2002

# Dublin Visitor Suvery 2002

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## Executive Summary

In Ireland, over the past decade, there has been much development in the area of tourism. However potential for improving the performance through research within niche areas (including urban tourism) remains largely untapped. Given the importance of tourism to Dublin's economy, it is vital that visitor attitude and characteristics are evaluated on an annual basis in order to facilitate planning for future city management and development. Such research is even more critical in light of the pessimistic assessments of the tourism industry and its potential for recovery of business lost in 2001 (ITIC, 2002a) The tourism sector has gone through a second year of decline in several markets and a further reduction in US visitors, Ireland's highest-spending visitors.

The Faculty of Tourism and Food at Dublin Institute of Technology together with Dublin Tourism Regional Authority and CERT have produced this report which provides data on the attitudes and behavioural characteristics of tourists visiting Dublin City. This report is published annually.

The key objectives of the survey are:

- to improve the quality of urban tourism information within a Dublin City context;
- to provide a more detailed understanding of the leisure tourism market, and visitors' perceptions of Dublin City, its facilities and services;
- to ultimately provide a comparative analysis of visitor opinion across a range of European cities to enable meaningful comparisons to be made.
- to provide those engaged in a wide range of tourism activities within Dublin City with the necessary information to make management decisions.
- To establish a database which can be utilised in urban tourism research in the future. This will facilitate the measurement of urban tourism development in Dublin city.

The Survey has followed the visitor questionnaire as designed by the Research and Statistics Working Group of the Federation of European City Tourist Offices (FECTO). A total of 1447 visitor surveys were completed between April 2001 to March 2002.

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

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

- The British Market remains the biggest single market for Dublin (48%) followed by North America (29%) and Mainland European (16%). The European market represents a decrease of 7% on the previous survey and a 10% decrease on the

1999-2000 figure. This profile within Dublin contrasts with Heidelberg for example, where the majority of visitors originate from the USA(32%), Japan (20%), the UK(9%) and Switzerland (4%).

- One third (33%) of overseas visitors to Dublin city could be described as white collar/public service employees while the second most significant grouping are senior executives (19%). This is a significant increase on the previous years survey.

- Over half (53%) of those visiting Dublin City are with a partner or with other adults while the number traelling alone had decreased by 5% on the 2000-2001 survey.

Visitors exhibit interesting patterns in relation to holiday taking behaviour:

- The majority surveyed (79%) are visiting the city for holiday purposes. In Heidelberg, by comparison, 39% of those interviewed stated they were on holiday while 18% were visiting friends and relatives.

- 78% stay up to 4 nights in Dublin and this represents in increase on the 1999-2001 survey period.

Choice of accommodation among Dublin City visitors exhibits interesting patterns:

- Three most popular types of accommodation were moderate quality (3 Star) hotel accommodation (31%), luxury/superior hotel (15%) and standard budget hotel (14%). Bed & Breakfast (12%), Youth Hostels (11%), Guest Houses (10%) and staying with Friends and Family (10%) were other types of accommodation used in Dublin. Other types were university/college accommodation (3%), rented house/apartment (1%), Tourist caravan/tent (0.3%), Second Home (0.2%), Static Caravan/Tent (0.1%) and other types (1%). These included cruise ship, host family and house exchanges. Key changes from 2000-2001 survey period are an increase in the choice of moderate hotel accommodation while the percentage staying in hostel accommodation has decreased for the second consecutive year and those staying with friends and relatives is also experiencing a decline.

  This compares with Heidelberg where 31% stay in mid range hotels while hostels are less popular than in Dublin (6%) but staying with friends and relatives is very much more significant (30%).

- Accommodation is generally booked (32%) 1-4 weeks in advance of arrival. Less than one third booked directly with accommodation providers (27%) and 20% used the Internet. Direct booking with accommodation providers shows an increase of almost 70% on the previous year while internet usage for booking purposes has increased consistently since 1999.

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

- Eighty-four of overseas visitors to Dublin City arrive by air. This is directly comparable with the 1999-2001 survey periods.

- A significant number book their transport through a travel agent (40%), while 28% book using the Internet, 11% book directly with airline/ferry/train/bus operator, 6% book through tour operator, 6% book transport through a third party, 3% are part of organised group, while 2% did not book. Booking through a travel agent has decreased by almost 10% since 1999 while usage of the internet increased from 3.7% in 1999-2000 to 28% in 2001-2002.

The major influencing factors affecting the decision to visit Dublin City have important implications for those engaged in marketing tourism. Advice from friends and relatives influences 29% while previous experience plays an important role for 17%. Twenty three percent were influenced by other factors these included their curiosity to see Dublin, to visit friends and relatives, for business and education purposes and watch the rugby matches.

In Heidelberg, the most important information sources for visitors are friends and relatives (39%) as well as the Local Convention and Visitors Bureau. An increasing number of visitors use the internet (38%) in preparation for their stay in Heidelberg.

The attitudes of visitors towards the city are, in the main, quite positive. For example:

- The vast majority of visitors (94%) feel that the people in Dublin are friendly and hospitable. This is directly comparable with the 1999-2001 research periods.

- Over 93% of respondents believe Dublin is safe and a similar proportion feel it is an easy city to get around. On a positive note, this represents an increase on the 2000/2001 survey period.

- Dublin is generally perceived to have a good supply of visitor attractions (78%) and restaurants.

- From a cultural viewpoint the city is seen in a favourable light with 80% of visitors agreeing that Dublin has a rich cultural life and 73% saying that there are plenty of museums to visit. Although this overall outcome is positive, it must be noted that this represents a decrease on 2000-20001 research findings.

Although no major negative attitudinal opinions emerged from the research, a couple of areas of concern that need to be highlighted include:

Over 17% regard Dublin as a dirty city. However, this represents a decrease of 7% on the 2000-2001 survey findings. 21% Thoughts Dublin was too expensive (a decrease of 9% on the previous year) while 7% thought the destination did not offer good value for money.

The 5 most popular activities engaged in by visitors to Dublin City are:

- Visiting sights /attractions

- Going out in the evening to a pub, bar or restaurant
- Walking around the city
- Visiting museums
- Going on an organised tour

The development of Dublin as a major European city destination has been constant in recent years, and with an overall satisfaction rating of 8 out of 10 from respondents the indications are that this trend is set to continue.

## INTRODUCTION

This joint project between Dublin Tourism (DT), CERT, the Federation of European City Tourist Offices (FECTO) and the Faculty of Tourism and Food at the Dublin Institute of Technology provides a model for a structured visitor survey questionnaire. This report presents the findings from the first Dublin Visitor Survey conducted over a twelve-month period ending March 2002.

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 ultimately provide a comparative analysis of visitor opinion across a range of European cities to enable meaningful comparisons to be made.
- to provide those engaged in a wide range of tourism activities within Dublin with the necessary information to make management decisions.
- to establish a data base which can be utilised in urban tourism research in the future to measure urban tourism developments in Dublin City and
- to improve the compatibility and integration of statistics between various European cities.

The project has been put forward by Dublin Tourism and Federation of European City Tourist Offices (FECTO) and is a model for a structured visitor survey questionnaire which could be used by city tourist offices (CTOs) when they undertake or consider undertaking market research amongst their visitors. The questionnaire includes a set of core questions relevant to all FECTO cities.

## METHODOLOGY

The Survey has followed as far as possible the visitor questionnaire as designed by the Research and Statistics Working Group of FECTO. One thousand four hundred and forty seven (1447) visitor surveys were completed between April 2001 and March 2002. The purpose was to target leisure tourists primarily and the locations at which the interviews took place reflect the need to capture this market. Seven locations were used as survey points across Dublin City so as to achieve geographical spread and to ensure a variation and range of types of tourist facility were covered. The locations used were:

- Book of Kells, Trinity College
- The National Gallery
- St. Patrick's Cathedral

- Dublin Woolen Mills
- Guinness Storehouse
- The Dublin Writer’s Museum
- Temple Bar

All overseas visitor types to the city have been included with domestic travelers excluded.

The survey was carried out Monday to Sunday at all times of the day and evening between April 2001 to March 2002. The highest number of interviews was conducted during the months June to September as this reflected known visitor numbers (as supplied by Dublin Tourism) to the city at that period.

The Dublin Visitor Survey includes a set of core questions relevant to all FECTO cities. These include data relating to:

- Visitor Profile
- Party Composition
- Type of Holiday/Visit
- Length of Stay
- Type of Accommodation Used
- Method of booking holiday, accommodation and travel
- Types of Information used prior to and on arrival in the city
- Types of transport used prior to and on arrival in the city
- Major influencing factors affecting decision to visit
- Activities undertaken in the city
- View of and rating of Dublin

## The Value of Tourism

### In Ireland

Since the 1960s, the Irish Tourism Industry has grown very considerably in scale. Between 1965 and 2000, the number of overseas visitors to Ireland increased almost fivefold while foreign exchange earnings from tourism advanced by a factor of forty (ITICb). Tourism growth has been concentrated in the years 1985-2000, when tourism numbers climb from under two million to well over six million. Expenditure by tourists to Ireland (including receipts to Irish carriers by foreign residents) was estimated to be worth almost €3.8 billion in 2000. Overseas tourist visits to Ireland grew by 6% in 2000 to 6.3 million - the ninth successive year of growth. Between 1999 and 2000 tourist visits from Britain grew by 2%, with those from Mainland Europe growing by 10%. Visits from North America increased by 11% and visits from long haul destinations increased by 9%. Every €1.3 million out-of-state expenditure supports 51 jobs.

Tourism is Ireland's second largest industry, which supports 145,000 jobs and contributes over €2 billion in tax revenue to the Exchequer.

However, the challenges now facing Irish tourism are considerable. During 2001, the Foot & Mouth Crisis, the global economic slowdown and the impact of the terrorist attacks in the US on $11^{th}$ of September, has resulted in a dramatic decline in the fortunes of the industry in Ireland, with projected losses against targets, set in the National Development Plan, of 770,000 visitors and €317 million in tourist expenditure.

The industry has experienced a difficult and unpredictable season and while there appears to be a trend towards shorter booking lead times, at the time of writing the majority of our key markets are failing to achieve the targets set out in the Tourism Ireland 2002 Marketing Plans. Of particular concern is the reported drop, of an excess of 25%, in bookings by Tour Operators in the American market and a substantial fall-off in European business.

CSO figures show a decrease of 5.1% in 2001 and while it was hoped that for the 2002 season we might maintain the 2001 level of business, it now appears unlikely, as fall out is still occurring from the events in America and recovery from Foot and Mouth is much slower than expected. Since the $11^{th}$ of September capacity into Ireland from the USA is down by 25%, as Aer Lingus terminated routes to Newark and Baltimore. The latest Bord Fáilte Tourism Barometer Survey confirms that 2002 is undoubtedly proving to be a trying year, and that a recovery cannot be taken for granted. While some sectors are rallying quite strongly, others are having a more difficult time, particularly those that are reliant on the North American market. Businesses have blamed the lingering impact of $11^{th}$ of September, the lack of access capacity on transatlantic routes, increased competition in the marketplace and a concern about high prices in Ireland, for this year's poor showing in comparison to last year.

Expectations from the trade are that overall overseas demand will be down, due largely to a continuing weakness from the US and German markets, whereas the general feeling is that the British market will be stronger than last year. The strength of sterling, repeat business, an exceptionally late advance booking period and improved marketing techniques including greater use of the internet are positive factors working in favour this year.

Industry experience over the past four decades shows that continuous future growth in tourism cannot be taken for granted.

## In Dublin

Much change has taken place in the area of tourism development in Ireland over the past decade. Given the importance of tourism to Dublin's economy, visitor trends are evaluated on an annual basis by a number of agencies and from various perspectives in order to facilitate planning for future city management and development.

Dublin attracted 4.5 million tourists in 2001 of which 3.3m are comprised of overseas visitors and 176,000 arrived from Northern Ireland (with the remainder from the domestic market). Total tourism revenue amounted to £973.8 million of which £832.3 million was generated from overseas visitors. Dublin is the most visited city in Ireland by overseas visitors, generating 14,854,000 bednights.

However, there is little scope for complacency in Dublin in light of reports from Bord Failte’s Tourism barometer (August2002) which shows an estimated 58% of accommodation businesses in the Dublin region reporting a decrease in volume of business compared the same time in 2001.

This is in addition to the fact that Cresta, the largest UK operator into Ireland, admits that demand for holidays has been flat. This may signal the end of honeymoon for Dublin’s dominance in the weekend breaks sector. Other European destinations are now targeting UK tourists who are availing of increasing budget airline routes.

In Dublin, business traffic continues to be depressed, while one-off events, conferences and leisure weekends appear to be buoyant. However the loss of coach tours and fewer overseas tourists, in contrast to the expansion of supply, occupancy and yields will fall below budget for most properties.

# MAIN FINDINGS OF THE SURVEY

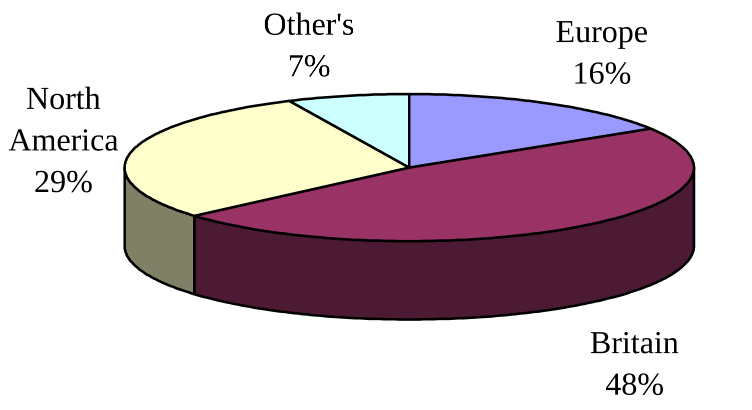
The main findings of this survey centre on the analysis of 1,447 valid questionnaires.

The data is presented under the following headings:

## Visitor Profile

Just under half (48%) of the interviewees were British visitors to Dublin while North America (USA and Canada) accounted for 29%, European 16% and Others 7%. The British market remains the biggest single overseas market for Dublin City (47%) followed by the North American market which represents over a quarter (29%) of all overseas visitors to Dublin. The majority of the European market were Germans (4%), Spanish (2%), Italian (2%) and French 2%).

**Figure 1: Visitor Profile**




The remaining overseas visitors, approximately 7.6%, come from what is known as the Rest of the World, which in the case of this survey, includes Australia (5%), Russia (0.4%), Japan (0.2%) and Miscellaneous (2%). This profile within Dublin contrasts with Heidelberg for example, where the majority of visitors originate from the USA (32%), Japan (20%), the UK (9%) and Switzerland (4%).

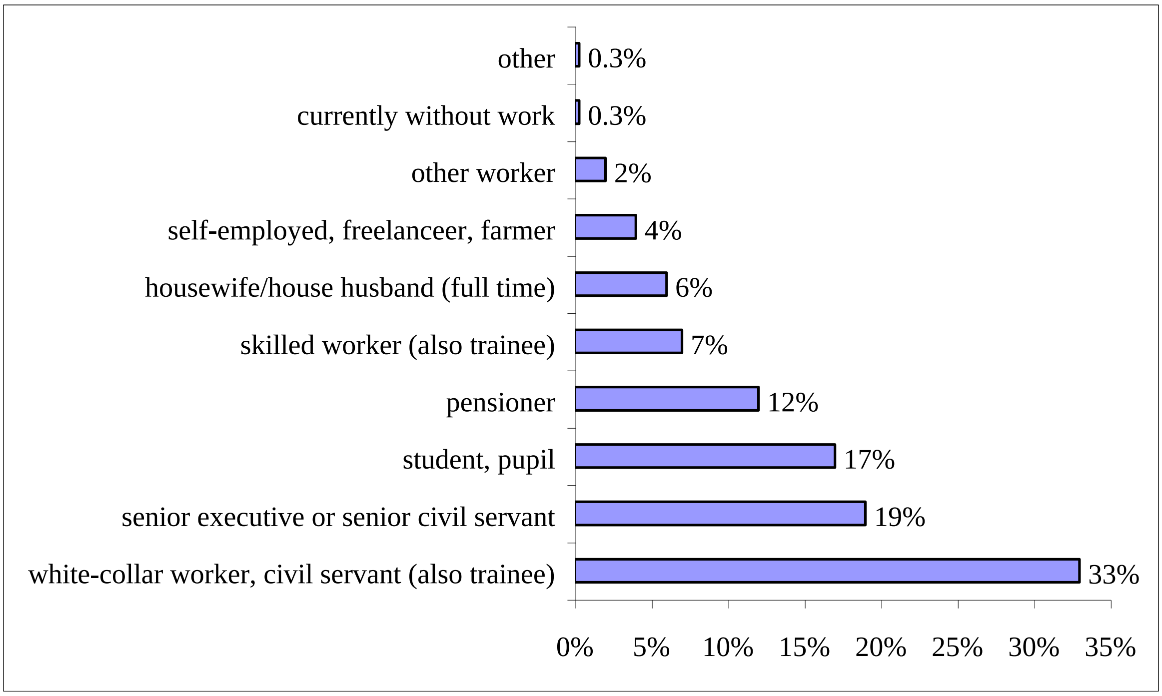
**Table 2: Origin of Visitors (%)**

| | **Britain** | **North America** | **Mainland Europe** | **Other** |
|---|---|---|---|---|
| **Ireland (SOT)** | 46% | 25% | 23% | 6% |
| **Dublin (SOT)** | 50% | 19% | 25% | 6% |
| | | | | |
| **Dublin** | 47% | 29% | 16% | 7.6% |

## Working Status

Thirty three percent of overseas visitors to Dublin could be described as white-collar worker/civil servants while the second most significant grouping is senior executives/senior civil servants (19%). Also of significance are (17%) and pensioners (12%). Seven percent of respondents were skilled workers, 6% were housewives/house husbands, 4% were self employed, working as a freelancer or farmer while 1% were currently without work. There has been a significant increase within the white collar/senior executive categories as a percentage of the overall tourist body in Dublin since 1999, rising from 35% for this group combined (1999) to 39.3% (2000/2001) to 52% in 2001/2002.

**Figure 2: Working Status**




## Household Composition

A significant number of those surveyed are living with a partner or with other adults (53% and 40%). A minority had children (12%) while the household composition of 10% of those surveyed was a lone occupant.

**Table 3: Respondent Household Composition**

| | 2001/2002 | 2001/2000 | 1999/2000 |
|---|---|---|---|
| Alone | 10% | 15 | 17.6 |
| With Partner | 53% | 50.5 | 44.4 |
| With Other Adults | 40% | 37.8 | 39.8 |
| With Children | 12% | 13 | 4.5 |

The trend is for the majority of those surveyed to travel with a partner or other adult.

## Type of Visit

The majority of visitors surveyed (79%) identified holidays as the primary reason for visiting Dublin (Figure 3). Twelve percent were on holiday visiting family, friends and relatives, 4% visited Dublin on business, 1% for shopping, 1% were on a day trip, while 2% had other reasons for visiting Dublin. Other reasons included for educational purposes, and for special occasions and events. Broadly this pattern is in line with trends observed in previous years.

In Heidelberg, by comparison, 39% of those interviewed stated they were on holiday while 18% were visiting friends and relatives.

**Figure 3: Main Purpose of Visit to Dublin**

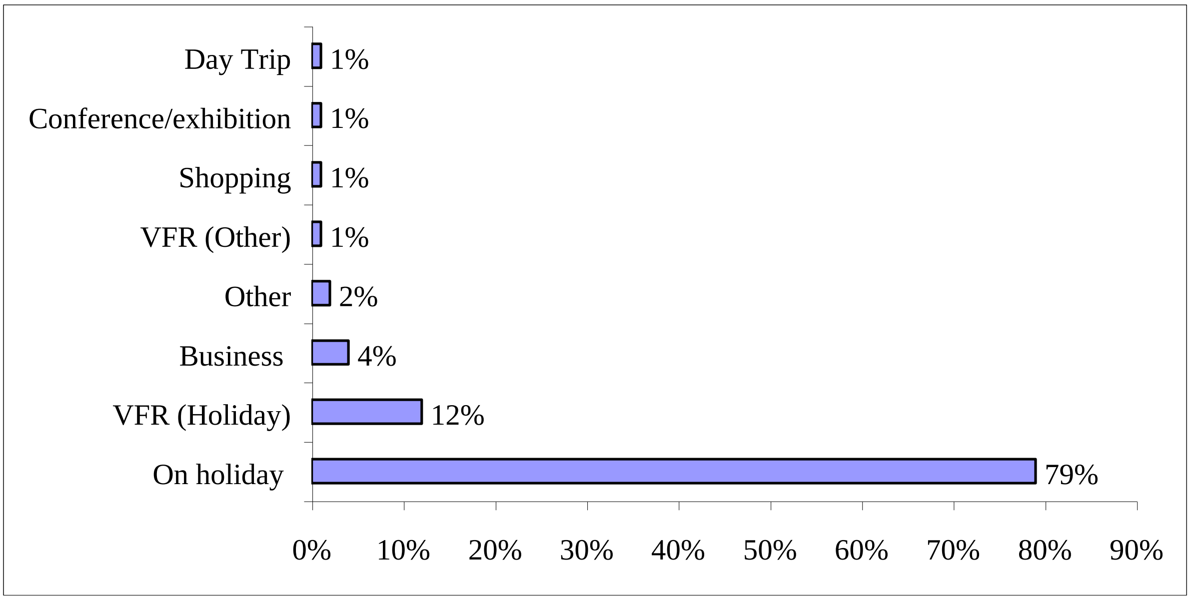
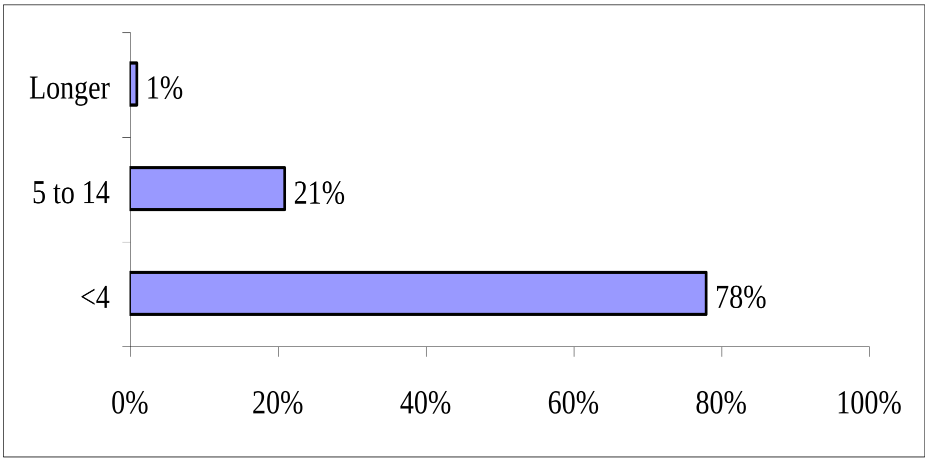



**Figure 4: Number of Nights in Dublin**



On average 78% of those surveyed stayed up to 4 nights in Dublin (Figure 4). Twenty one percent stayed in the capital for 5 to 14 nights, while 1% stayed for longer. The average length of stay in Dublin is 4 nights.

**Table 4: Duration of Visit in Dublin and Ireland**

| Number of Nights | Average Stay | Ireland | Dublin 2002 | Dublin 2001 | Dublin 2000/1999 |
|---|---|---|---|---|---|
| <4 | 38% | 67% | 78% | 69 | 73.3 |
| 5-14 | 43% | 31% | 21% | 26 | 22 |
| Longer | 19% | 2% | 1% | 5 | 4.6 |

Table 4 illustrates the average length of holiday, length of stay in Dublin and also the amount of time they spend in the rest of the country. The short break nature of a significant component of Dublin's market is reflected as those staying 4 nights or less is greater than the trend for Ireland generally. Those choosing to stay for a time period exceeding 14 nights trend to be very much in the minority. It is worth nothing that the percentage for Dublin (11%) exceeds that of the Irish National trend for short term (<4 nights) stay. The overall trends in relation to length of stay in Dublin vary little over the temporal range of the survey (1999-2002) Some increase is recorded in those staying longer then 14 nights.

## Age and Party Size

The average ages of those visitors who stated their age were aged between 25 to 34 (22%) and also 35 to 44. Seventeen percent were aged between 19 to 24 and also 45 to 54, 11% were aged between 55 to 64 while 5% were 65 years of age or more.
Forty two percent of those surveyed comprised a party of two while 54% were alone.

Over 28% of those surveyed in Heidelberg were between25-34 years of age while 20% were aged 35-44. Similar to Dublin, 18% lie within the 45-54 age group but Heidelberg has a higher proportion of older visitors with 14% aged 55-64 age group (11% in Dublin) while 8% were 65 years of age or more (5% in Dublin).

## Accommodation Used

Almost one third (31%) of those surveyed showed a preference for a moderate hotel, 15% stayed in a Luxury, Superior hotel, (14%) stayed in a standard or budget hotel 12% in Bed & Breakfast, 10% in Guest Houses, and 11% used Youth Hostels, 10% stayed with Friends and Relatives and 3% stayed in university or college accommodation.

The remainder stayed in rental accommodation, caravan/tent, and a second home or 'other' accommodation. Other types of accommodation used included Cruise-ship, Host Families and House exchanges.

Key differences emerging over the research period pertain to the increased usage of all types of hotel accommodation but in particular the budget sector which has almost doubled. The tendency to stay with friends and relatives, utilise guesthouse or hostel accommodation varies from year to year with no clear patterns emerging.

In Heidelberg by comparison, 31% stay in mid range hotels while hostels are less popular than in Dublin (6%) but staying with friends and relatives is very much more significant (30%).

**Table 5: Accommodation Used**

| Type of Accommodation | 2001-2002 | 2000-2001 | 2000-1999 |
|---|---|---|---|
| Moderate Quality Hotel | 31% | 27% | Non Comparable |
| Luxury, Superior Hotel | 15% | 13% | 9.1 |
| Standard/Budget Hotel | 14% | 7% | Non Comparable |
| Bed & Breakfast | 12% | 15% | 16.0 |
| Youth Hostel | 11% | 11% | 16.1 |
| Guest House | 10% | 5% | 10.6 |
| Friends & Relatives | 10% | 16% | 11.9 |
| University/College | 3% | 2% | 0.4 |
| Rented House/Apartment | 1% | 1% | 1.5 |
| Other | 1% | 4% | 2.6 |
| Tourist Caravan/tent | 0.3% | 0% | 0.7 |
| Second Home | 0.2% | 1% | 0.2 |
| Static Caravan/Tent | 0.1% | 1% | 0.3 |

*Sheila, sample of doing comparative analysis over 2 years. We can do this for all.*

### Booking Accommodation

Ninety four percent of the respondents booked their accommodation in advance of travel. Six percent of visitors to Dublin did not book any form of accommodation in advance of their visit but booked on arrival.
Twenty seven percent used a travel agent, 20% booked using the Internet, 18% booked directly with accommodation providers, while 10% stayed with friends and relatives.

Seven percent of accommodation used was booked through a third party, 5% used tour operators, 4% were part of an organised group, 1% booking directly with the local tourist office, 1% booked through an airline/ferry company while 1% used other methods. Other methods included Agents at airport and Teletext.

**Table 6: Method of booking Accommodation in Dublin**

| Method of Booking | 2001-2002 | 2000-2001 | 2000-1999 |
|---|---|---|---|
| Travel Agent | 27% | 22% | 27.1% |
| Internet | 20% | 12% | 4.5% |
| Directly with Accommodation | 18% | 21% | 33% |
| Staying with Friends and Relatives | 10% | 15% | 8.5% |
| Third Party | 7% | 5% | N/A |
| Did not Book | 6% | 8% | 8.6% |
| Tour Operator | 5% | 4% | 5% |
| Organised Group | 4% | 3% | 3.2% |
| Directly with Local Tourist Office | 1% | 2% | 1.1% |
| Directly with Airline/Ferry Operator | 1% | 2% | 2.1% |
| Other | 1% | 6% | 4.7% |

The overall pattern of booking accommodation remains the same over the research period with the exception of the dramatic increase in usage of the internet (4.5% to 20% between 1999-2002) and the significant decrease in directly contacting accommodation suppliers. This is a trend, which is reflected in the pattern of increased usage of the internet as an intermediary. Variations exist in relation to accommodation booking behaviour within the key markets. Booking through a travel agent is a popular method with all the key markets but particularly with the US market. Booking accommodation directly is popular with British, German and Spanish but less popular with American visitors. The Internet now also a popular method, particularly with the British market.

**Table 7: Method of Booking Accommodation by Key Markets**

| Nationality | UK | US | Germany | Spain |
|---|---|---|---|---|
| Did not Book | 5% | 6% | 8% | 6% |
| Travel Agent | 22% | 35% | 25% | 27% |
| Tour Operator | 4% | 10% | 2% | - |
| Organised Group | 1% | 4% | 2% | 18% |
| Direct with Accommodation | 21% | 11% | 20% | 18% |
| Direct with Tourist Office | 1% | 1% | - | - |
| Staying with Friends & Relatives | 10% | 8% | 8% | 12% |
| Direct with transport Operator | 2% | 1% | 2% | - |
| Internet | 26% | 14% | 17% | 21% |
| Other | 2% | 1% | - | - |
| Booked by a Third Party | 7% | 9% | 17% | - |

**Table 8:Method of Booking Accommodation by Purpose of Visit**

| Purpose of Visit | Holiday | VFR (Hol) | VFR Other | Shopping | Bus. | Conf/ Exhib | Other |
|---|---|---|---|---|---|---|---|
| Did not Book | 78% | 12% | - | 1% | 1% | - | 1% |
| Travel Agent | 89% | 8% | .3% | 1% | 2% | .3% | 1% |
| Tour Operator | 96% | 3% | - | - | - | - | 1% |
| Organised Group | 78% | 2% | 2% | - | 2% | 6% | 10% |
| Direct with Accommodation | 84% | 12% | .4% | 1% | 1% | 1% | 2% |
| Direct with Dublin Tourism | 100% | - | - | - | - | - | - |
| Visiting Friends & Relatives | 30% | 58% | 9% | 1% | 1% | - | 1% |
| Direct with Transport Operator | 84% | 11% | - | - | 5% | - | - |
| Internet | 91% | .3% | 4% | 1% | 1% | .3% | 1.7% |
| Other | 94% | 6% | - | - | - | - | - |
| Third Party | 44% | 5% | 3% | 1% | 25% | 8% | 13% |

**Table 9: How Holiday type Reflects Method of Booking Accommodation**

| Method of Booking | Main Holiday | Secondary Holiday | Short Break | Other |
|---|---|---|---|---|
| Did not Book | 49% | 17% | 33% | 1% |
| Travel Agent | 46% | 23% | 30% | 1% |
| Tour Operator | 41% | 28% | 31% | - |
| Organised Group | 78% | 8% | 85 | 6% |
| Direct with Accommodation | 49% | 17% | 32% | 2% |
| Direct with Dublin Tourism | 25% | 42% | 33% | - |
| Visiting Friends & Relatives | 40% | 23% | 36% | 1% |
| Direct with Transport Operator | 42% | 21% | 32% | 5% |
| Internet | 26% | 17% | 55% | 2% |
| Other | 29% | 29% | 41% | |
| Third Party | 22% | 17% | 34% | 28% |

When method of booking accommodation is broken down by type of holiday, table 9 shows the Internet is a popular method for booking short breaks (55% or respondents) while travel agents (46%) and tour operators (41%) tend to be more popular for booking main holiday. Also booking as part of an organised group tends to be more popular for main holiday than secondary holiday or short break.

*Sheila, these figures do not mirror the previous 2 years at all*

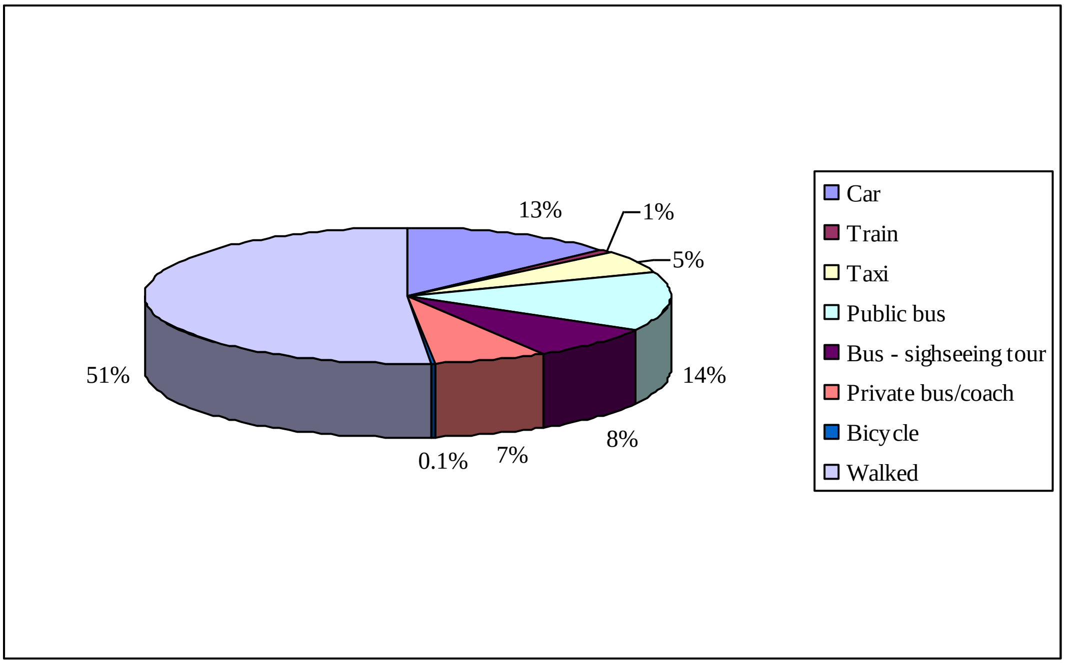
## Transport

| Type of Transport | 2001-2002 | 2000-2001 | 2000-1999 |
|---|---|---|---|
| Plane | 84% | 84% | 84% |
| Boat/Ferry | 11% | 14% | 17% |
| Private Car/Van | 4% | 10% | 4% |
| Public Bus/Coach | 4% | 12% | 2% |
| Train | 3% | 6% | 5% |
| Private Bus/Coach | 3% | 5% | 3% |
| Hired Car/Van | 2% | 4% | 2% |
| Walked/hitch hiked | 1% | 2% | 0.3% |
| Bicycle | .1% | 0.2% | 0.2% |
| Motorbike | .1% | 0% | 0 |
| Other | .1% | 4% | 0.2% |

The vast majority (84%) of overseas visitor arrive by air, with just 11% arriving by boat/ferry. Four percent arrived to Dublin by private car/van, another 4% arrived by public bus/coach, 2% by hired car/van while 1% walked to Dublin. An extremely small number of respondents arrived by bicycle, motorbike and other forms of transport. Other form of transport used to arrive in Dublin included Cruise Ship.

**Figure 5: Main Forms of Transport Used Most often in Dublin**

Once in Dublin most visitors use more than one form of transport. Walking (51%)




was the most popular means of getting around the city. Public bus was the most frequently used form of public transport (14%), followed by private bus/coach (13%) and bus–sightseeing tour bus (8%). Similar to Dublin, most visitors staying in Heidelberg explore the town and its attractions by foot.

**Table 11: Method of Booking Transport to Dublin by Key Markets**

| Nationality | UK | US | Germany | Spain |
|---|---|---|---|---|
| Did not Book | 2% | 2% | 3% | - |
| Travel Agent | 31% | 49% | 40% | 52% |
| Tour Operator | 4% | 11% | 2% | - |
| Part of Organised Group | 1% | 4% | 25 | 15% |
| Direct with Accommodation | 1% | 1% | - | - |
| Direct with Tourist Office | .4% | 1% | - | - |
| Friends and Relatives | .4% | 1% | - | - |
| Direct with Transport | 15% | 11% | 10% | 9% |
| Internet | 37% | 19% | 28% | 24% |
| Other | 2% | 1% | 2% | - |
| Third Party | 6% | 7% | 13% | - |

**Table 12: How Holiday type Reflects Method of Booking Transport**

| Method of Booking | Main Holiday | Secondary Holiday | Short Break | Other |
|---|---|---|---|---|
| Did not Book | 60% | 3% | 37% | - |
| Travel Agent | 53% | 22% | 25% | 1% |
| Tour Operator | 41% | 27% | 32% | - |
| Organised Group | 77% | 8% | 8% | 6% |
| Direct with Accommodation | 46% | 46% | 9% | - |
| Direct with Dublin Tourism | 50% | 33% | 17% | - |
| Visiting Friends & Relatives | 43% | 29% | 29% | - |
| Direct with Transport Operator | 38% | 22% | 39% | 2% |
| Internet | 25% | 18% | 56% | 2% |
| Other | 28% | 28% | 44% | - |
| Third Party | 18% | 16% | 32% | 34% |

There are variations between the different methods of booking used for the types of holidays. In relation to main holidays the most popular method was organised by a group (77%), secondary holidays were booked directly with accommodation providers (46%)while short breaks were booked using the Internet (56%).

## Major Factors Influencing the Decision to choose Dublin

The three most popular influences on visitors to Dublin were friends and relatives (29%), other factors (23%), including curiosity to visit Dublin, visit friends and relatives, business, educational purposes and watching rugby matches and previous visits (17%). Other factors affecting the decision to visit Dublin were tourist brochures (8%), magazines/newspaper advertising (6%), guide books (5%), magazines/newspaper articles (4%), Internet Site (3%), and travel agent advice (2%). The impact of friends an relatives has declined somewhat (-8%) from 1999, guidebooks (-7.6%) and TV programmes (-3.3%) while magazines and newspaper advertising (+4.3%) and other factors gained growth in popularity as influencing factors.

In Heidelberg, the most important information sources for visitors are friends and relatives (39%) as well as the Local Convention and Visitors Bureau. An increasing number of visitors use the internet (38%) in preparation for their stay in Heidelberg.

**Table 13: Primary Factors Affecting the Decision to Visit Dublin**

| | 2001/2002 | 2000/1999 |
|---|---|---|
| Friends and Relatives | 29% | 38% |
| Other | 23% | 0.2% |
| Previous Visit | 17% | 21% |
| Tourist Brochures | 8% | 7% |
| Magazines/Newspaper Advertising | 6% | 2% |
| Guide Books | 5% | 12% |
| Magazines/Newspapers Articles | 4% | 3% |
| Internet Site | 3% | 4% |
| Travel Agent Advice | 2% | 1% |
| TV Programmes | 1% | 4% |
| TV Advertising | 1% | 1% |
| Tourist Information Centre | 1% | 1% |
| Irish Tourist Board | 1% | 0.4% |
| Radio programmes | 0.1% | 0.5% |

**Table 14: Statistically Significant Influencing Factors in Decisions to Visit**

| Influencing Factor | UK | US | Germany | Spain |
|---|---|---|---|---|
| Friends and Relatives | 47% | 30% | 4% | 3% |
| Other | 48% | 27% | 4% | 2.3% |
| Previous Visit | 67% | 17% | 1.2% | 3% |
| Tourist Brochures | 19% | 39% | 4% | 7% |
| Magazines/Newspaper Advertising | 18% | 48% | 6% | 6% |
| Guide Books | 29% | 27% | 11% | 2% |

## Information Sources used within Dublin on this Visit

Visitors used 4 main sources of information during their stay in Dublin – the Dublin Tourism Centre (38%), friends and relatives (28%), the Dublin Tourism Internet site (22%) and Guide Books (20%). Each of these factors (with the exception of guidebooks|) were key sources of information used within Dublin in 1999. Nine percent contacted the Irish tourist Board while 6% used other sources of information. Other sources included the Internet, travel agent at home and previous visit.

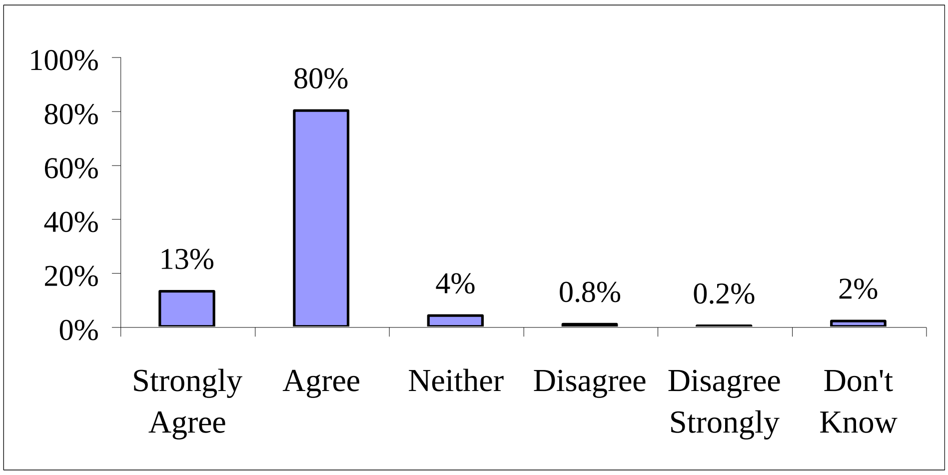
## Attitudes Towards Dublin

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

**Safe City**

Ninety three percent of visitors to Dublin felt that the city was a safe place to visit. This is an increase of ten percentage points from the previous year. Just one percent of visitors felt Dublin was not a safe city.

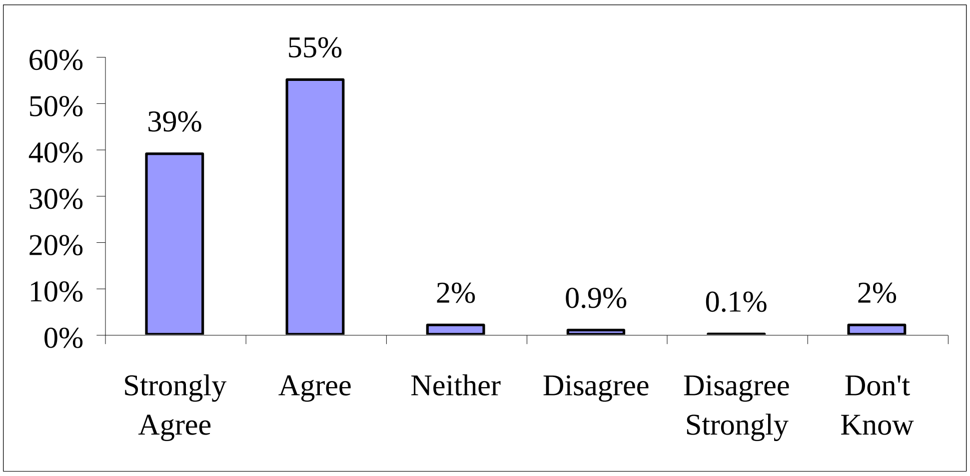
**"***It's a Safe Place to visit***"**



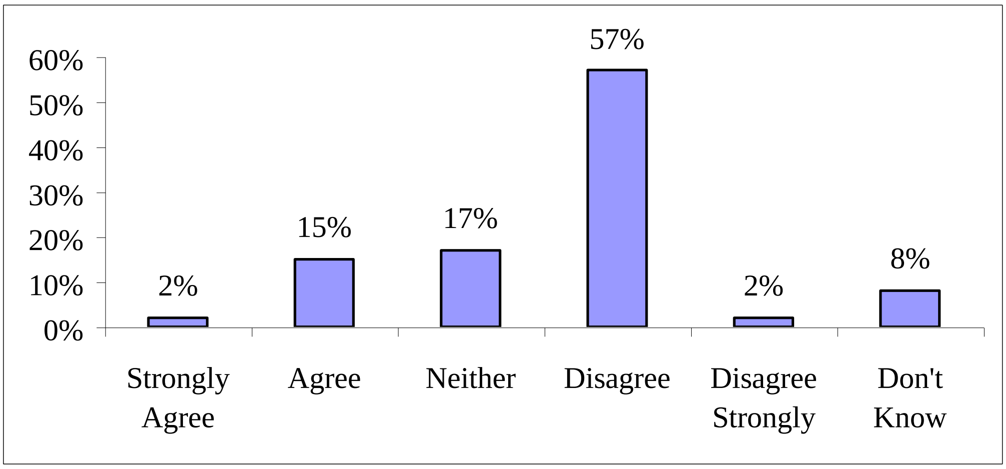

**Céad Mile Fáilte**

Visitor attitude towards the friendliness of the people in Dublin continues to be very positive. Ninety four percent agreed that the people were friendly and hospitable, a figure that has remained almost unchanged for the past three years.

*"The people are friendly and hospitable"*




**Dublin and it's Litter**




Although the image of Dublin as a dirty city is a concern for many, the trend in visitor attitude appears to be improving. For the second year in a row the overall agreement level with this negative statement about the city has fallen and now stands at 17%, a drop of five percentage points from the previous year.

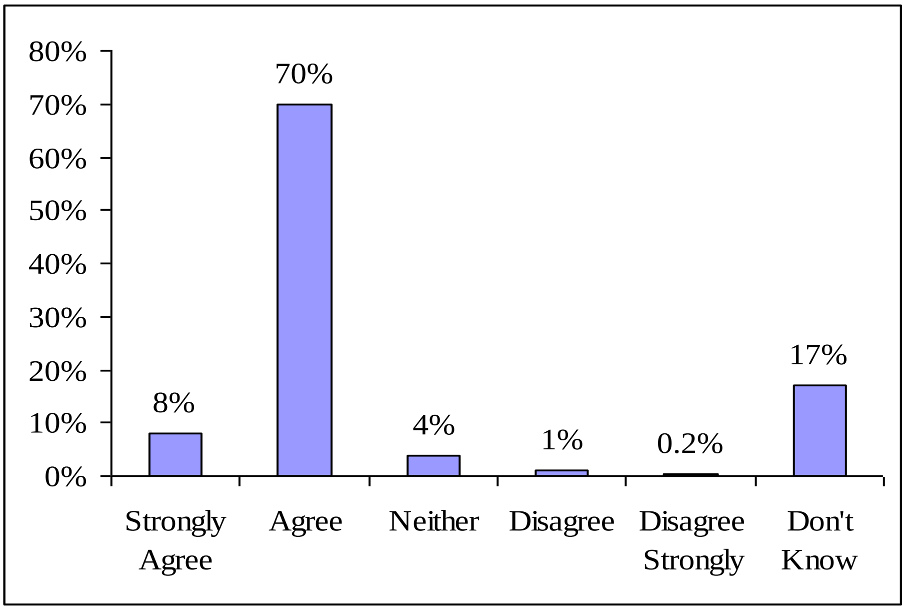
*"Dublin is a dirty city"*

***(Can we get an international breakdown here)***

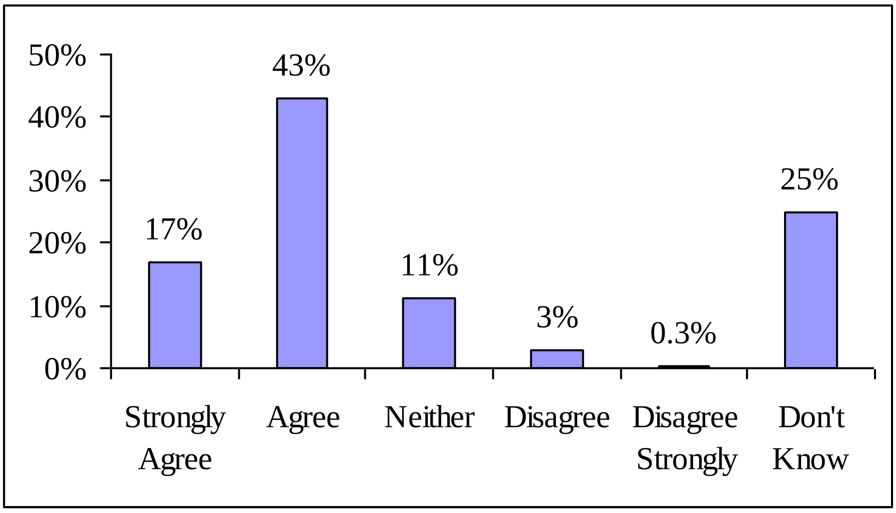
## Things to Do in Dublin

There was general agreement among visitors that the city had a wide range of attractions (78%), plenty of restaurants (73%) and quite a good nightlife (60%). It should be noted however that all three agreement levels are down slightly from the previous year.

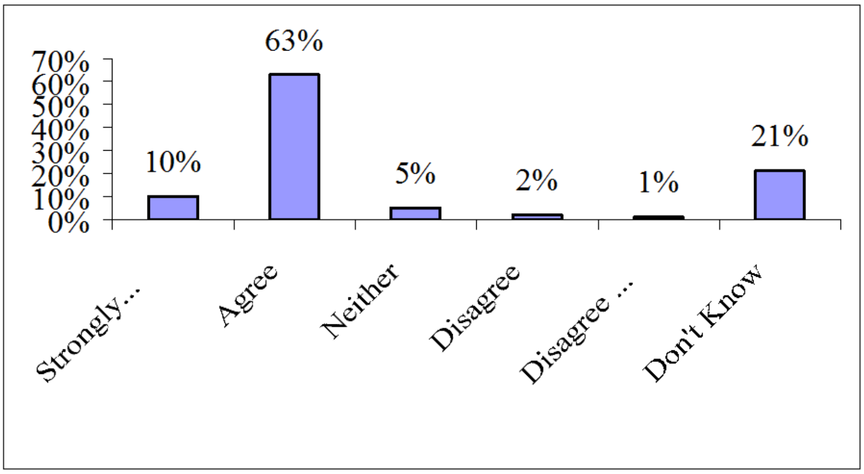
*"It has a good variety of visitor attractions"*



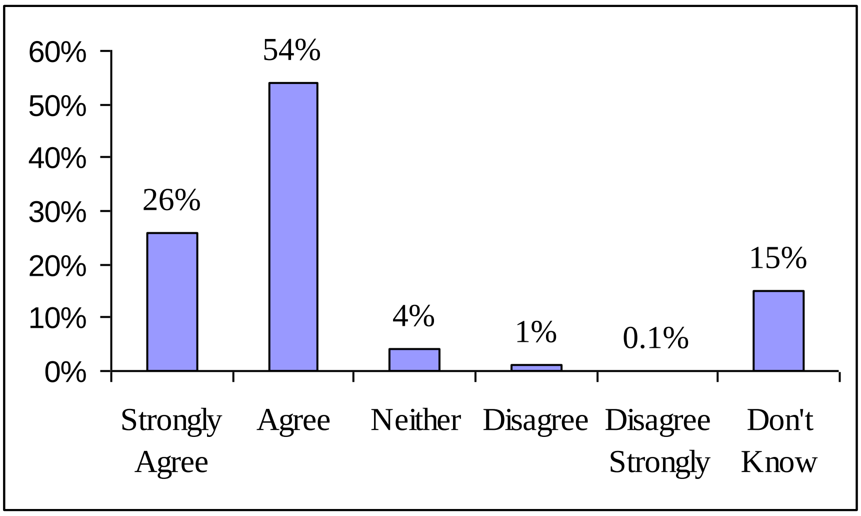

"*It has a good nightlife*"



*"Plenty of Good Restaurants available"*




**Cultural Image**

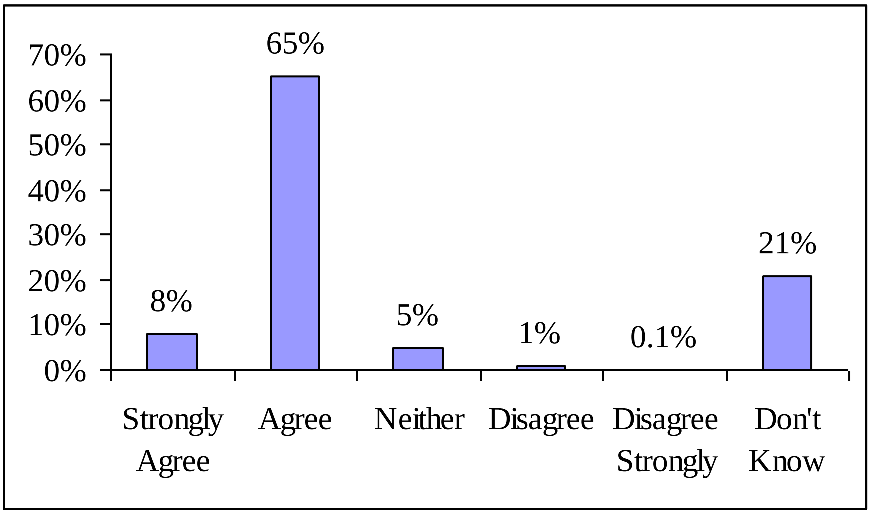



Dublin seems to be positively perceived from a cultural standpoint, with a high majority of visitors (80%) seeing the city as possessing a rich cultural life.

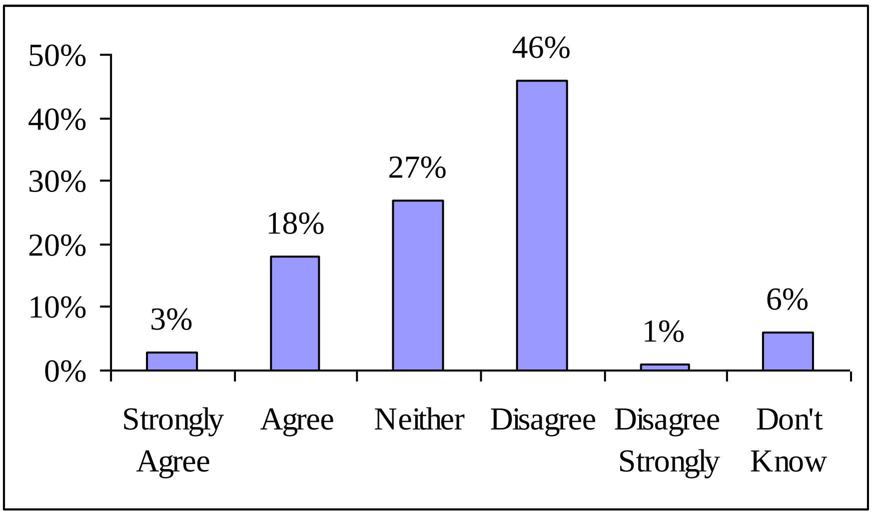
*"Dublin has a rich cultural life"*

This opinion is reemphasised by the fact that almost three quarters of visitors felt that the city had a good stock of museums.

*"There are a lot of museums to visit"*



**Prices in Dublin**



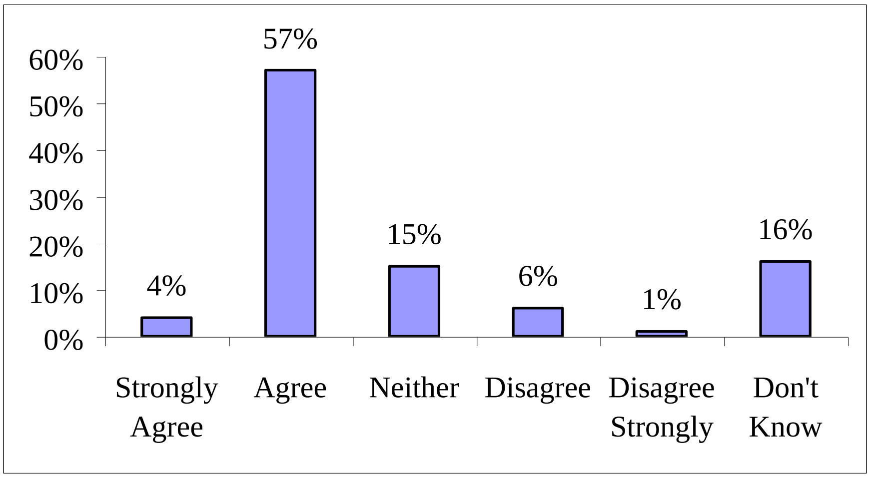

Just over one in five visitors (21%) felt that prices in Dublin were too high. Interestingly this figure has fallen for the second year in a row.

*"Prices are too expensive"*

***(Can we get an international breakdown here)***

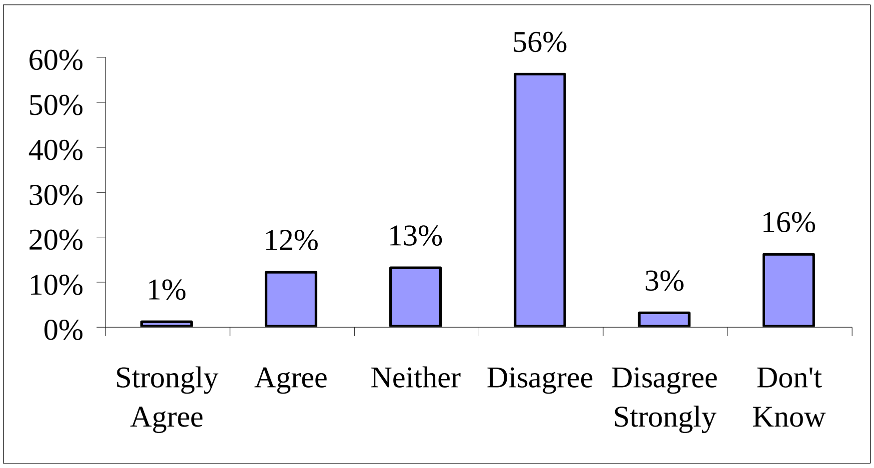
Overall the city was perceived quite positively in terms of offering value for visitors, with 61% agreeing that Dublin is good value for money. In contrast only 7% disagreed with this statement.

**"***Good Value for Money***"**



**Crowded City**

People's perception of Dublin as a crowded city seems to be changing. Less than one




in eight people felt that the city was too crowded for sightseeing (13%). This represents a fall from two years ago when the figure was one in five (20%).

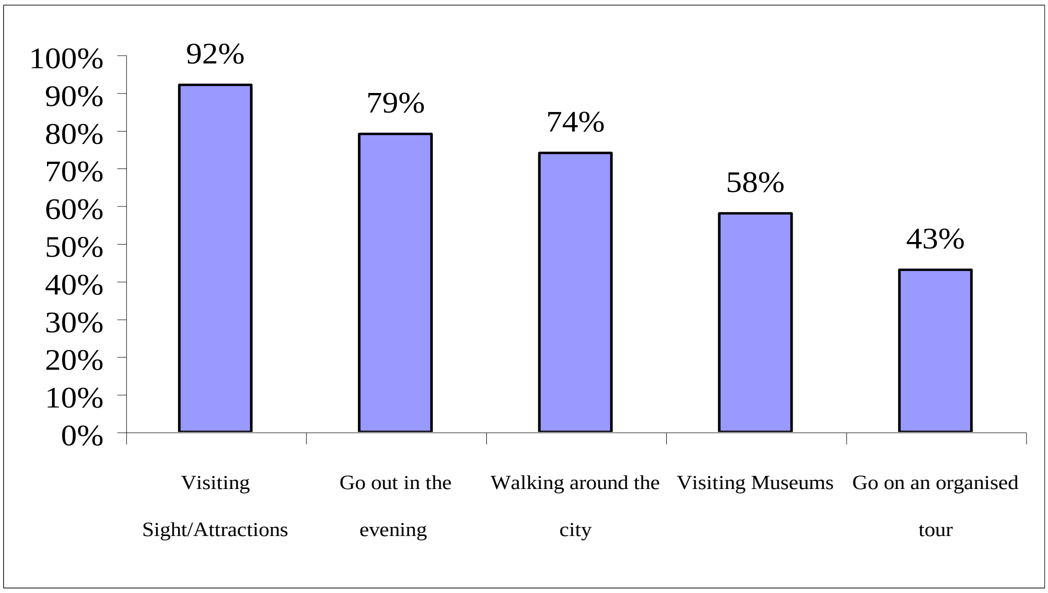
*'Too crowded for sightseeing"*

## Activities Engaged In By Tourists

Visitors were asked to state which activities they had done or had planned to do during their stay in Dublin. From a list of 13 activities, the five most popular with respondents were as follows:

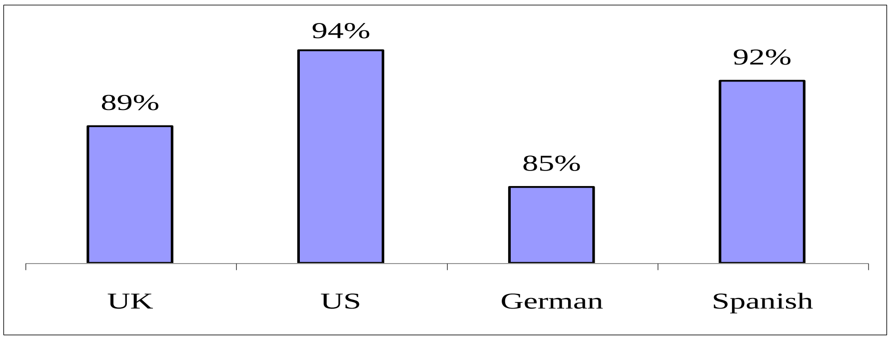
1) "Visiting sights/attractions"
2) "Go out in the evening to a Pub/Bar or Restaurant"
3) "Walking around the City"
4) "Visiting Museums"
5) "Go on organised Tour"

**Five most popular Activities engaged in by Tourists**

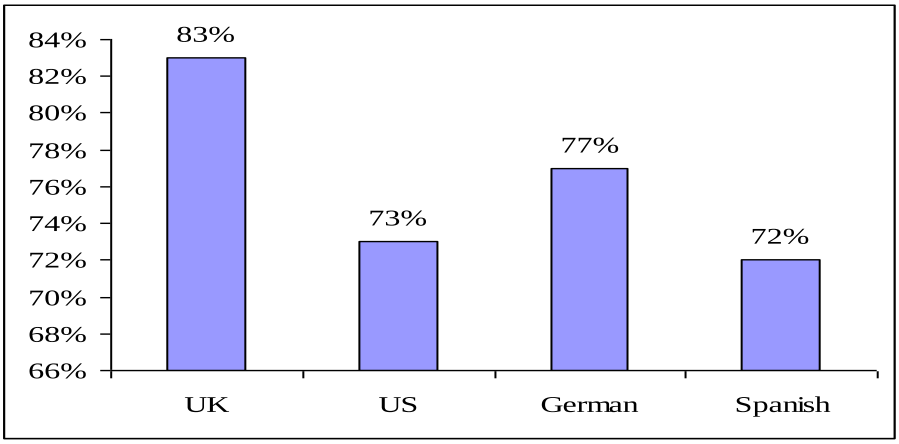


## Activities engaged by the different markets

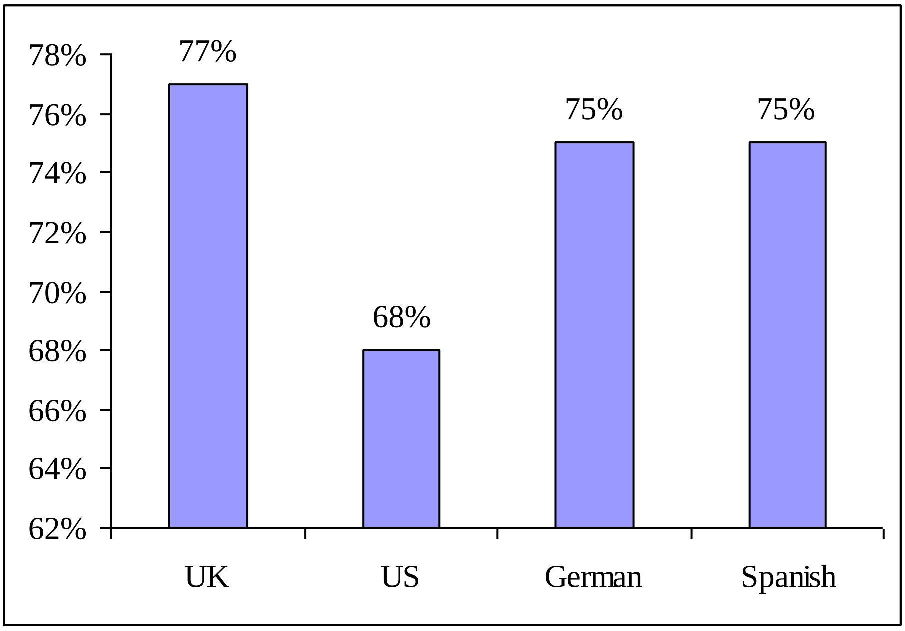
*Visiting Sights/attractions*



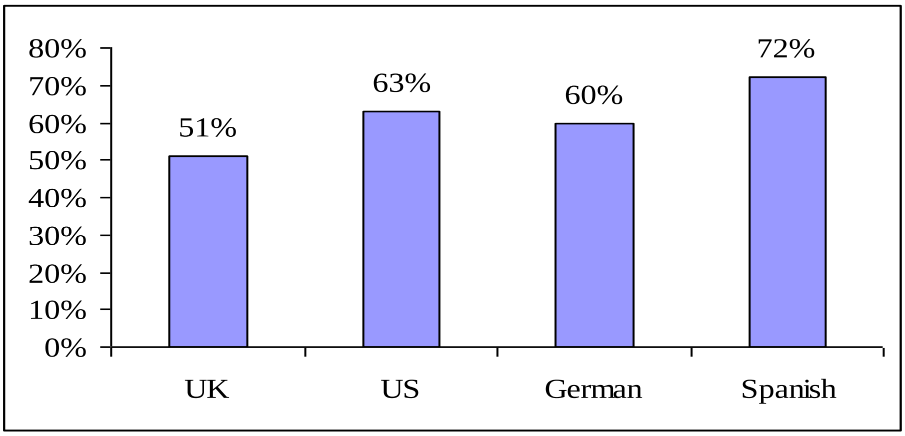

*Go out in the evening to a Pub/Bar or restaurant*



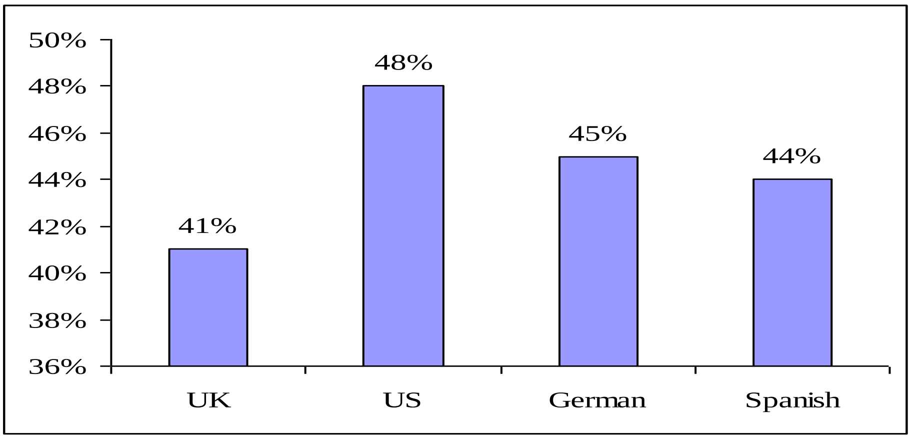

*Walking around the City*



*Visiting Museums*

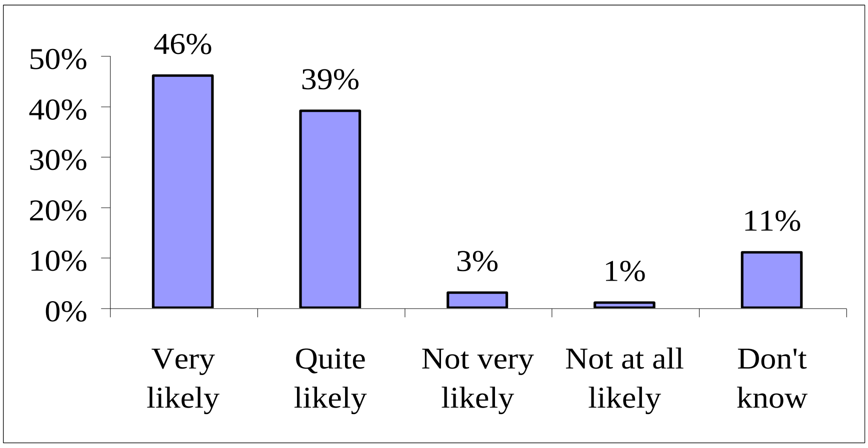



*Go on organised Tour*




**Likelihood of Returning**

A high proportion of respondents expressed a likelihood to visit Dublin again in the future. This figure has remained steady for the past three years at around 85%.

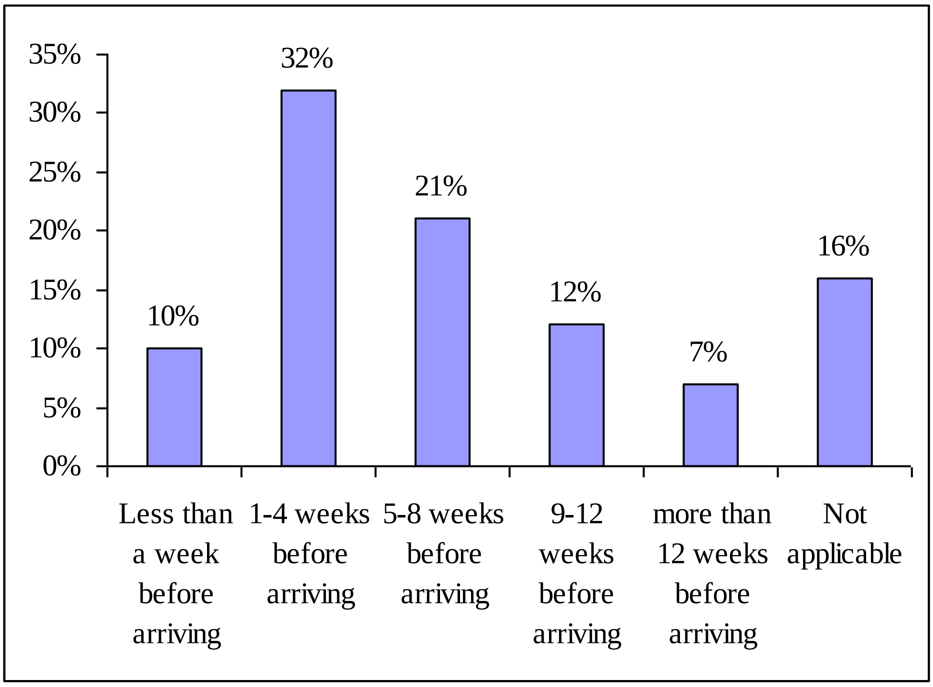



**Overall Rating of Dublin**

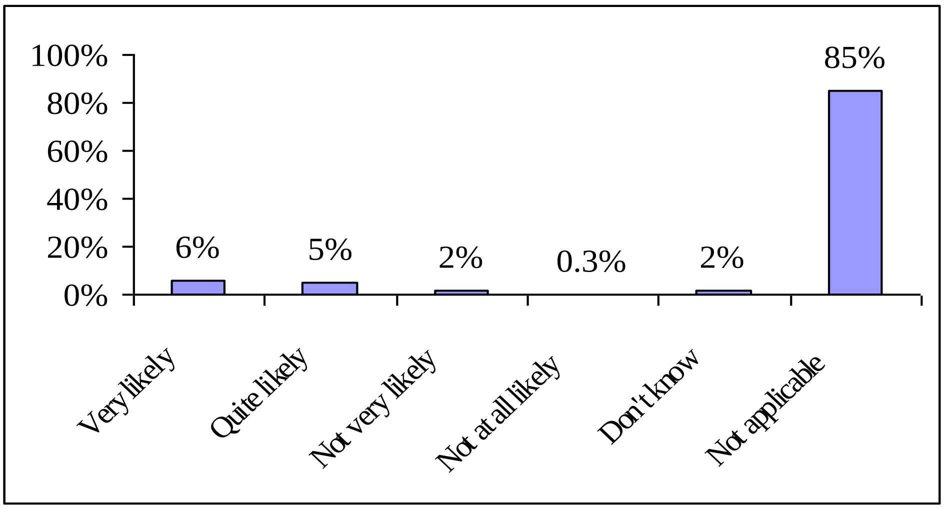
Dublin received an average overall rating of 8 and 9 out of a possible 10. This represents quite a high general level of satisfaction with the city amongst visitors.

**Extra Questions**

**Booking in advance**




**Likelihood of returning to Ireland**




| **Expenditure** | | **Average Spend per Day (Avg. 4 days)** |
|---|---|---|
| Accommodation | €218.05 | €54.40 |
| Meals/snacks | €155.87 | €38.97 |
| Tourist Shopping | €134.57 | €33.64 |
| Entertainment | €85.43 | €21.36 |
| Other Miscellaneous | €111.23 | €27.81 |
| Total | €463.05 | €115.76 |

Average cost of Package €1695.44

**Gender**

| | | |
|---|---|---|
| Male | 629 | 43% |
| Female | 818 | 57% |

**Age of teen/adult respondent**

| | |
|---|---|
| 15 to 18 years of age | 5% |
| 19 to 24 years of age | 17% |
| 25 to 34 years of age | 22% |
| 35 to 44 years of age | 22% |
| 45 to 54 years of age | 17% |
| 55 to 64 years of age | 11% |
| 65+ years of age | 5% |

**Eldest**

| | |
|---|---|
| Not applicable | 1% |
| 15-18 | 3% |
| 19-24 | 17% |
| 25-34 | 22% |
| 35-44 | 22% |
| 45-54 | 17% |
| 55-64 | 11% |
| 65+ | 6% |

**2nd oldest**

| | |
|---|---|
| 15-18 | 57% |
| 19-24 | 3% |
| 25-34 | 7% |
| 35-44 | 11% |
| 45-54 | 9% |
| 55-64 | 7% |
| 65+ | 4% |