

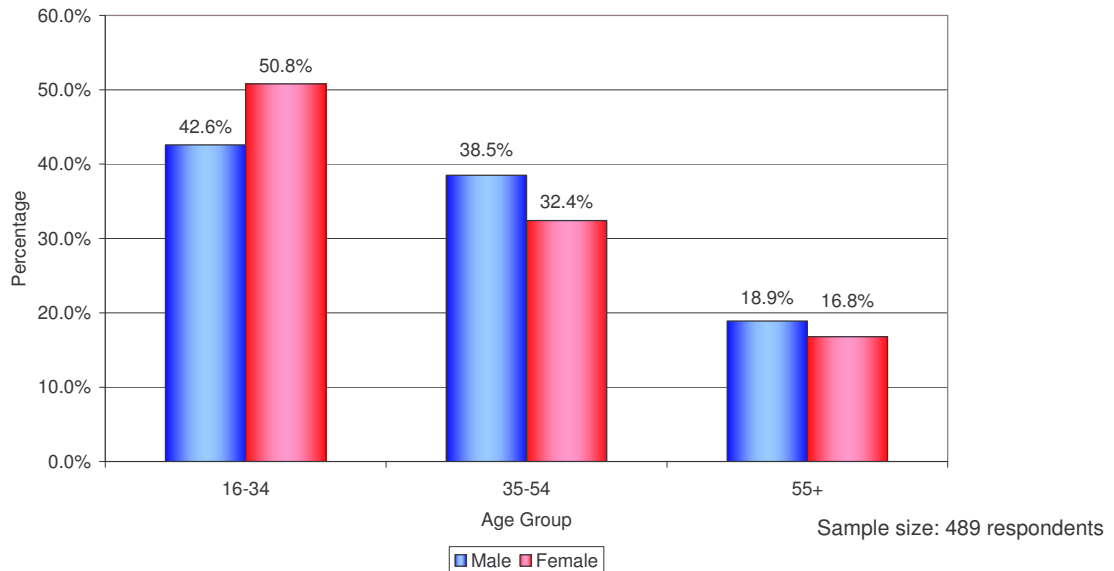
APPENDIX 4b

Key Results

GDA RETAIL STRATEGY UPDATE – VISITOR STREET SURVEY

- The visitor survey was carried out in Dublin City Centre (DCC) between October 15th and October 29th 2007.
- Only those living outside the household telephone survey area and those who had finished their shopping in DCC for the day were interviewed.
- An overall sample of 484 shoppers was collected, of which 315 (65%) were female and 169 (35%) were male.
- This sample comprised of 232 (48%) 16 to 34 year olds, 167 people (34%) 35 to 54 year olds, and 85 (18%) 55+ year olds (see **Figure 1**).

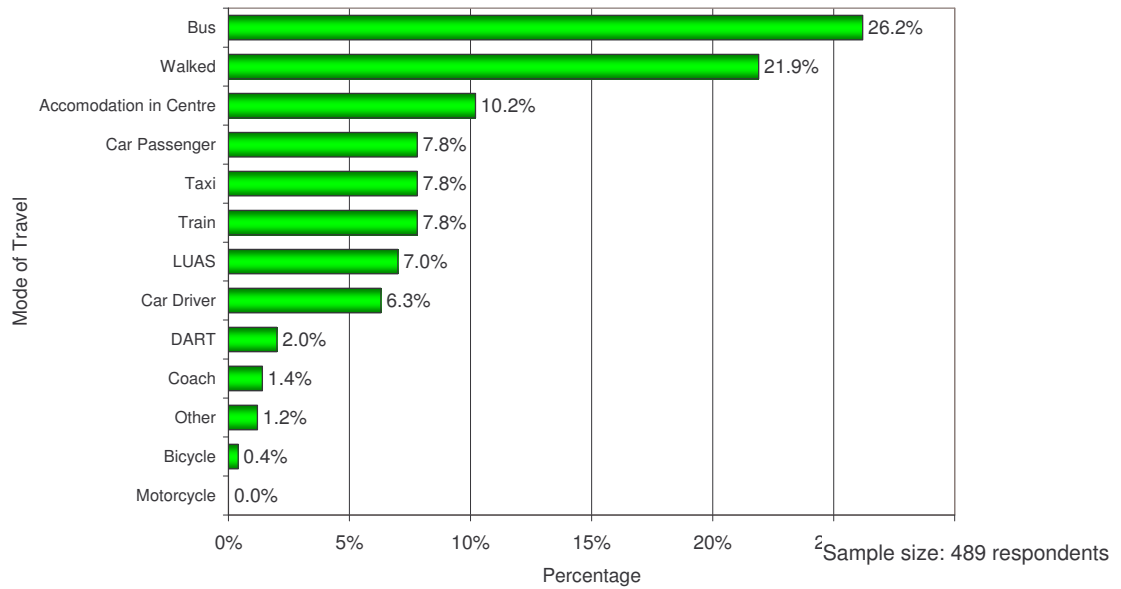
Figure 1 – Age Groupings by Gender



- On average there were 1.4 females in a party compared to just 0.77 males. The average total size of a party was 2.22.
- Only 19 parties had children under the age of 16 with them, accounting for 4% of respondents.
- The majority of visitors (39.5%) said that they were visiting DCC for sightseeing or tourism. Shopping (including window shopping) was also high on the list of reasons for visiting DCC, amounting to 36%.
- 31.8% of females stated they were shopping for goods with a further 8.2% window shopping, totalling 40%, in comparison to just 28.6% for males. This shows that shopping is the most important main reason for females to visit DCC.
- The three main reasons for visitors staying in DCC were; “*plenty to see / do*”, “*better shopping*” and “*culture / history*”, with 33.5%, 32.5%, and 22.8% respectively.
- Only 4.7% had shopped, or planned to shop, outside of DCC. Of these, most (36.4%), were planning to shop at “*other*” locations. The most popular of the recognised shopping areas was Dundrum Shopping Centre with 31.8% of the total.
- More respondents (15.4%) had shopped or were planning to shop elsewhere if they were staying longer than one day. 16 specific centres across the whole of Ireland were mentioned, with the majority (27.4%) again being categorised as “*other*”.
- The majority of respondents (59.9%) stated that they would be staying between 2-7 days.
- For length of stay in DCC that day, “*3 hours to 3 hours 59 minutes*” was the most popular with 15.2% of all respondents.
- On average, respondents length of visit to DCC for the day was 3 hours 40 minutes.

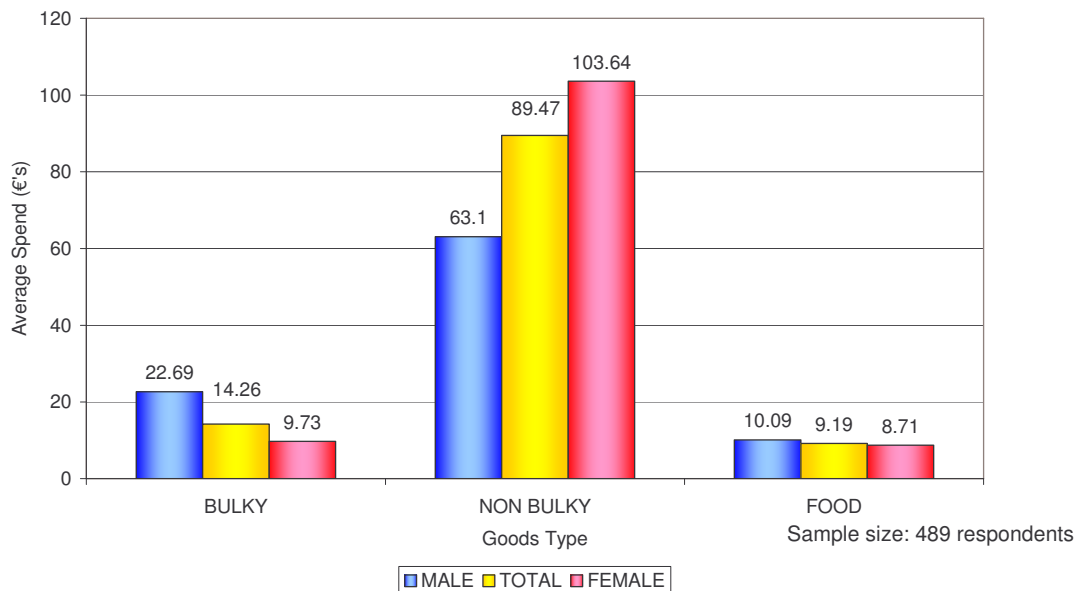
- Most peoples' trip origin was "hotel / other accommodation", accounting for 59.7%, "home" and "home of friends" were next with 20.2% and 17.4% respectively.
- The majority of respondents stated that they had travelled to DCC by either bus (26.2%) or through walking (21.9%) (See **Figure 2**).

Figure 2 – Modes of Travel



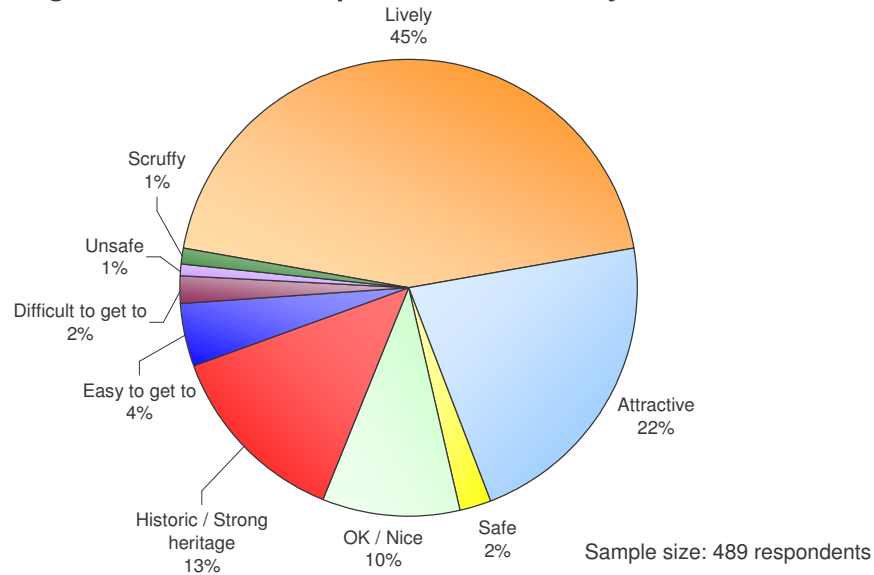
- 16.8% of respondents didn't purchase anything while in DCC.
- In terms of actual purchases, clothing came out on top with 47% of respondents making a purchase. The next highest was catering with 37% of visitors purchasing this service.
- Average spend per party on non-bulky comparison goods was highest at €89.47. Bulky comparison goods was next at €14.26. Food/convenience goods spend per party was lowest at €9.19.

Figure 3 – Average Party Spend All Visitors



- In terms of average spend per head, there was an overall spend of €40.30 for non-bulky comparison goods, €6.42 for bulky comparison goods and €4.14 for food/convenience goods.
- The majority of respondents, 45%, described DCC as “lively” (Figure 4). This was particularly common amongst with younger people; 53% of 16 to 34 year olds compared to just 21.2% of the 55+ age group.
- The vast majority of visitors were positive about DCC, with fewer than 4% choosing a negative description.

Figure 4 – All Visitor Opinion of Dublin City Centre



- **Figure 5** summarises the descriptions of DCC as stated by the 55+ age groups. The results show a much more even spread of responses, with “lively”, “OK / nice”, “attractive” and “historic / strong heritage” all being popular.
- Additionally, the older age group were more likely to be negative about DCC, with over 14% of respondents choosing the negative options.

Figure 5 – 55+ Age Group Visitor Opinion of Dublin City Centre

