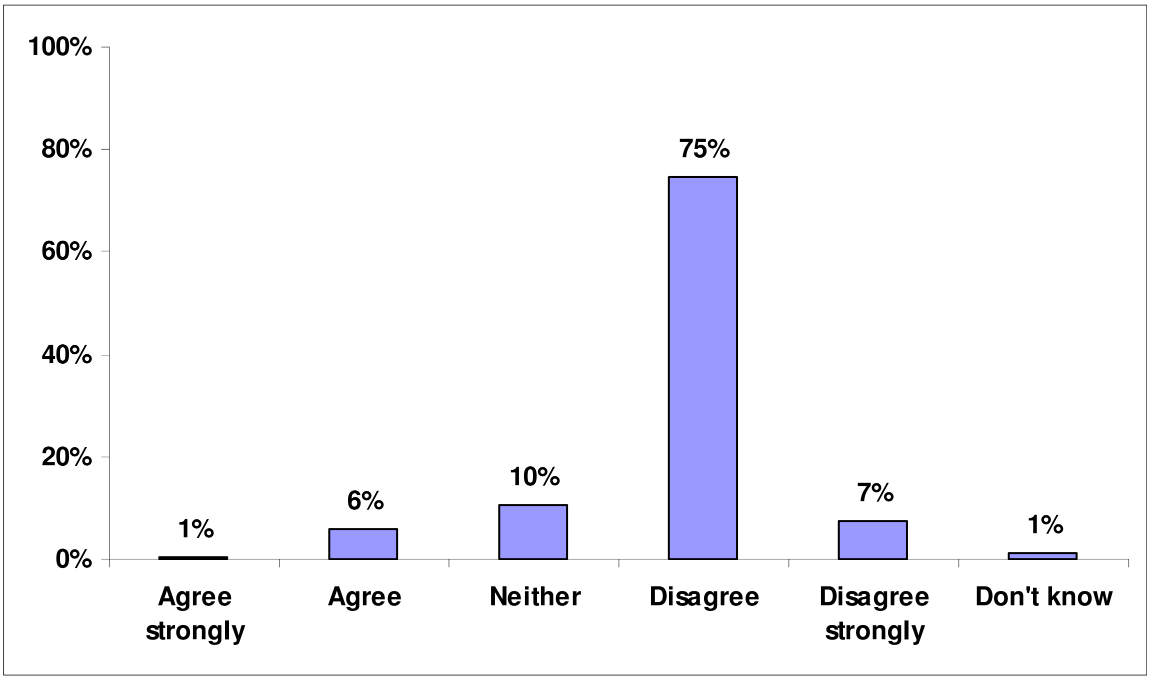
Figure 21: "People are Friendly and Hospitable" Agree Strongly/Agree 2003 – 2009



9.3 Dublin and Litter

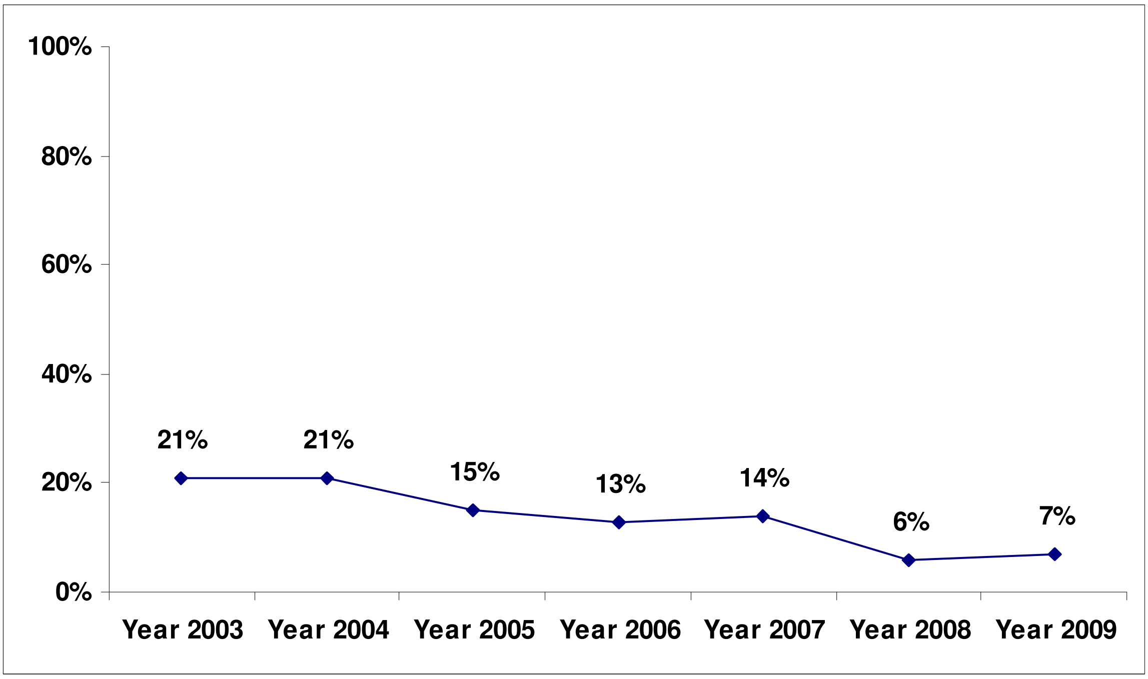
Only 7% of respondents felt that the city is dirty (Figure 22), which is an increase of 1% on 2008 figures (Figure 23), however, it is still a very encouraging finding, particularly for the local authorities and other agencies in the area responsible for litter management. It also highlights the success of business campaigns (e.g. Irish Businesses Against Litter – Anti Litter League) and other local initiatives (e.g. Tidy Towns committees, Greening Temple Bar, Business Improvement District) that aim to improve the cleanliness of Dublin as a destination.

Figure 22: "Dublin is a Dirty City"



Number of respondents = 700

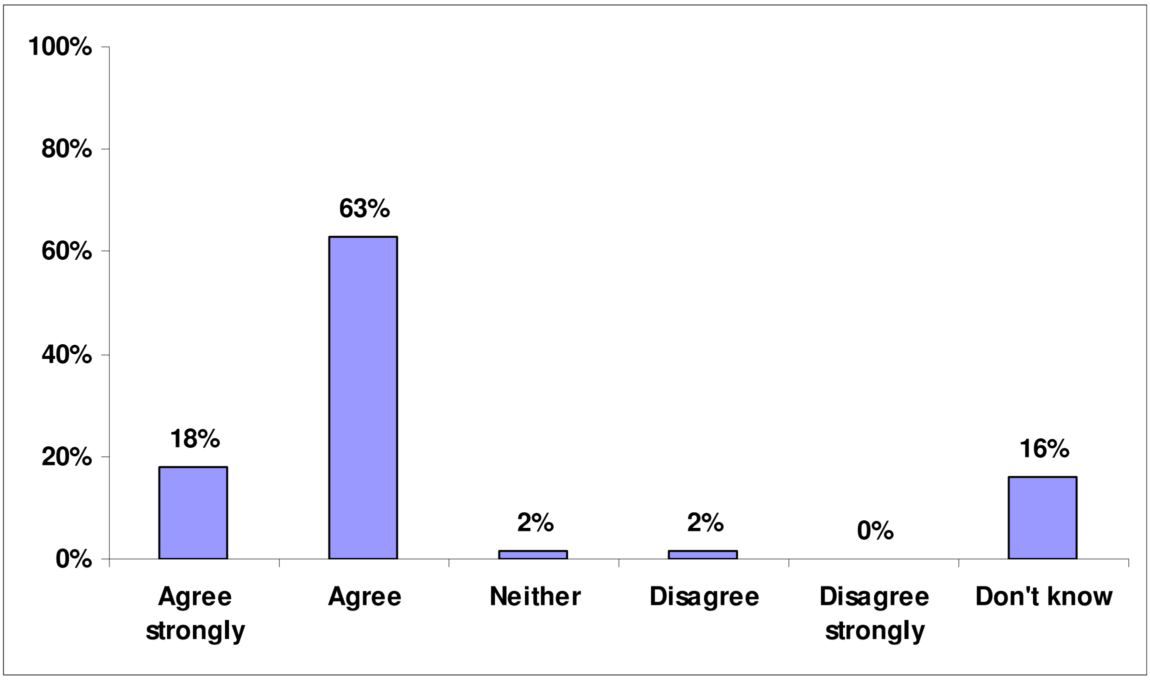
Figure 23: "Dublin is a Dirty City" Agree Strongly/Agree 2003 – 2009



9.4 Dublin's Night Life

Eighty-one percent of respondents felt that Dublin has a good night life (Figure 24, which is up from 55% in 2008.

Figure 24: "Dublin has a Good Night Life"

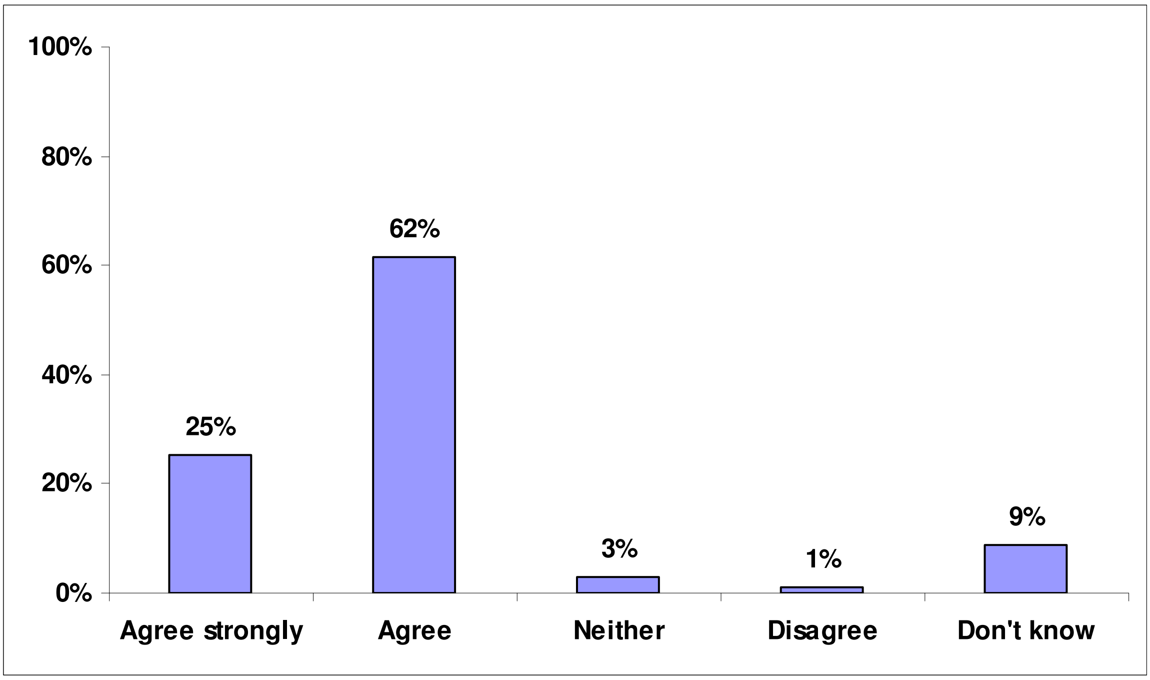


Number of respondents = 700

9.5 Variety of Restaurants in Dublin

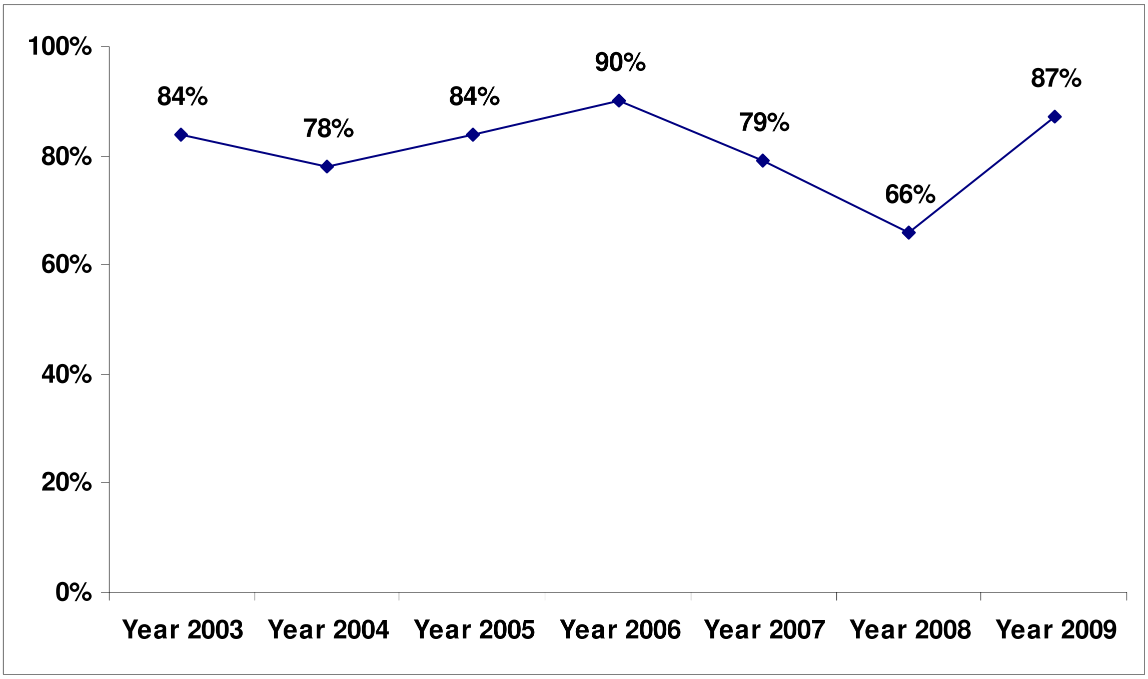
Eighty-seven percent of respondents feel that Dublin has plenty of good restaurants (Figure 25). This finding is an increase of 21% since 2008 and is a move back towards the highest score of 90% from 2006 (Figure 26).

Figure 25: "Dublin has Plenty of Good Restaurants"



Number of respondents = 700

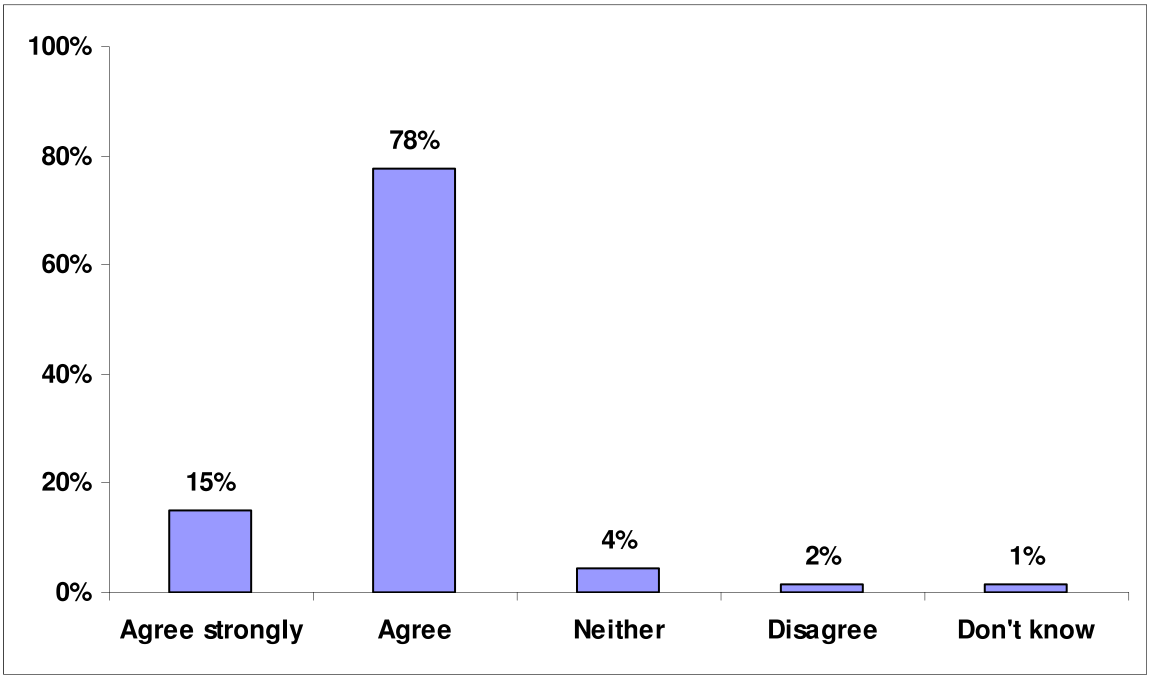
Figure 26: "Dublin has Plenty of Good Restaurants"



9.6 Variety of Attractions in Dublin

Ninety-three percent of respondents feel that Dublin has a good variety of attractions (Figure 27), which is up from 86% in 2008. To ensure that visitors continue to experience this, it is important for tourism agencies and tourism product/service providers in Dublin to strive toward developing new and innovative attractions as well as upgrading, improving and marketing existing ones. This is increasingly important if Dublin is to cater for and attract repeat visitors.

Figure 27: "Dublin has a Good Variety of Attractions"

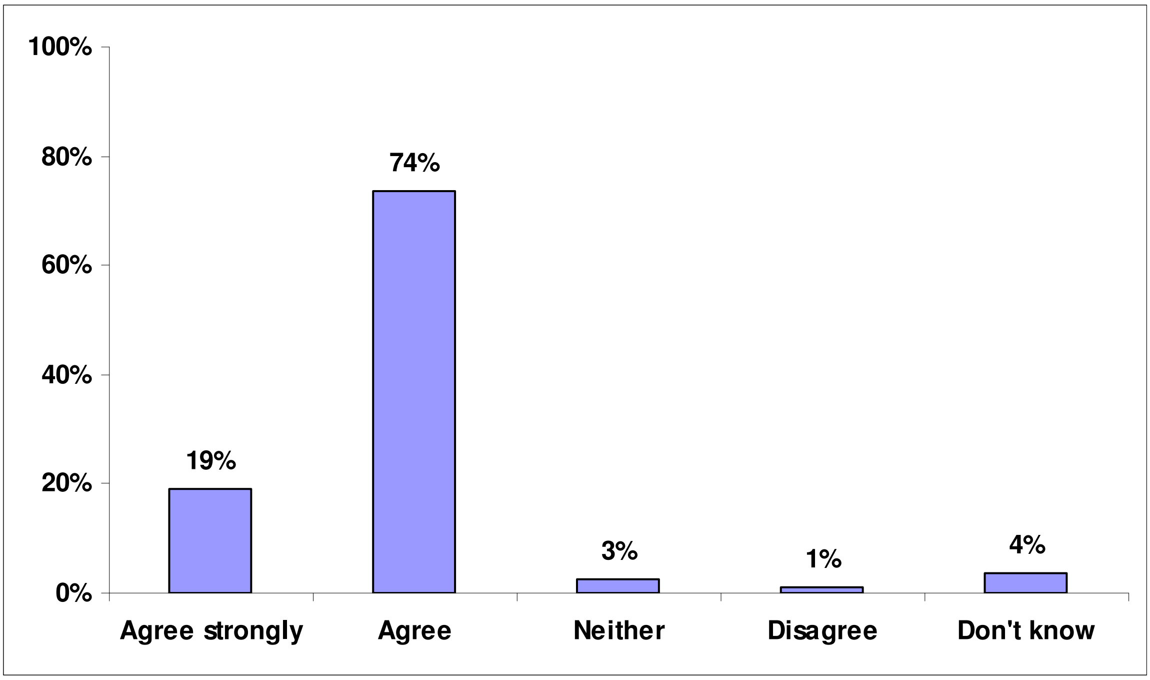


Number of respondents = 700

9.7 Cultural Image

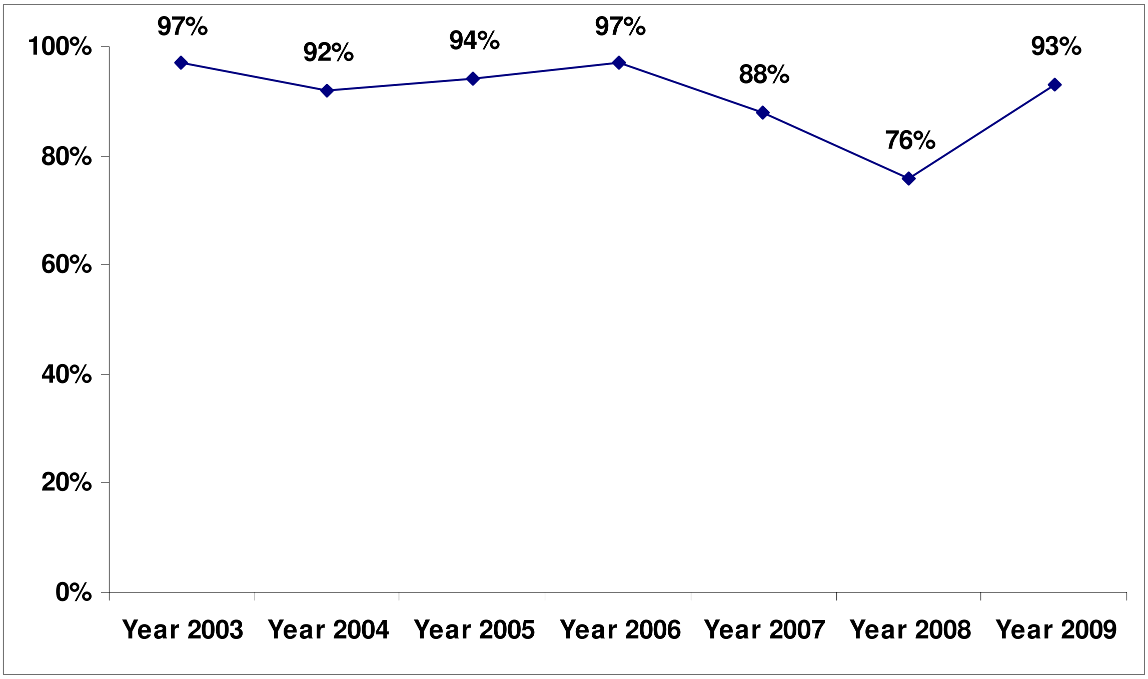
The majority of respondents in 2009 (93%) agree/agree strongly that Dublin has a rich cultural life (Figure 28). This is a positive reversal of the downward trend over the previous two years and marks a significant improvement from the 2008 finding of 76% (Figure 29).

Figure 28: "Dublin has a Rich Cultural Life"



Number of respondents = 700

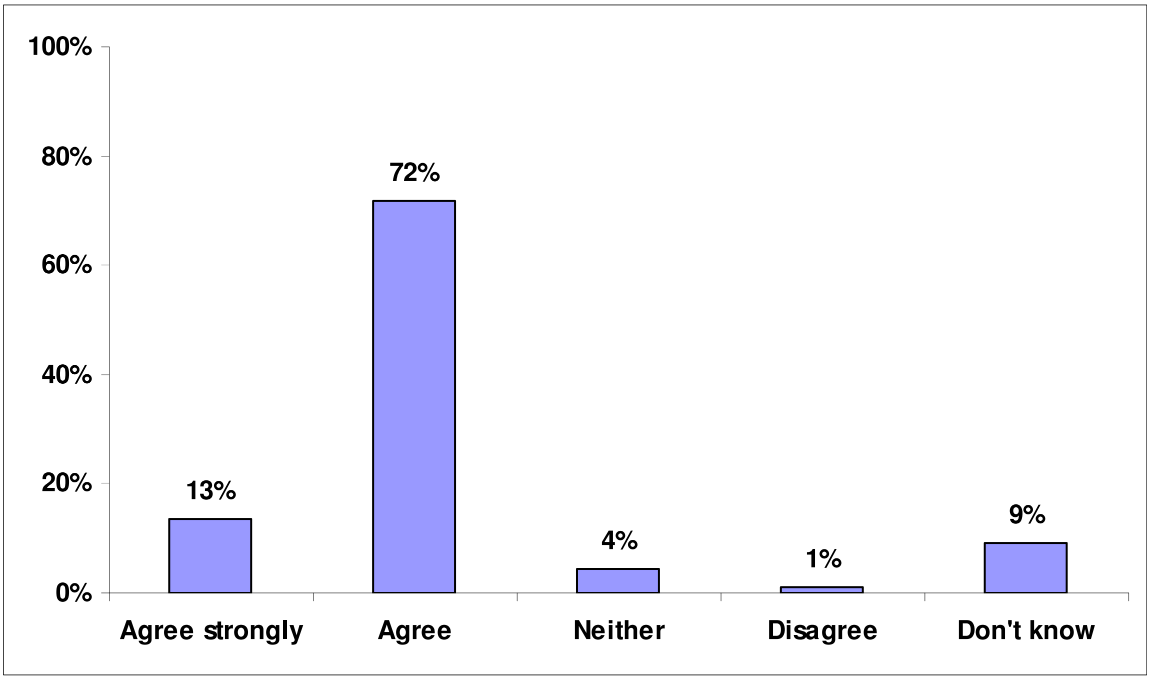
Figure 29: "Dublin has a Rich Cultural Life" Agree Strongly/Agree 2003 – 2009



9.8 Number of Museums in Dublin

Visitor perception of Dublin as having a rich cultural life is perhaps supported by the fact that 85% of respondents feel there are a lot of museums to visit (Figure 30).

Figure 30: "There are a lot of Museums to Visit"

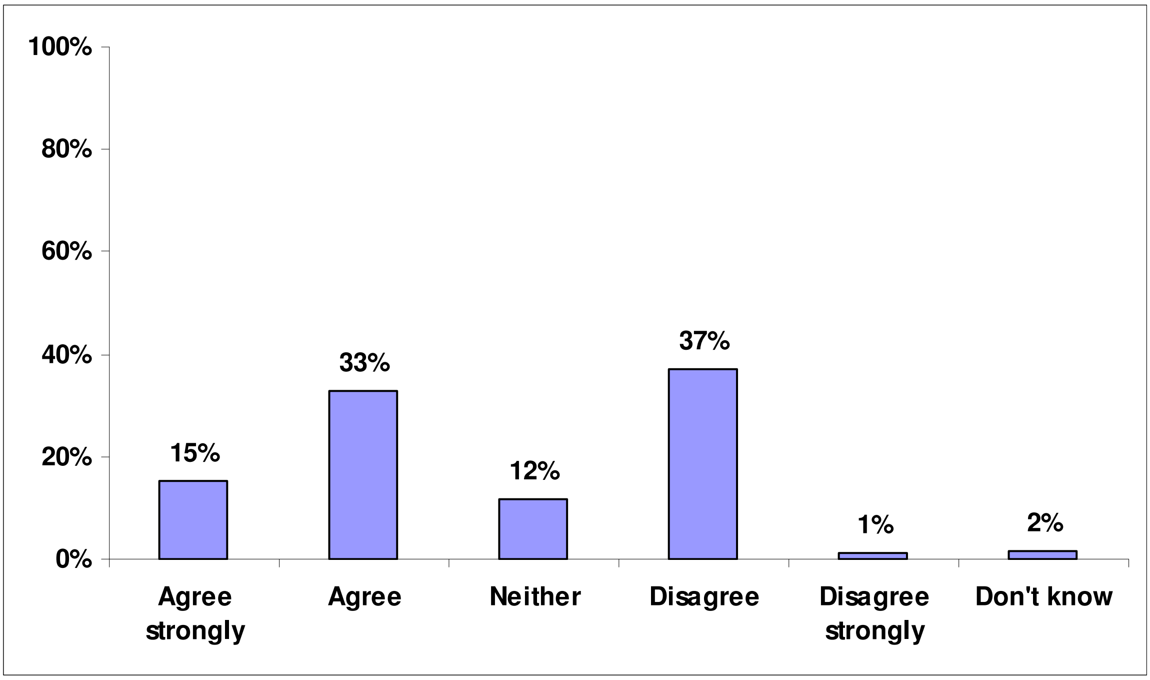


Number of respondents = 700

9.9 Prices in Dublin

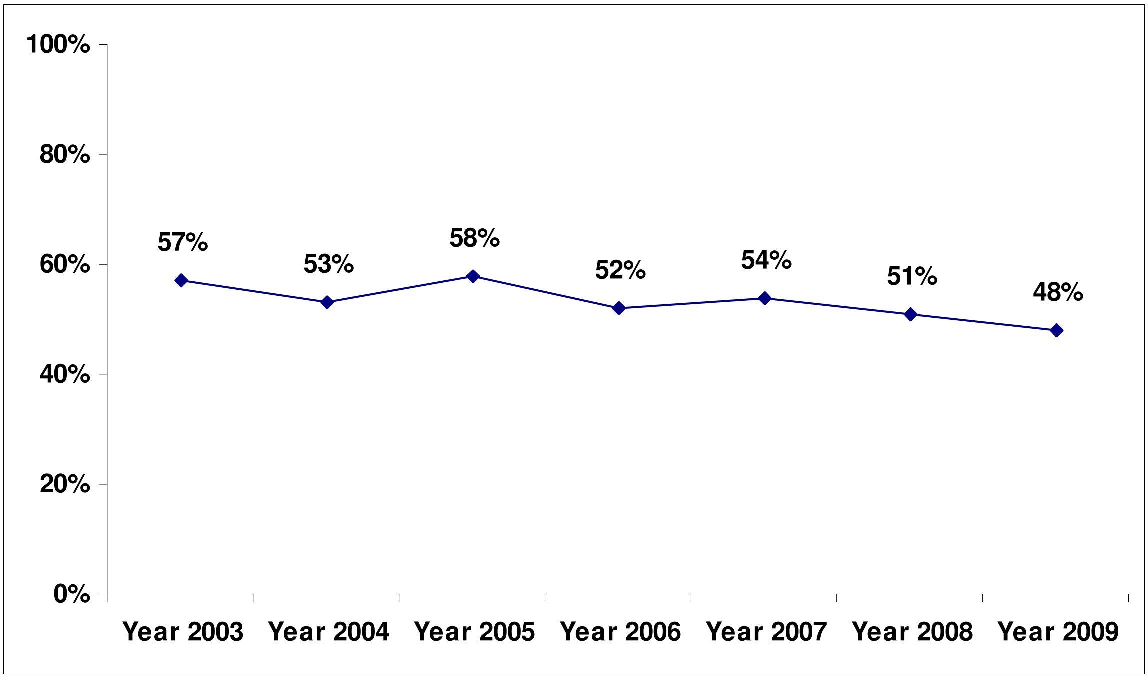
Figure 31 illustrates 48% of respondents felt that prices were too high. This is a decrease of 3% on the 2008 study (Figure 32) and represents the lowest rating over the seven years from 2003 to 2009.

Figure 31: "Prices are too Expensive"



Number of respondents = 700

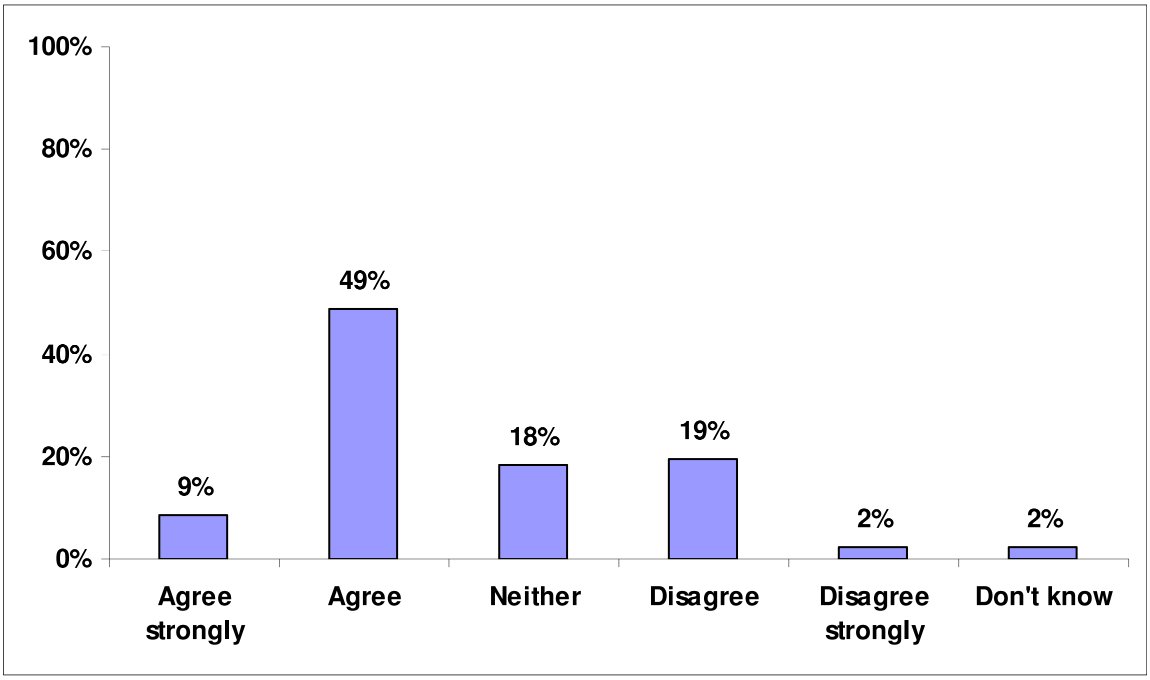
Figure 32: "Prices are too Expensive" Agree Strongly/Agree 2003 – 2009



9.10 Value for Money in Dublin

Fifty-eight percent of respondents to the capital felt Dublin offered good value for money to visitors (Figure 33), while 21% felt Dublin does not.

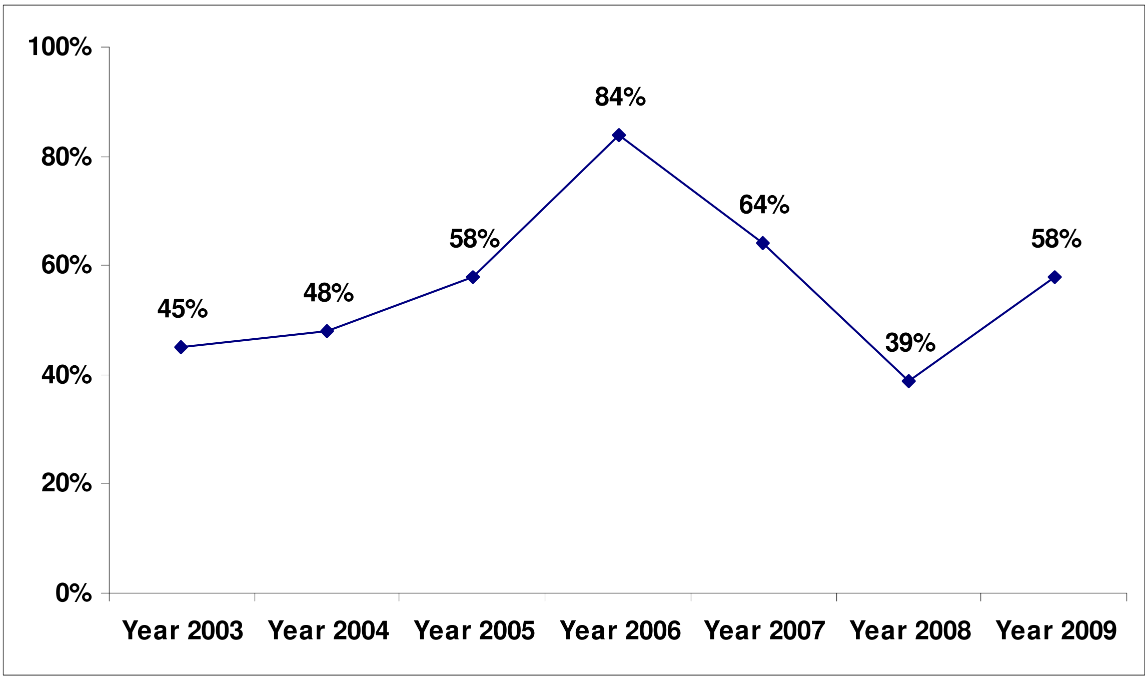
Figure 33: "Good Value for Money"



Number of respondents = 700

Figure 34 shows that there has been a welcome increase in the number of respondents who agree strongly and agree with this statement in recent years (up 19% since 2008). This bounce back from the all time low in 2008 is positive but there is still more work to be done to improve this rating.

Figure 34: "Good Value for Money" Agree Strongly/Agree 2003 – 2009

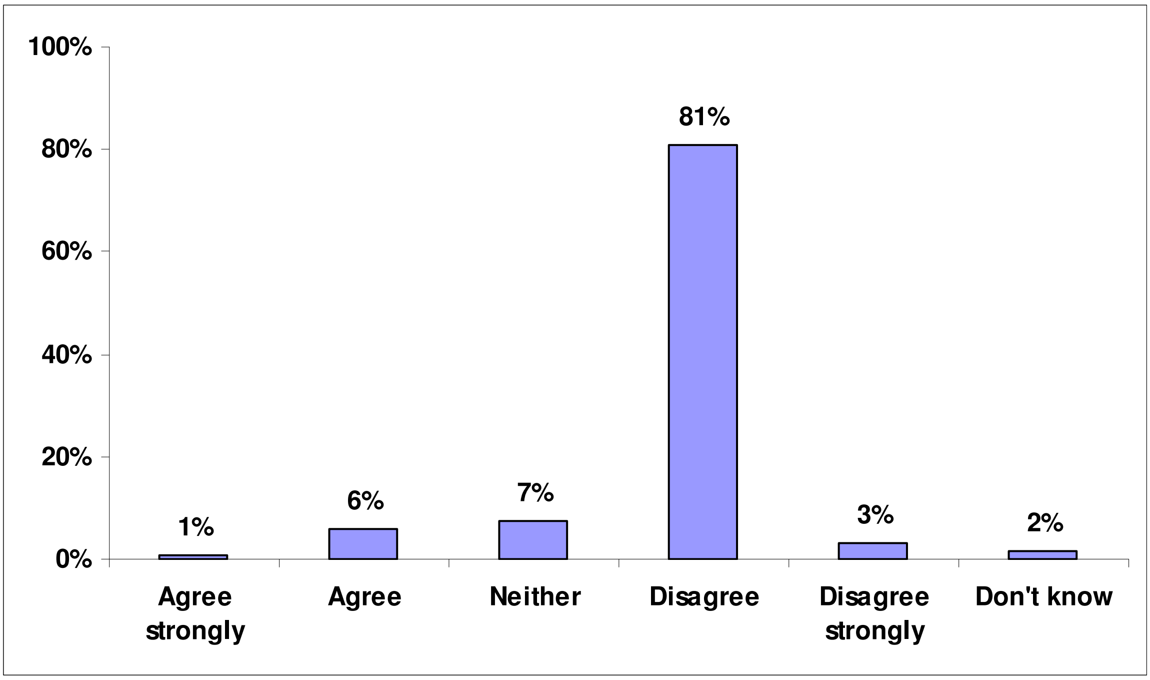


9.11 Crowded City

In 2009, 7% of respondents agreed that Dublin is too crowded for sightseeing (Figure 35). This represents a decrease of 1% on results from 2008 (Figure 36).

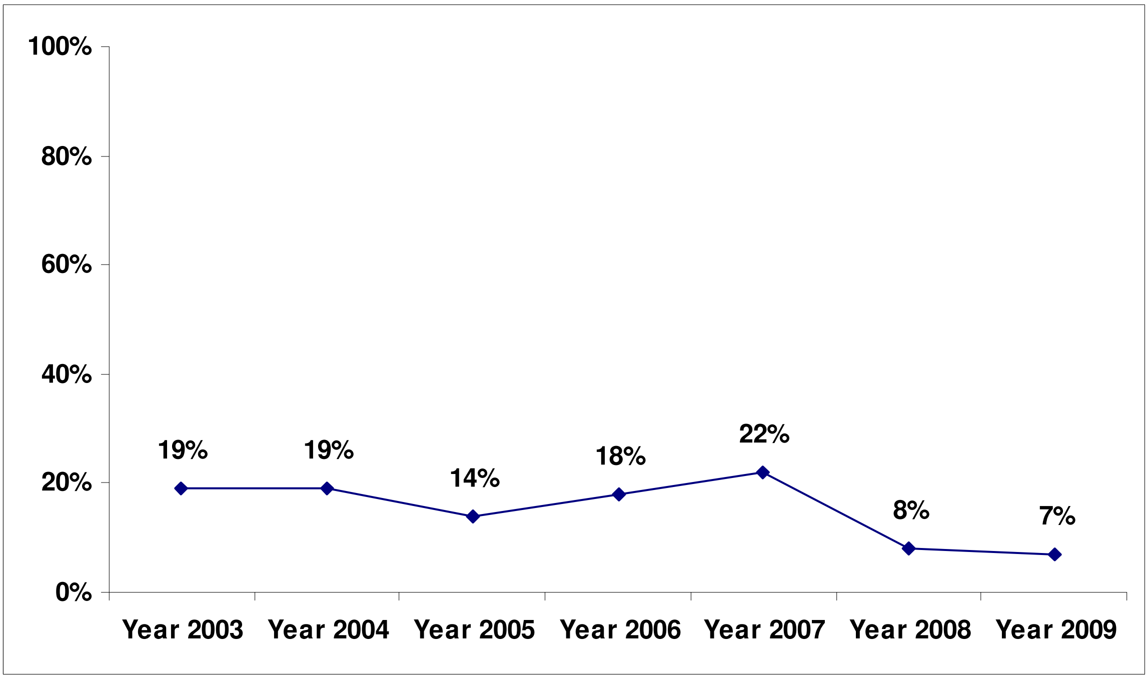
As one would expect, the summer months showed the higher level of agreement with this statement.

Figure 35: 'Too Crowded for Sightseeing"



Number of respondents = 700

Figure 36: 'Too Crowded for Sightseeing" Agree Strongly/Agree 2003 – 2009

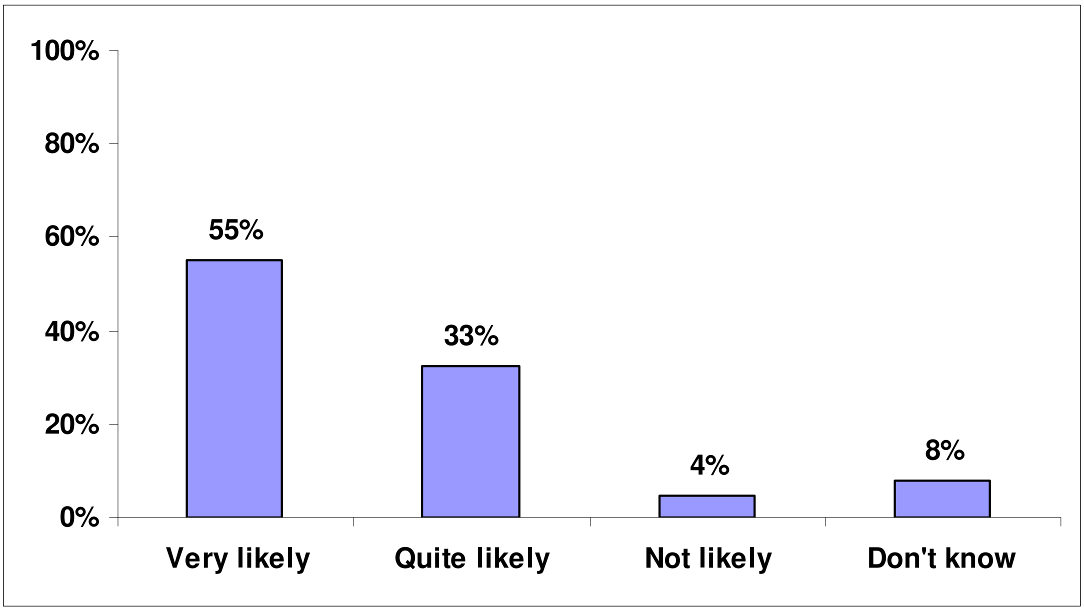


10.0 Likelihood of Returning

A high proportion of respondents (88%) expressed a likelihood of visiting Dublin again in the future (Figure 37), representing an increase of 13% on the 2008 figure (Figure 37). This return to form from the negative year overall in 2008 is a welcome finding.

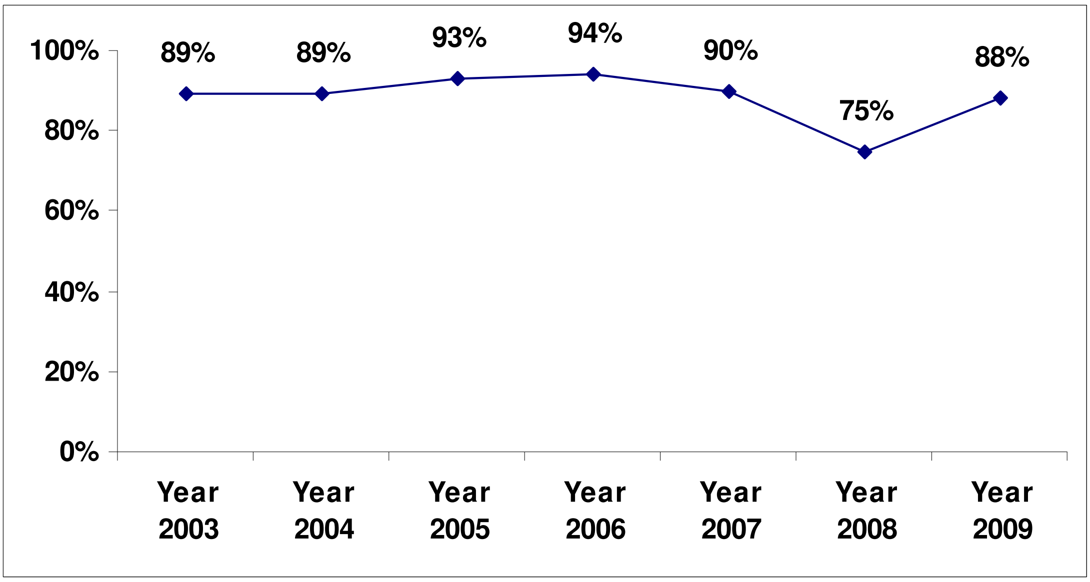
Respondents very likely to return were mainly in the 18-34 age range (51%) and from Britain (49%).

Figure 37: Likelihood of Returning



Number of respondents = 700

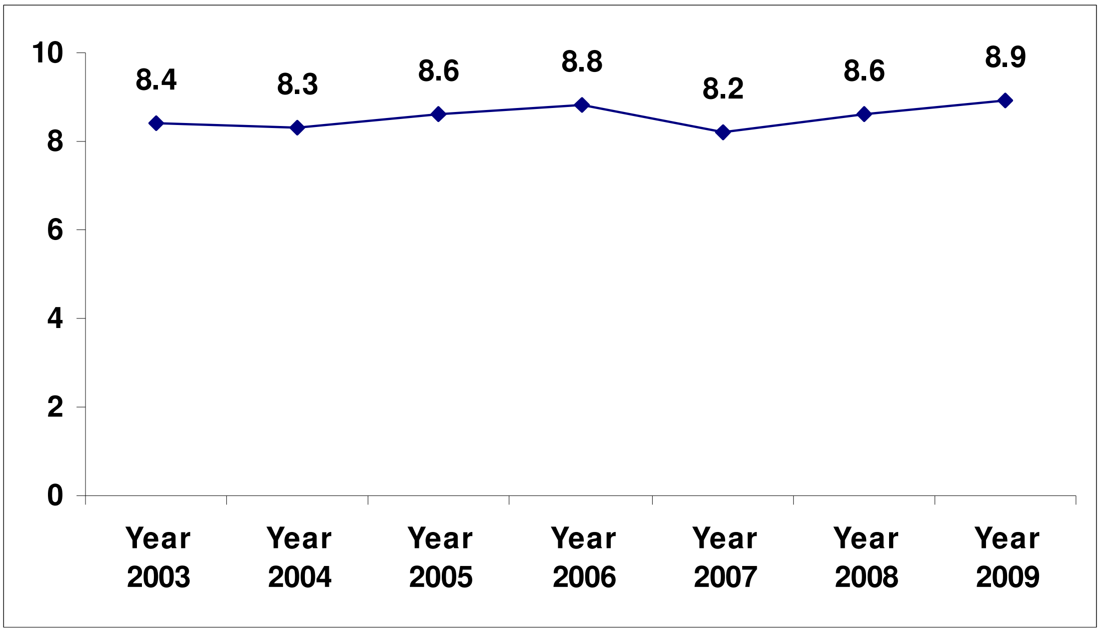
Figure 38: Likelihood of Returning – Very Likely/Quite Likely 2003 – 2009



11.0 Overall Rating of Dublin

Dublin received an average overall rating of 8.9 out of a possible 10. This indicates an increase of 0.3 on the findings in 2008 and is the highest score over the seven years since 2003 (Figure 39).

Figure 39: Overall Rating out of 10: 2003 – 2009



Further Opportunities

This report highlights a core set of 2009 survey findings and also presents trends over a number of years, made possible due to the longitudinal nature of the study. For further information on the range of opportunities that exist to further analyse and develop aspects of the survey, please contact one of the research partners (details below).

Dublin Tourism

Dublin Tourism is the official tourist board for Dublin, with responsibility for the marketing and promotion of tourism in the Dublin region. It is a state-appointed, not for profit (commercial) agency representing more than 700 businesses, drawn from the region's leading tourism related organisations. Dublin Tourism also operates walk-in Tourist Information and Reservations Centres which are open 364 days a year, and five Visitor Attractions in the region. Dublin Tourism is the industry research partner for the Dublin Visitor Survey.

Contact Information:

Frank Magee
Chief Executive
Dublin Tourism
Suffolk Street
Dublin 2

Phone: 00 353 (0)1 605 7700
Email: frank@dublintourism.ie

School of Hospitality Management and Tourism

The School of Hospitality Management and Tourism prides itself in developing challenging curricula in tourism. It has consistently contributed to the advancement of tourism education and research in Ireland and abroad. It is innovative in its philosophy and balances academic rigour with industry relevance. It combines academic expertise, research capability and knowledge derived from visiting academics and key industry practitioners to offer a dynamic learning environment.

Contact Information:

Dr. Sheila Flanagan
School of Hospitality Management and Tourism,
College of Arts and Tourism,
Dublin Institute of Technology,
Cathal Brugha Street,
Dublin 1,

Phone: 00 353 (0)1 402 4380
Fax: 00 353 (0)1 402 4496
Email: sheila.flanagan@dit.ie

Report compiled by:

Insight Info
Insight Info provides research and development to the tourism, hospitality, event and leisure industries.

Contact Information: John Carty
Phone: 00 353 (0)87 410 2126
Email: insightinforesearch@gmail.com

Jane Stacey Associates
Provides quality tailor-made applied research services, delivering creative insights and realistic solutions to support planning and development in the wider tourism sector

Contact Information: Jane Stacey
Phone: 00 353 (0)87 2658544
Email: janemestacey@gmail.com