2008-01-01

Dublin Visitor Survey 2008 Report

Sheila Flanagan
Technological University Dublin, sheila.flanagan@tudublin.ie

John Carty
Technological University Dublin, tourism@tudublin.ie

Gerard Dunne
Technological University Dublin, gerard.dunne@tudublin.ie

Dublin Visitor Survey

2008 Report

Prepared by:
Tourism Research Centre
Dublin Institute of Technology
Cathal Brugha Street
Dublin 1

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 Tourism Research Centre and 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 the Tourism Research Centre and the School of Hospitality Management and Tourism at the Dublin Institute of Technology with the support of Dublin Tourism. The study has been conducted annually since 1999 and has amassed a wealth of rich data over the years. This report highlights the principal 2008 findings from the annual visitor survey including the characteristics and attitudes of out of state tourists visiting Dublin city.

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 2008 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 ten questions arising from the findings of Dublin Visitor Survey 2008 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 2008 than previous years?
3. What is the reason for the decrease in first time visitors to Dublin in 2008?
4. Why did less visitors use the Internet to book accommodation in 2008?
5. How come fewer visitors stayed in hotels and hostels in 2008?
6. Why did the majority of visitors in 2008 think Dublin is a safe, clean and uncrowded city?
7. Why did visitors feel that Dublin's cultural offering has diminished in recent years?
8. Why did visitors feel there were fewer museums to visit in 2008?
9. Why did fewer visitors think that prices in Dublin were too high in 2008?
10. How come the overall rating for Dublin increased in 2008, yet fewer visitors indicated they were likely to return?

The Dublin Visitor Survey 2008 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 2008 respondents was as follows:

- The British market remained the biggest single market for Dublin (45%), followed by Mainland European (34%), North America (17%) and Rest of World (5%).
- One third (33%) of those visiting Dublin were with a partner, 29% were with a group of friends, 13% were alone and 4% were in a family group with children aged 17 and under.

Visitors exhibited interesting patterns in relation to holiday taking behaviour:

- The majority surveyed (80%) were visiting the city on a holiday away from home.
- Sixty-eight percent stayed up to 4 nights in Dublin, which was a decrease of 10% on the 2007 findings.

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

- The most popular types of accommodation were hotels (48%), hostels (14%) and staying with friends and relatives (13%).
- Accommodation is generally booked 5-8 weeks in advance of arrival (28%). Fifty-eight percent booked on the Internet and 9% 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 53% when compared with findings from 2008.

Patterns of interest for transport managers in Dublin include:

- Ninety-four percent of out of state visitors to Dublin arrived by air up from 84% in 1999
- Eighty-one percent of respondents booked their transport to the city on the Internet and the next most popular method was with a travel agent (7%). The Internet only accounted for 4% of transport bookings in 1999.
- Walking was the most popular means of getting around (72%), followed by public bus (7%) and car (6%).

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 27% of responses followed by the experience of a previous visit (17%) and inexpensive airfares also played a role (9%).

The top three most important activities considered by visitors when deciding to visit Dublin were: sightseeing (13%), holiday/break (13%) and culture/history (11%).

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 over half of visitors (51%) felt that prices were too high. This figure represents a slight decrease of 3% on the 2007 study. There has, however, also been a decrease in the percentage of respondents who feel that Dublin offers good value for money (down 25% since the 2007 study).

Dublin received a high overall satisfaction rating (8.6 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 over a twelve-month period from January to December 2008. This project is undertaken by the Tourism Research Centre with support from the School of Hospitality Management and Tourism at the Dublin Institute of Technology and Dublin Tourism. The study has been conducted annually since 1999 and longitudinal analyses are made throughout the report, where possible.

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

One thousand visitor surveys were completed between January and December 2008. 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. Northern Irish visitors are included in the study providing they fulfil these criteria.

1.2 Irish Tourism in 2008

In order to set the DVS 2008 Report in context, it is useful to look at tourism in Ireland during that year. Global economic factors stemming from the U.S. credit crunch in late 2007, record high oil prices in mid 2008, the global financial crisis coupled with high market and exchange rate volatility all combined to lead to a loss of consumer and business confidence. This was reflected in a downturn in demand for travel.

Overall visitor numbers to Ireland in 2008 were reported down by 2.2%, with Britain showing a 4% drop and North America a 6% decline. Mainland Europe showed growth of 1% and Rest of World visitors increased 11% compared with 2007 (Central Statistics Office, February 2009).

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 2008. Demand for leisure trips by Irish residents, a high growth market in recent years, showed signs of slowing down during 2008. This market also suffered from the economic slowdown and the poor weather during 2008, particularly over the summer months.

1.3 Irish Tourism in 2009

The Irish tourism industry is anxious and concerned about the challenges to be faced in 2009. 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.

In 2009, the Dublin Visitor Survey celebrates its 10th year of existence and during that time it has tracked the behaviours, motivations and attitudes of thousands of out of state visitors to Dublin. It has reported on upturns and downturns in the Dublin tourism industry and the wealth of data collected to date has helped to understand visitors and learn more about their attitudes and behaviours. This type of information will be crucial as the Dublin tourism industry aims to meet the current challenges and be competitive in an international context to assist its sustainable growth in the future.

2.0 Main findings of the Survey

The main findings of this survey centre on the analysis of 1,000 valid questionnaires. Please note that in some Figures/Tables the total may not add up to 100% due to rounding. Please also note that 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

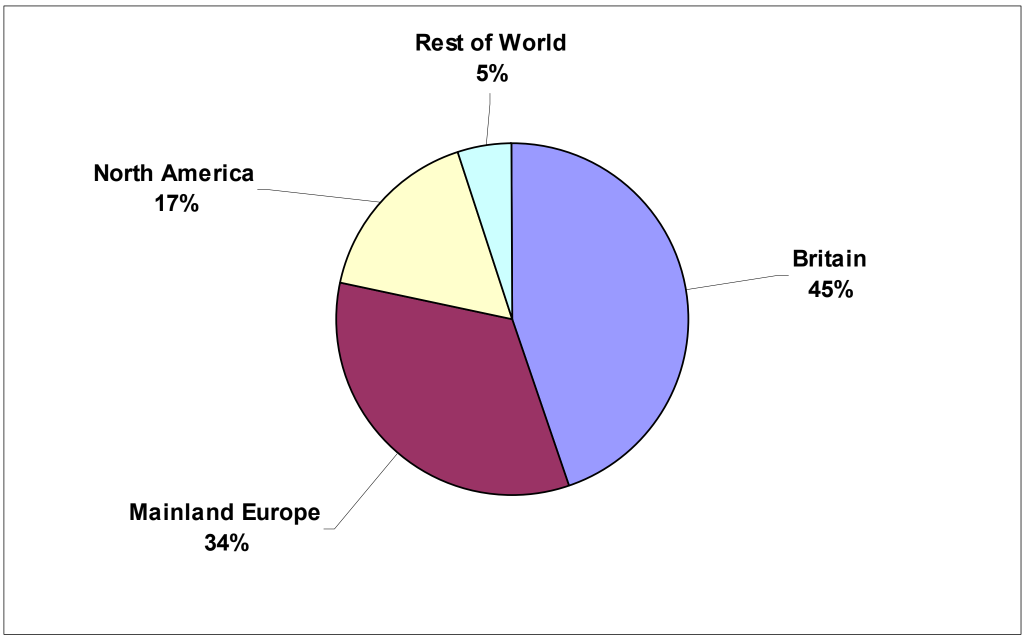
This section provides a profile of out of state visitors to Dublin in 2008.

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 main group of respondents were visitors from Britain (45%), while Mainland Europe accounted for 34%, 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 = 1000

The majority of Mainland Europe respondents were from Germany (6%), France (5%), Italy (3%) and Spain (3%). Rest of World respondents were mainly from Australia (3%) and New Zealand (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 2006 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 (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.

Table 1: DVS Market Breakdown of Respondents 2003 – 2008

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

* Based on Dublin regional statistics from 2006
** Based on national statistics

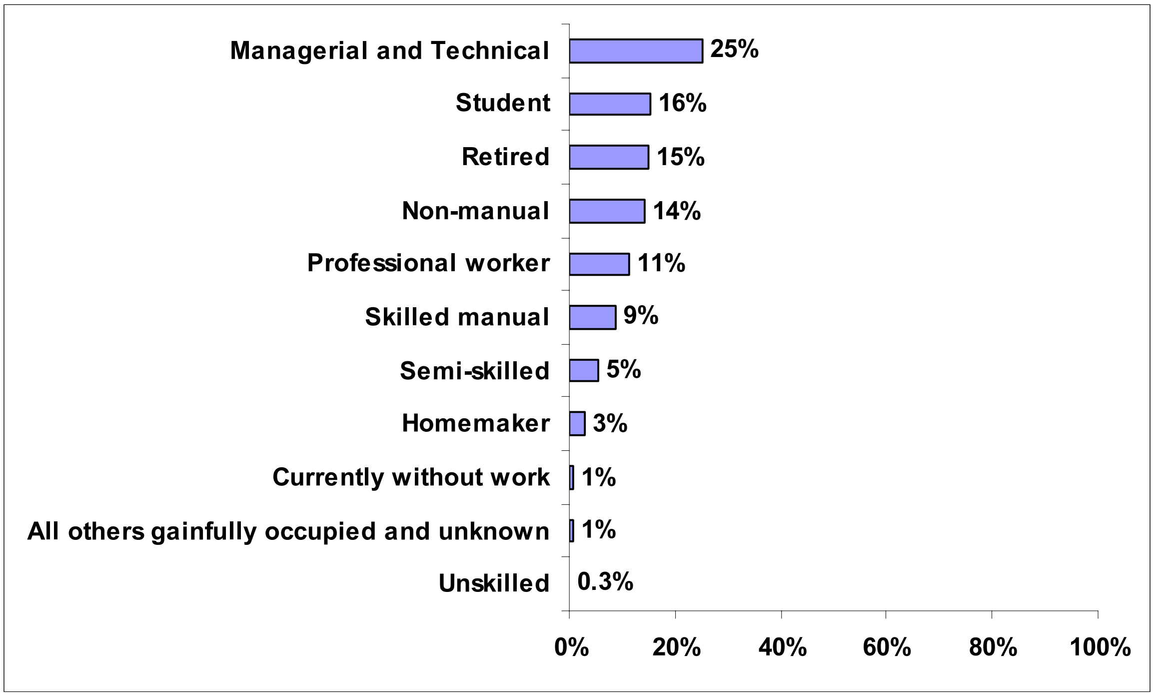
The regional statistics also identify when visitors arrive and surveys are collected accordingly to reflect the seasonal influx of visitors.

2.1.2 Working Status

Respondents were asked their occupation and this was categorised based on the Central Statistics Office (CSO) Social Classification System. Twenty-five percent of respondents work in the managerial and technical area, while non-manual workers account for 14%, professional workers (11%), skilled manual (9%), semi-skilled (5%), all others gainfully occupied and unknown (1%) and unskilled (0.3%) (Figure 2). Respondents not in full time employment include students (16%), retired people (15%), homemakers (3%) and respondents without work at the time of surveying (1%).

It is interesting to note that student respondents in 2008 are down 5% on 2007 figures and retired respondents are up 7% on the same period, which is worth bearing in mind throughout the report.

Figure 2: Employment Status/Level of Occupation



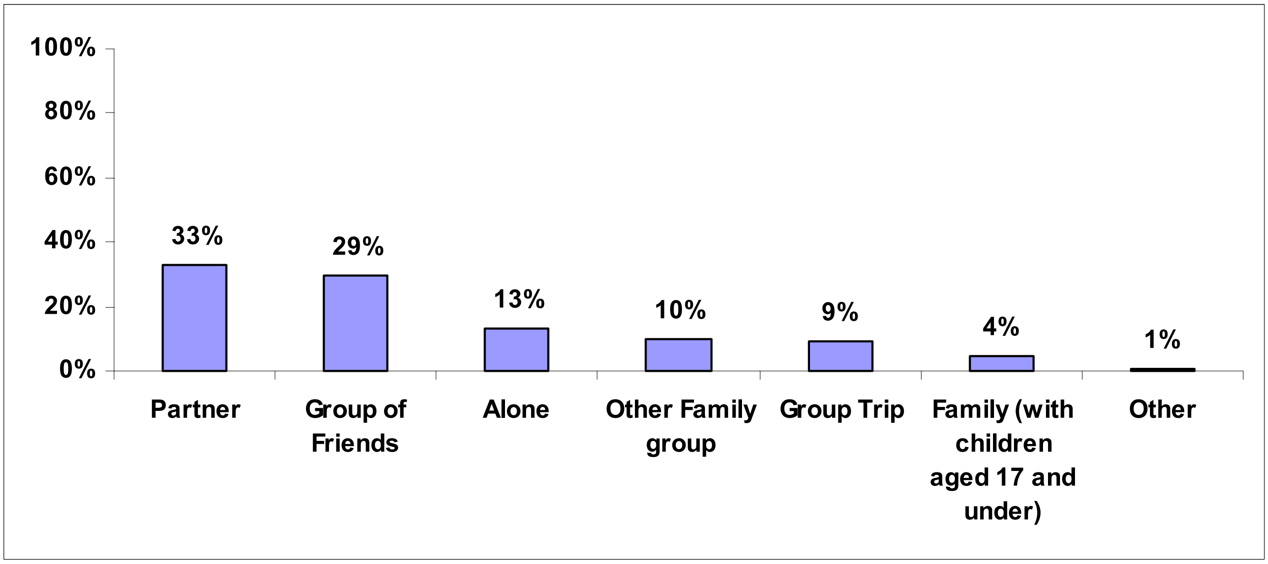
Number of respondents = 1000

2.1.3 Group Composition and Group Size

The most common group compositions among respondents were as follows: travelling with a partner (33%), group of friends (29%) and alone (13%) (Figure 3). Ten percent of respondents were in an 'other family group', 9% part of a group trip, 4% in a family group (with children aged 17 and under) and 1% were in an 'other' type of group.

Figure 3 suggests that Dublin does not attract many families, 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

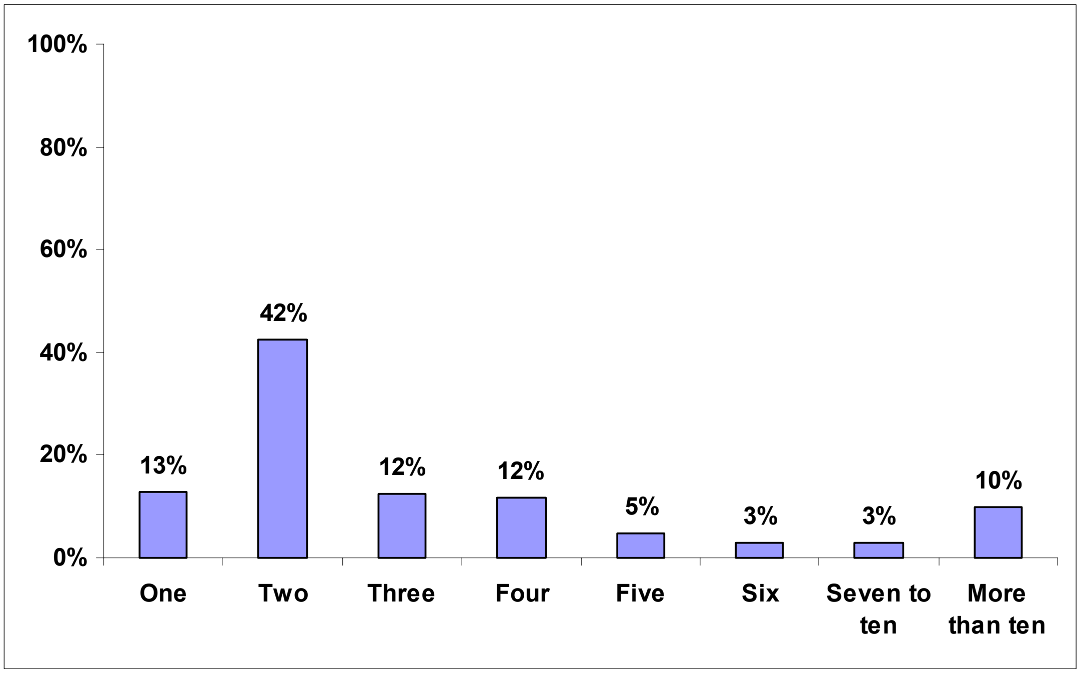


Number of respondents = 1000

2.1.4 Group Size

The majority of respondents were travelling in a group of two people (42%), 24% in a group of three or four and the remaining 21% were in a group of five or more (Figure 4). Thirteen percent were travelling alone.

Figure 4: Group Size



Number of respondents = 1000

Table 2 indicates that a group of two remained the most common size among visitors to Dublin over the past six years, despite dropping 18% since 2003. All other group sizes have increased over this period: one (up 3%), three (up 6%), four (up 1%), five (up 2%), six (up 2%), seven to ten (up 0.5%) and more than ten (up 4%).

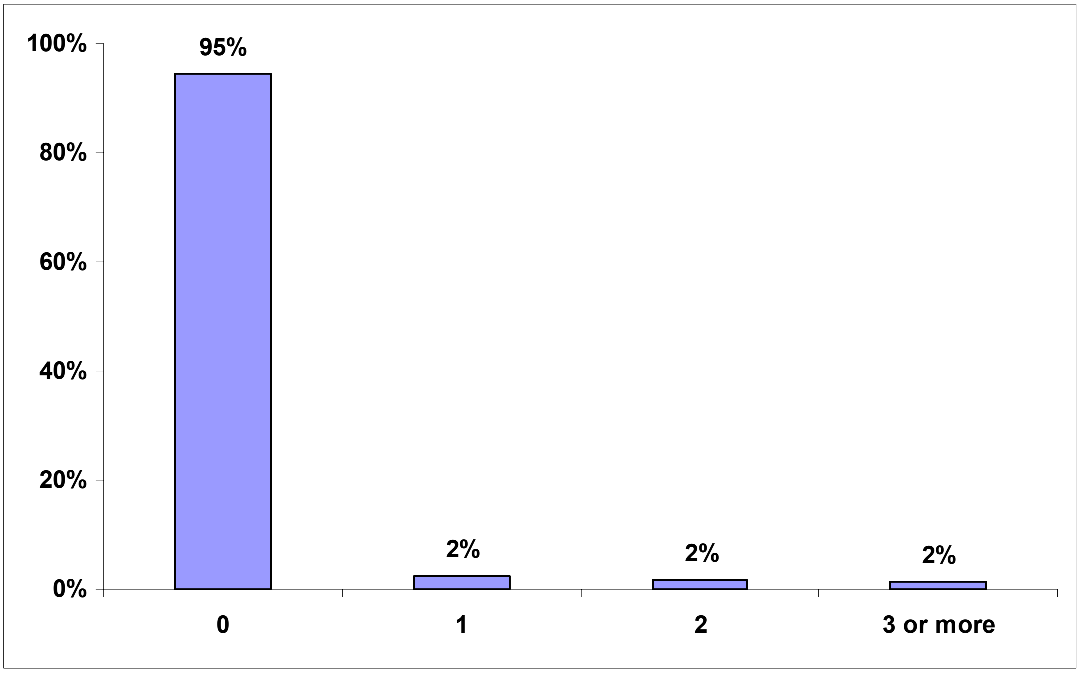
Table 2: Group Size 2003 – 2008

	2008	2007	2006	2005	2004	2003	Average 2003-2008
One	13%	11%	10%	11%	11%	10%	11%
Two	42%	48%	51%	43%	50%	60%	49%
Three	12%	8%	9%	12%	11%	6%	10%
Four	12%	13%	9%	13%	12%	11%	12%
Five	5%	3%	3%	3%	3%	3%	3%
Six	3%	4%	6%	4%	2%	1%	3%
Seven to ten	3%	5%	3.5%	5.5%	3.5%	2.5%	4%
More than ten	10%	7%	8.5%	9%	8%	6%	8%

2.1.5 Number of Children Travelling in the Party

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

Figure 5: Number of Children Travelling in the Party

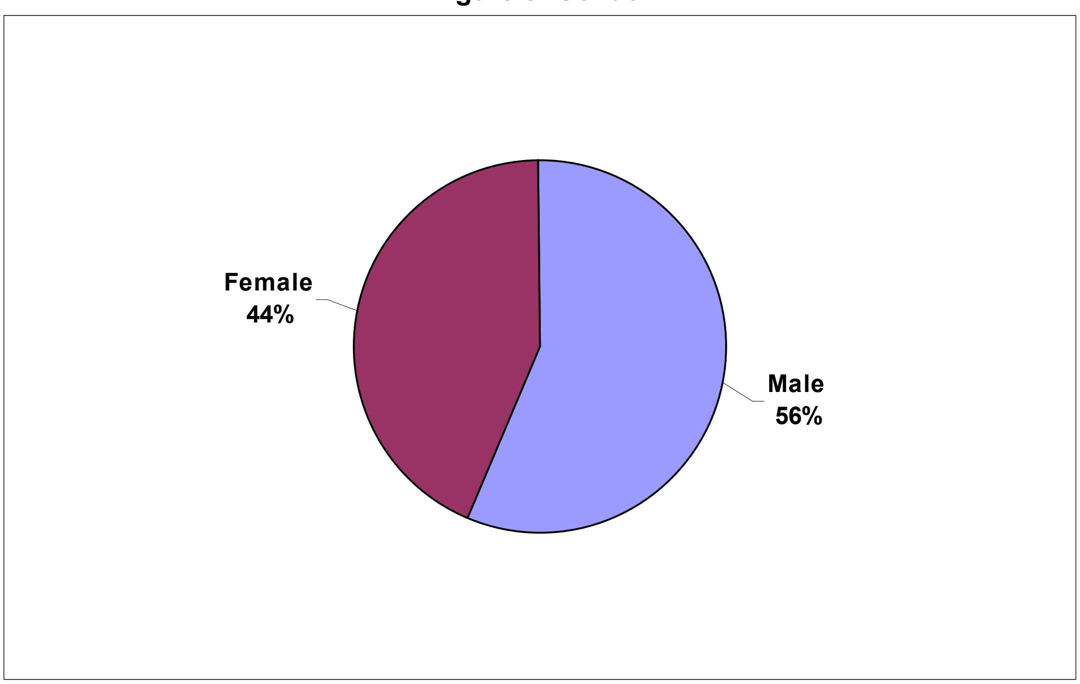


Number of respondents = 1000

2.1.6 Gender

Fifty-six percent of those interviewed were male and 44% were female (Figure 6).

Figure 6: Gender

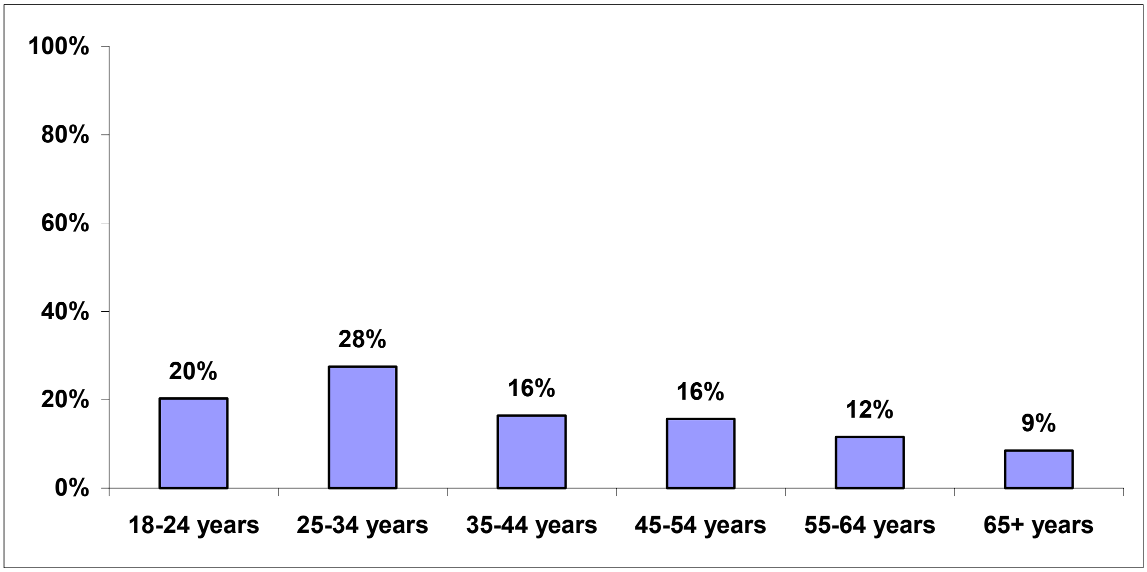


Number of respondents = 1000

2.1.7 Age

Figure 7 shows the breakdown of respondents by standard age range groupings. Almost half of respondents (48%) were aged between 18 and 34. Thirty-two percent were aged between 35 and 54 while the remaining 21% were aged 55 or over.

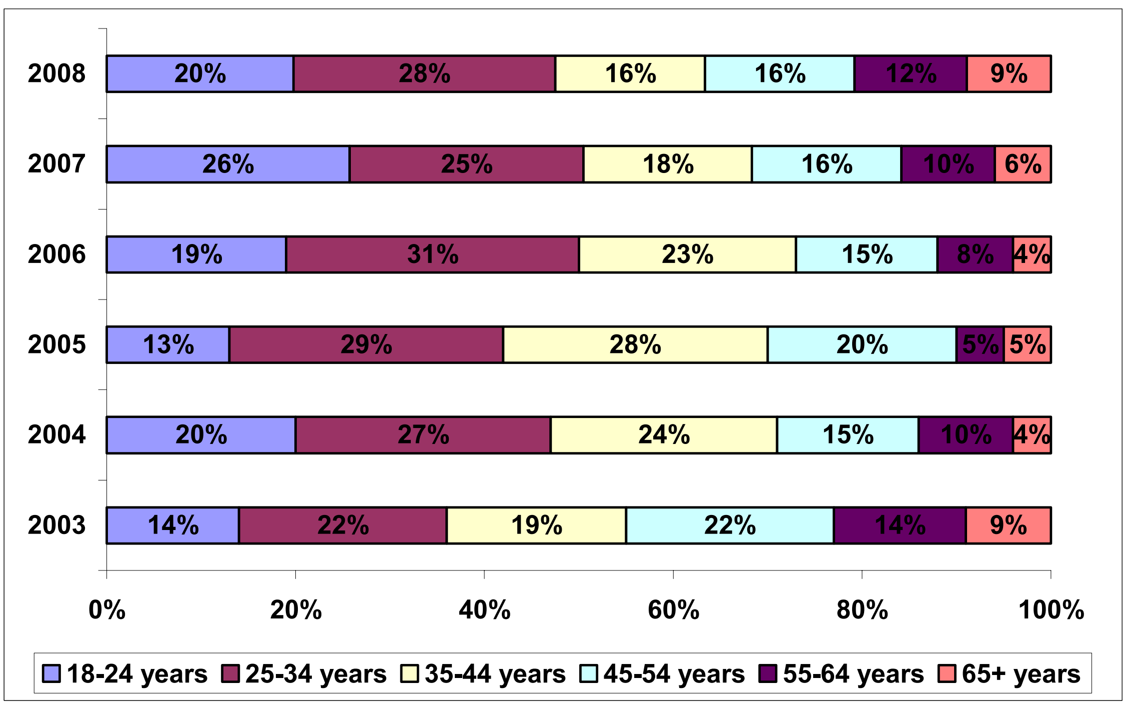
Figure 7: Age of Respondents



Number of respondents = 1000

Figure 8 depicts the age range of respondents from 2003 to 2008. It is worth noting that in 2008, there was a slight shift with more respondents aged 55 or older (21%) than in each of the previous four years. A related result is a reduction in the 18-24 year old respondents in 2008 compared to 2007 (down 6%), however it is still a significant market.

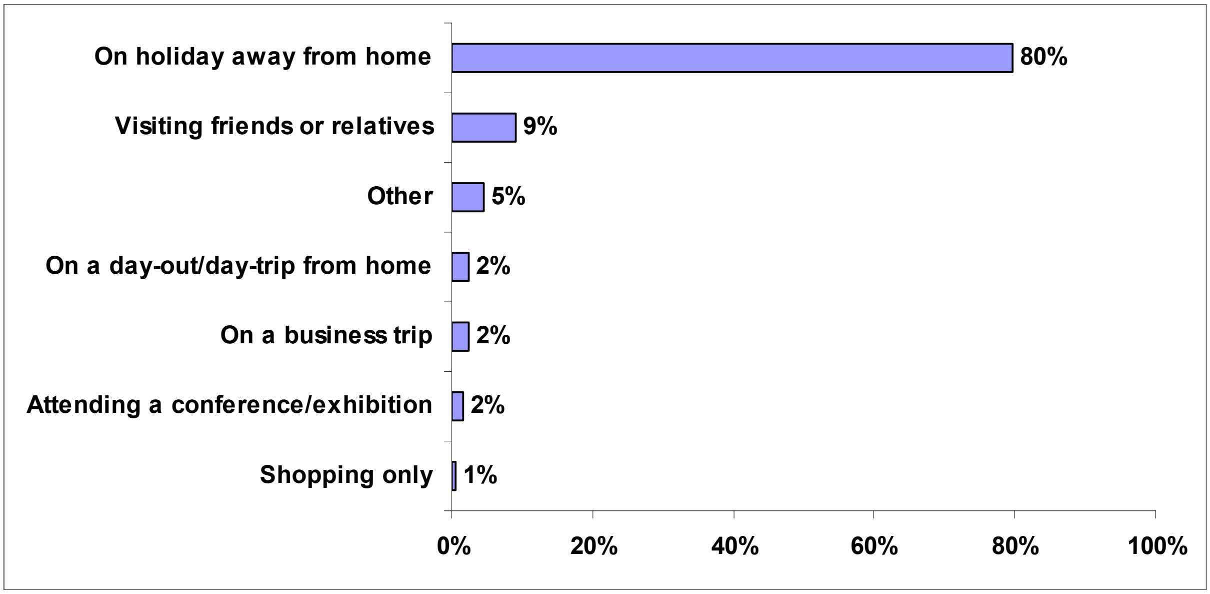
Figure 8: Age of Respondents 2003 – 2008



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 (80%) identified a holiday away from home as the primary reason for visiting Dublin (Figure 9). Visiting friends or relatives (VFR) (9%) is also an important purpose for the trip.

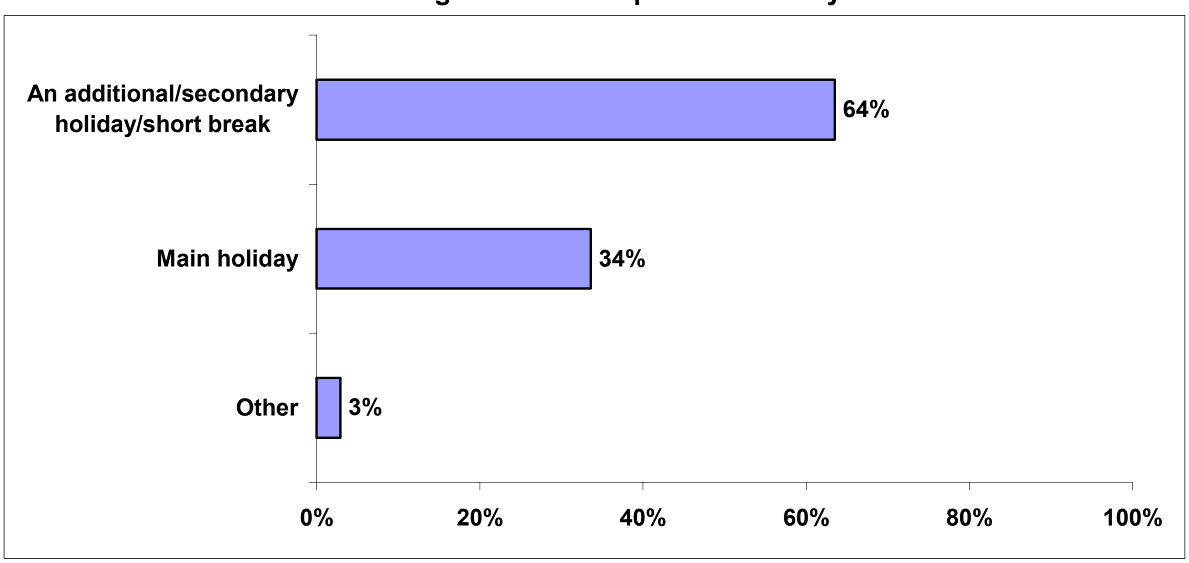
Figure 9: Main Purpose of Visit to Dublin



Number of respondents = 1000

2.2.2 Description of Holiday
Sixty-four percent of respondents described their holiday as an 'additional/secondary holiday/short break' (Figure 10). Thirty-four percent indicated it was a main holiday and 3% indicated they were on an 'other' type of holiday.

Figure 10: Description of Holiday



Number of respondents = 1000

Just over one third of respondents (34%) described their trip as their main holiday, which is up 3% from 2007 figures. Over one third (36%) of those identifying their visit as their main holiday came from North America, one third (33%) were from Mainland Europe, 21% from Britain and the remaining 10% were from Rest of World countries.

Figure 10 supports the idea that there is a continuing trend of people taking additional/secondary holiday/short breaks, however, this figure is down 2% from 2007. The trend of taking short breaks may be linked with the relatively large amount of ‘cash rich/time poor’ people who can financially afford to go on holidays but are only able to go away for a short time. It will be interesting to see how this trend develops in the future considering the current global economic difficulties and tourism forecasts.

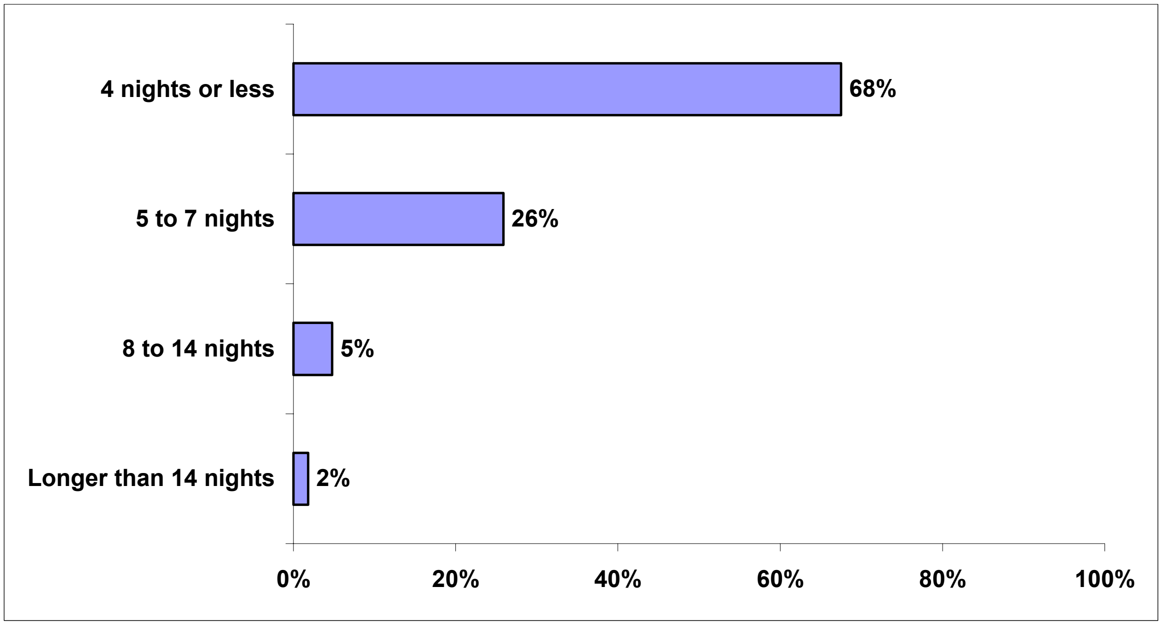
2.3 Duration of Trip

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

2.3.1 Number of Nights in Dublin

Sixty-eight percent of those surveyed stayed up to 4 nights in Dublin (Figure 11). Twenty-six percent stayed in the capital between 5 and 7 nights, 5% stayed between 8 and 14 nights and 2% stayed longer than 14 nights.

Figure 11: Number of Nights in Dublin



Number of respondents = 1000

Table 3 illustrates that in 2008 there was a decrease from 2007 in the number of respondents who spent 4 nights or less in Dublin (down 10%). Respondents tended to stay longer in Dublin in 2008 than in any of the previous five years (2008 – 33% stayed 5 nights or longer).

Table 3: Number of Nights in Dublin 2003 - 2008

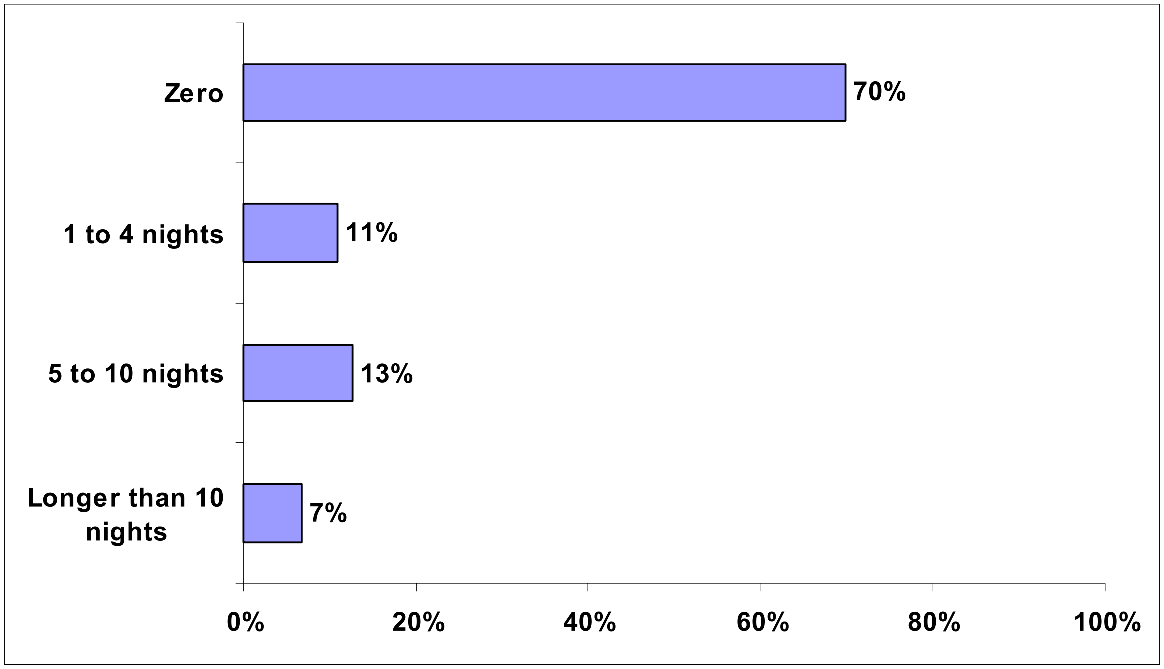
Number of nights	2008	2007	2006	2005	2004	2003	Average 2003-2008
4 nights or less	68%	78%	73%	84%	80%	78%	77%
5-7 nights	26%	17%	22%	11%	14%	15%	18%
8-14 nights	5%	3%	3%	4%	4%	5%	4%
Longer than 14 nights	2%	1%	2%	1%	2%	3%	2%

The average length of stay in Dublin in 2008 was 4.3 nights, emphasising the importance of the short break market. This compares with 3.9 nights in 2007, which highlights the positive trend in Table 3 of respondents spending more nights in Dublin in 2008.

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

Over two thirds (70%) of respondents stayed only in Dublin on their trip, while the remaining 31% 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 = 1000

Of those who did overnight in other parts of the Republic of Ireland, the majority of respondents were from North America (34%), followed by Mainland Europe (33%), Britain (26%) and Rest of World (6%).

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 17%) since 2003.

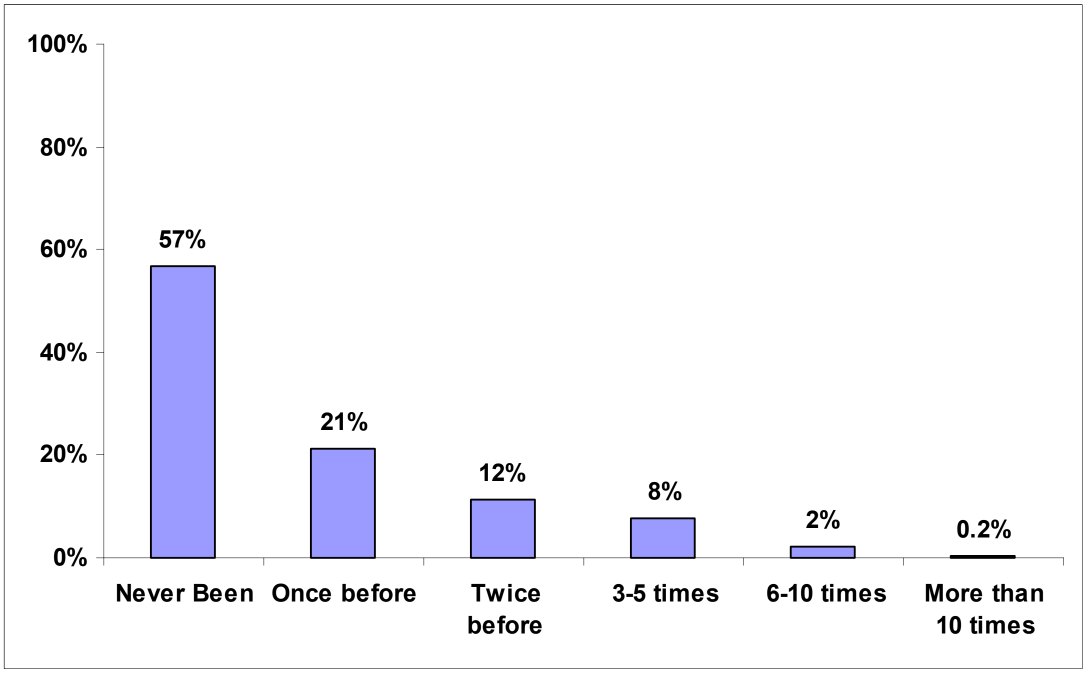
Table 4: Number of Nights in other parts of the Republic of Ireland 2003 – 2008

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

2.4 Previous Visits to Dublin

Fifty-seven percent of respondents had never visited Dublin previously, 41% had been to Dublin between one and five times, 2% had been between six and ten times, while 0.2% of respondents had been to Dublin more than ten times (Figure 13).

Figure 13: Previous Visits to Dublin



Number of respondents = 1000

Table 5 shows that Dublin continues to attract first time visitors (57% in 2008), albeit at a lesser rate than in previous year (67% in 2007 and 62% in 2006). Attracting first time visitors is a positive indication of the attractiveness of Dublin as a destination.

Table 5: Previous Visits to Dublin 2004 – 2008

	2008	2007	2006	2005	2004	Average 2003-2008
Never been	57%	67%	62%	59%	56%	60%
Once before	21%	13%	8%	16%	22%	16%
Twice before	12%	10%	12%	9%	8%	10%
3-5 times	8%	6%	10%	10%	9%	9%
6-10 times	2%	3%	5%	5%	3%	4%
More than 10 times	0.2%	1%	3%	2%	2%	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 2008.

Please note that these are reported, not actual, expenditure figures.

Table 6: Average Daily Expenditure per Person per Day

	2008
Accommodation	€69
Food	€38
Drinks	€38
Shopping	€65
Entertainment	€30
Other	€28
Total	**€268**

In 2007, the reported average expenditure per person per day was €191. The main categories to experience changes in the 2008 findings were: shopping (up €24), other (up €19), accommodation (up €5) and entertainment (down €2).

Considering the average number of nights in Dublin in 2008 was 4.3, it can be estimated that the average expenditure per person per trip was approximately €1,152.

4.0 Accommodation

Forty-eight percent of respondents stayed in hotels, 14% in hostels, 13% with friends and relatives, 12% in guest houses, 8% in bed and breakfast accommodation, 3% in rented houses/apartments, 2% other types of accommodation and 1% indicated they used university/college accommodation (Table 7).

It is interesting to note the decrease in 2008 in hotel usage (down 6% from 2007) and hostel usage (down 4% from 2007). The main areas to benefit from these decreases over the same period were guest houses (up 7%), bed and breakfasts (up 1%) and staying with friends and relatives (up 3%).

Table 7: Accommodation Used (%)

Type of Accommodation	2008	2007	2006	2005	2004	2003	2002	Average 2002-2008
Hotel	48	54	61	56	58	57	52	55
Hostel	14	18	11	9	13	9	13	12
Staying with friends/relatives	13	10	10	13	10	11	12	11
Guest house	12	5	9	13	5	6	5	8
Bed & Breakfast	8	7	5	6	13	16	15	10
Rented house/apartment	3	2	2	2	1	1	2	2
Other	2	2	1.5	1	2.5	3.5	3	2
University/college	1	2	1	0.5	1	2	1	1

Number of respondents = 1000

4.1 How Accommodation was Booked

In 2008, the primary method of booking accommodation was through the Internet (58%), followed by directly with accommodation offline (9%), travel agent (4%) and tour operator (4%) (Table 8). People staying with friends and relatives accounted for 9% of respondents and a further 9% had not booked accommodation in advance of arriving in Dublin.

For the first time in six years the Internet decreased as a method of booking accommodation in Dublin (down 11% from 2007). Interestingly, in the DVS 1999 Report only 5% of visitors booked accommodation via the Internet.

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

Method of Booking	2008	2007	2006	2005	2004	2003	2002	Average 2002-2008
Internet	58	69	65	54	50	36	25	51
Staying with friends/relatives	9	7	10	12	7	10	11	9
Did not book	9	4	1	2	5	3	6	4
Directly with accommodation offline	9	4	7	11	8	15	13	10
Travel agent	4	8	11	8	16	22	26	14
Tour operator	4	2	1	3	3	2	2	2
Organised group	4	3	4	4	4	1	4	3
Other	3	3	2.5	5.5	7	9	11	6
Directly with local tourist office	1	0.3	0.5	0.5	1	1	1	1

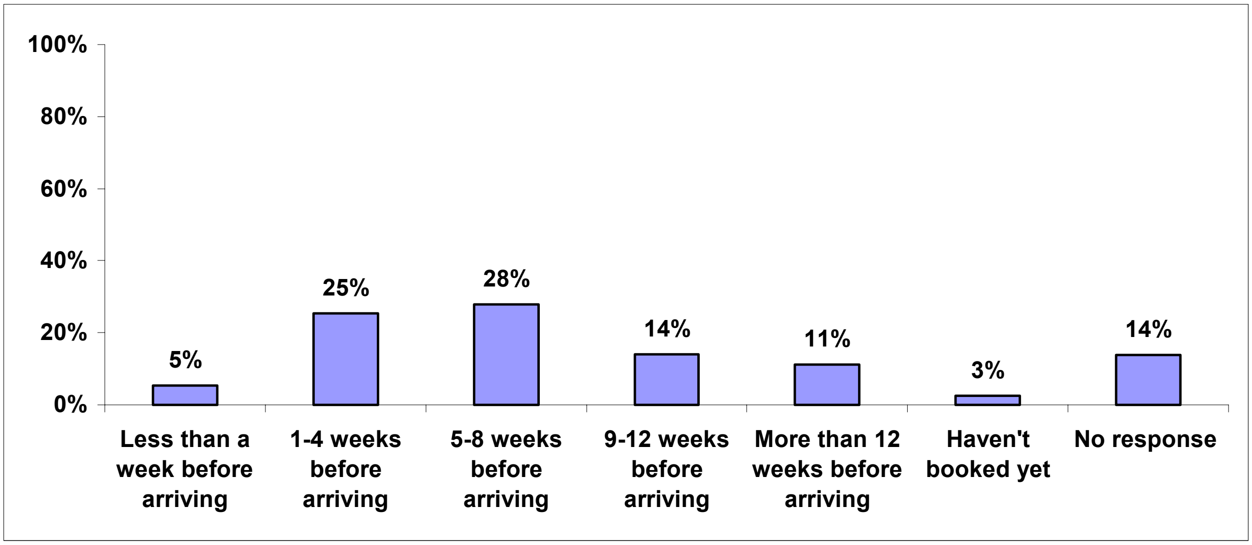
Number of respondents = 1000

4.2 When Accommodation was Booked

Figure 14 indicates that 5% of respondents booked their accommodation in Dublin less than a week before arriving, one quarter of respondents (25%) booked 1-4 weeks before arriving and 28% booked 5-8 weeks before arriving. The remaining 25% booked more than 9 weeks before arriving whilst 3% had not booked at the time of interview.

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 = 1000

5.0 Transport

The vast majority (94%) of out of state visitors to Dublin in 2008 arrived by air, while just 3% arrived by boat/ferry (Table 9). In DVS 1999 Report, 84% arrived by air and 17% arrived by boat/ferry.

Table 9: Main Type(s) Of Access Transport Used to Dublin (%)

Type of Transport	2008	2007	2006	2005	2004	2003	2002	Average 2002 – 2008
Plane	94	94	95	91	85	86	85	90
Boat/ferry	3	3	2	6	8	11	9	6
Private car/van	1	1	1	1	2	3	4	2
Train	1	1	0.5	1	3	2	4	2
Hired car/van	0.5	1	0.5	1	-	4	2	1
Public bus/coach	0.1	0.4	0.5	0.5	1	5	4	2
Private bus/coach	0.1	0.2	0.5	0.5	1	2	1	1

Number of respondents = 1000

5.1 How Transport was Booked

The Internet (81%) and travel agent (7%) remain the two main methods of booking transport to Dublin in 2008 (Table 10). Interestingly, the largest market to Dublin (Great Britain) showed the highest Internet booking rate (87%).

It is also interesting to point out that the Internet increased 2% from the 2007 study as a method of booking accommodation and 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 (%)

	Total	Britain	Mainland Europe	North America	Rest of World
Internet	81%	87%	83%	63%	78%
Travel agent	7%	2%	5%	18%	14%
Tour operator	4%	4%	1%	9%	2%
Part of an organised tour	4%	2%	6%	4%	2%
Did not book themselves	2%	2%	2%	2%	2%
Other	2%	2%	3%	2%	2%
Directly with the travel operator- offline	1%	1%	0%	1%	0%

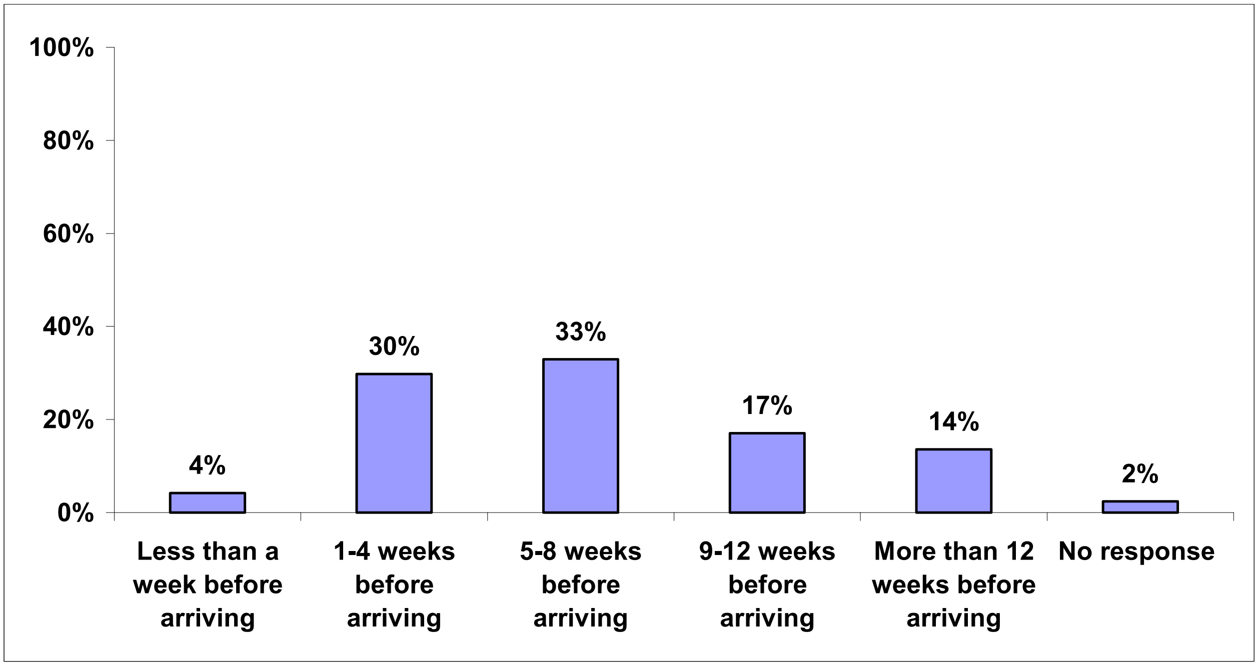
Number of total respondents = 1000

5.2 When Travel was Booked

Figure 15 indicates that 4% of respondents booked their travel to Dublin less than a week before arriving (down from 7% in 2007), 30% booked 1-4 weeks before arriving and 33% booked 5-8 weeks before arriving. The remaining 31% booked more than 9 weeks before arriving whilst 2% made no response.

These findings show close correlations with the pattern of when accommodation was booked.

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



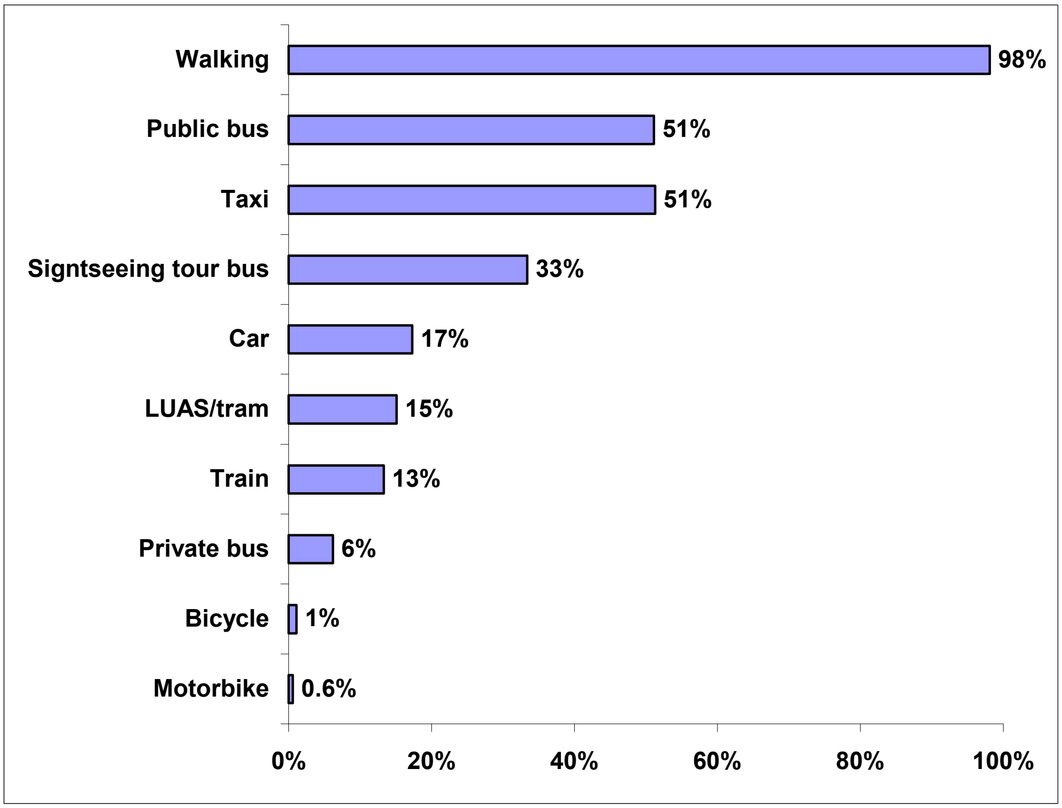
Number of respondents = 1000

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 (98%) walked around Dublin and over half (51%) also used the public bus system and taxis (51%). Sightseeing tours buses were used by one third of respondents (33%), car (17%), LUAS/tram (15%) and train (13%). Private bus (6%), bicycle (1%) and motorbike (0.6%) were less frequently used.

Figure 16: Forms of Transport used to get around Dublin

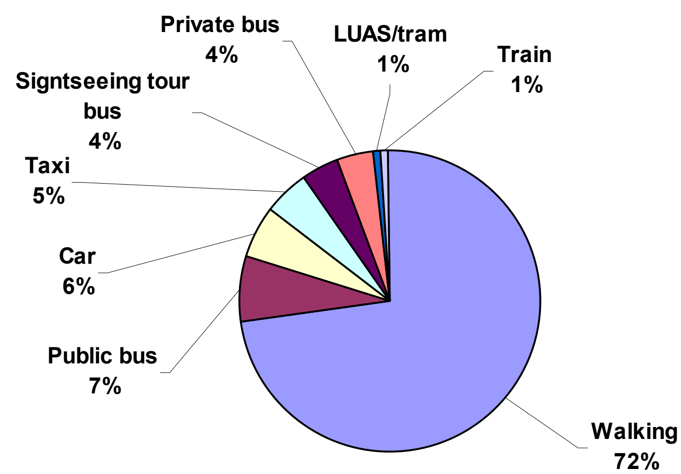


Number of respondents = 1000

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. Public bus (7%) and car (6%) were the next most frequent responses, followed by taxi (5%), sightseeing tour bus (4%), private bus (4%), LUAS/tram (1%) and train (1%).

Figure 17: Form of Transport used Most Often within Dublin



Number of respondents = 1000

Table 11 indicates the categories that increased their ranking as the ‘most often used’ form of transport from 2007 to 2008 are walking (up 15%) and taxi (up 1%).

Forms of transport that decreased were public bus (down 11%), car (down 3%), sightseeing tour bus (down 1%) and LUAS/tram (down 1%). Private bus and train ratings remained the same.

Table 11: Form of Transport used Most Often within Dublin 2003 – 2008

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

6.0 Major Factors Influencing the Decision to Visit Dublin

Table 12 highlights the top five 'major influences' affecting decisions to visit Dublin in 2008 from a list of eleven factors and tracks the results for each since 2004. In 2008, advice from friends and relatives accounted for 27%, the experience of a previous visit (17%), other (15%), inexpensive airfare (9%) and Internet site (7%).

It is interesting to note that there were a couple of large decreases in 2008 compared with 2007: inexpensive airfares (down 20%) and Internet site (down 16%). The only categories to experience increases in the same period were advice from friends and relatives (up 1%) and other factors (up 6%).

Some of the other major influences specified by respondents include: never been before (4%), work (2%), concerts/music (2%), genealogy (2%) and visiting friends and relatives (1%).

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

	2008	2007	2006	2005	2004	Average 2004-2008
Advice from friends and relatives	27%	26%	48%	44%	37%	36%
Previous visit	17%	19%	32%	31%	26%	25%
Other	15%	9%	40%	21%	24%	22%
Inexpensive airfare	9%	29%	42%	26%	19%	25%
Internet site	7%	23%	23%	28%	17%	20%

Number of respondents = 1000

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 (27%) and guidebooks (17%) were the most popular sources (Table 13).

There were 185 responses to specific Internet websites used by respondents as sources of information before arriving in Dublin. The top two websites specified were: www.google.com (45%) and www.visitdublin.com (19%). Interestingly, www.ryanair.com was the most popular website specified in 2007 (26%) but it was mentioned by only 2% of respondents in 2008.

Lonely Planet was the most frequently specified guidebook, accounting for 30% of the 183 responses in this category, which highlights the influence of this guidebook, particularly among the 18-34 year olds (accounting for 69% of Lonely Planet responses). The second most frequently specified guidebook was the AA travel guide (10%), followed by Eyewitness (7%).

Examples of other sources of information were mainly to do with prior knowledge about Dublin from respondents who visited before and respondents originally from Ireland.

Table 13: Information Sources before Arriving in Dublin

Information sources	% of responses
Accessed the Internet	32
Obtained information from friends/relatives	27
Guidebooks	17
Travel agent/tour operator	9
Other sources	7
Group leader/organiser	5
Received brochures/leaflets from Fáilte Ireland/Tourism Ireland	3
Received brochures/leaflets from Dublin Tourism	2

Number of responses = 1199

Table 14 tracks the trend in information sources used before arriving in Dublin from 2003 to 2008. It is interesting to note that although the usage of the Internet as a source has increased by 1% over this period, it has actually decreased 2% in 2008 compared with 2007. Information from friends/family decreased by 1% and guidebooks also decreased as a source of information (down 8%) over the same period.

Table 14: Information Sources before Arriving in Dublin 2003 – 2008

Information sources	% of responses					
	2008	2007	2006	2005	2004	2003
Internet	32	34	40	44	36	31
Information from friends/relatives	27	28	26	24	21	20
Guidebooks	17	25	22	18	25	28
Travel agent/tour operator	9	2	5	9	7	7
Brochures/leaflets from Fáilte Ireland/Tourism Ireland/Dublin Tourism	5	9	3	4	5	8
Group leader/organiser	5	2	1	1	3	2
Other sources	7	1	3	0.5	4	3

7.2 Information Sources after Arriving in Dublin

During their stay in Dublin, the majority of respondents sourced information from brochures/leaflets from Dublin Tourism (34%), guidebooks (16%) and brochures/leaflets from Fáilte Ireland/Tourism Ireland (14%) (Table 15).

Table 15: Information Sources after Arriving in Dublin

Information sources	% of responses
Received brochures/leaflets from Dublin Tourism	34
Guidebooks	16
Received brochures/leaflets from Fáilte Ireland/Tourism Ireland	14
Other sources	12
Obtained information from friends/relatives	11
Group leader/organiser	5
Travel agent/tour operator	4
Accessed the Internet	4

Number of responses = 1034

Table 16 tracks the trend in information sources used after arriving in Dublin from 2003 to 2008. There have been fluctuations over the period, but the main sources (brochures/leaflets and guidebooks) have remained the most common over the years.

Table 16: Information Sources after Arriving in Dublin 2003 – 2008

Information sources	% of responses					
	2008	2007	2006	2005	2004	2003
Brochures/leaflets from Fáilte Ireland/Tourism Ireland/Dublin Tourism	48	52	47	27	26	48
Guidebooks	16	25	25	44	43	26
Friends/relatives	11	10	2	12	8	9
Group leader/organiser	5	4	-	5	8	2
Internet	4	5	-	8	6	2
Travel agent/tour operator	4	2	-	1	4	1
Other	12	3	10	1	5	12
Information from accommodation	-	-	17	1	-	-
Brochures from attractions	-	-	-	1	-	-

Please note that from 2003-2006 'Brochures/leaflets from Irish/Dublin Tourist Board' was the only category for brochures/leaflets. In 2007, this question was split up to capture more information and the new categories were: 'Brochures/leaflets from Fáilte Ireland/Tourism Ireland' and 'Brochures/leaflets from Dublin Tourism'. Both categories are collated in Table 16 to allow comparison with earlier years.

Other examples of sources specified by respondents included information from accommodation 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:

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

These activities have continuously been in the top five from 2003-2008, although the order has varied during this period.

Table 17 depicts the extent to which main markets to Dublin engaged in activities. Walking around the city is most likely to be engaged in by Mainland European, North American and Rest of World visitors. North American visitors were the predominant market most likely to visit sights/attractions, visit pubs/bars, dine in restaurants and to engage in shopping.

Table 17: Activities Engaged in by Main Markets to Dublin

	Total	Britain	Mainland Europe	North America	Rest of World
Walking around the city	97%	97%	98%	98%	98%
Visiting sights/attractions	96%	94%	96%	99%	98%
Visit pubs/bars	94%	94%	93%	95%	92%
Dine in restaurants	86%	90%	81%	93%	78%
Shopping	73%	71%	69%	87%	71%

Number of respondents = 1000

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 1640 responses. The top five most important unprompted activities were grouped together as follows: sightseeing (13%), holiday/break (13%), culture/history (11%), visiting friends and relatives (10%) and new experience/first time visitors (7%) (Table 18).

Interestingly, socialising and shopping were ranked among the top five activities in 2007 (9% and 5% respectively), however, they were not as frequently responded in 2008 (4% and 2% respectively).

Table 18: Activity Most Important when Deciding to Visit Dublin

Activity	% of responses
Sightseeing	13%
Holiday/break	13%
Culture/history	11%
Visiting Friends and Relatives (VFR)	10%
New experience/first time visitor	7%

Number of responses = 1640

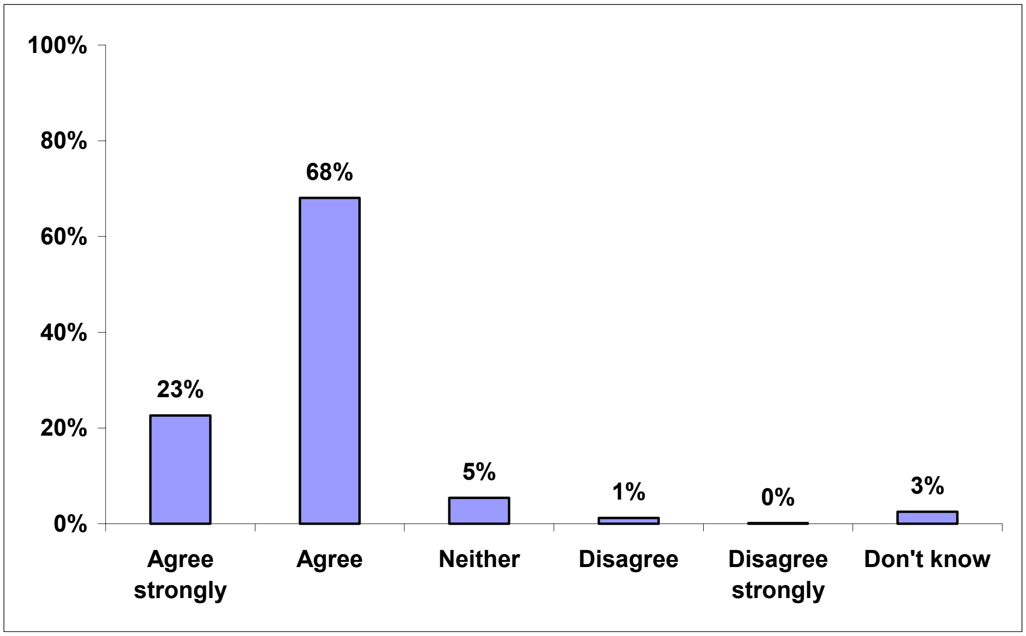
9.0 Attitudes Towards Dublin

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

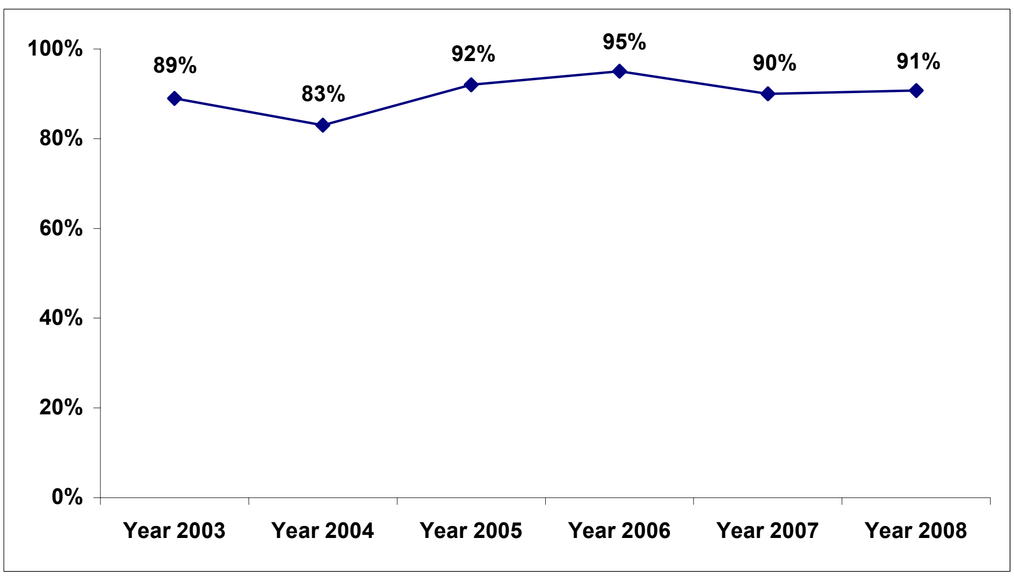
Figure 18 illustrates 91% of respondents to Dublin in 2008 felt the city was a safe place to visit. This is an increase of 1% from the previous year (Figure 19). Only 1% of respondents felt Dublin was not a safe city, which is down 1% from 2007. The agreement level was consistent across all markets.

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



Number of respondents = 1000

Figure 19: "It is a Safe Place to Visit" Agree Strongly/Agree 2003 – 2008

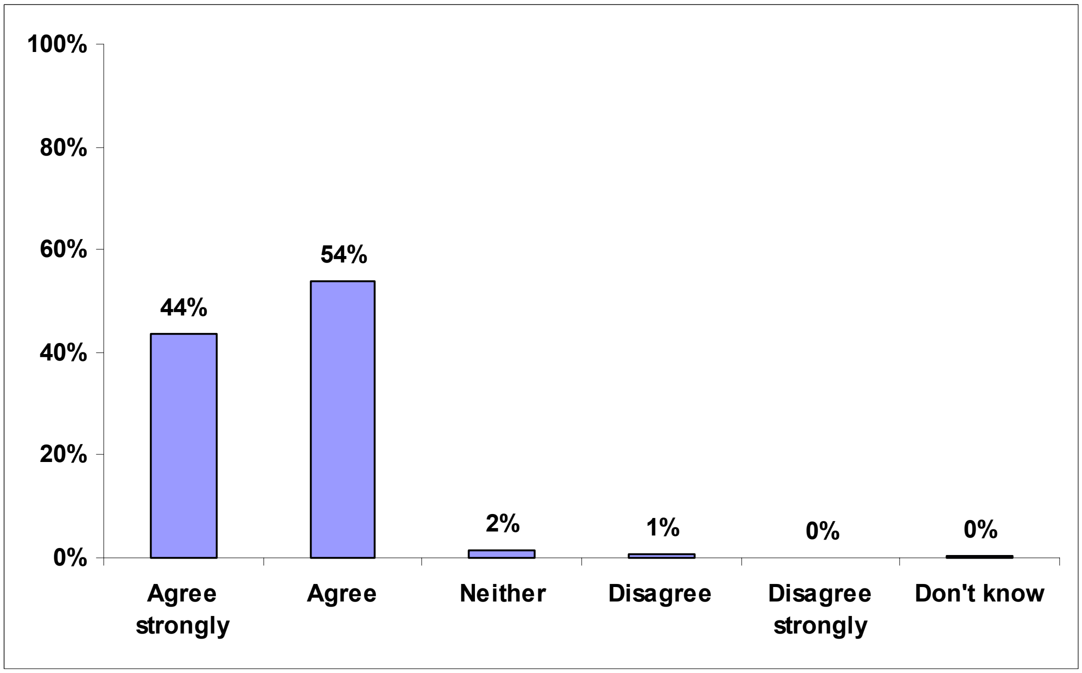


Number of respondents = 1000

9.2 Céad Míle Fáilte – Friendly and Hospitable People

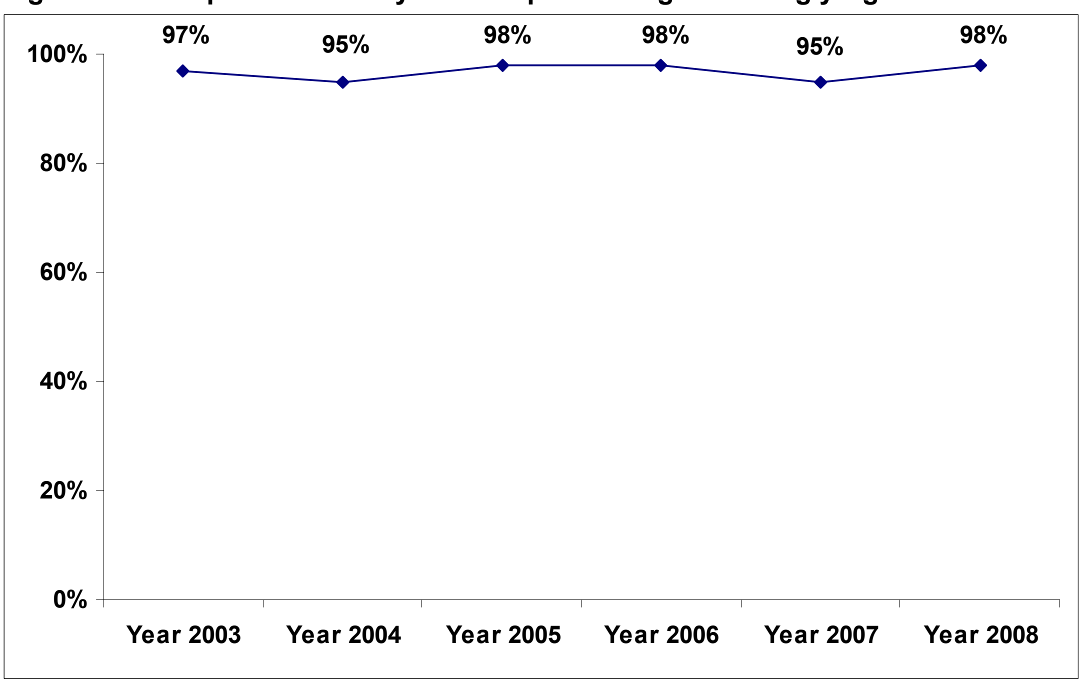
Visitor attitude towards the friendliness of the people in Dublin continues to be very positive (Figure 20). Ninety-eight percent were of the opinion the people were friendly and hospitable; this is a slight increase on the 2007 figure (up 3%) (Figure 21) and is a very positive outcome and challenges 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 = 1000

Figure 21: "People are Friendly and Hospitable" Agree Strongly/Agree 2003 – 2008

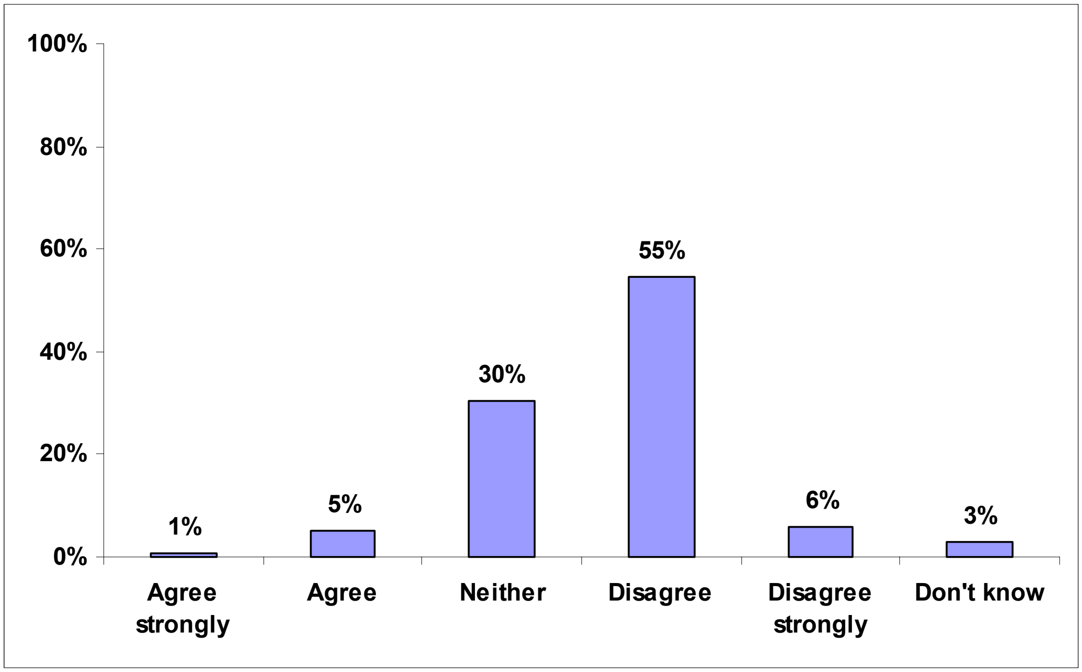


Number of respondents = 1000

9.3 Dublin and Litter

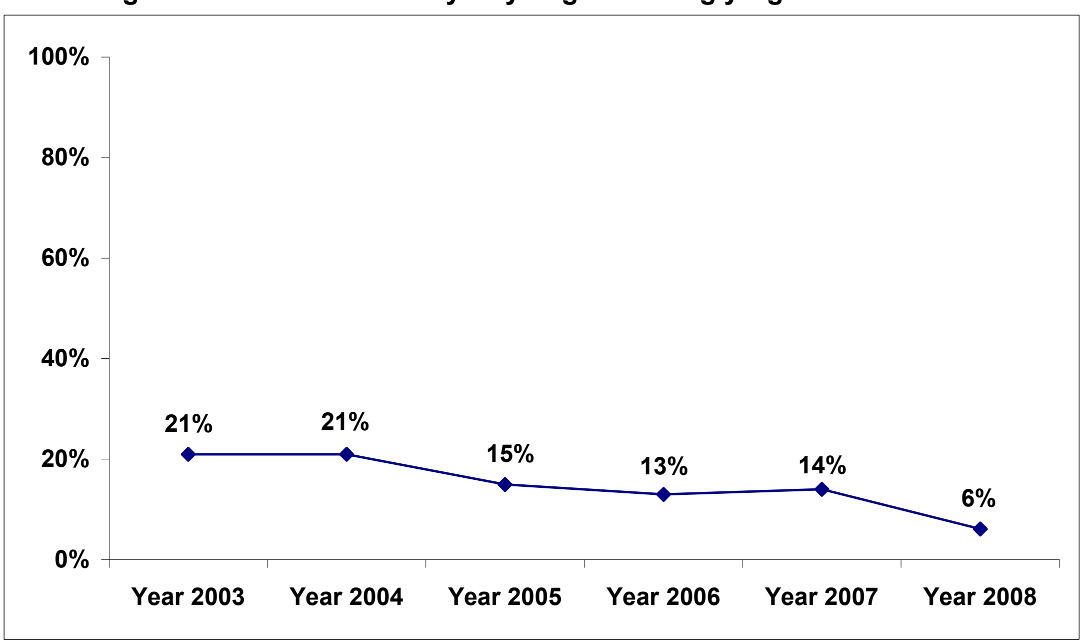
Only 6% of respondents felt that the city is dirty (Figure 22), which is a decrease of 8% on 2007 figures (Figure 23) and is an encouraging finding, particularly for the local authorities and other agencies in the area responsible for litter management. It also highlights the success of business campaigns (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 = 1000

Figure 23: "Dublin is a Dirty City" Agree Strongly/Agree 2003 – 2008

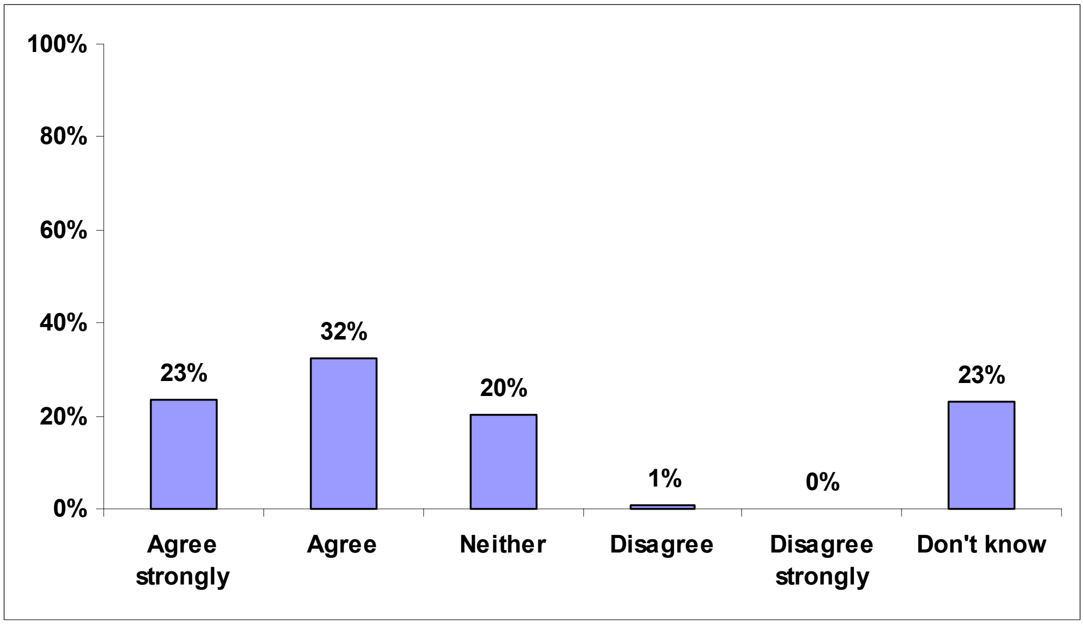


Number of respondents = 1000

9.4 Dublin's Night Life

Fifty-five percent of respondents felt that Dublin has a good night life (Figure 24) and almost one quarter (23%) did not know. Fifty-one percent of those who answered don't know to this statement were aged 45 and over.

Figure 24: "Dublin has a Good Night Life"

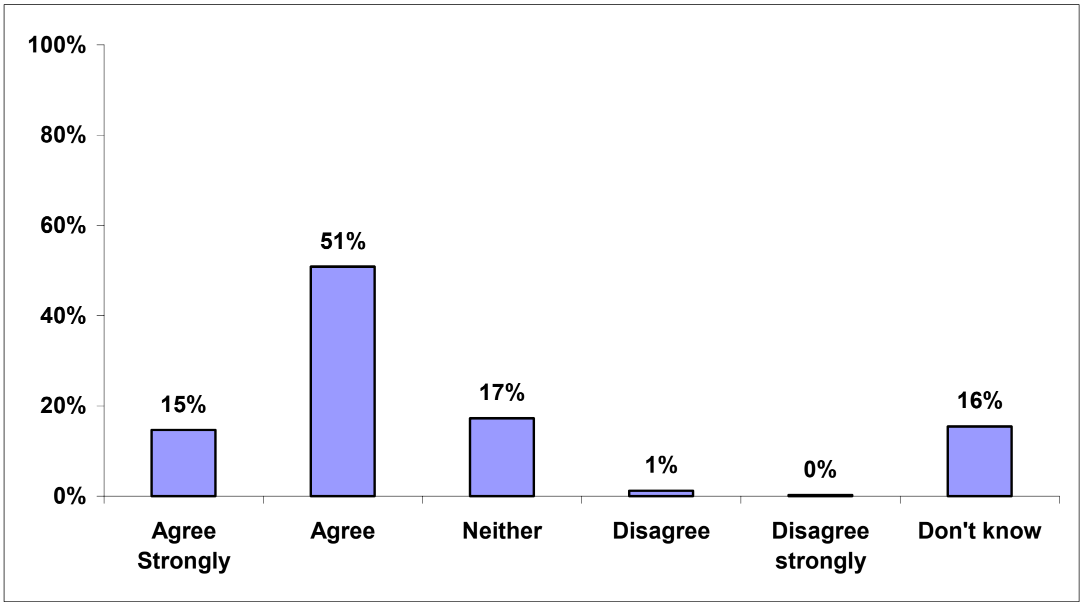


Number of respondents = 1000

9.5 Variety of Restaurants in Dublin

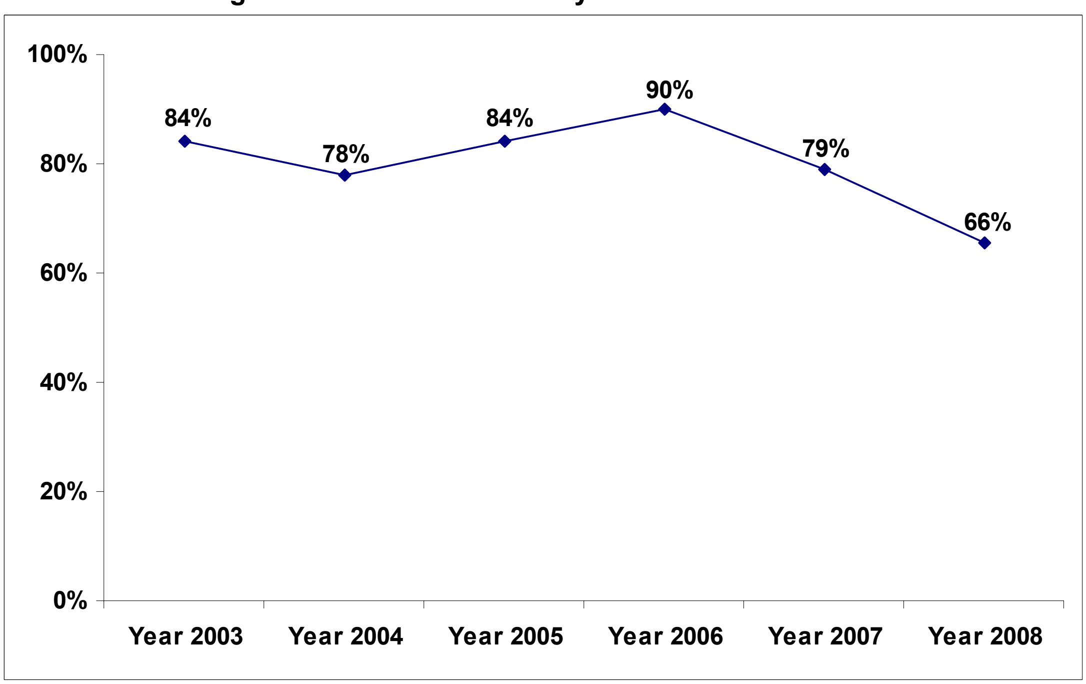
Sixty-six percent of respondents feel that Dublin has plenty of good restaurants (Figure 25). Interestingly, 32% of those who strongly agree with this statement are aged 18-34 and 43% who agree also come from this age range, indicating a strong performance among younger people. However, this level of agreement has been on a downward trend since 2006 (down 24%) (Figure 26).

Figure 25: "Dublin has Plenty of Good Restaurants"



Number of respondents = 1000

Figure 26: "Dublin has Plenty of Good Restaurants"

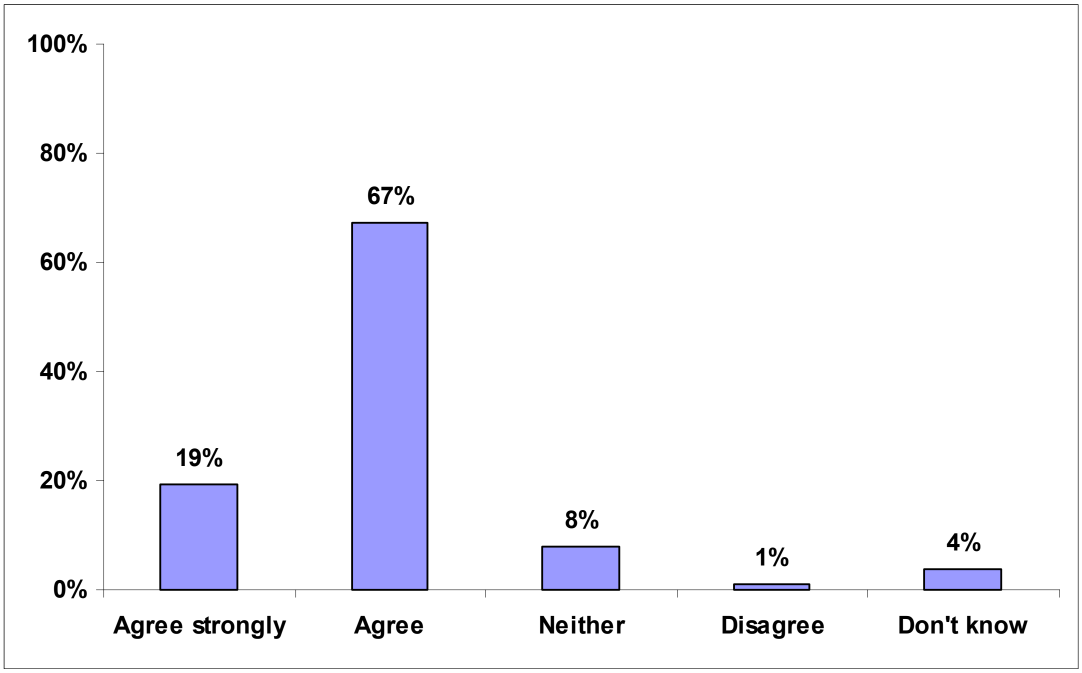


Number of respondents = 1000

9.6 Variety of Attractions in Dublin

Eighty-six percent of respondents feel that Dublin has a good variety of attractions (Figure 27). 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"

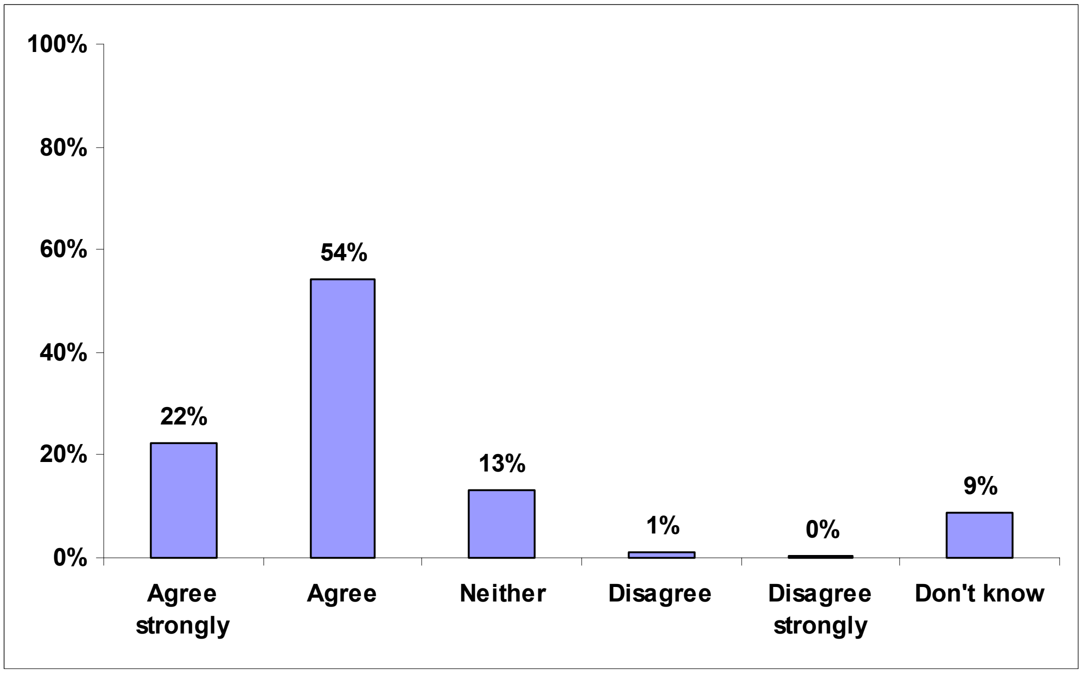


Number of respondents = 1000

9.7 Cultural Image

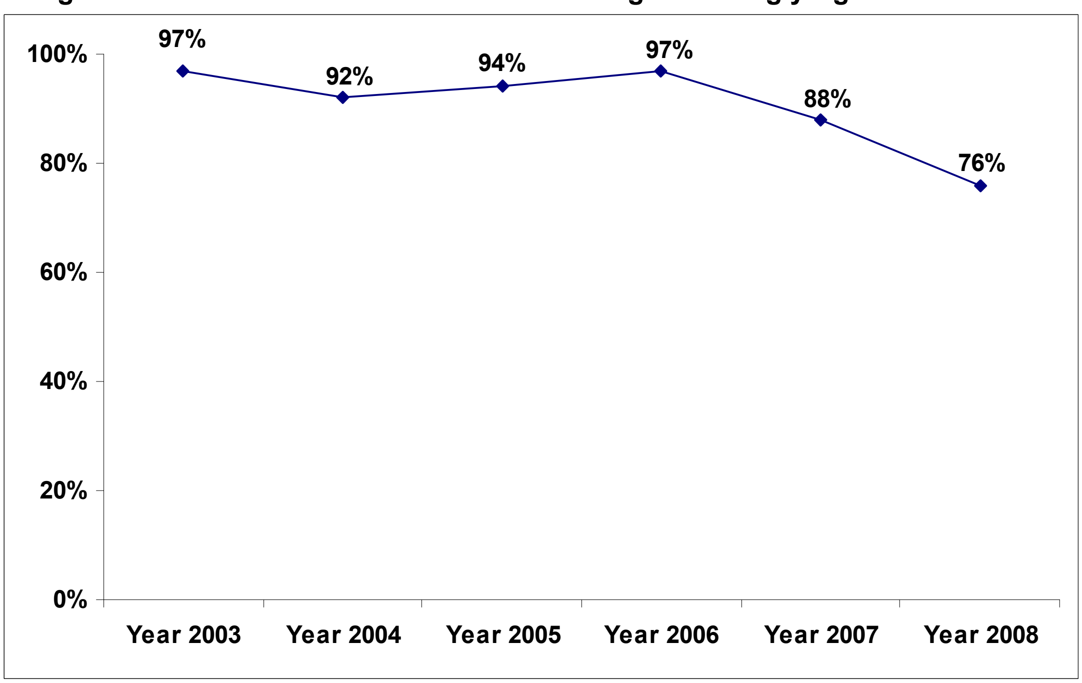
Although Dublin continues to be positively perceived from a cultural standpoint, with a high percentage of respondents (76%) seeing the city as possessing a rich cultural life (Figure 28), there is a marked decrease of 12% from 2007 figures (Figure 29).

Figure 28: "Dublin has a Rich Cultural Life"



Number of respondents = 1000

Figure 29: "Dublin has a Rich Cultural Life" Agree Strongly/Agree 2003 – 2008

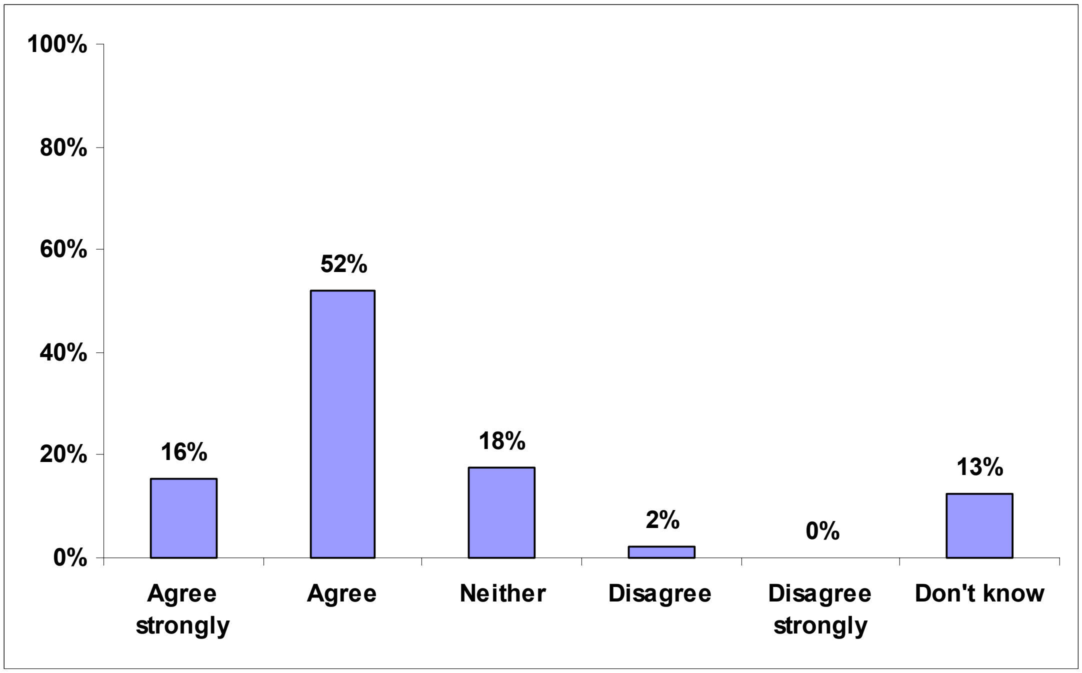


Number of respondents = 1000

9.8 Number of Museums in Dublin

Visitor perception of Dublin as having a rich cultural life is perhaps supported by the fact that 68% of respondents feel there are a lot of museums to visit (Figure 30), however, this figure is considerably decreased on 2007 figures (down 20%).

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

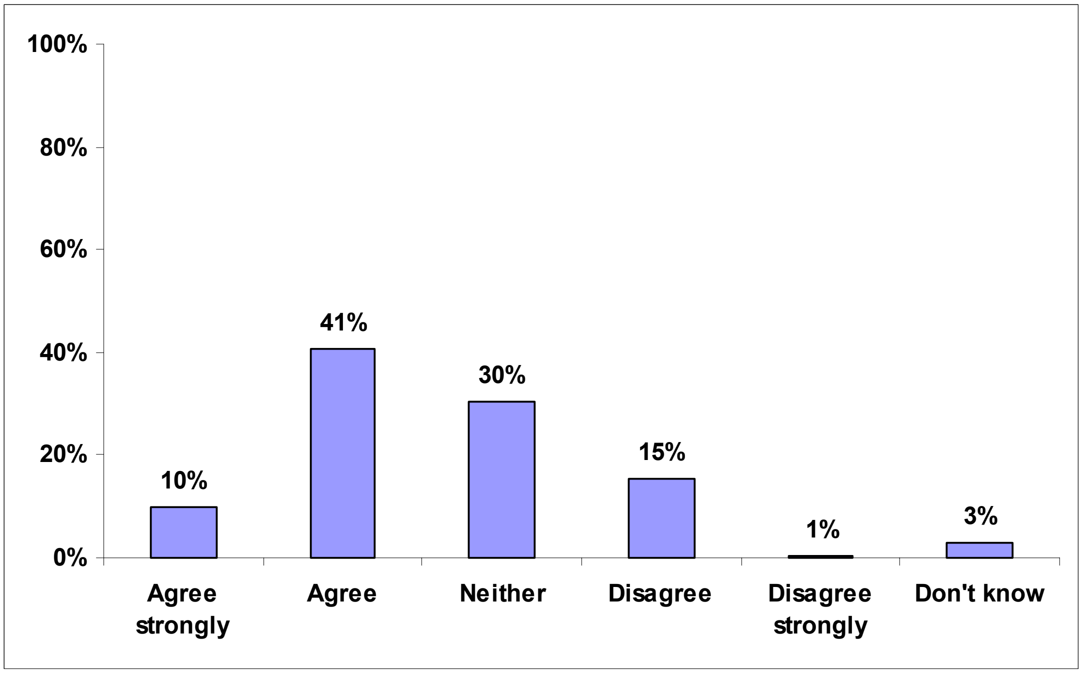


Number of respondents = 1000

9.9 Prices in Dublin

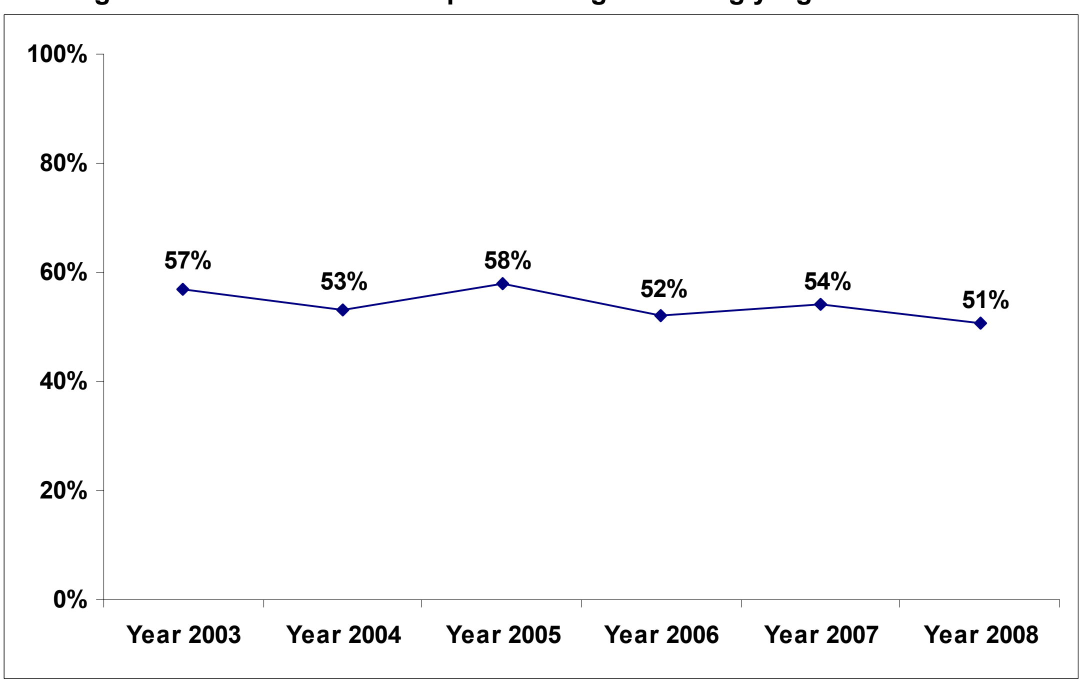
Figure 31 illustrates 51% of respondents felt that prices were too high. This is a decrease of 3% on the 2007 study (Figure 32) and represents the lowest rating over the six years from 2003 to 2008.

Figure 31: "Prices are too Expensive"



Number of respondents = 1000

Figure 32: "Prices are too Expensive" Agree Strongly/Agree 2003 – 2008

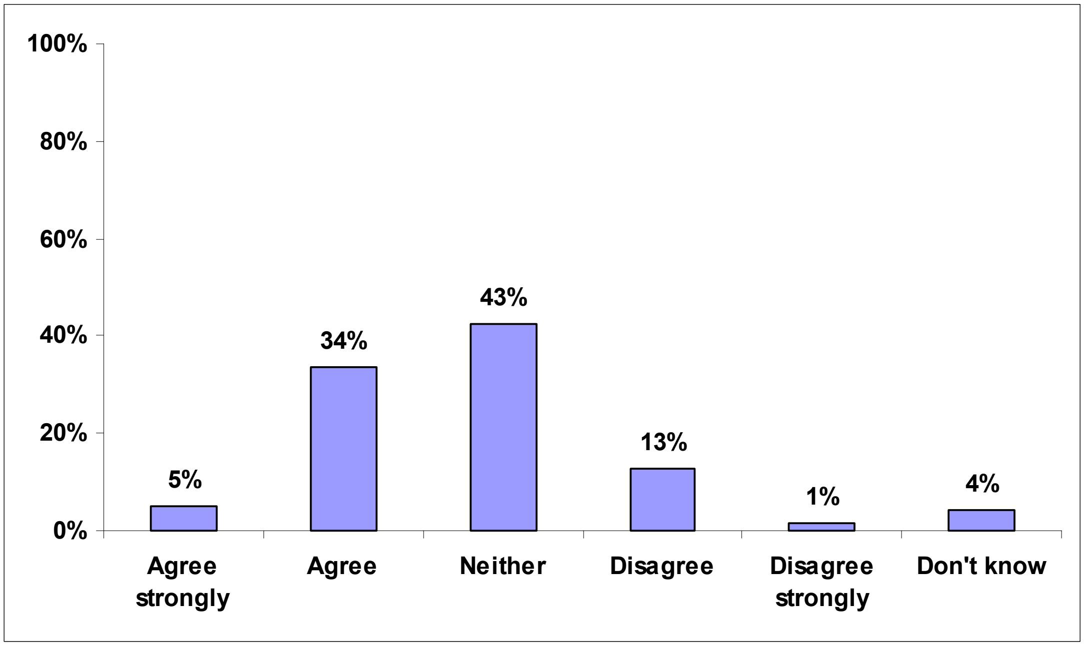


Number of respondents = 1000

9.10 Value for Money in Dublin

Thirty-nine percent of respondents to the capital felt Dublin offered good value for money to visitors (Figure 33), while 14% felt Dublin does not.

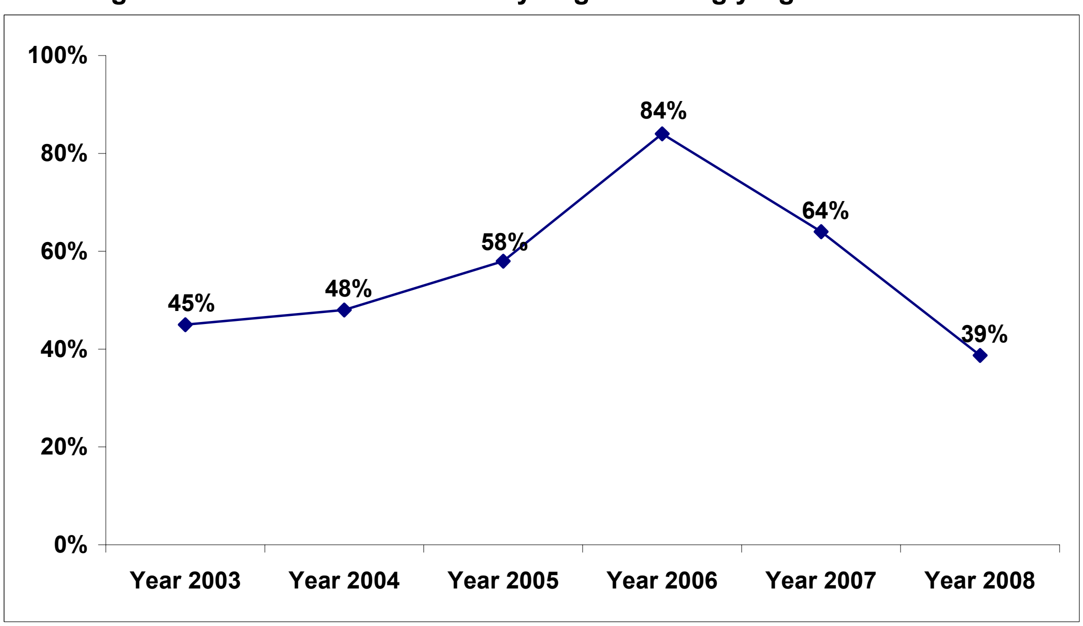
Figure 33: "Good Value for Money"



Number of respondents = 1000

Figure 34 shows that there has been a dramatic decrease in the number of respondents who agree strongly and agree with this statement in recent years (down 45% since 2006).

Figure 34: "Good Value for Money" Agree Strongly/Agree 2003 – 2008



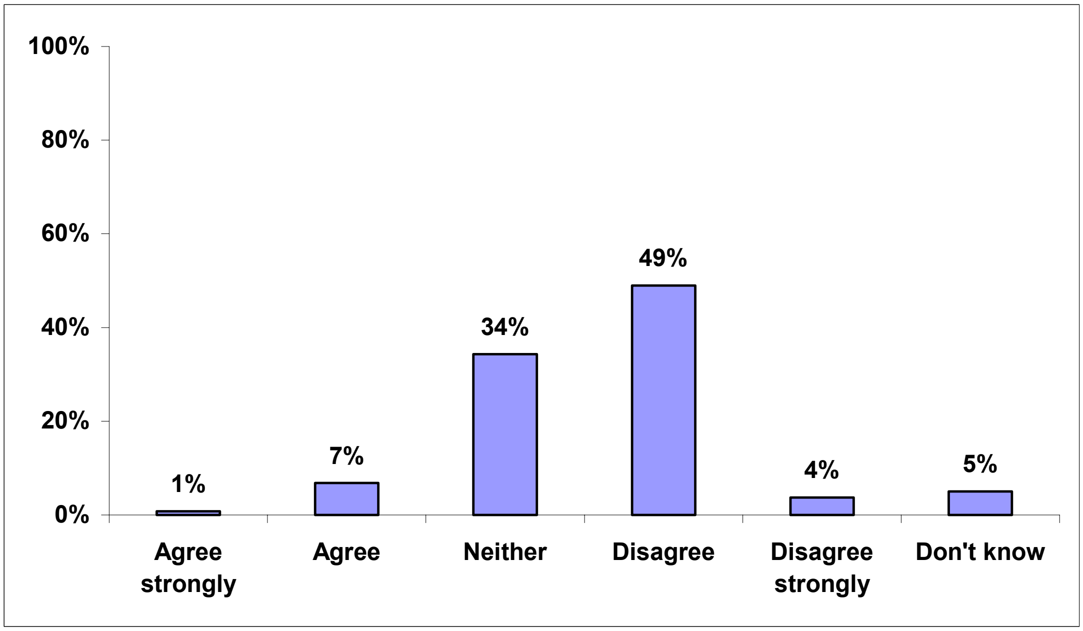
Number of respondents = 1000

9.11 Crowded City

In 2008, 8% of respondents agreed that Dublin is too crowded for sightseeing (Figure 35). This represents a decrease of 14% on results from 2007 (Figure 36).

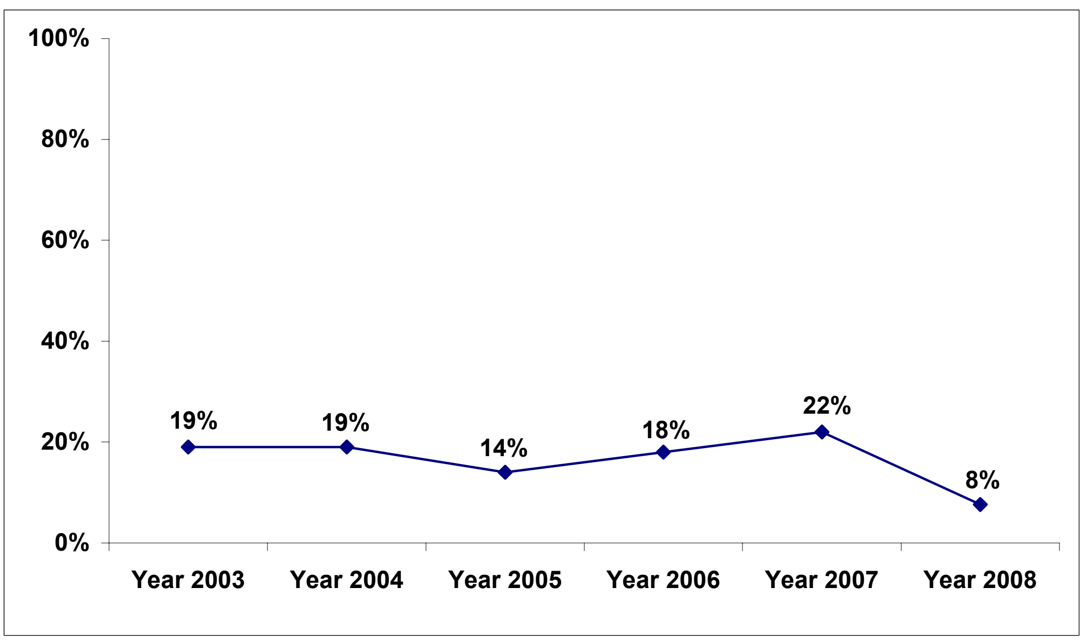
As one would expect, the summer months showed the higher level of agreement with this statement.

Figure 35: 'Too Crowded for Sightseeing"



Number of respondents = 1000

Figure 36: 'Too Crowded for Sightseeing" Agree Strongly/Agree 2003 – 2008



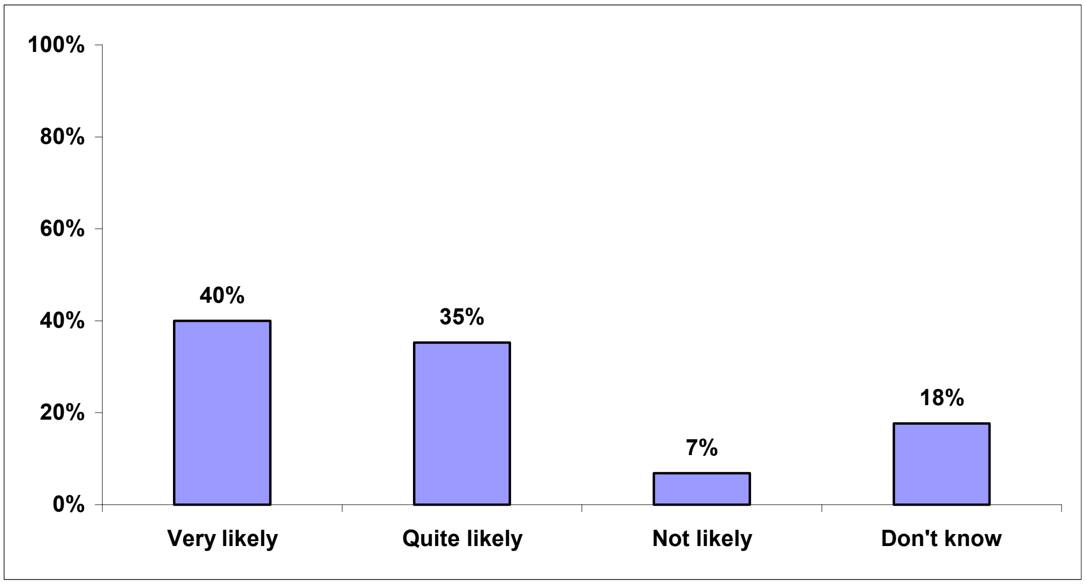
Number of respondents = 1000

10.0 Likelihood of Returning

A high proportion of respondents (75%) expressed a likelihood of visiting Dublin again in the future (Figure 37), representing a decrease of 15% on the 2007 figure (Figure 37). Respondents very likely to return were mainly in the 18-34 age range (48%).

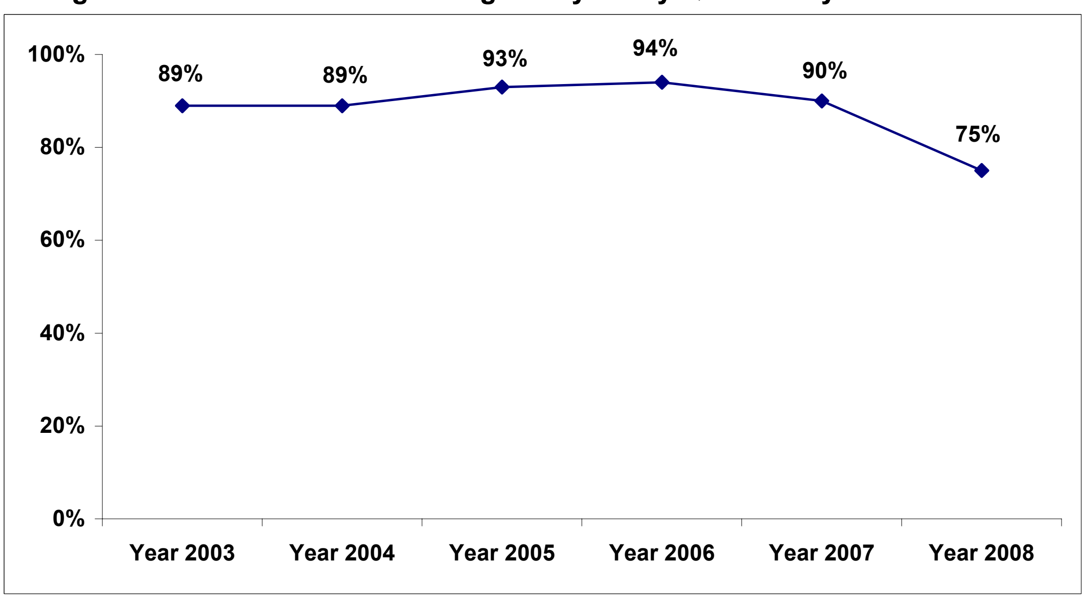
The 2008 rating (Figure 38) is the lowest rating since 2003 and is possibly an indication of the turbulent economic conditions during 2008, which caused a downturn in demand for travel. Interestingly, 18% of respondents in 2008 specified that they did not know if they would return to Dublin again, this was up 14% on 2007 indicating the extent of uncertainty that prevailed in the tourism industry in 2008.

Figure 37: Likelihood of Returning



Number of respondents = 1000

Figure 38: Likelihood of Returning – Very Likely/Quite Likely 2003 – 2008

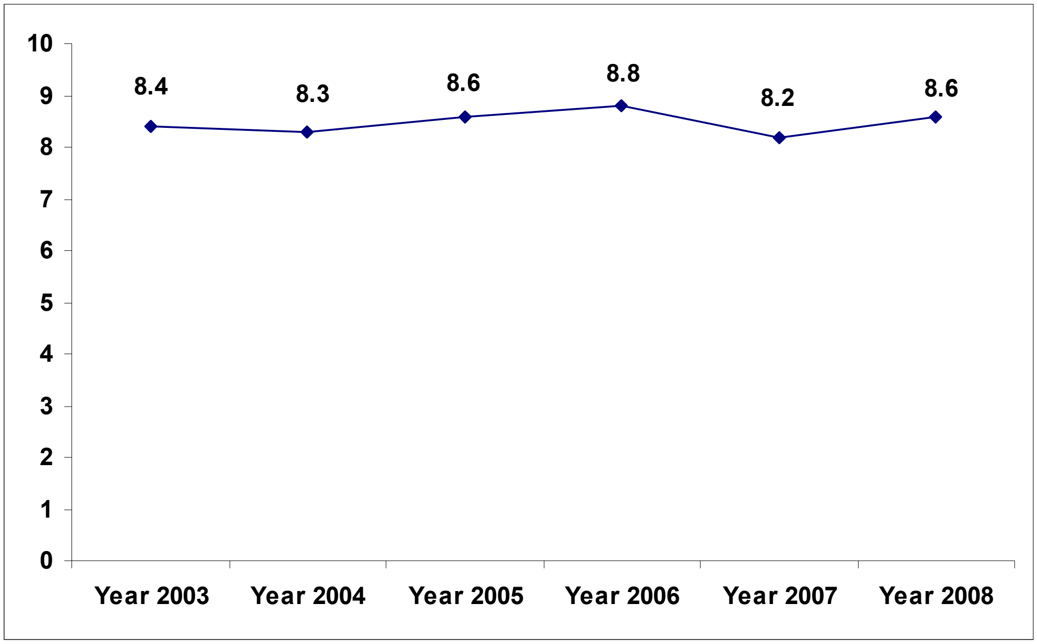


Number of respondents = 1000

11.0 Overall Rating of Dublin

Dublin received an average overall rating of 8.6 out of a possible 10. This indicates a continued high level of satisfaction with the city amongst respondents and an increase of 0.4 on the findings in 2007 (Figure 39).

Figure 39: Overall Rating out of 10: 2003 – 2008



Number of respondents = 1000

Further Opportunities

This report highlights a core set of 2008 survey findings and also presents trends over a number of years, made possible due to the longitudinal nature of the study. Opportunities exist to further analyse and develop aspects of the survey and the Tourism Research Centre is available to conduct such research on behalf of interested parties. For further information on the range of opportunities available, please contact the Tourism Research Centre (details below).

Tourism Research Centre

The Tourism Research Centre is an industry service centre of the Dublin Institute of Technology, Cathal Brugha Street. Its aim is to provide independent research and development services for the tourism and hospitality industry in Ireland. The Centre's core strengths include market research, integrated regional development, service development and training.

Contact Information:

John Carty
Tourism Research Centre,
Dublin Institute of Technology,
Cathal Brugha Street,
Dublin 1,
Ireland.

Phone: 00 353 1 814 6087
Fax: 00 353 1 874 8572
Email: tourism@dit.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 has developed strategic alliances with major centres of tourism education worldwide. 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,
Faculty of Tourism and Food,
Dublin Institute of Technology,
Cathal Brugha Street,
Dublin 1,
Ireland.

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

Supported by Dublin Tourism

Dublin Tourism is the official tourist board for Dublin, with responsibility for the marketing and promotion of tourism in the Dublin region and they are industry research partners for the Dublin Visitor Survey.