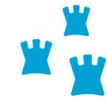


Attitudes to Tourism in Dublin

Survey Results – Executive Summary



Comhairle Cathrach
Bhaile Átha Cliath
Dublin City Council



Economic Development Office
Dublin City Council

Report Date: 12/06/2023
Survey Fieldwork: May 2023

Report by:



Delve Research
Survey Research & Analysis

www.delve-research.com

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Life Satisfaction

- **6.8 out of 10** is the average life satisfaction score among respondents. This is up slightly from 6.7 measured in March 2023. Life satisfaction is **highest among over 65s** (7.6 out of 10). Life Satisfaction is higher among those with higher incomes.

Reasons for Tourists to Visit Dublin

- The **top five** reasons for tourists to visit Dublin, according to residents, were:
 - Dublin's pub scene
 - Dublin's history
 - Dublin's culture
 - Dublin's literary heritage / events
 - Dublin's people

Making Dublin More Appealing to Tourists

- Making Dublin more **affordable**, improving **public transport**, addressing **safety** concerns and improving **cleanliness** were the top four suggestions for making Dublin more appealing to tourists.

Engaging in Activities

- Dubliners are very likely to engage in many activities in Dublin, the top five being:
 - Eating out in a restaurant (94% at least once in the past 12 months)
 - Walking around the city (93%)
 - Shopping in the city (91%)
 - Going to the pub (87%)
 - Visiting a sight / attraction in Dublin (84%)

Getting To and From Activities

- Those engaging in activities were most likely to use:
 - Dublin Bus (80%)
 - Walk (72%)
 - Luas (59%)
 - Private Car (57%)
 - DART (45%)

Interacting with Tourists

- **61%** of respondents indicated that they interact with tourists. **19%** have interactions at least **weekly**.
- **87%** of these described their interactions with tourists as **somewhat or very positive**

Areas of Dublin and Tourism

- Respondents felt that the areas of Dublin **benefiting most** from Dublin were the **city centre** / between the canals.
- Respondents mentioned many areas that they felt **tourists should be made more aware of**. The most commonly mentioned were areas along the **coastline** / DART line.

Impacts of Tourism

- **92%** of respondents felt that **international tourism is good for Dublin**.
- **96%** felt that **domestic tourism is good for Dublin**.

Impacts of Tourism

- The majority of respondents felt that tourism had a positive impact on the following aspects of Dublin:
 - The local economy (92% positive)
 - The preservation and showcasing of historical heritage (85%)
 - The atmosphere and entertainment in the city (78%)
 - The cultural activities on offer (78%)
 - The leisure activities on offer (62%)

Problems Caused by Tourism

- **54%** of respondents reported no problems caused by tourism in Dublin. 36% indicated that they experience problems at certain times of the year. 11% experienced problems most of the year.
- Among those experiencing problems, **crowding** (69%), **cost of living** (56%), **housing prices** (55%), **problems with cleanliness / waste** (47%) and **depopulation of the city centre** (45%) were the most commonly indicated problems caused by tourism.

Proud of Dublin

- **55%** of respondents indicated that they would feel **proud of Dublin** if showing someone around. This was highest among **over 65s** at **72%**

Community and Neighbourhood Involvement in Tourism Development

- When asked how local communities can be more involved in the tourism development process in Dublin, the most common suggestions related to:
 - **Local initiatives** like walking tours / markets / fairs / music events etc.
 - Local **clean-ups** / Tidy Towns
 - Being more involved in **consultation** re development
 - **Advertising** / promoting **local events**

Suggesting Places to Stay

- **71%** of respondents said that a friend visiting Dublin could stay with them. **54%** said that they would suggest a hotel, **31%** would suggest a traditional B&B, **18%** a short-term let and **8%** a hostel.

Hosting Visitors to Dublin

- **83%** of respondents indicated that they host family or friends at least once a year
- **42%** had hosted international tourists in the past 12 months
- **45%** had hosted domestic tourists in the past 12 months

Sustainable Tourism

- **70%** of respondents were familiar with the term “sustainable tourism”
- **34%** felt that tourism in Dublin is somewhat or very sustainable

Technology and the Tourist Offering in Dublin

- **33%** of respondents felt that technology is used reasonably or very well to add to the tourist offering in Dublin
- Suggestions for using technology to add to the tourist offering in Dublin included “**Improved public transport app**”, “**Easier payment on public transport**”, “**A Dublin app – with activities / what’s on / discounts**” and “**Augmented reality / interactive experiences**”

Vision for the Future of Tourism in Dublin

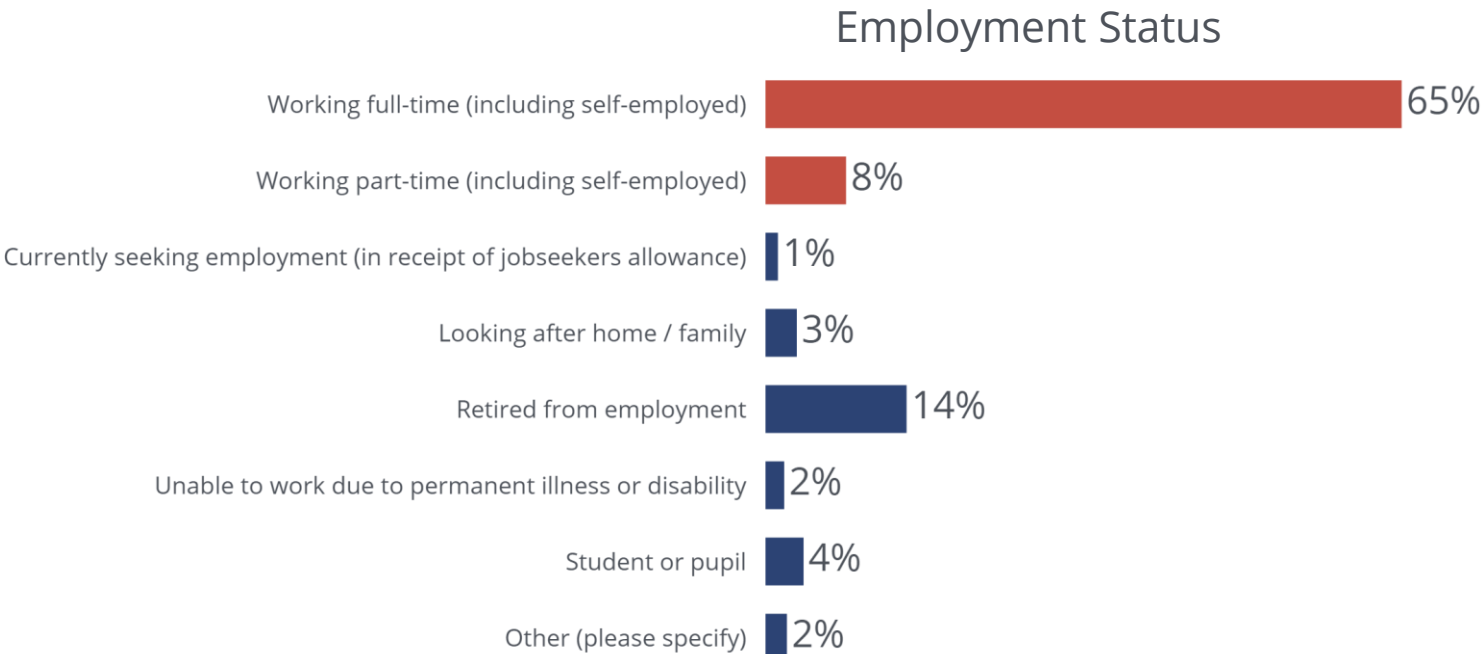
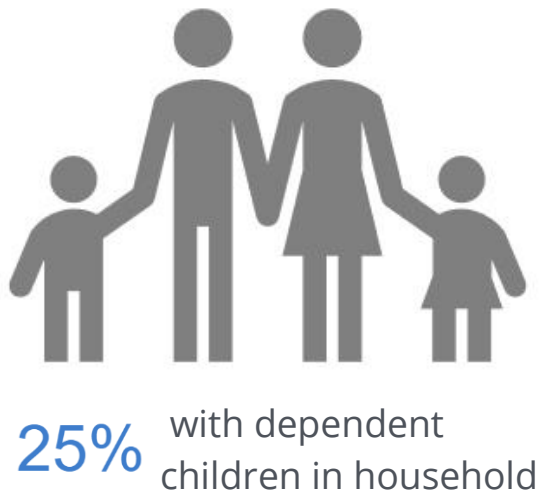
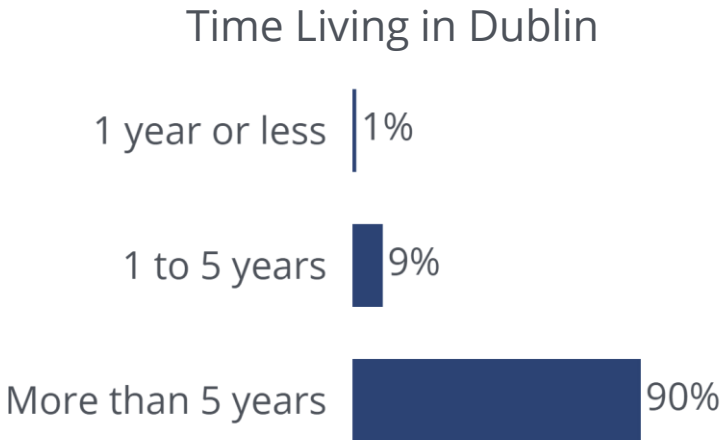
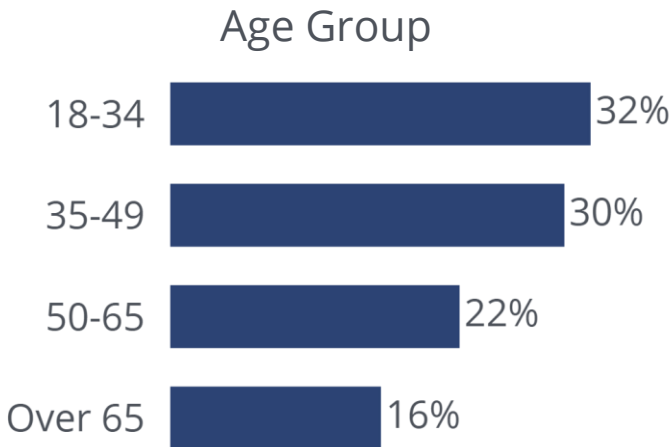
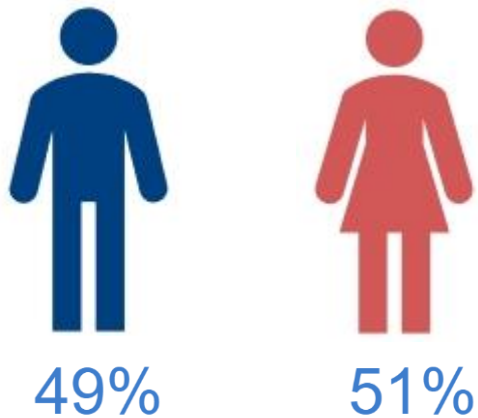
- When asked to describe their vision for the future of tourism in Dublin, the descriptions commonly included reference to:
 - **Affordable** / good value destination
 - A city that is **easy to get around**
 - A **safe** / family-friendly city
 - A city with a **rich cultural heritage**
 - A **clean** city
 - A **sustainable** / environmentally friendly visitor experience

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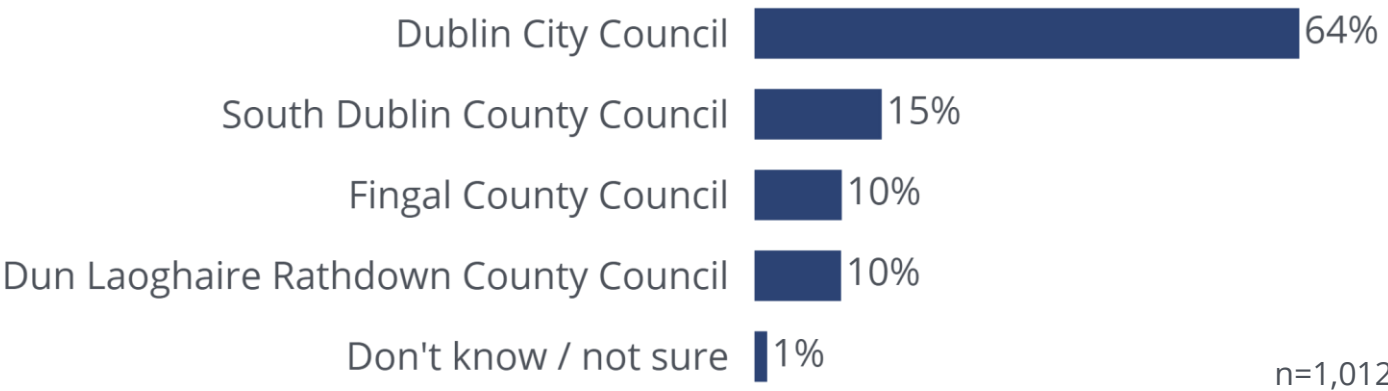
- Online survey, 9th May - 23rd May 2023
- 1,066 respondents from the "Your Dublin, Your Voice" opinion panel
- 22% response rate
- Global margin of error +/- 3.0%
- Robust panel in existence since 2010, recruitment through various channels



43 nationalities represented on this survey, 89% Irish



Local Authority

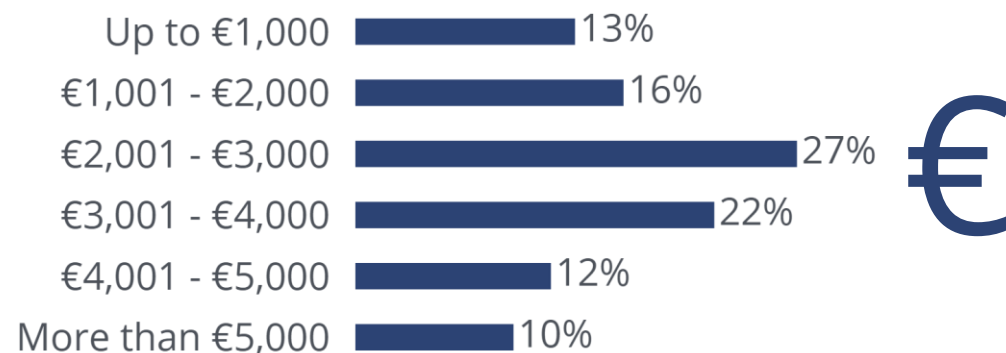


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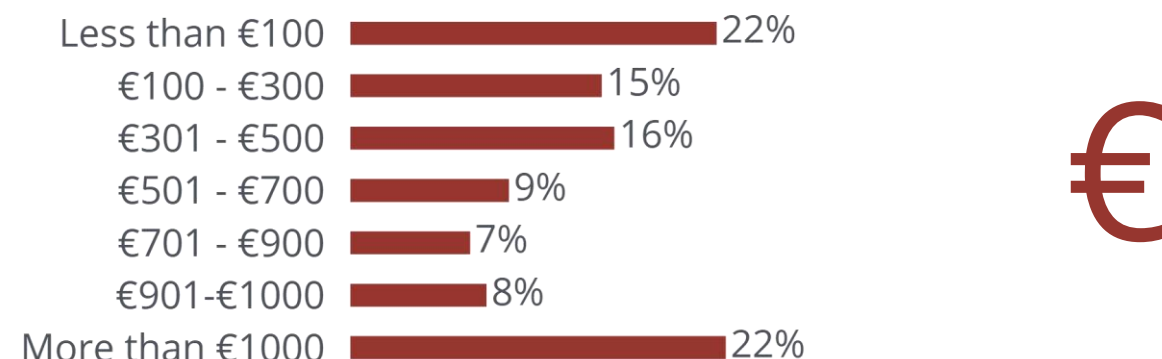
Current Area of Residence

	%
Outside County Dublin	5%
Dublin 1	3%
Dublin 2	2%
Dublin 3	5%
Dublin 4	4%
Dublin 5	4%
Dublin 6	3%
Dublin 6W	3%
Dublin 7	9%
Dublin 8	9%
Dublin 9	8%
Dublin 10	1%
Dublin 11	5%
Dublin 12	7%
Dublin 13	3%
Dublin 14	3%
Dublin 15	3%
Dublin 16	3%
Dublin 17	1%
Dublin 18	2%
Dublin 20	1%
Dublin 22	1%
Dublin 24	3%
County Dublin	12%
NET	100%

Monthly Income After Taxes, Before Bills



Monthly Disposable Income After Bills Are Paid



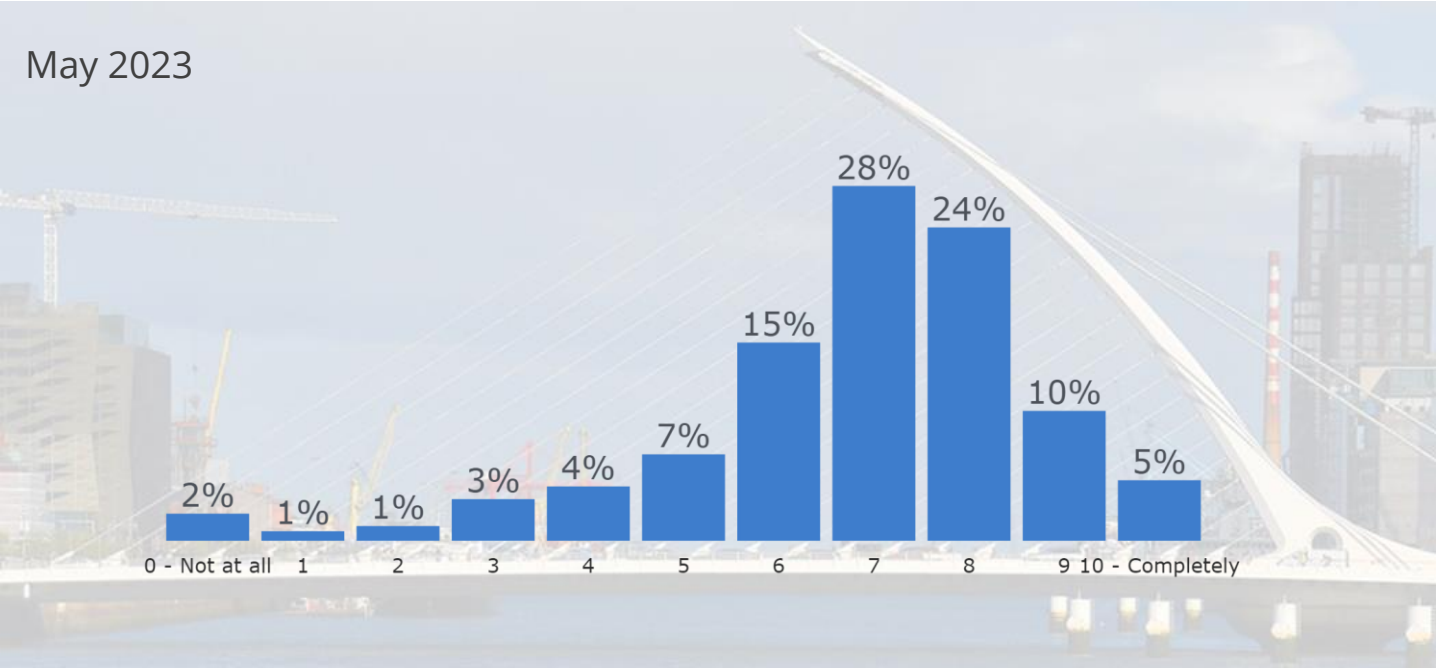
Across the survey results, age group tends to be the biggest source of variation in attitudes.

Where other variations are observed, these tend to also be linked to age group and life stage – e.g. income level, employment status etc.

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On a scale of 0 to 10, overall how satisfied are you with your life nowadays?



6.8
is the average life
satisfaction score out of 10

This is up slightly from the
level measured in March
2023



Base: 1066

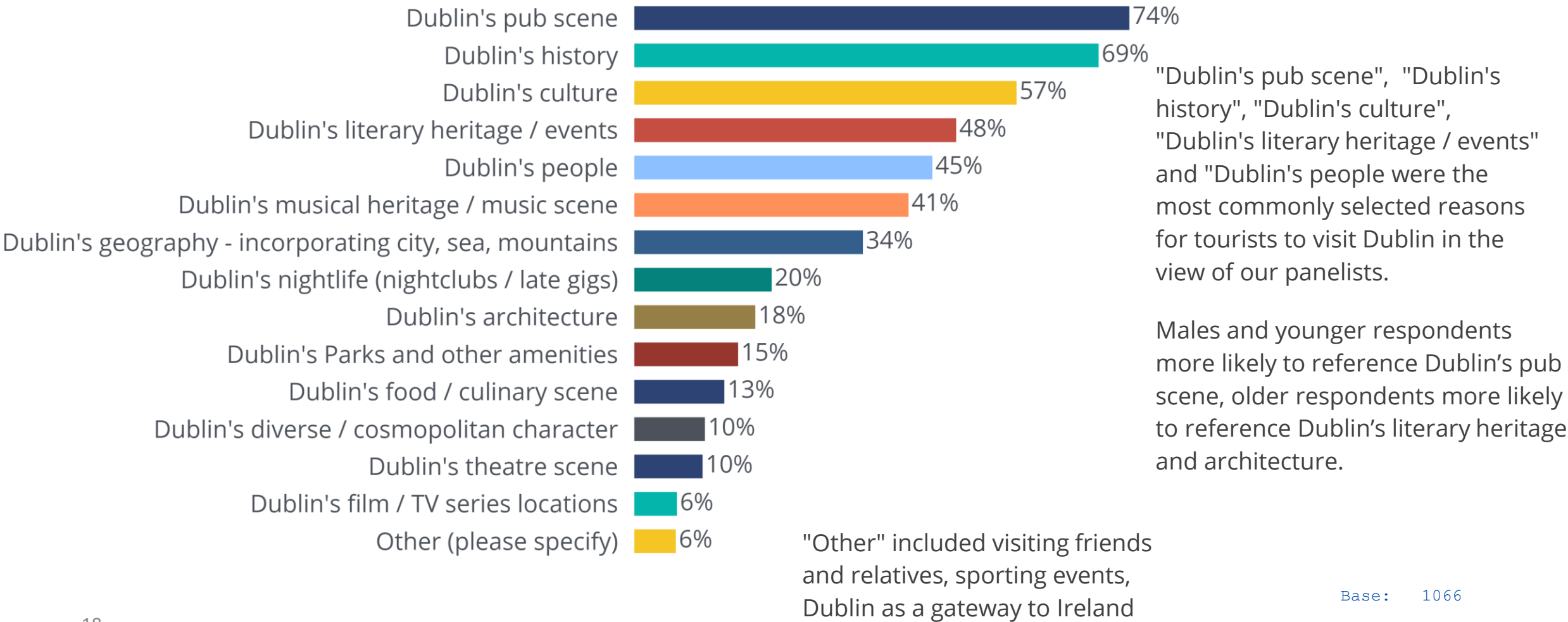
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Reasons for Tourists to Visit Dublin

There are many reasons that tourists visit Dublin. From the following list, please select the top 5 reasons that tourists (domestic and international) would visit Dublin in your opinion

% selecting in top 5



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What Would Make Dublin More Appealing to Tourists?

What, if anything, would make Dublin more appealing to tourists (local, domestic and international)?
(open ended comments categorised)

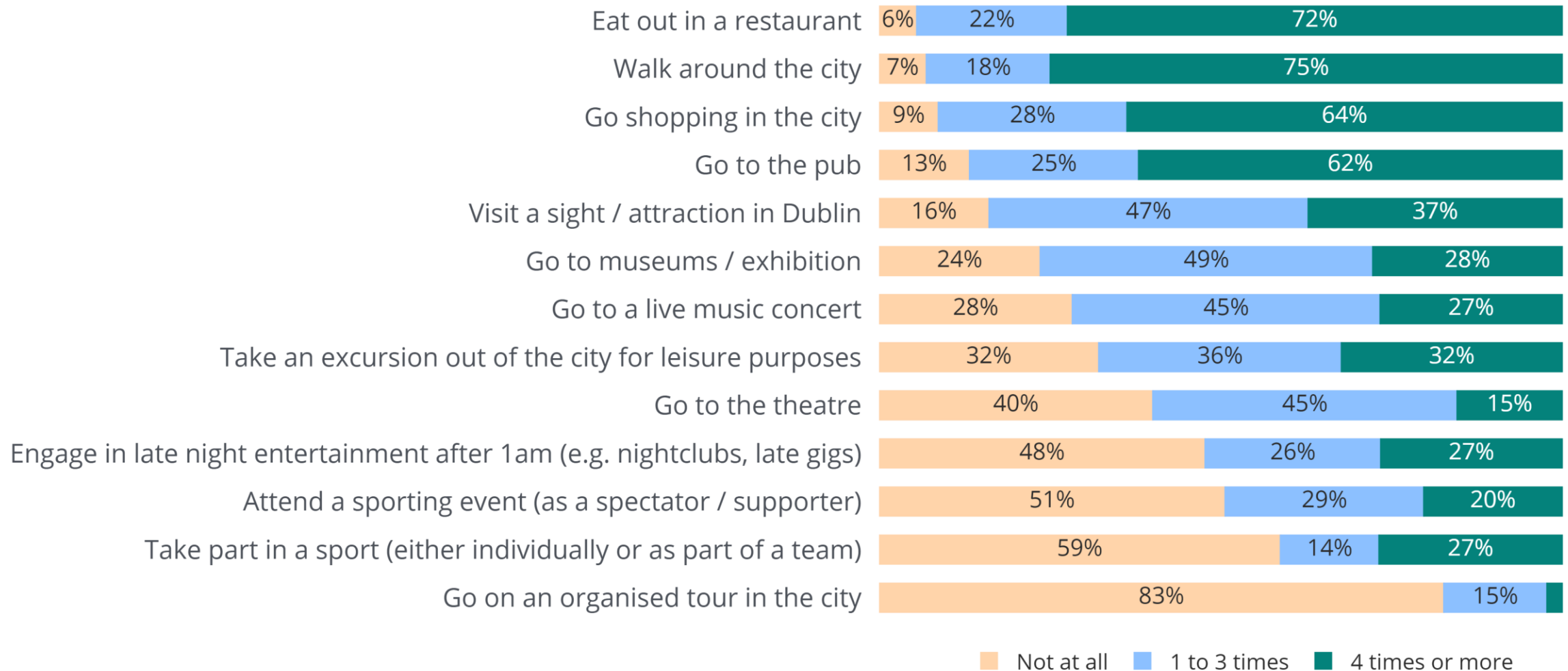


Making Dublin more affordable, improving public transport, addressing safety concerns and improving cleanliness were the top four suggestions for making Dublin more appealing to tourists.

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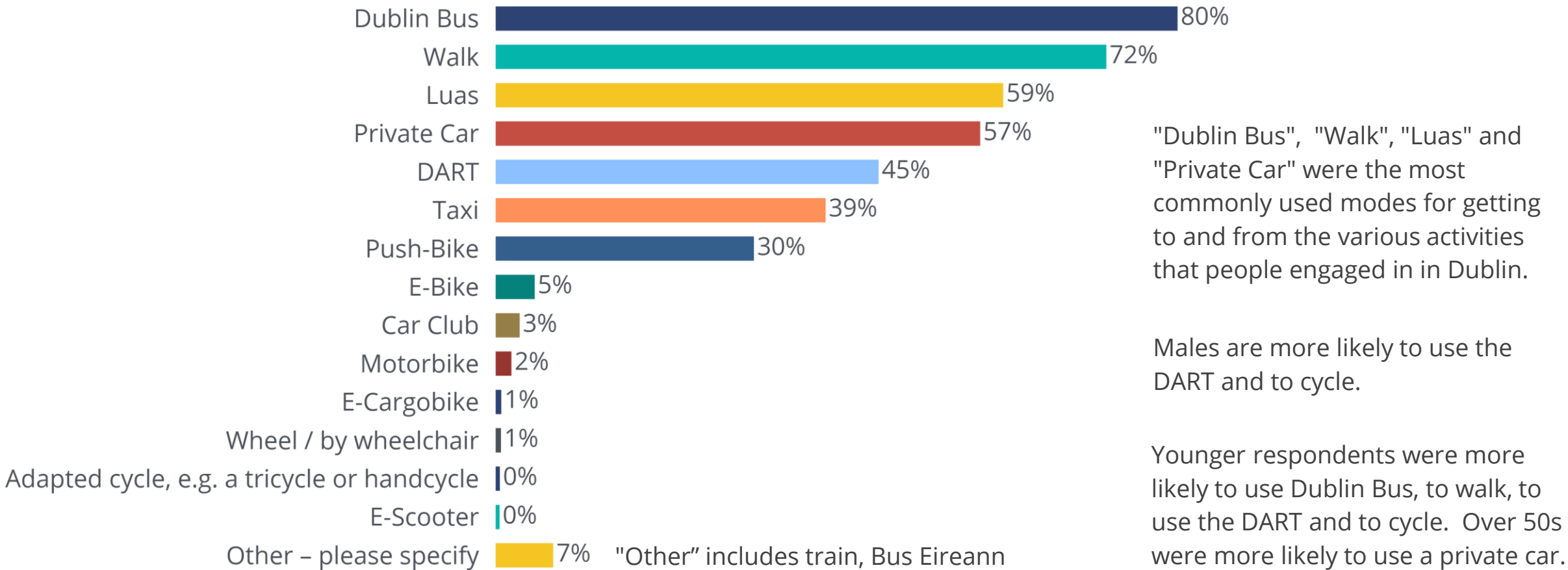
In the past 12 months, how often have you done the following in Dublin?



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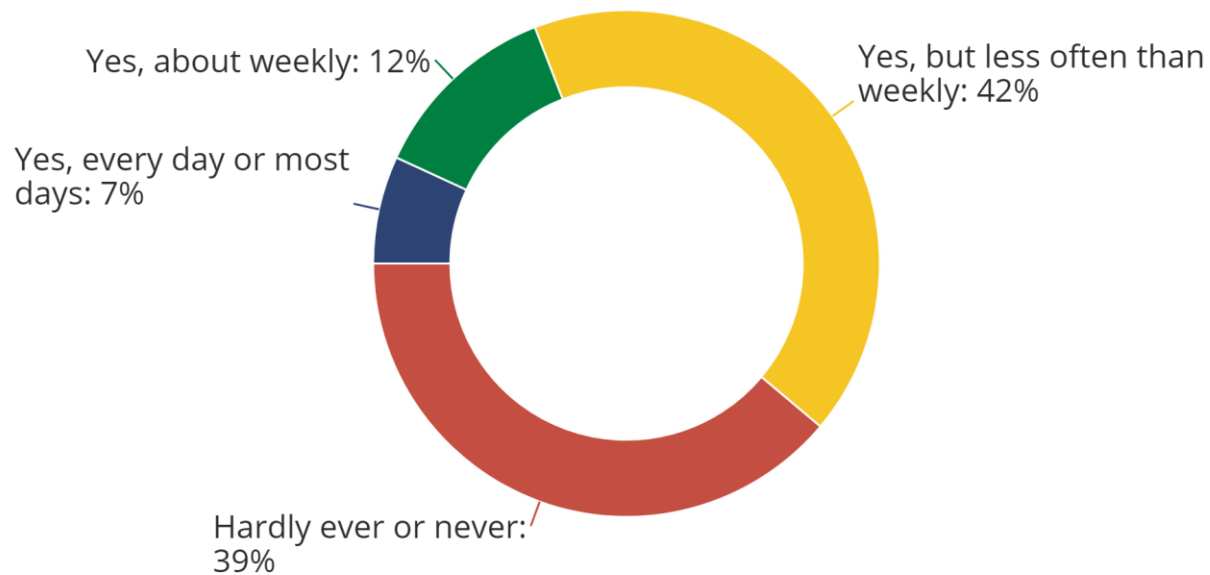
When getting to and from any of the activities listed on the previous question, which of the below options do you usually use? Please select as many options as apply.



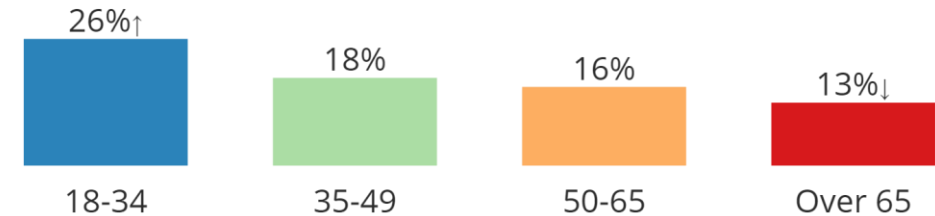
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Do you ever interact with tourists (domestic and / or international) in Dublin?



% at least weekly, by age group



Younger respondents were more likely to have frequent (weekly or more often) interactions with tourists than older respondents.

How would you describe your interactions with tourists to Dublin?

Very negative Somewhat negative Just okay Somewhat positive Very positive



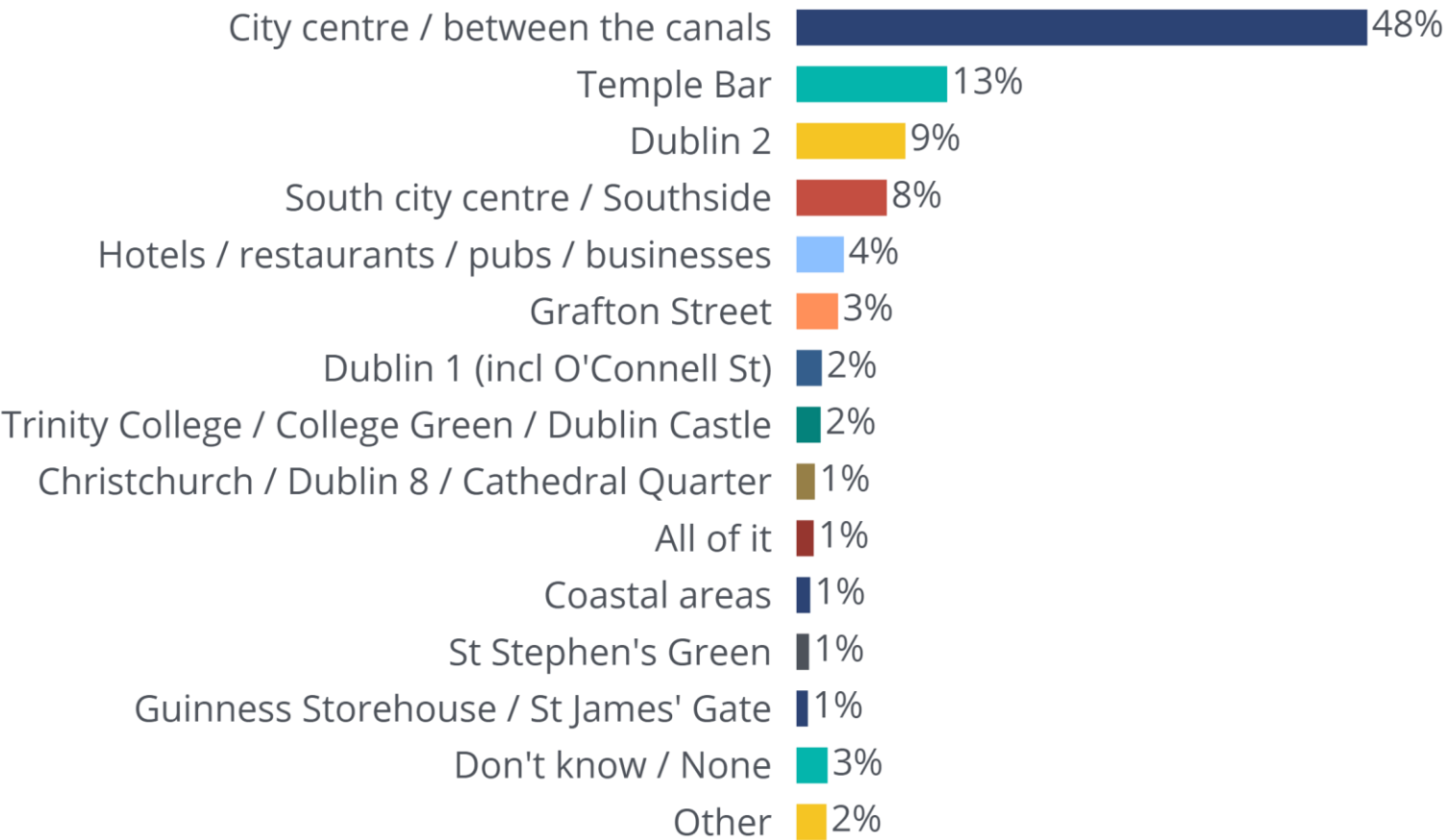
87% described their interactions with tourists as positive or very positive

No meaningful variation by demographics

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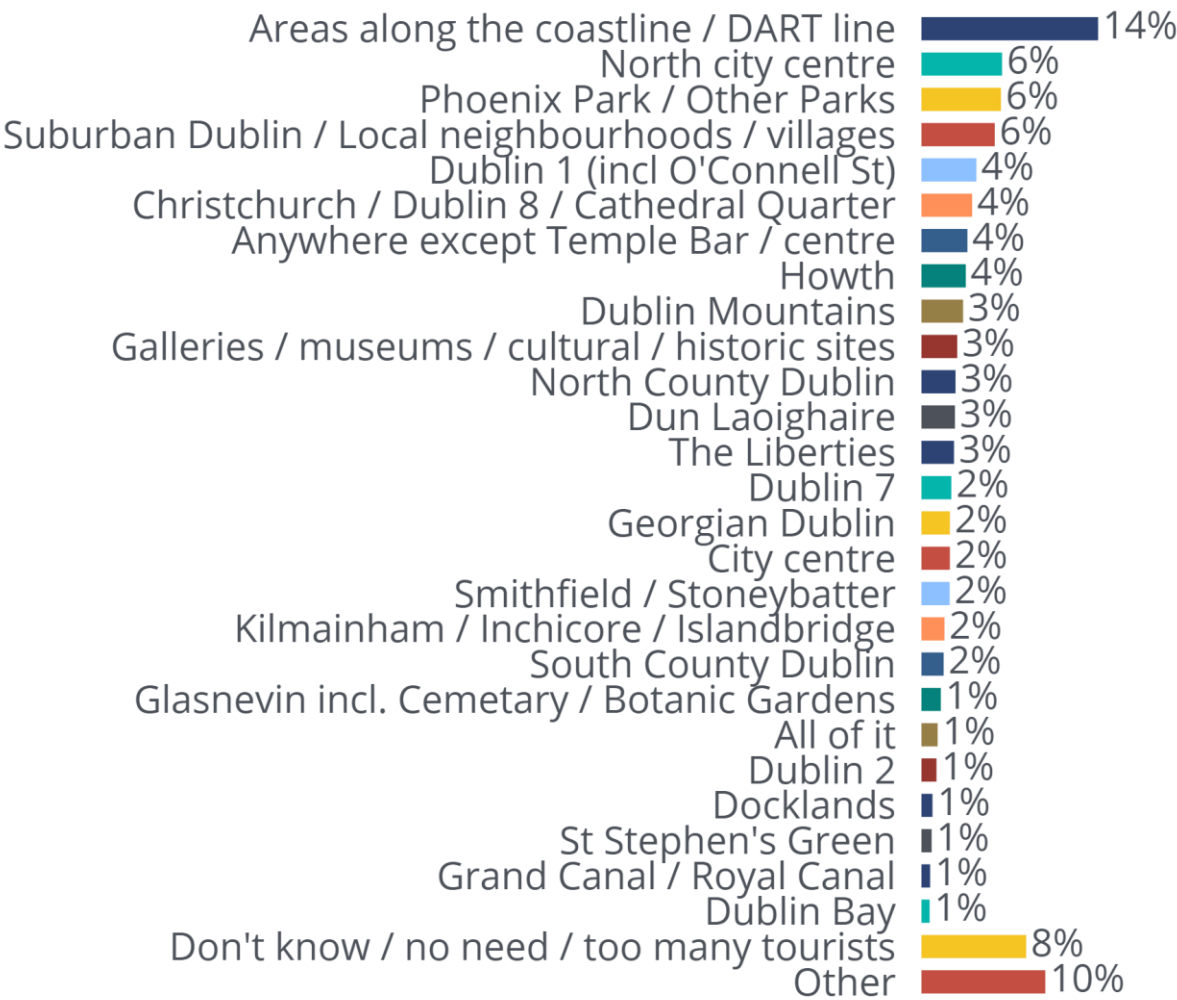
Which area of Dublin do you think benefits most from tourism?
% first mentions



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And which area of Dublin do you think tourists should be made more aware of?
% first mentions

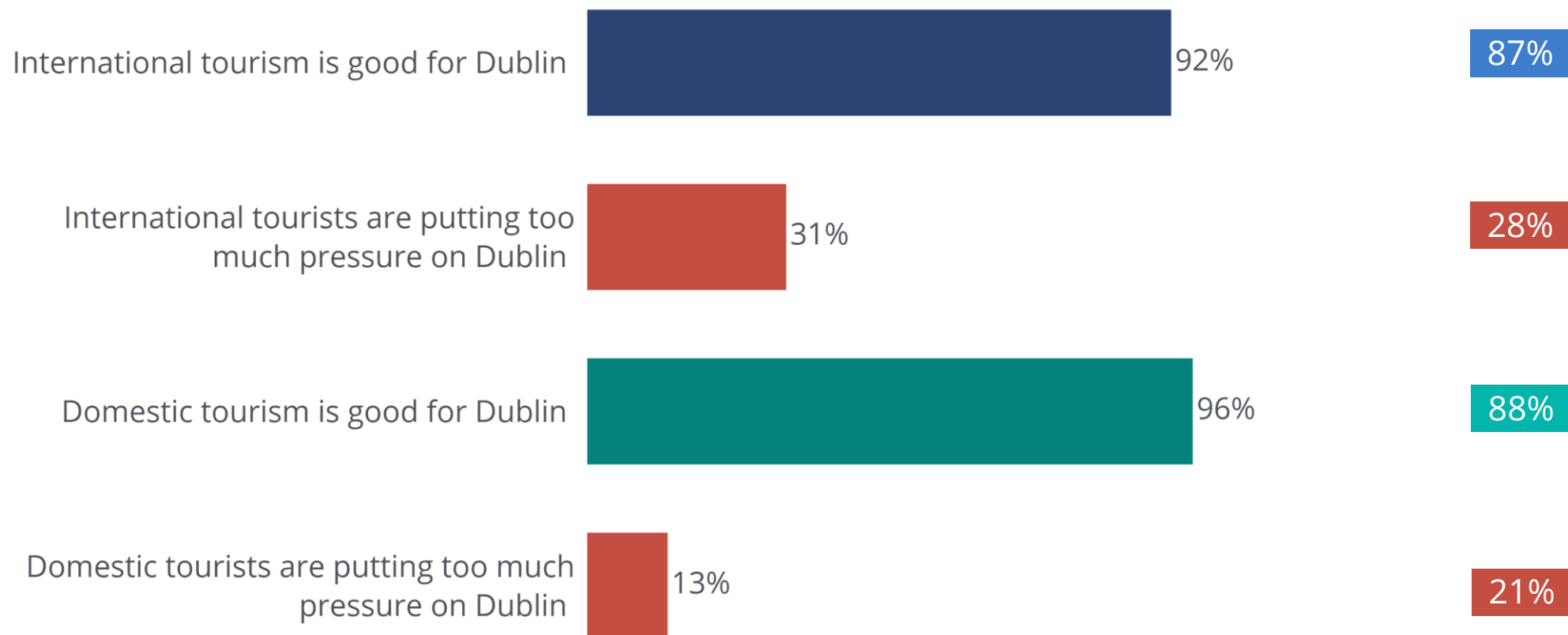


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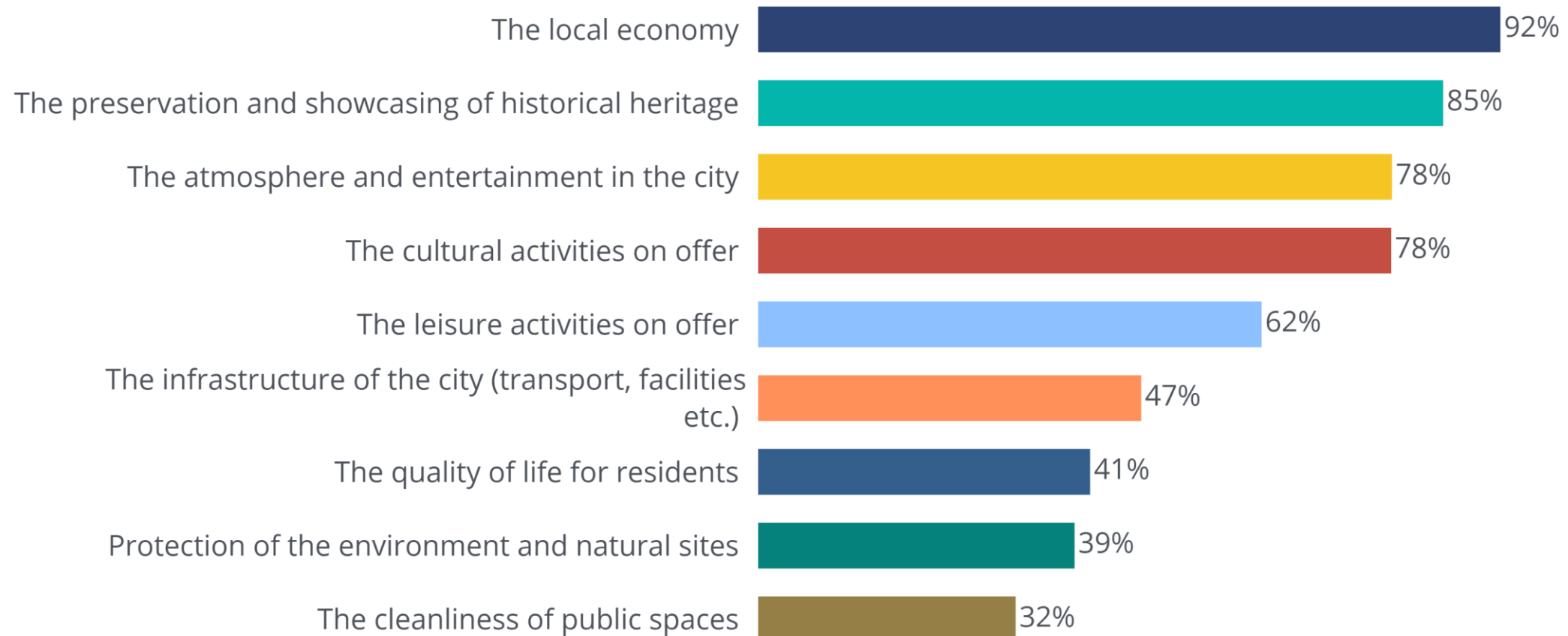
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Please indicate your agreement with the following statements:

National benchmarks*



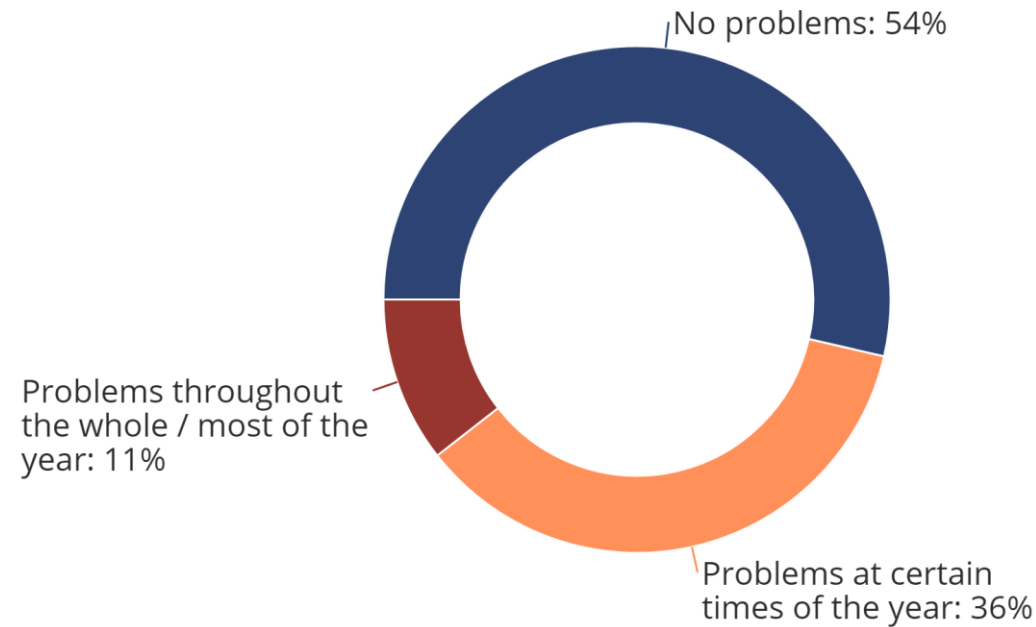
In your view, what are the impacts of tourism on the following aspects of Dublin?
% positive



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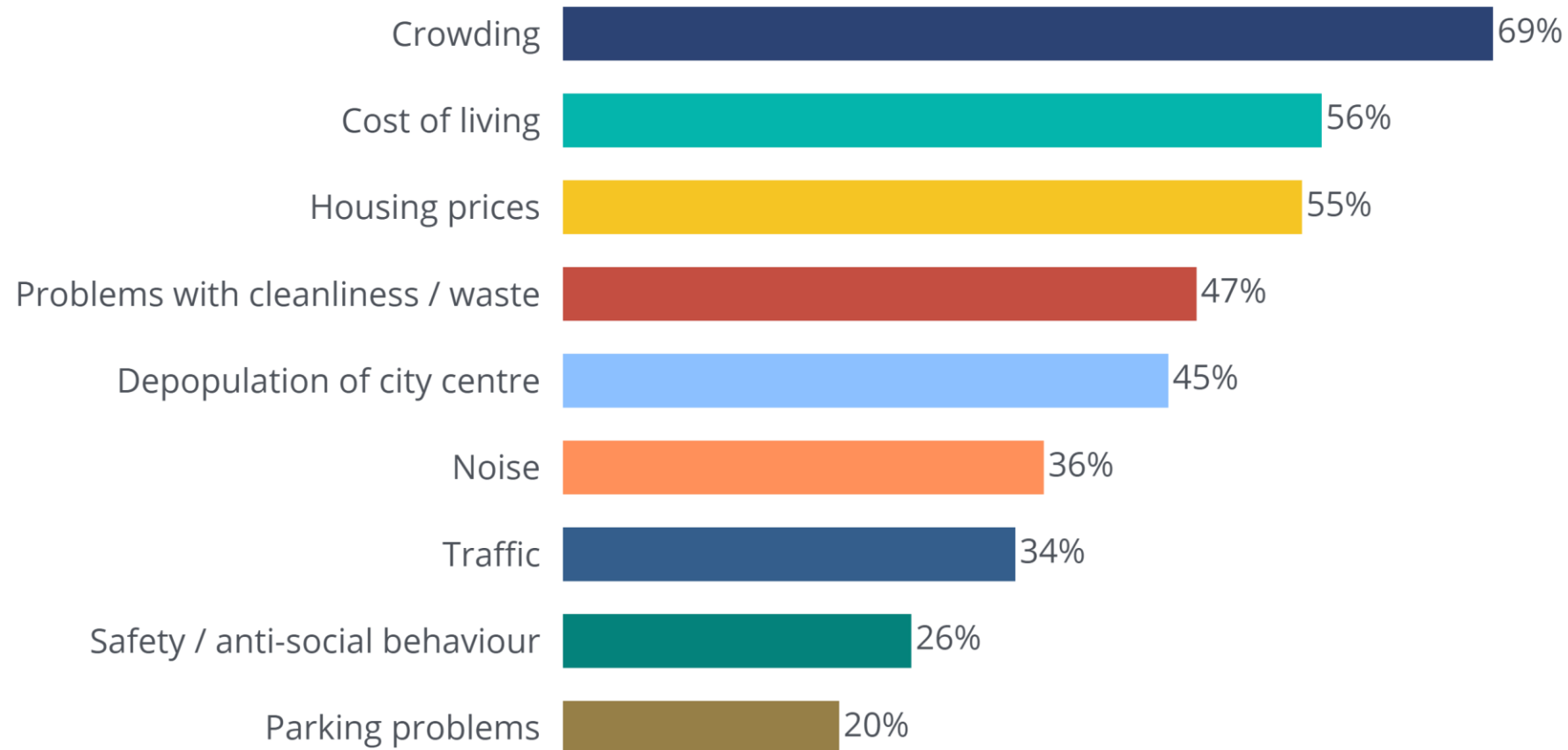
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Does tourism cause problems for you in Dublin?

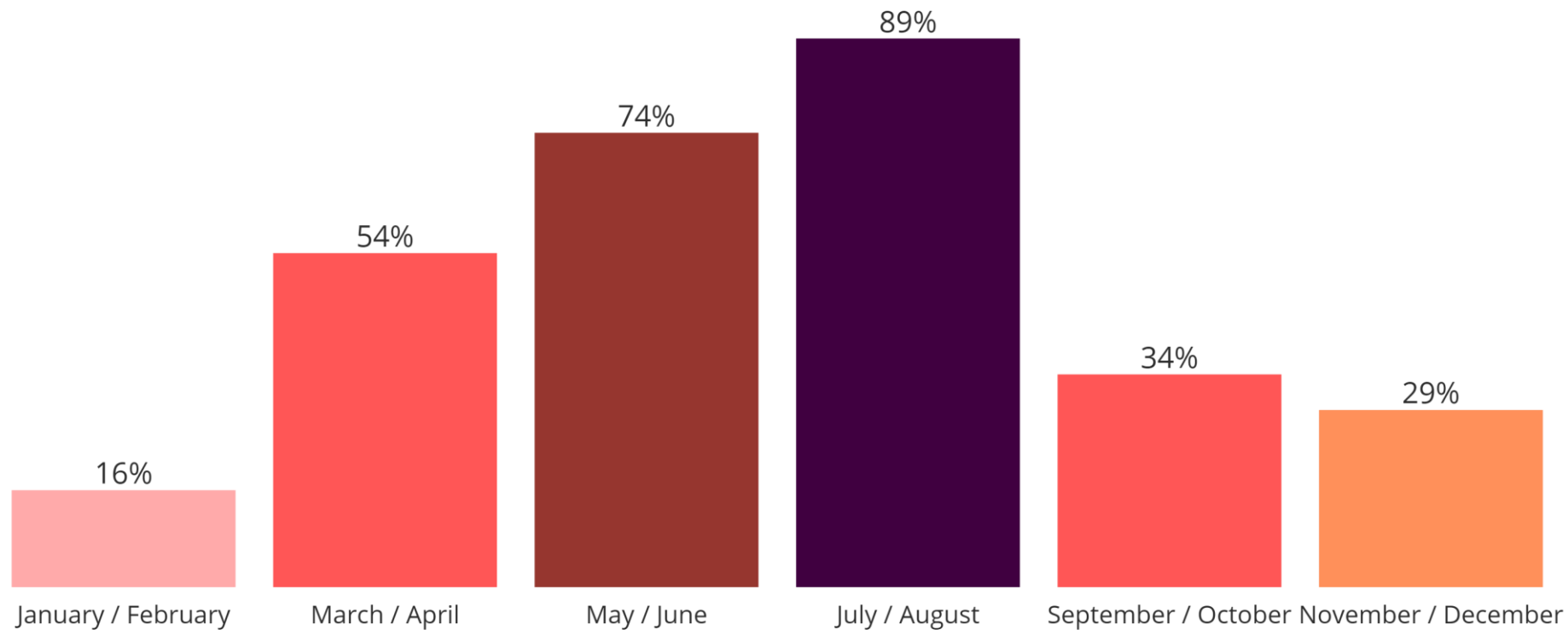


Experience of problems caused by tourism is more likely to be reported by younger age groups, by those with higher educational achievement and by those in employment.

Which types of problems have been caused by tourism in Dublin? Please select as many as apply.



What specific times of year do you experience problems caused by tourism in Dublin?

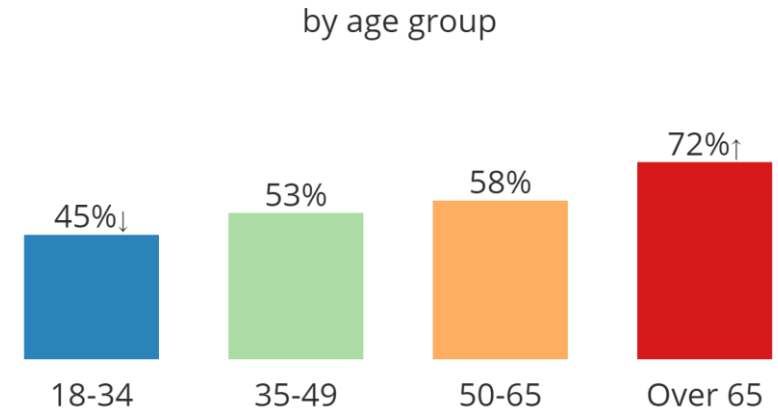
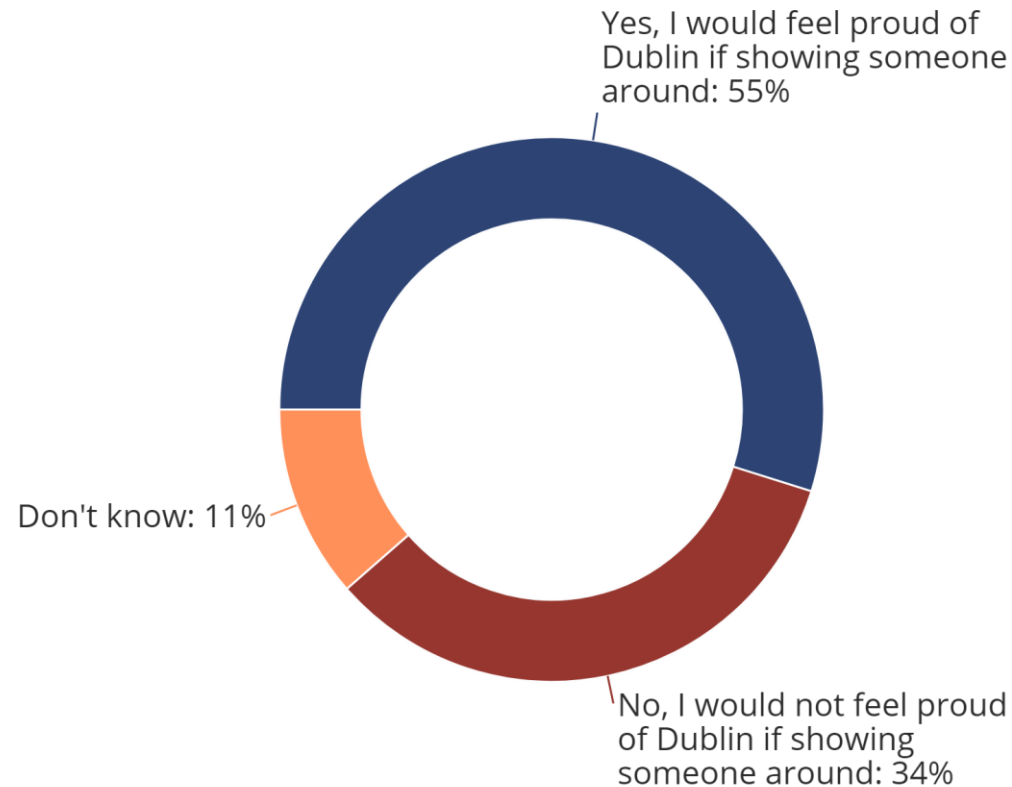


Among those experiencing problems caused by tourism in Dublin, most reported experiencing these problems in July / August.

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If you were showing a tourist around Dublin, would you feel proud of Dublin?

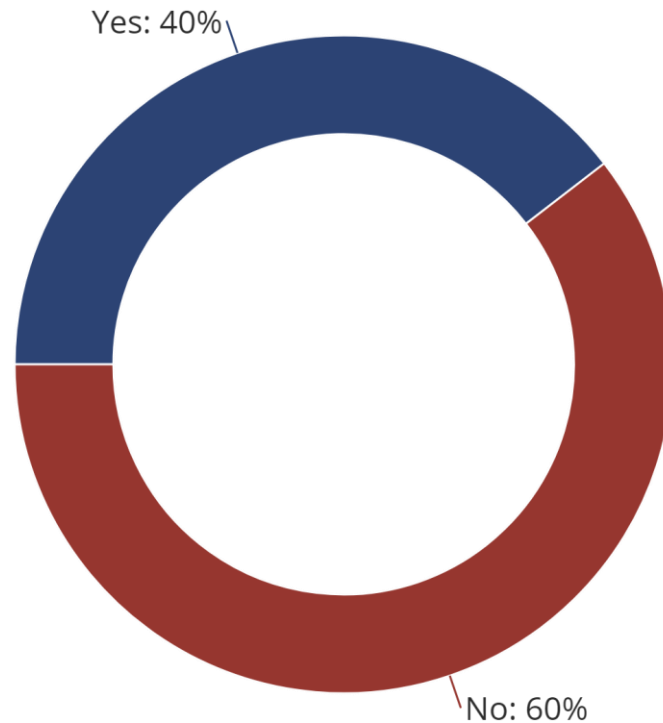


55% of respondents indicated that they would feel proud of Dublin if showing a tourist around. Over 65s were more likely than others to feel proud of Dublin if showing someone around.

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Are you personally involved in any community / voluntary activities in your local area?



40% of respondents indicated that they were involved in community / voluntary activities in their local area.

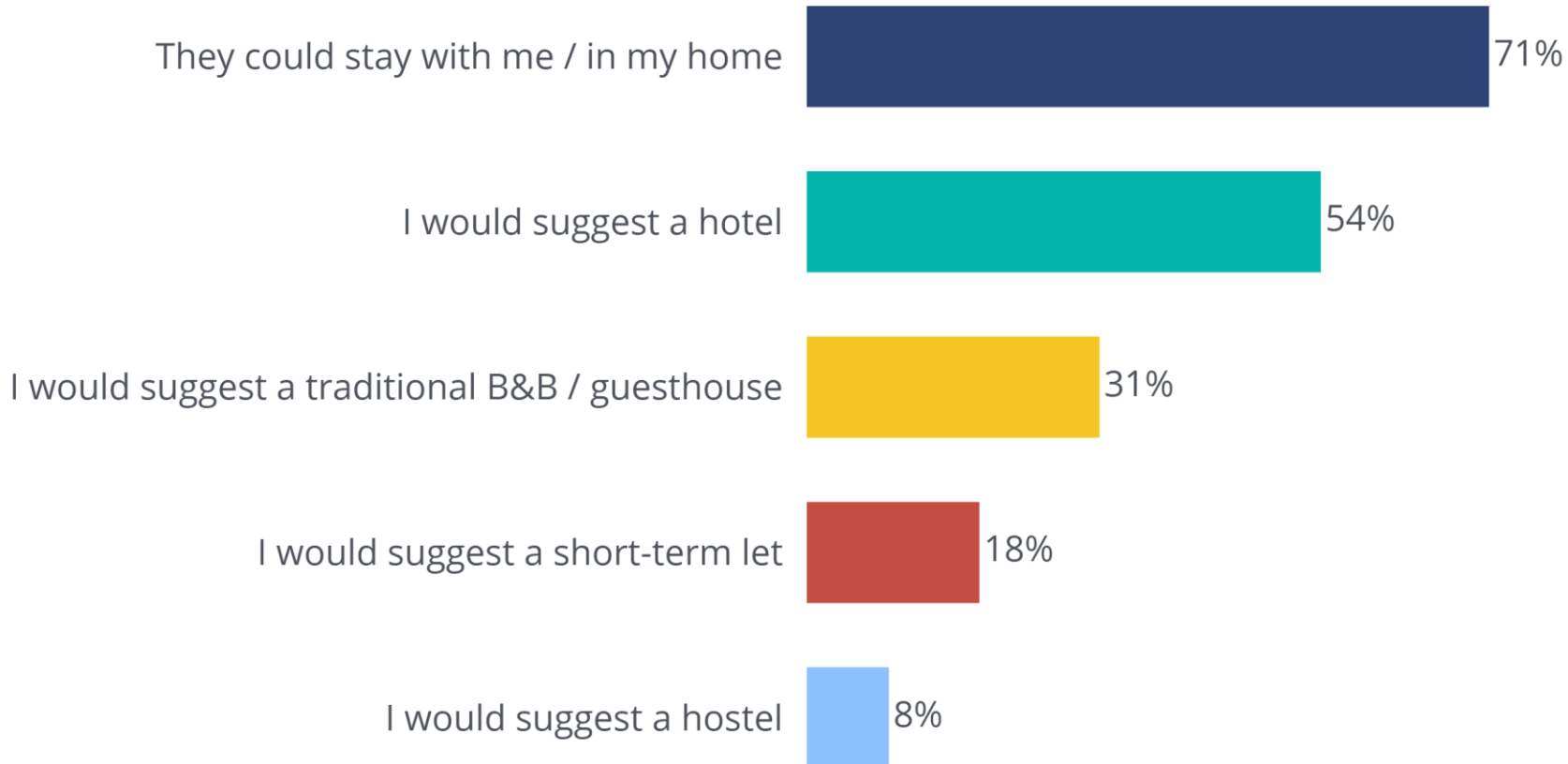
How can local communities and neighborhoods be more involved in the tourism development process in Dublin?
(open ended comments categorised)



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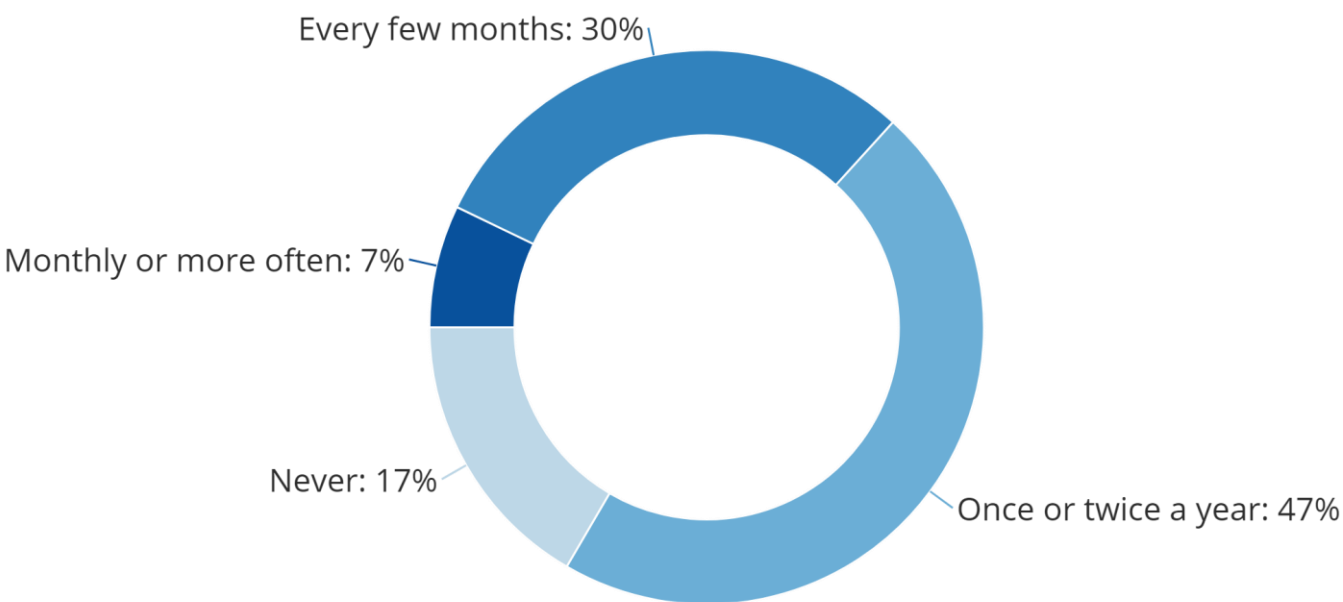
Imagine that you have a friend coming to visit Dublin and they are looking for suggestions as to where they might stay. What options would you suggest to your friend? Please select as many as apply.



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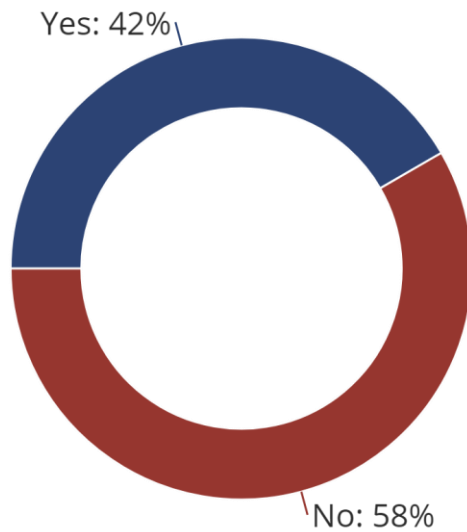
How often would you host family or friends visiting Dublin?



83% of respondents indicated that they host friends or family at least once a year.

This rises to **91%** among those in the highest income bracket.

In the past 12 months have you hosted international tourists visiting Dublin?



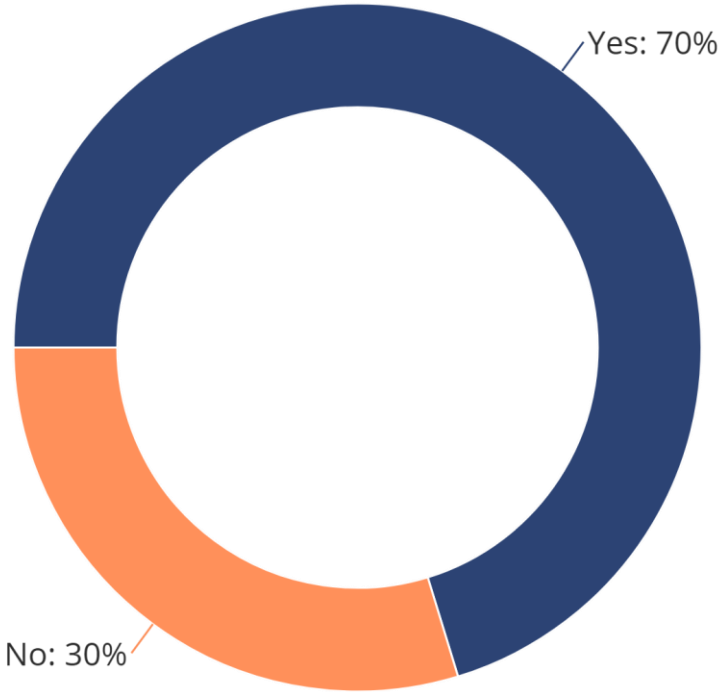
In the past 12 months have you hosted domestic tourists visiting Dublin?



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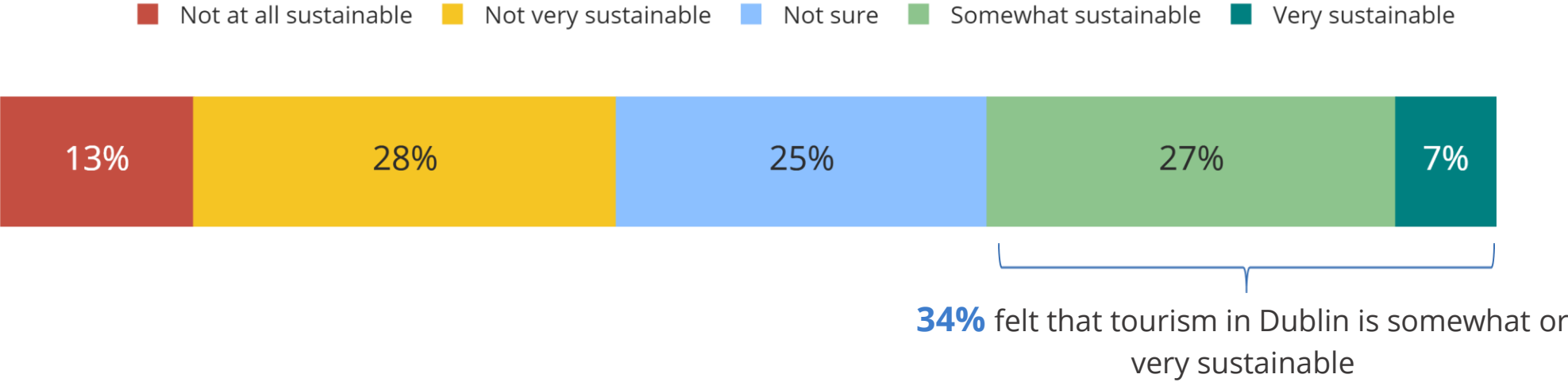
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Before today, have you ever heard of the term "sustainable tourism"?



Awareness of Sustainable Tourism is highest among 35-49 year-olds, increases with education and with income.

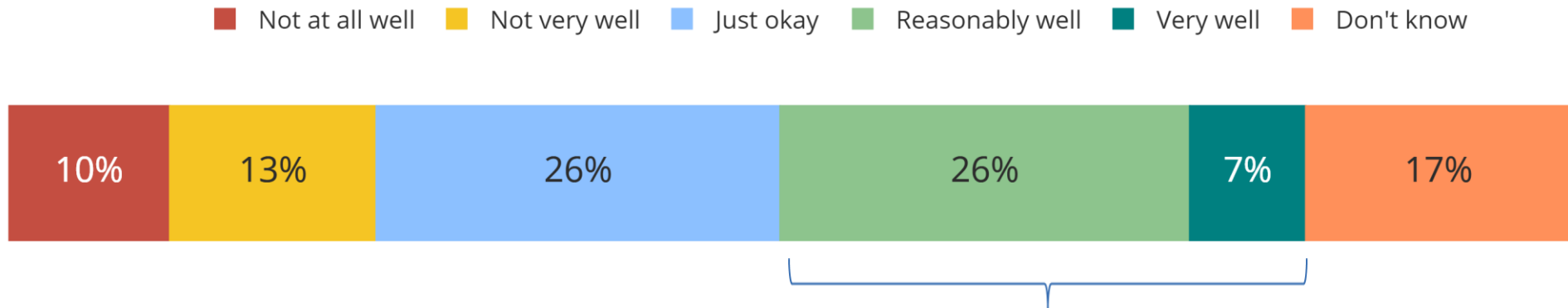
Sustainable tourism can be defined as "tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of tourists, the industry, the environment and host communities." To what extent do you feel that tourism in Dublin is sustainable?



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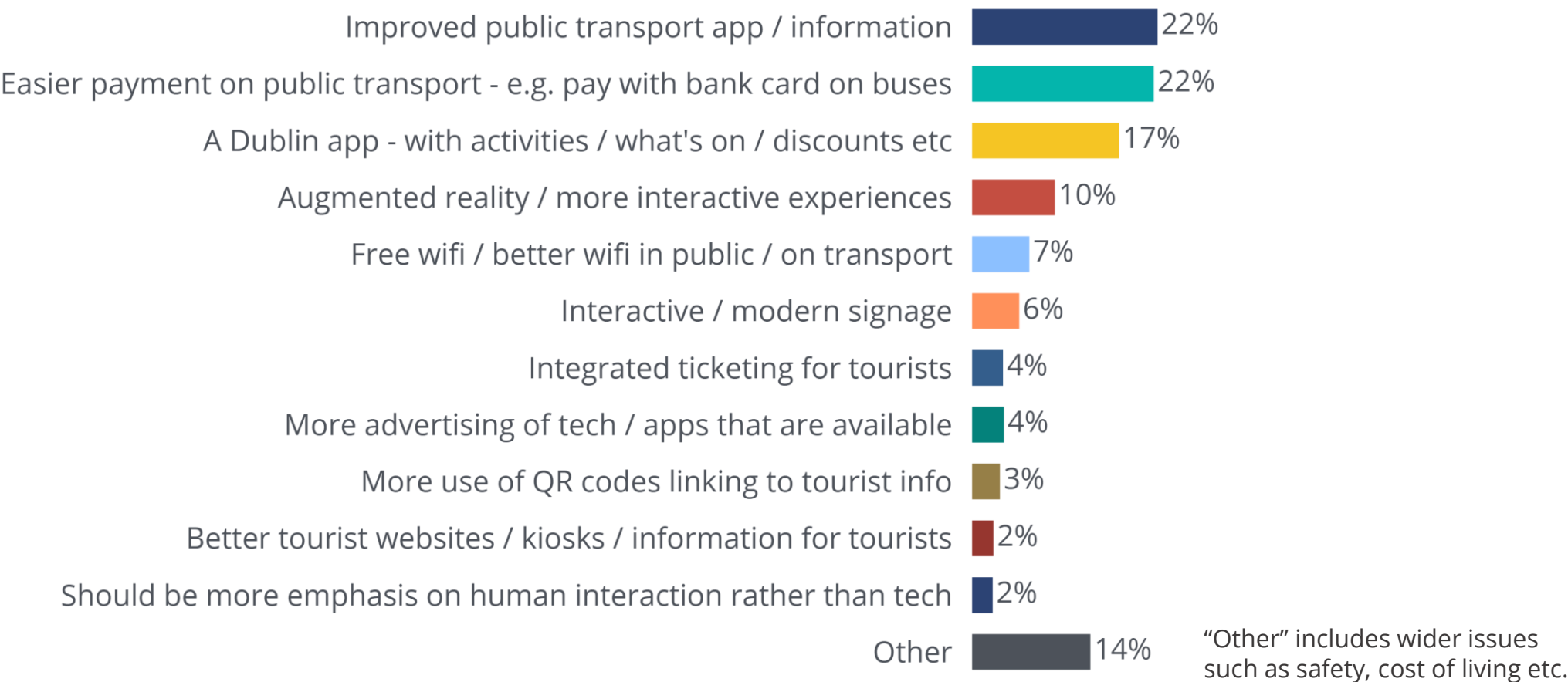
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How well do you think technology is used to add to the tourist offering in Dublin?



33% felt that technology is used reasonably or very well to add to the tourist offering in Dublin

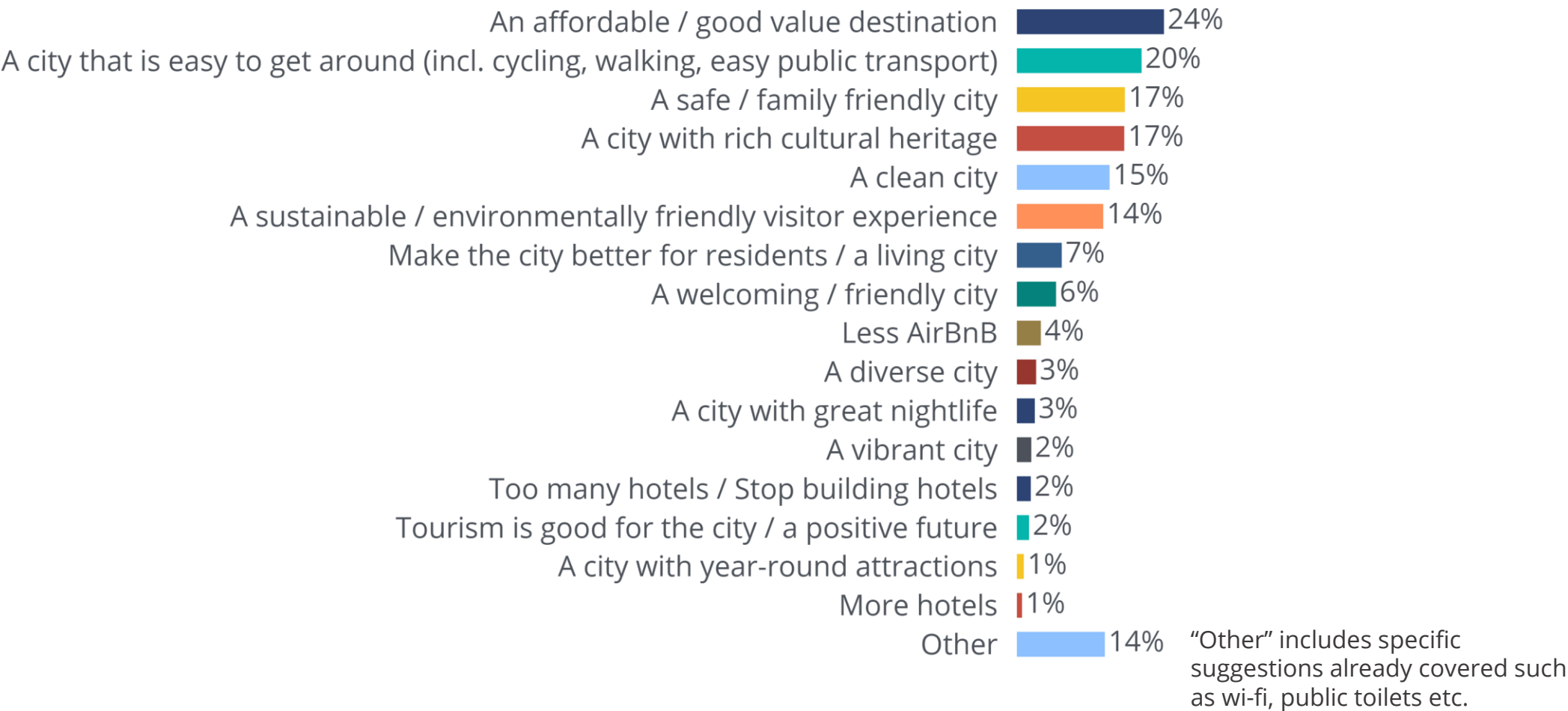
Do you have any suggestions for how technology could be used to add to the tourist offering in Dublin?
(open ended comments categorised)



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In three sentences or less, what is your vision for the future of tourism in Dublin?
(open ended comments categorised)



For further information please
contact:

Economic Development Office
Dublin City Council
01 222 5611
research@dublincity.ie



Comhairle Cathrach
Bhaile Átha Cliath
Dublin City Council