

Cruise ships survey report for 2022



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Introduction to the survey

Dún Laoghaire Harbour welcomed almost 70 cruise ships between April and October 2022. With over 90 ships booked for 2023, Dún Laoghaire-Rathdown County Council and the Dún Laoghaire Business Association are keen to engage with the local business community to assess and increase the local benefit from these ships, their passengers and crew.

This survey was carried out to find out the views of local business on Cruise Ships in Dún Laoghaire Town. The information gathered was only be used for this purpose and will not be used for any other purposes.

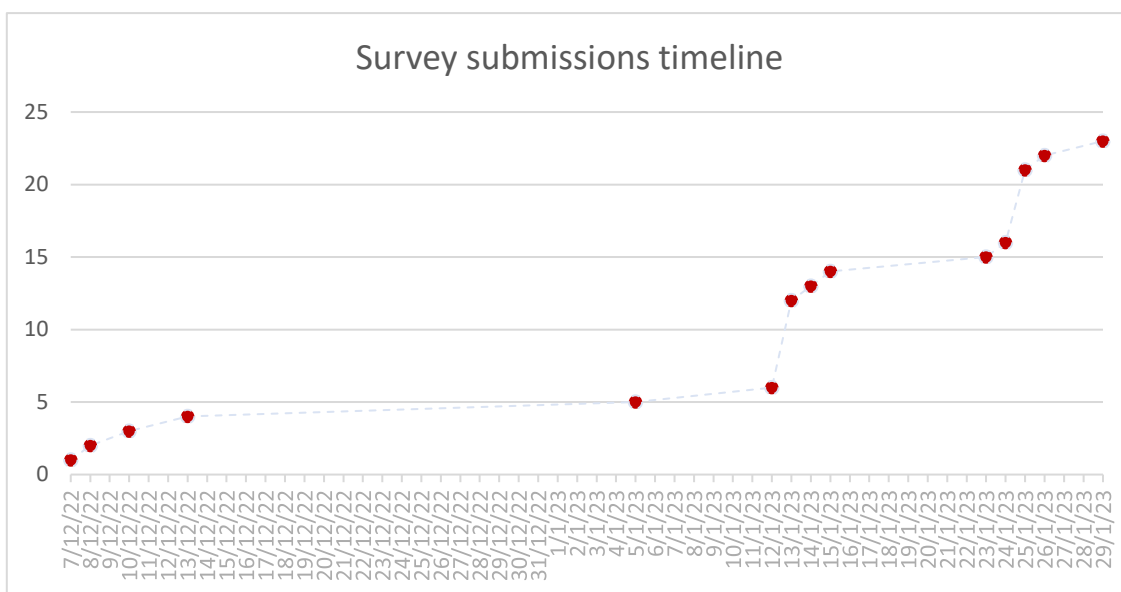
Key findings

- Only 23 businesses in Dún Laoghaire responded to the survey so this is a very small sample to draw conclusions from.
- There was a high level of awareness of cruise ships and their arrival dates, and among this group, communication methods were effective in delivering this information.
- Over 40% of the local businesses have made or plan to make changes to their stock in response to cruise ships.
- More than half the businesses are interested in participating in a town discount scheme, and an even higher number of them are willing to stock Dún Laoghaire branded goods.
- Most local businesses said Dún Laoghaire needs welcome ambassador program, but less than half the businesses are willing to participate in such program.
- Nearly half the businesses who responded to the survey have a unique offering that could be packaged as part of a tour.

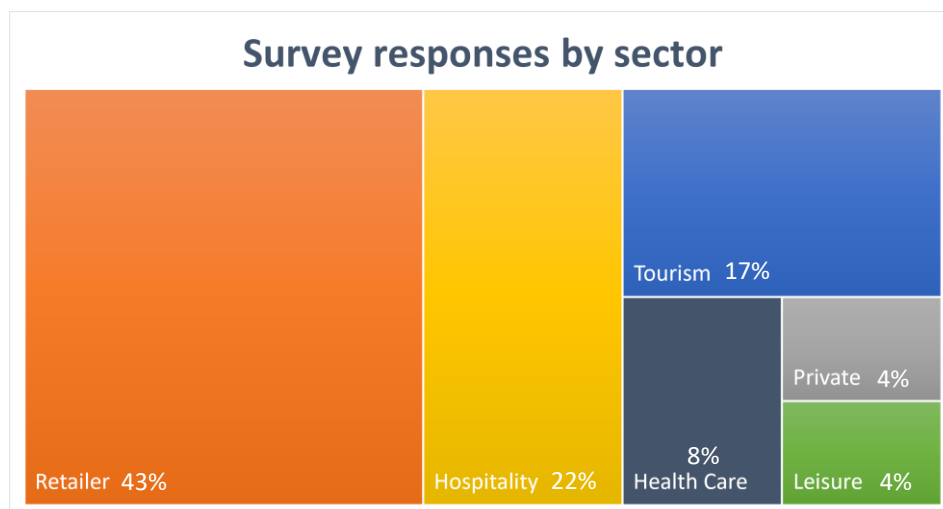
Survey Overview

The survey consisted of 20 questions which are divided into 4 sections. Business details section; 4 questions. Cruise ships awareness section; 5 questions. Business impact section; 9 questions. Notes/suggestions section; 2 questions. The survey was designed to present questions based on the flow of the logic. This means that certain questions only show if the answer of the previous question satisfied the logic of the survey. It was designed that way to reduce the need for unnecessary user input. An example of this is the cruise ships arrival dates awareness question, which only shows if the user answered “yes” to the previous question about the cruise ships awareness.

The survey was live from 7th of December 2022 to 29th of January 2023, with a total of 23 completed submissions collected throughout this duration.



The majority of the responses obtained in this survey were contributed by businesses in the Retail sector, with the Hospitality and Tourism sectors following closely behind in terms of the number of responses received. A comprehensive distribution of the responses by sector has been presented in the following graph.



Survey Results

This section will include analysis drawn from the responses to questions or question groups. The reliability and accuracy of the analysis of this survey is dependent on the reliability and accuracy of the survey respondents, the analysis assumes the responses are accurate and reliable. Analysis will be done for each section of the survey, and relations will be drawn from the replies to different questions within each section as well as across the different sections.

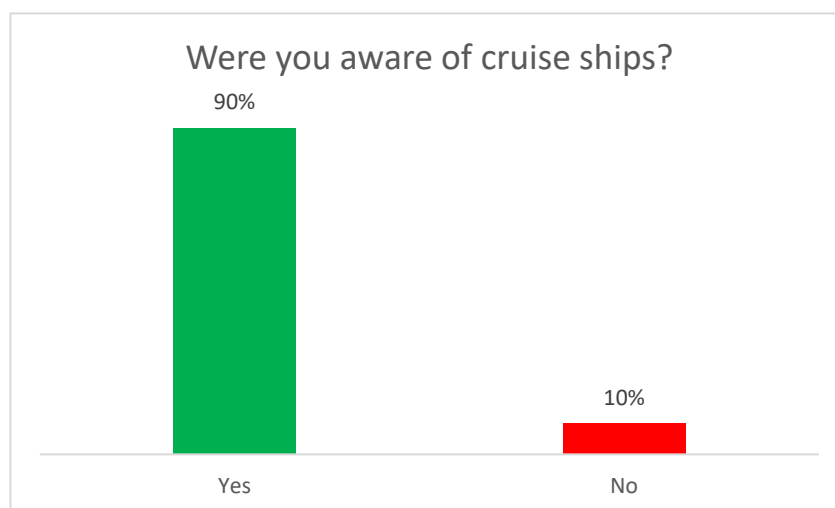
In some parts, a cross-tabulation analysis was conducted to examine the relationship between different variables in the survey responses. This technique is also known as contingency tables and is useful for understanding how the responses to one question relate to the responses to another question. In other parts, similar but non-quantitative analysis was made as well. Finally, it is difficult to draw any firm conclusions due to the low uptake in the survey.

Awareness of cruise ships

The survey starts by checking the awareness level of cruise ships by the locals, this is done with a series of questions starting with the question:

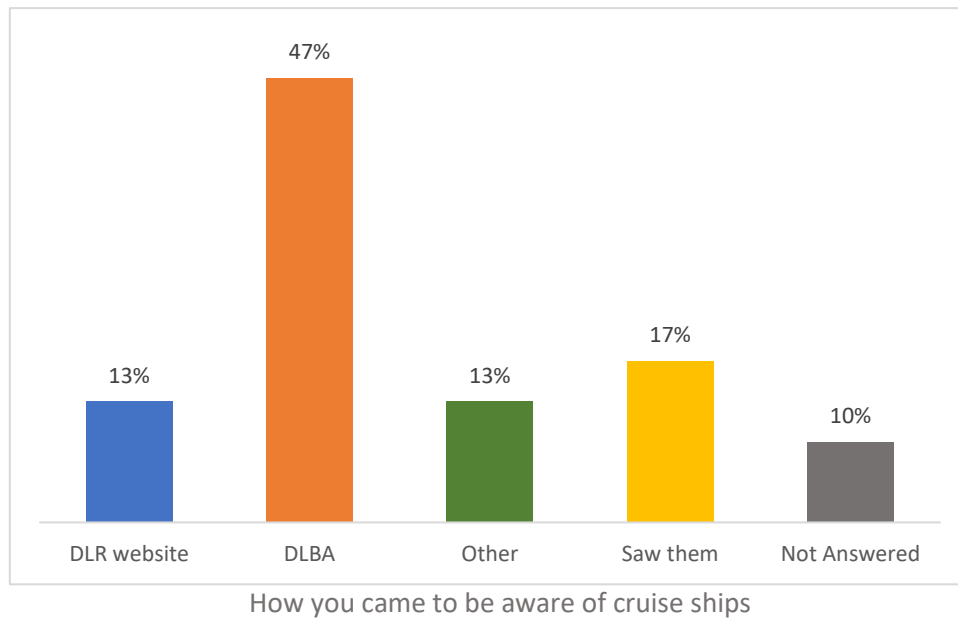
“Were you aware of cruise ships coming to Dún Laoghaire this year”

Survey results show a significant majority of 90% of the respondents indicated that they were aware of the cruise ships in Dún Laoghaire for 2022. However, there was a relatively small subset of 10% of respondents who indicated that they were not aware of such plans. Specifically, 5% of the respondents who answered "No" to this question belonged to the tourism sector, while the remaining 5% were affiliated with the healthcare sector. A graphical representation of the distribution of responses to this question is provided on the following page.



“How respondents came to be aware of cruise ships” was the follow up question, to gauge the effectiveness of communication methods compared to other options. The available options to choose from were: Dún Laoghaire website, DLBA, Saw them (physically seeing the ships), Other, or not answered (was not aware of cruise ships to begin with). Of those 90% who were aware of cruise ships, nearly half were informed by the DLBA. Breakdown of all the methods can be seen in the

following graph, where the 10% who were not aware of cruise ships are represented by the “Not Answered” option.

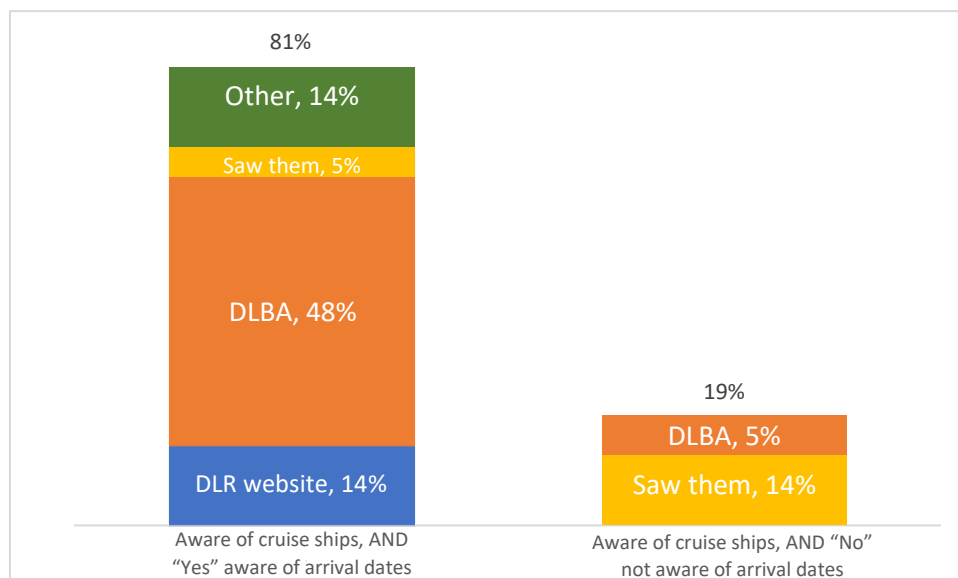


The 90% group were asked a follow up question to measure how informed they were, question being:

“Were you aware of cruise ships arrival dates in Dún Laoghaire this year”

Excluding the “Not Answered” group above, 81% of the 90% group who were aware of cruise ships, were also aware of the cruise ships’ arrival dates. All were asked a follow up question as to how they came to be aware of cruise ships’ arrival dates, and the graph below shows the answers’ percentage matched against the mean of how they were informed.

Were you aware of cruise ships arrival dates?



The graph also shows that means of communication were efficient for the most part. Respondents who were not aware of cruise ships arrival dates were mostly (75%) the ones who only

realised there were cruise ships after physically seeing them. The rest (25%) who were informed about cruise ships by the DLBA but were not aware of the arrival dates.

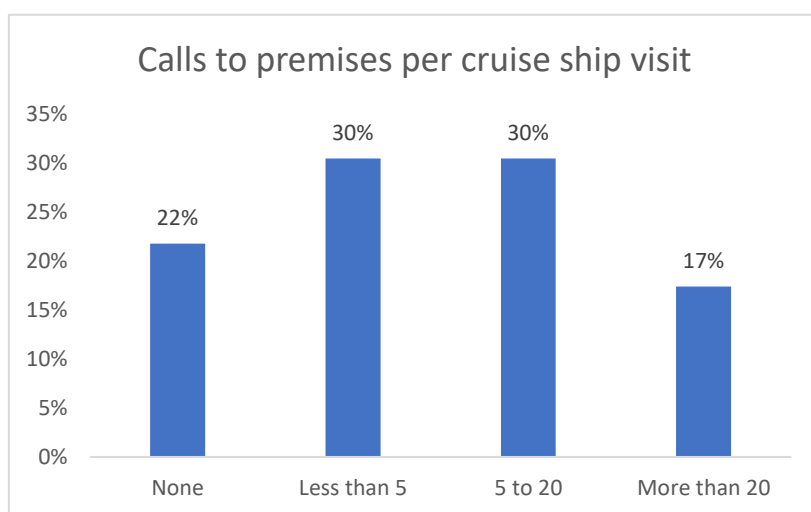
Dún Laoghaire website, DLBA, and other methods were all successful methods to communicate both cruise ships and their arrival dates. However, it can be seen from the graph that the DLBA was the most successful in communicating the cruise ships, with nearly 50% reach compared to 14% reach for both Dún Laoghaire website and other methods.

Business impact

This section of the survey was designed to assess the impact of cruise ships on local businesses. The first question in this section asked respondents to report on the average number of cruise ship passengers or crew who visited their premises during each ship visit, the question was:

“On average, how many cruise passengers/crew called to your premises per visit”

Respondents were presented with a range of options for their answer, including "None," "Less than 5," "5 to 20," and "More than 20." The responses to this question revealed that most businesses experienced a moderate level of visitation from cruise ship passengers and crew during each visit. The majority of respondents provided answers within the “Less than 5” and “5 to 20” range. However, smaller number of businesses reported either no visitation or a higher volume of visitors, with responses falling into the "None" or "More than 20" categories. The next graph shows the breakdown of the responses.



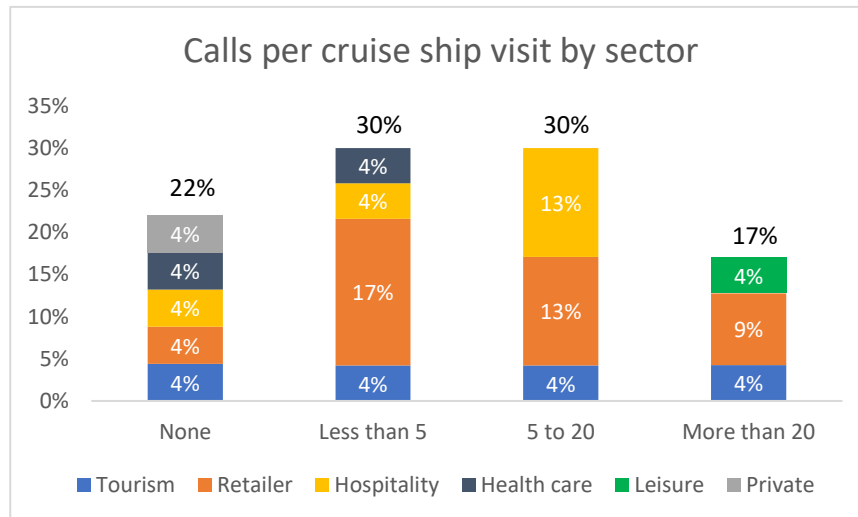
Second, third and fourth answer groups were all aware of the cruise ships, the only difference is in the percentage of awareness of cruise ships arrival dates. Therefore, from this point the analysis will ignore the cruise ships awareness factor for this question because it is the same for all the remaining answer groups.

Second answer group (replied “Less than 5” to this question) were 86% aware of cruise ships arrival dates. Communication method for this group were 57% DLBA, 28% Other, and 14% not answered (not aware of arrival dates). 90% of the third answer group (replied “5 to 20” to this question) were aware of cruise ships arrival dates, with method of communication being 70% DLBA;

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15% other; and 15% not answered (were not aware of arrival dates). The fourth and last answer group (replied “More than 20” to this question) were also 90% aware of arrival dates. Method of communication was 50% DLBA, 25% other, and 25% not answered (were not aware of arrival dates).

By exploring the sectors, a relationship might be seen between cruise ships business impact and the business sector. The graph below shows the breakdown of the business impact question by sector.



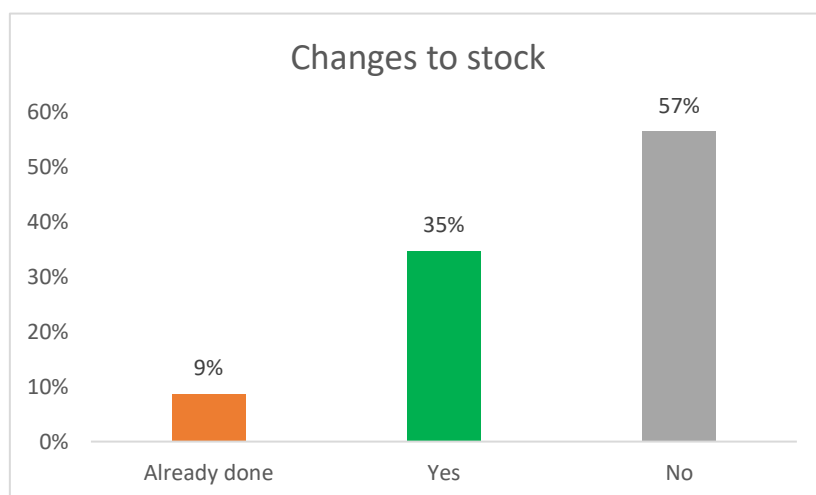
The above shows that Tourism sector performed consistently across all groups, Leisure sector is confined in the higher end group, and Retail sector performed best in the second group while Hospitality is present in most groups with highest presence in the mid-high end.

Effects of business impact

This part of the analysis is still within the business impact section of the survey; however, it measures the willingness of the businesses to adapt to the impact (or potential impact) of cruise ships. The next question in the business impact section was:

“Do you intend making changes to stock to respond to demand from cruise passengers/crew”

The answer options available to this question were “Yes”, “No”, and “Already done”. More than half the replies were negative, respondents were not intending to make changes to stock to respond to demand from cruise passengers/crew. Breakdown of the replies to this question is as below:



A few interesting facts can be seen when linking this to previous questions. Respondents who were not aware of cruise ships answered Yes, they intend to make changes to stock. Those who already made the stock changes (replied “Already done” to this question) were among those who were aware of ships arrival dates. Finally, even though it might be expected, there is no obvious relation between the replies to this question and replies to previous question (cruise ships customer calls to premises).

Considering retail sector is the most affected by stock decisions, another fact can be noticed when matching this question to retail business sector. The 9% that already made changes to their stock were all in the retail sector, which make 20% of the whole 43% of retailers who responded to the survey. Only 30% of the retailers said “Yes” they will make changes to their stock in response to cruise ships, the remaining 50% of retailers said “No” they do not intend to make changes to their stock.

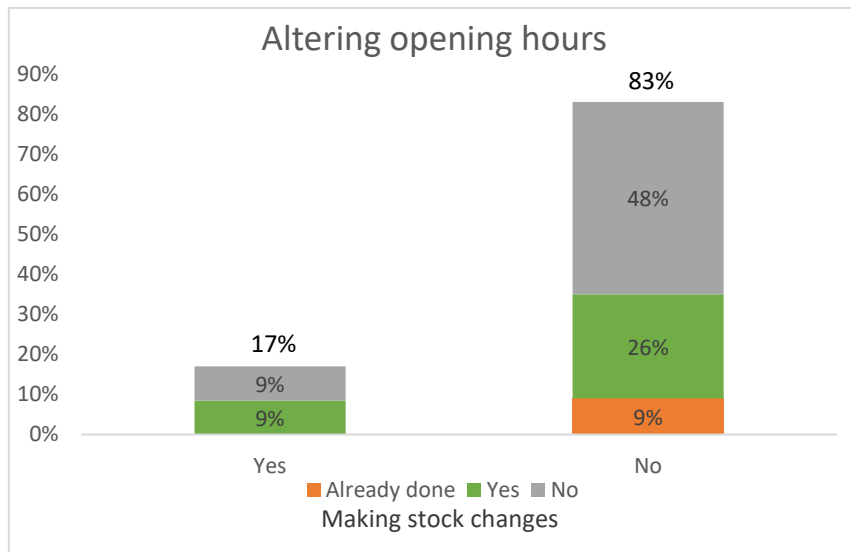
The follow up question to measure the cruise ships impact on businesses was intended to gauge the willingness of businesses to make any changes, other than changes to stock, in response to the cruise ships. The question was:

“Do you intend altering opening hours, shop display or staff rosters in response to the arrival of cruise ships into the harbour”

83% of the respondents replied “No” to this question, this includes the Hospitality and Retail sectors which are most relevant to this question. All of the respondents in the Hospitality sector said they do not intend to alter their opening hours, and only 10% of retailers said they intend to change their

opening hours in response to cruise ships. It may be that there is no need to alter opening hours, given the arrival and departure times of the vessels.

The 83% who answered “No” include the ones who were willing to make changes to stock or already done so as well as those who were not. On the other hand, 50% of the respondents who answered “yes” to making stock changes in response to cruise ships, also answered “Yes” to altering opening hours. The following graph shows the breakdown of this question (altering opening hours) matched with the previous one (stock changes).



Potential for initiatives

The next series of questions were intended to engage with the businesses and get their feedback regarding initiatives that can be introduced in Dún Laoghaire. The first question of those was:

“If a town discount scheme for passengers/crew was set up, would you be interested in participating”

60% answered “yes” they would be interested in participating in a town discount scheme, the remaining 40% answered “No” they would not be interested in such scheme. The number of customer calls to premises does not seem to be a factor in answering this question, nor the willingness to make stock changes and/or altering opening hours. When matching answers to this question to the previous questions (customer calls, stock changes, opening hours), answers seem to include every other answer group in no/non-clear pattern.

The following question was regarding Dún Laoghaire branded goods, the question was:

“If Dún Laoghaire-branded goods were available (e.g., tote bags, magnets, etc), would you be willing to stock them”

74% of the respondents answered “Yes” they are willing to stock Dún Laoghaire branded goods, and 26% are not willing and answered “No”. From this group (who answered “No” to this question); 66% answered “No” to discount scheme, 83% answered “No” to altering opening hours as well, 66% answered “No” to making changes to stock, and more than half of them were among the businesses who reported “None” or “Less than 5” calls to premises per cruise ship visit.

The next two questions were regarding the “Welcome Ambassador” program, the two questions that were asked were close ended questions with Yes/No answers. The questions were:

“Some ports operate a ‘Welcome Ambassador’ programme where highly visible volunteers provide directions, information and a welcome to guests. Do you think this is needed in Dún Laoghaire? - Welcome Ambassador”

“If such ‘Welcome Ambassador’ programme were introduced, would you be willing to participate? - Participate in Welcome Ambassador”

For the first question, 86% said “Yes” Dún Laoghaire needs a welcome ambassador program. However, only 50% of those said they would be interested in participating in such program if it was introduced. Not everyone who answered “Yes” to the first question answered the same for the second, and vice versa.

Unique Offering

The final two questions in this section of the survey sought to explore the unique offerings and experiences available among local businesses. Specifically, respondents were asked whether they possessed a distinct offering or experience that could be packaged as part of a tour. This could include a wide range of activities or other forms of hands-on experiences that might be of interest to tourists.

Of the respondents who answered this question, 43% indicated that they did in fact have a unique offering or experience that could be packaged as part of a tour. This suggests that a significant proportion of local businesses possess assets that could potentially be leveraged to support the growth of the local tourism.

The table below provides a summary of the unique offerings reported by respondents across different sectors. This information can help to identify potential areas of focus for tour packages or marketing initiatives, and could be useful in supporting the development of partnerships or collaborations among local businesses.

Sector	Unique offering
Tourism	Guided walking tours of DL
	Activity based your of harbour area from water, to include options on electrically assisted kayaks, powerboats tours to include bay landmarks.
	Capacities from 3-80+, timings usually are 2h windows during daylight hours.
	We offer InstaTours, help people shoot amazing Instagrams. We do that by bringing people to the most Instagrammable spots, show them how to take amazing pictures and tell stories about the local area.
	This is a locally owned business with tours offered in 8 cities across UK and Ireland. We've previously done local tours of Dún Laoghaire so this could fit in with a possible route. On timings, it can be 1, 2 or 3 hours. Our capacity is 60 but we can scale up if demand is there. Start location is also open and would be great to work with the council to highlight local great sites.
	The benefit to Dún Laoghaire county council is we will help people take amazing pictures for their Instagram, post and build an online viral reputation as a great port to visit. We're only ones globally offering a tour like this and rated as top photography tour on Tripadvisor.
Retailer	Link in with either hotel for an experience... All local/Irish made goods available- shipping offered.
Leisure	The Water Wags race historic boats which have been racing in the Harbour since 1887. The Water Wags are the oldest one-design sailing dinghy in the world. We race in the harbour on Wednesday evenings from late April until mid-September. If the cruise liner visitors realised that we were such a historic activity, their launches' crews would point us out to the passengers and would be quite happy to keep out of our way. In 2022 they sailed straight through our race course/ caused us to have to delay racing/ failed to depart at their designated time etc.
Hospitality	walking tours
	Coffee roasted in Dún Laoghaire

Health Care	Pain relief package: 110, 1hour
	Tea testing package 20 mins
	Healthcare needs for tourists and free advice from qualified healthcare personnel

Suggestions/Notes summary

The final section of the survey aimed to elicit additional feedback and suggestions from respondents regarding how to best encourage cruise ships passengers and crew to spend time in the local area. This open-ended question provided an opportunity for respondents to share their thoughts on how to improve the experience for cruise ship visitors, and to offer any other relevant feedback or ideas.

Of the total survey respondents, a substantial proportion - 74% - provided specific suggestions on how best to encourage cruise ship passengers and crew to remain in the town. These suggestions varied widely and included ideas such packaging the "Dún Laoghaire Experience" as an onboard tour, leveraging the town's unique attractions, providing more signage, and offering hop-on hop-off transportation. Table below is summary of the suggestions

It's too late selling DL when the passengers disembark. We should work with Excursions Ireland to package the "DL Experience" as an integrated package of events that would be sold on board the ship at a mark up big enough for the cruise ships to want to sell it.
We should also see what sort of leverage we have over the cruise ships to actively promote our destination product given that we have some degree of leverage since they physically can't dock in Dublin anymore.
Making a ring of Kerry or Wild Atlantic Way equivalent e.g. Dún Laoghaire Way with route map marked with tourism sights and shops on the way. More beautiful street art needed for the TikTok generation and photography.
As I know the team are well aware we need the Cruise operators , (& passengers), to understand they are coming to Dún Laoghaire in it's own right- not just as a dis-embarkation point. So the promotion of Dún Laoghaire as an actual destination needs to happen well in advance
Vouchers distributed to passengers while they are disembarking.
You guys are already pursuing getting the information on the local area to the Cruise line operators. Has to be room to use "great Town" in the promotions
Lots more signage
Interactive touch screen needed
Somehow get through "Excursions Ireland" to the cruise passengers a few days before they dock - quite impossible but we can try!!
Your previous suggestion of a welcome ambassador would probably suffice
The biggest one of all would be if the liners could dock in the port , I know it's not possible but more passengers would disembark then !!
A leaflet to be distributed to both passengers and crew detailing the offer that the town has in local and historical value prior to their arrival in the town. Together with an ambassador on board on arrival to facilitate any questions.
very badly written question!!
Hop on hop off transportation from port to town to Joyce's Tower.

Ambassadors / Maps / Events in town centre / Returning coaches drop passengers off in town centre not port.
We tried to get an email for each ship to inform them in advance of the attractions - but to no avail. A 'welcome pack' would be beneficial - but something in their hands the night they set sail to Dún Laoghaire so they can plan.
advertise with cruise operator
Build a deep sea dock so the bigger cruise ships can dock in the port, then more passengers will disembark.
The strongest offering would be quality restaurants such as Olivetto and Hartleys. Cruise visitors would probably welcome a break from ship food. The Ambassador program is a good way to start.
When will the digging be finished in the town? It is going on too long and is unsightly. More police presence would make tourists feel safe.
Clear signs to Main Street and leisure area
Big sign that says something simple like Dún Laoghaire town since XXXX. Ireland's old sea town or something like that. Tourists love visiting old historic sites.
Keep the town clean and tidy is good start. All the renovations and reparations are brilliant but they aren't maintained properly. The areas around DL Dart station, the Pavilion, Marine Rd. etc. could all use a good wash. Power hose the areas where people wait for the buses to make the town more attractive.

In response to the second question in this section, which asked if respondents had any additional thoughts to share beyond their suggestions for encouraging cruise passengers and crew to remain in the area, 34% of respondents provided further feedback.

The below provides a summary of the notes.

<p>1. While in our business we don't think we will see an increase in sales to the Cruise line passengers we fully understand that Dún Laoghaire need the harbour to produce income which we assume can go towards the necessary maintenance of the Harbour structure.</p> <p>We appreciate you are limited on disclosure but it would be useful for the business community to understand how financially valuable the cruise line visits are to the upkeep of the harbour. The better we understand the importance of the visits, the better we can spread the word in the community</p> <p>2. Most of our customers use Dublin Bay for on-the-water leisure; swimming, dinghy sailing, cruiser sailing, kayaking, paddle-boarding, etc. There is a perception within parts of the community that Cruise Liners are not particularly environmentally friendly and a concern about how/where they dump their sewage waste. Some clarity on this would be welcome</p> <p>3. The dlharbour.ie website has a webcam link - suggest you expand this if possible - have a look at the Afloat.ie webcams of Dublin Bay</p>
<p>In practice, cruise liners add little value or spend to the town. The passengers disembark onto buses which then go to locations such as Glendalough, Kildare etc. Cruise passengers rarely spend money in the towns they visit. The town would be better to encourage locals to come to Dún Laoghaire rather than them going to Dúndrum. The initiative to improve George's St is exactly the kind of initiative to support.</p>
<p>I'm happy to continue to liaise with the Harbour personnel to inform the DLBA</p> <p>Sinead</p>
<p>This was a survey done by the Dún Laoghaire BID company</p>
<p>https://docs.google.com/file/d/0B2_VD01aiJkzYjZ6a1BSSlpaN0k/edit?usp=drive_web</p>

To ensure Dún Laoghaire gets the most from Cruise Ship Passengers and staff it is important to have a close working relationship with the cruise companies. 90% of passengers have decided how they will spend their time on land long before they disembark the vessel. Engagement with passengers can begin as soon as they book their cruise. They then know they will have 6 - 8 hours in Dublin / Dún Laoghaire. It's up to Dún Laoghaire to ensure they get passengers to check out the town before or after their booked excursion. Cruise ships sell the tours so it is in their interest to have only crew in the town. A local tour Dalkey / Killiney / Sandycove / Monkstown / Dún Laoghaire should be proposed with lunch / drink - bookable on each ship.

More police presence to make tourists feel safe. A tourist office would help. Cleaner streets as there is detritus on the streets.

The Water Wags would like to be acknowledged by the cruise liner launches.