

WATERFORD CITY CENTRE SHOPPER SURVEY

QUANTITATIVE SURVEY

NTA

Prepared by:
Clare Kavanagh &
Sarah Chapman

October 2025



Contents

1

Research Objectives
and Approach

2

Reasons for Visiting
Waterford City
Centre

3

Mode of Transport
used

4

Length of Visit in
Waterford City
Centre

5

Anticipated Spend
in Waterford City
Centre

6

Summary of results

1. RESEARCH OBJECTIVES & METHODOLOGY



Research Objectives & Methodology

Objectives

The core objective of this research was to investigate how much money users of different transport methods are spending in Waterford city centre.

The research also aimed to ascertain the purpose of visits, length of stay and frequency of visits by mode of transport into Waterford city centre.

Methodology

Interviews were conducted face-to-face using tablets and a pre-programmed survey script.

Interviews were conducted on Broad Street, Apple Markets and Quay front in Waterford City Centre.

Respondents were aged 16+ year and living in Ireland.

Fieldwork

Fieldwork for the project took place from 1st to 29th September 2025.

Interviewing schedules were designed to deliver a robust cross section of visitors across time of day and weekday / weekend.

Sample

612 interviews were completed with the following spread across the three locations:

	N
Broad Street	193
Apple Markets	206
Quay Front	213
TOTAL	612

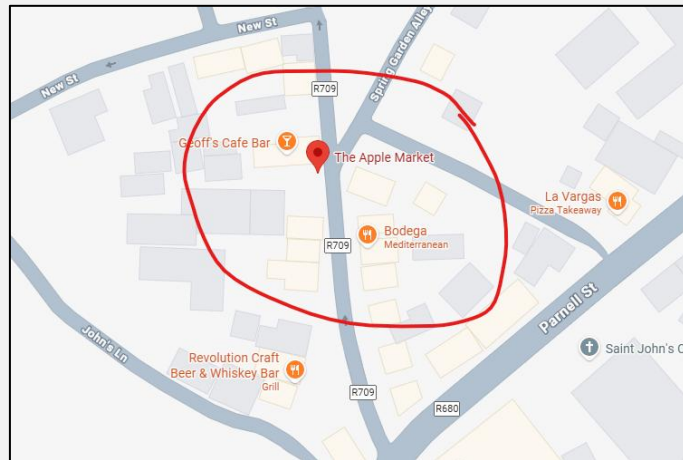
The margin of error is +/-4% at C.L. 95%

Interviews location

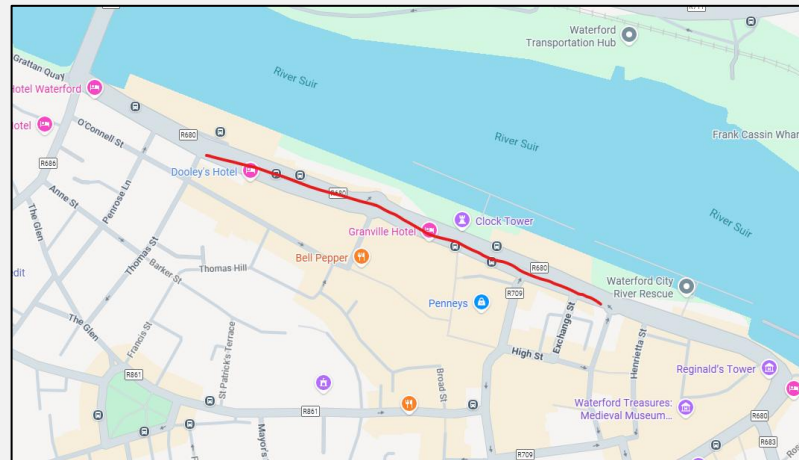
Interviews conducted in three locations in Waterford City Centre.

Interview Location

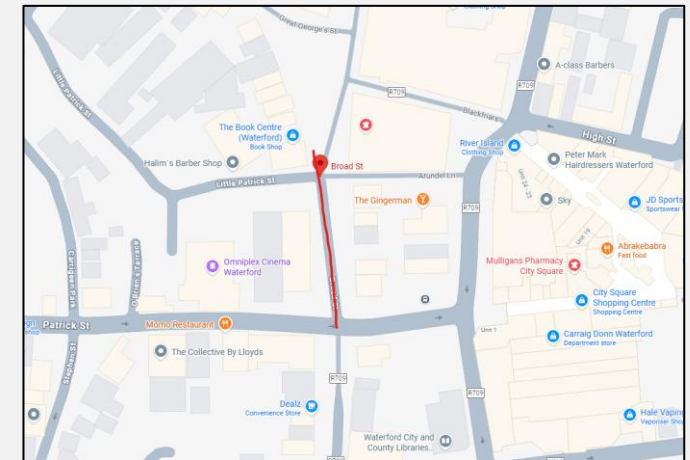
612
%



Apple Market



Quay Front



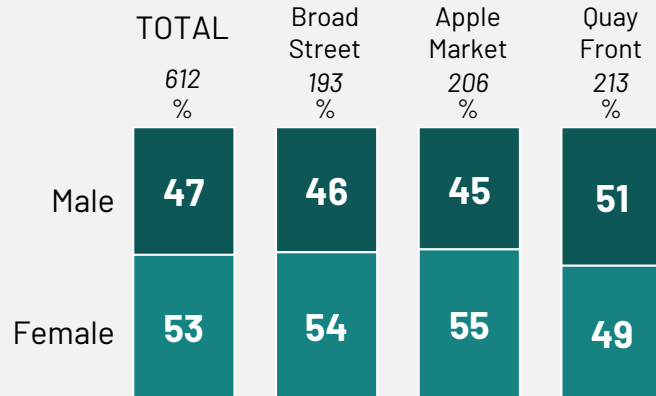
Broad Street

Base: All +16 in Waterford City Centre: 612

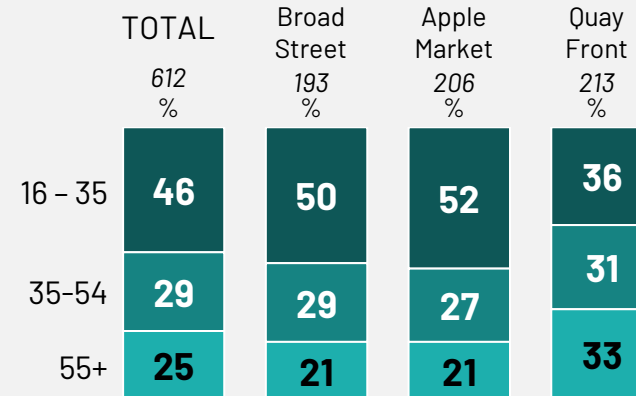
Profile of sample

Sample skews younger (46% under 35), ABC1 social grade (68%) and Waterford city based (54%).

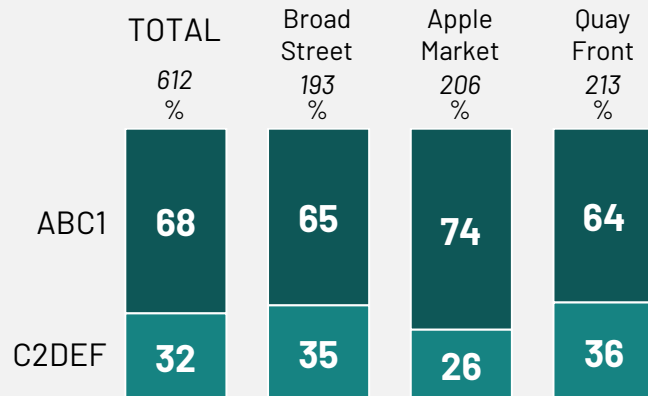
Gender



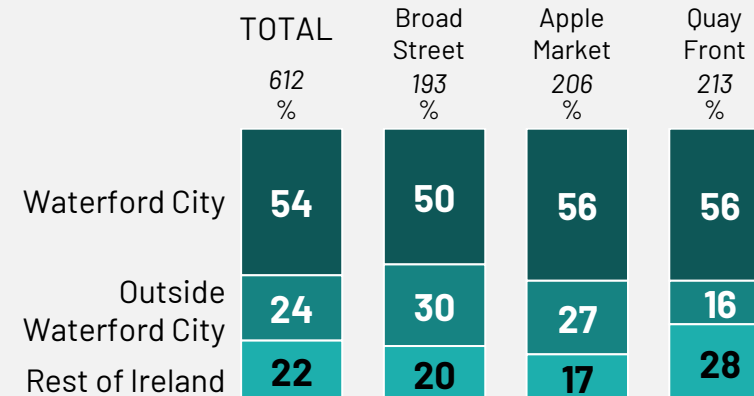
Age



Social Class



Where they live



Base: All +16 in Waterford City Centre: 612

Key Findings – Waterford City Centre Shopper Survey

57%

visited Waterford City via a sustainable mode of transport

€42

is the average spend among sustainable transport users

Sustainable transport users account for

41%

of total spend



Car users on average spend €77 and account for 53% of spend

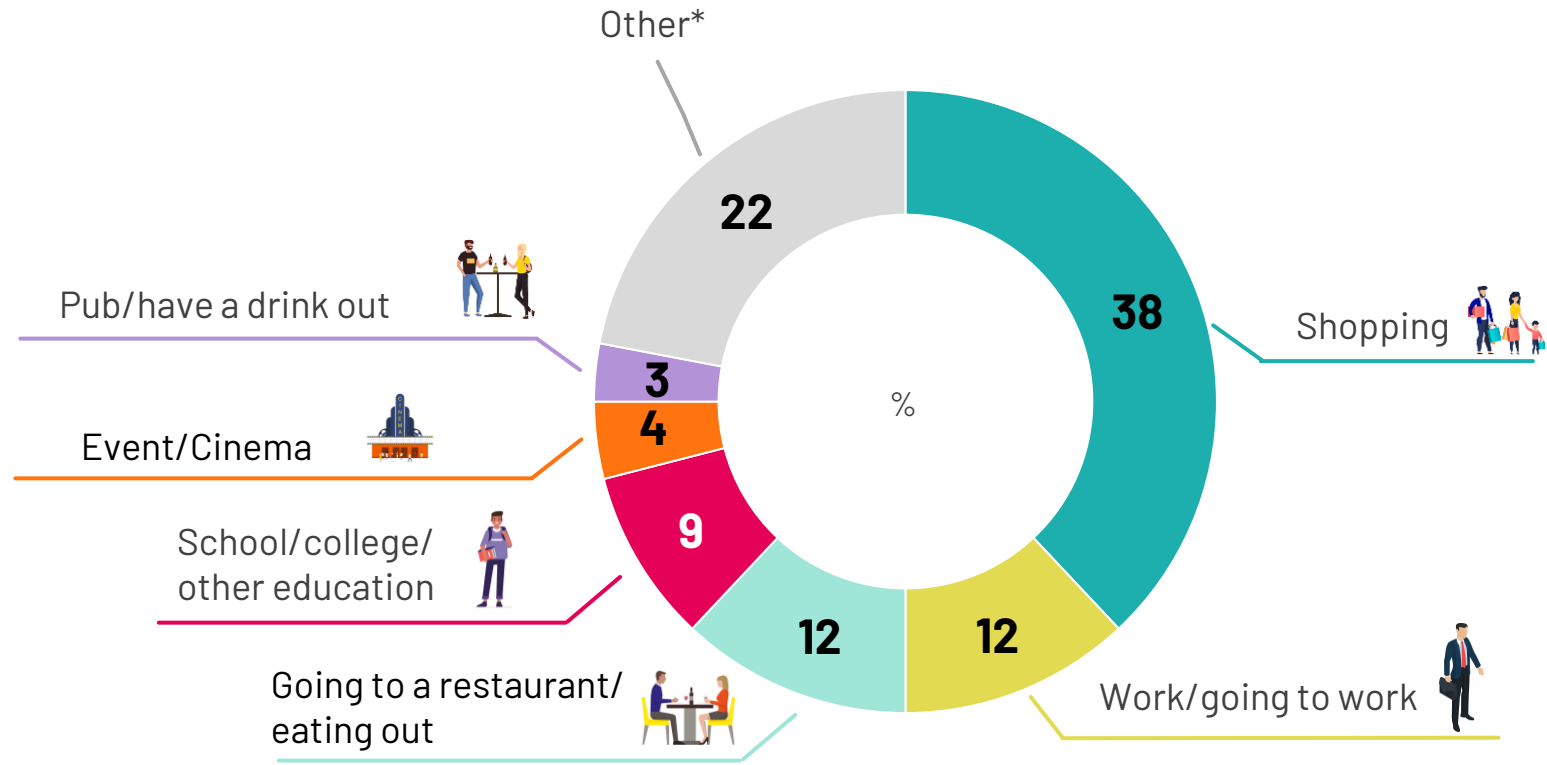
2. REASONS FOR VISITING WATERFORD CITY CENTRE



Main reason for visiting Waterford City centre

(on the day of the interview)

Shopping is the top reason for visiting the City centre at 38%, followed by dining (12%) and work (12%).

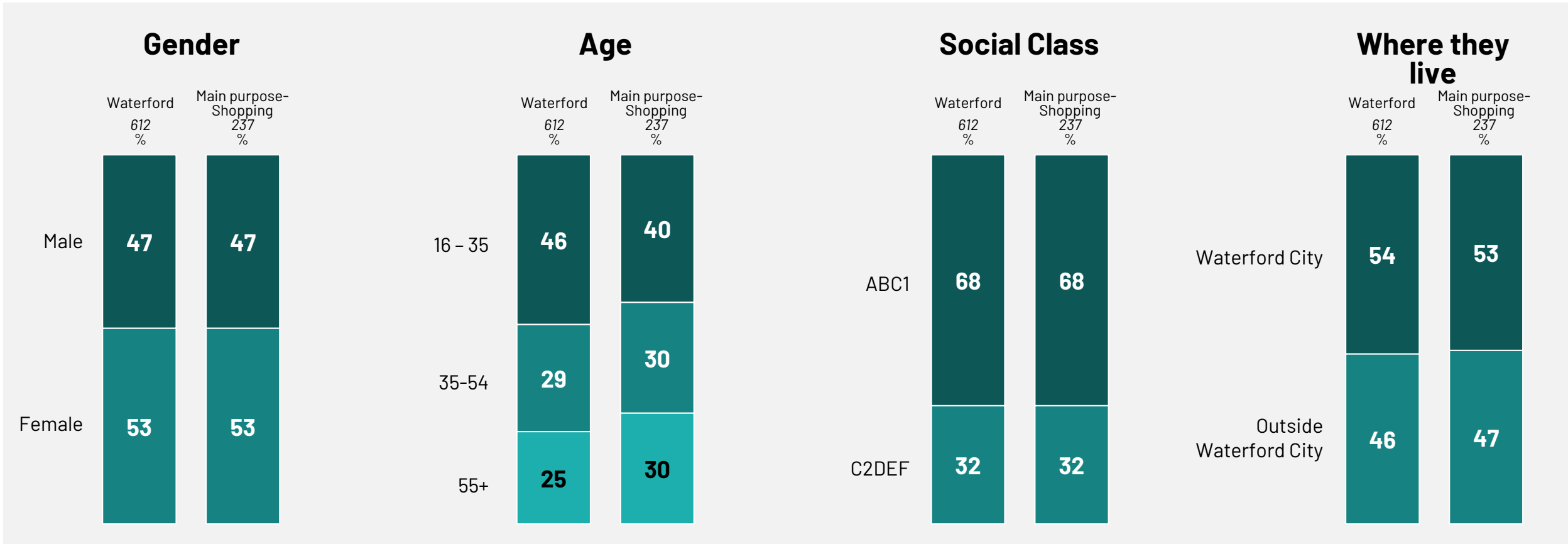


Main Reason Summary	%
Shopping	38
ANY work or school	21
ANY food or drink out	15
Event/cinema/theatre	4
Other	22

Base: All +16 in Waterford City Centre: 612
Q.2 What is the main purpose of your trip to the city centre today?

Profile of those visiting for shopping

Shoppers skew older with 30% over 55-year-olds.

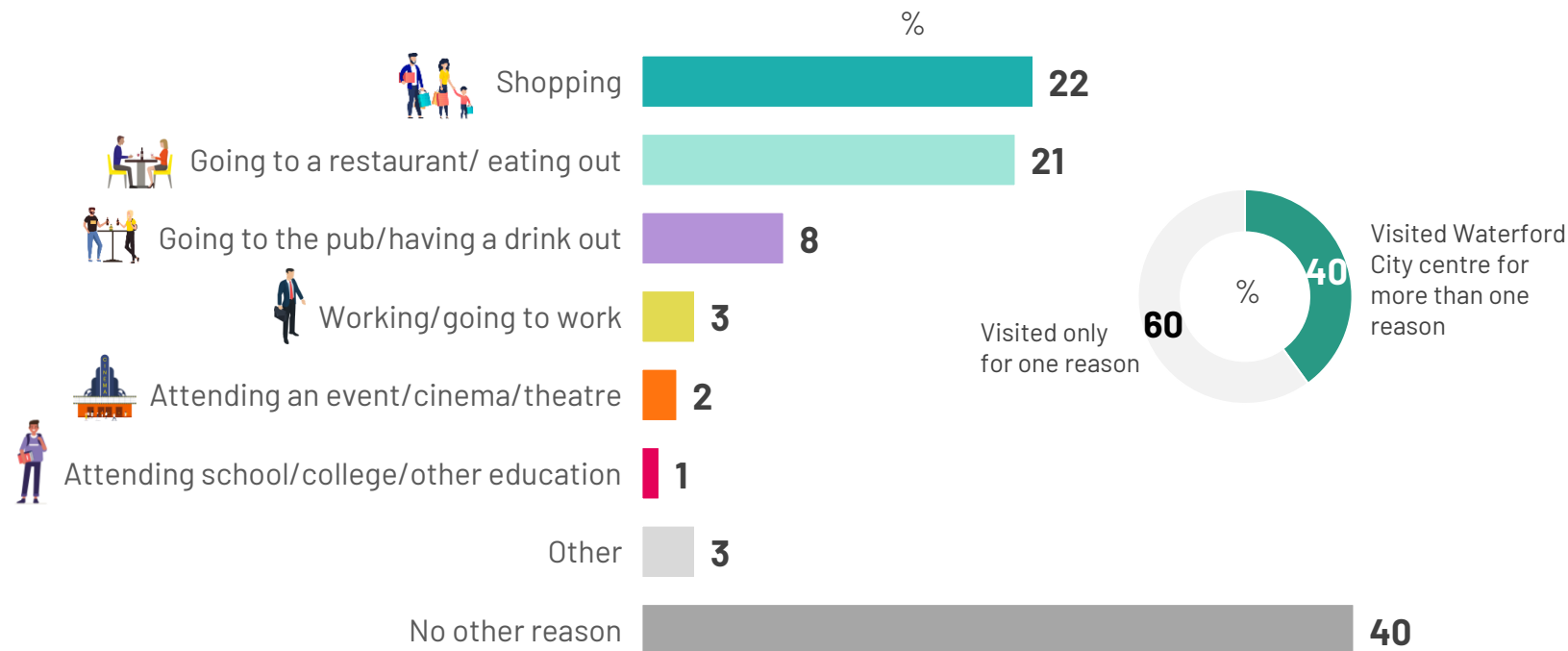


Base: All +16 in Waterford City Centre: 612
 Q.2 What is the main purpose of your trip to the city centre today?

Other reasons for visiting Waterford City centre

(on the day of the interview)

Four in ten have secondary reason for visiting the City centre, led by shopping (22%) and eating out (21%).



Other Reasons Summary	%
Attending school/college/ other education	1
Socialising	1

3. MODE OF TRANSPORT USED



Modes of transport used

(on the day of the interview)

Car is the top single mode of transport used at 40% followed by bus at 31%.

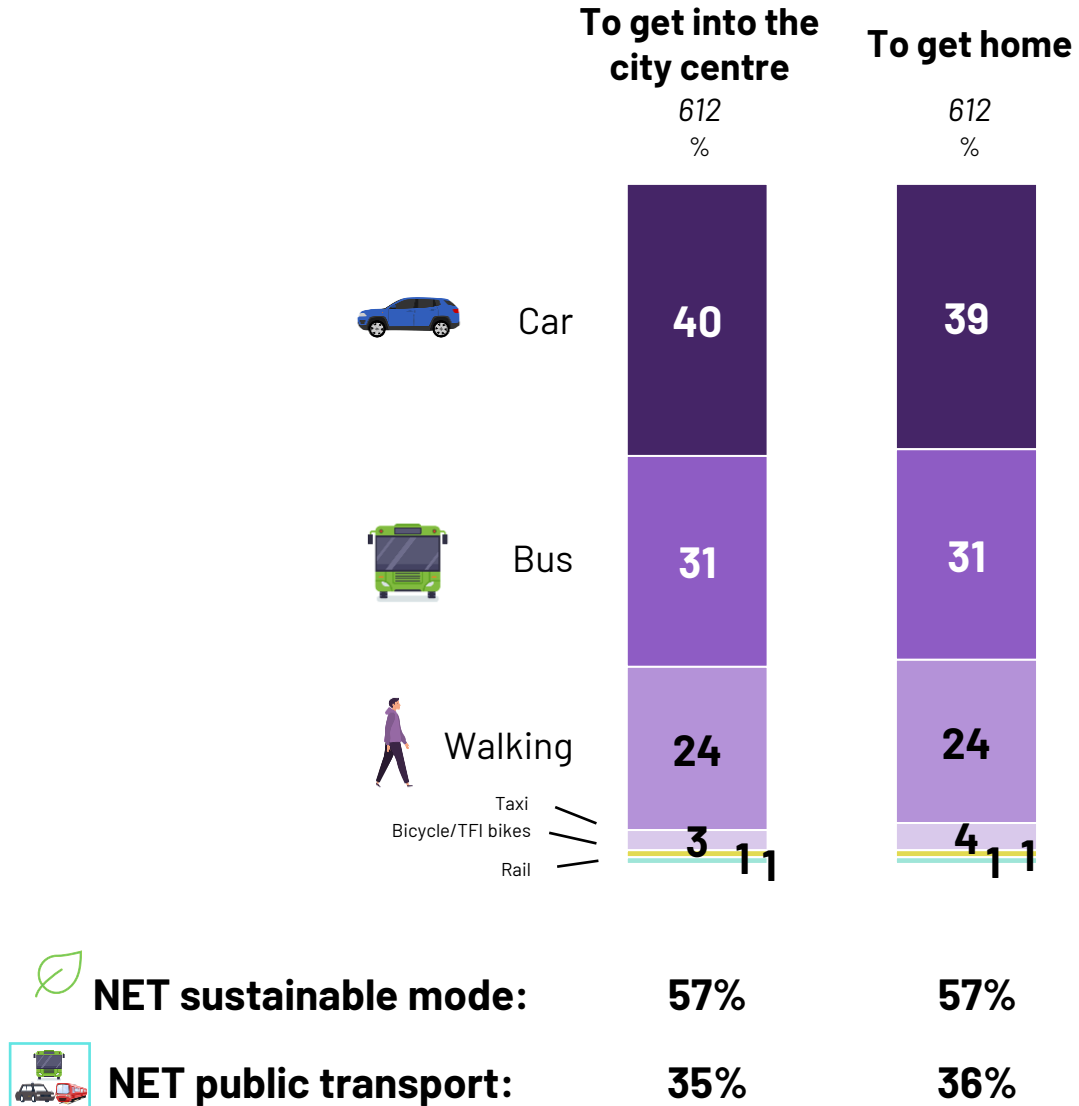
57% of visitors used a sustainable mode both ways with 35% using public transport.

Base: All +16 in Waterford City Centre: 612

Q.4 What was the main mode of transport you used to get into the city centre today?

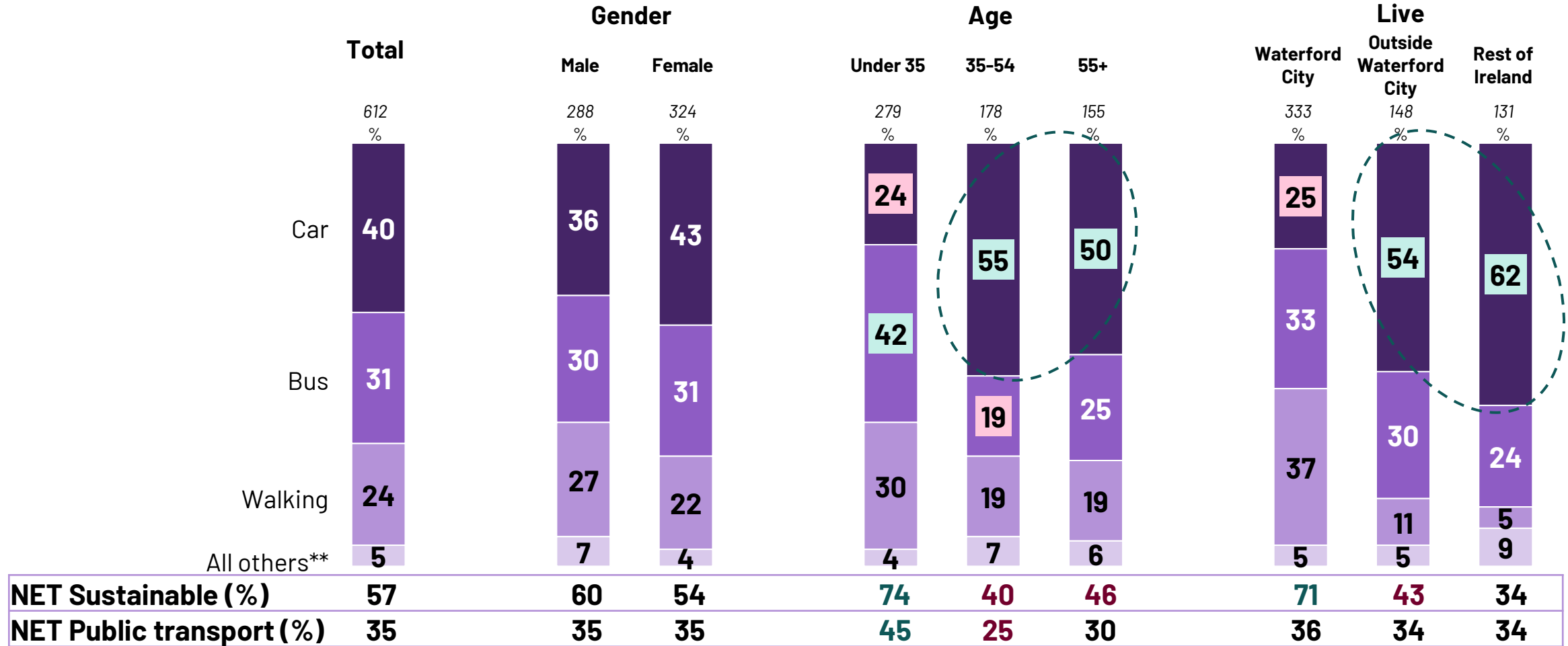
Q.5 What will be the main mode of transport that you will use to get home today?

Net sustainable mode includes Bus, Walking, Rail and Bicycle.



Modes of transport used by demos

Under 35s lean into bus travel while non city residents and over 35-year-olds default to the car.



Base: All +16 in Waterford City Centre: 612

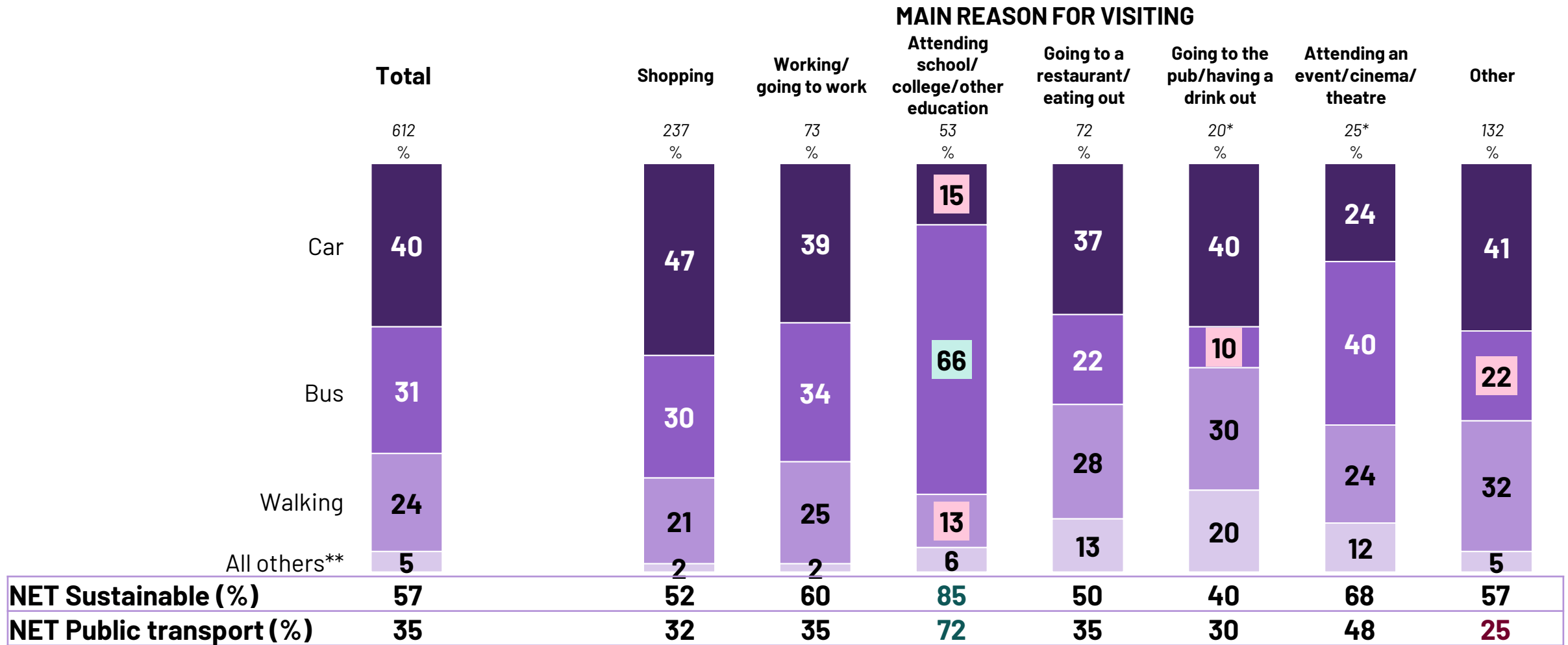
Q.4 What was the main mode of transport you used to get into the city centre today?

**Includes Rail, Taxi, Bicycle and Other .

Net sustainable mode includes Bus, Walking, Rail and Bicycle.

Modes of transport used by reason for visiting

Education trips are bus reliant. 47% of shopping visitors used a car to get to the City centre today.



Base: All +16 in Waterford City Centre: 612

Q.4 What was the main mode of transport you used to get into the city centre today?

*Caution: small base

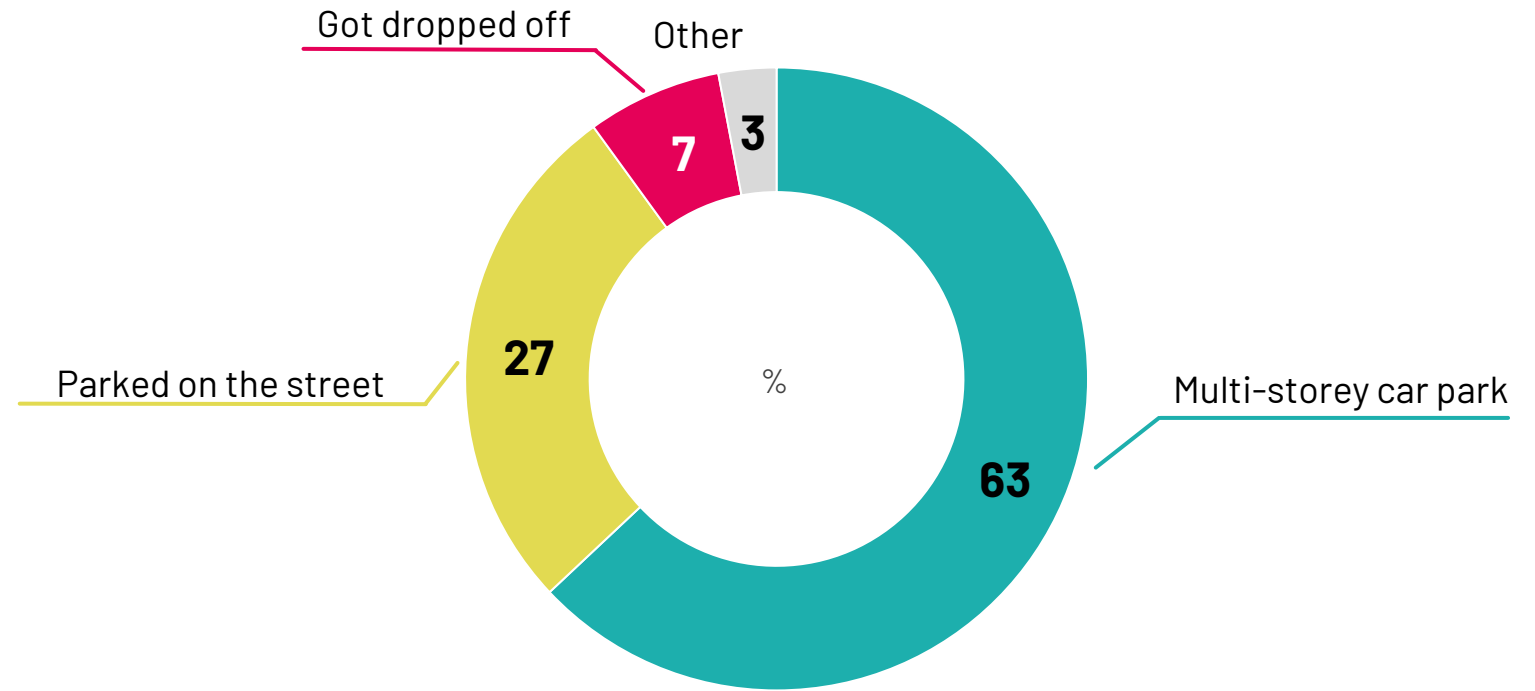
**Includes Rail, Taxi, Bicycle and Other

Net sustainable mode includes Bus, Walking, Rail and Bicycle.

Parking in Waterford City Centre

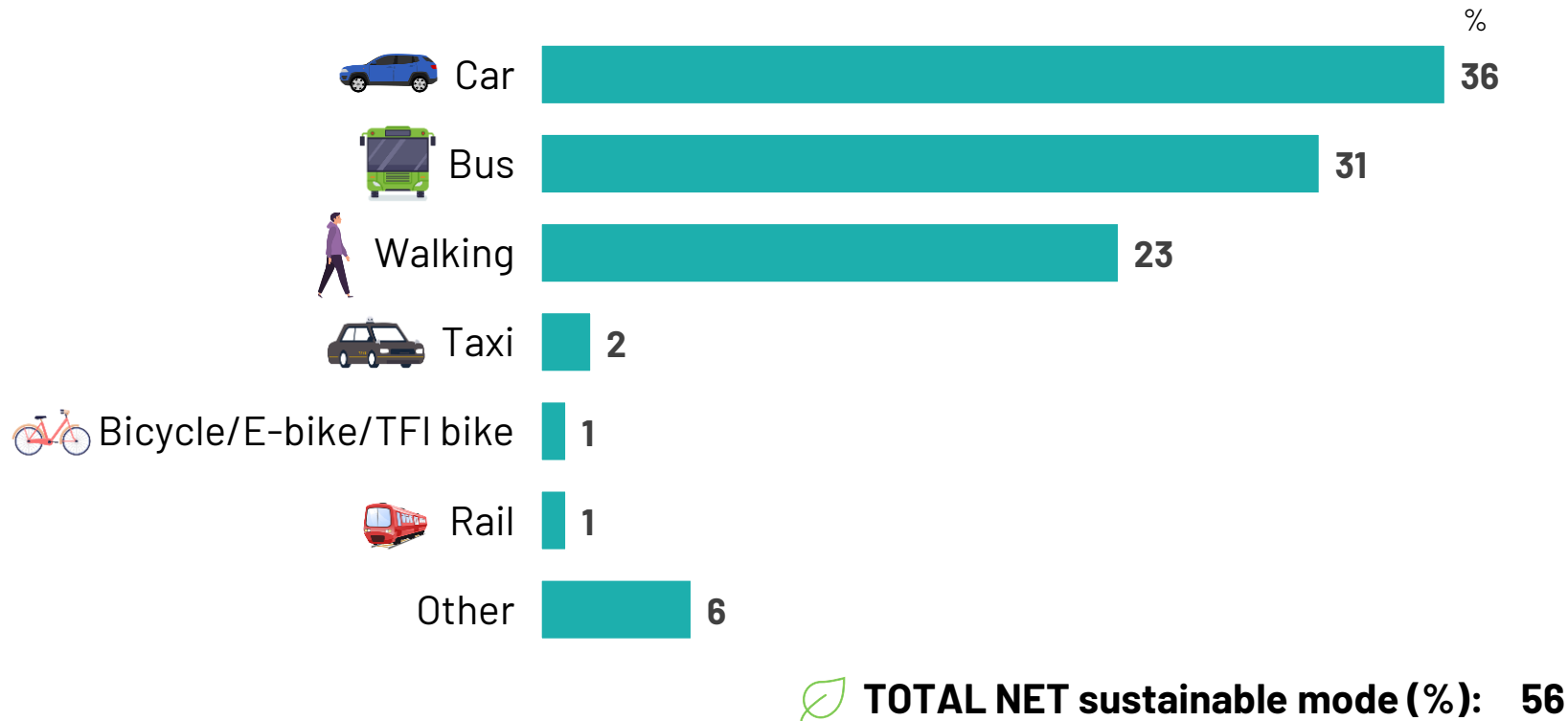
The majority of those who came to the City centre in a car parked – they weren't dropped off.

Most drivers use *multi-storey parking (63%)* with *27% using street parking.*



Main mode of transport used to get into Waterford City centre (past four weeks)

Across four weeks bus remains strong at 31%, although not as strong as car trips at 36%. 56% of visitors used a sustainable transport mode.



	Broad Street	Apple Market	Quay Front
	193	206	213
	%	%	%
	35	33	37
	30	34	31
	22	27	21
	2	0	3
	1	1	1
	1	2	1
	9	3	6
	54	64	54

Base: All +16 in Waterford City Centre: 612

Q.9 And what is the main mode of transport you have used to get into the city centre over the past four weeks?

Net sustainable mode includes Bus, Walking, Rail and Bicycle.

4. LENGTH OF VISIT IN WATERFORD CITY CENTRE

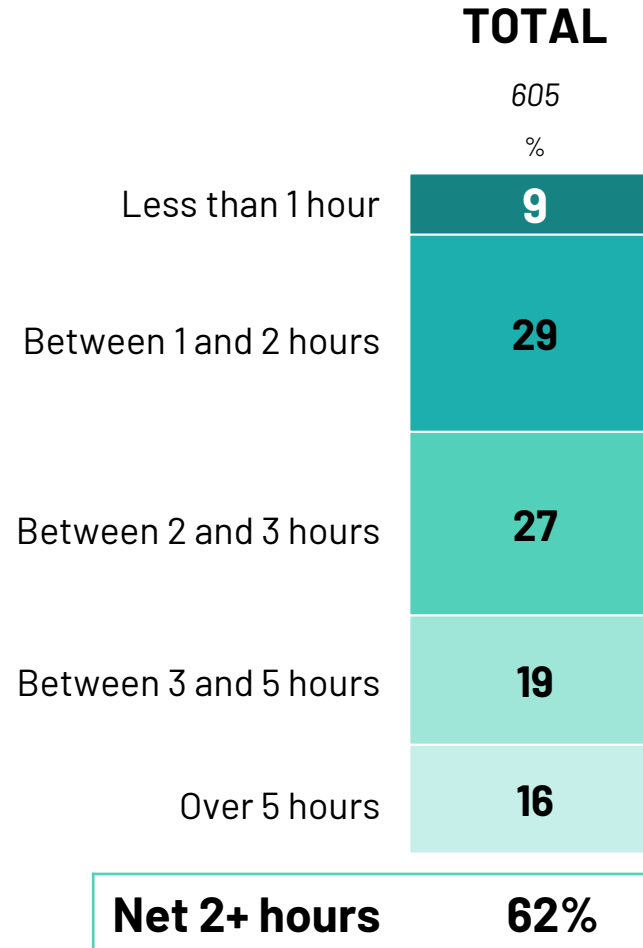


Anticipated length of visit

(on the day of the interview)

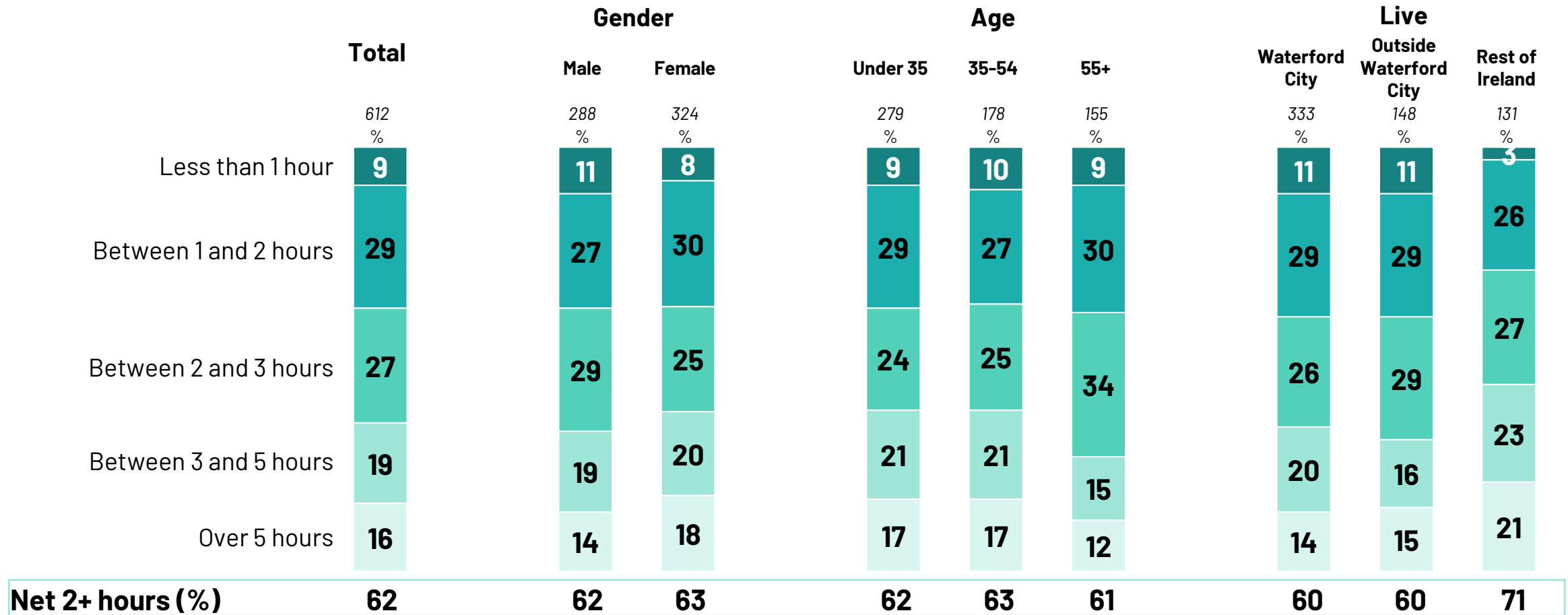
Three in five visitors plan to spend at least 2 hours in the City centre.

Just under one in ten are doing a quicker visit of up to an hour.



Anticipated length of visit by demos

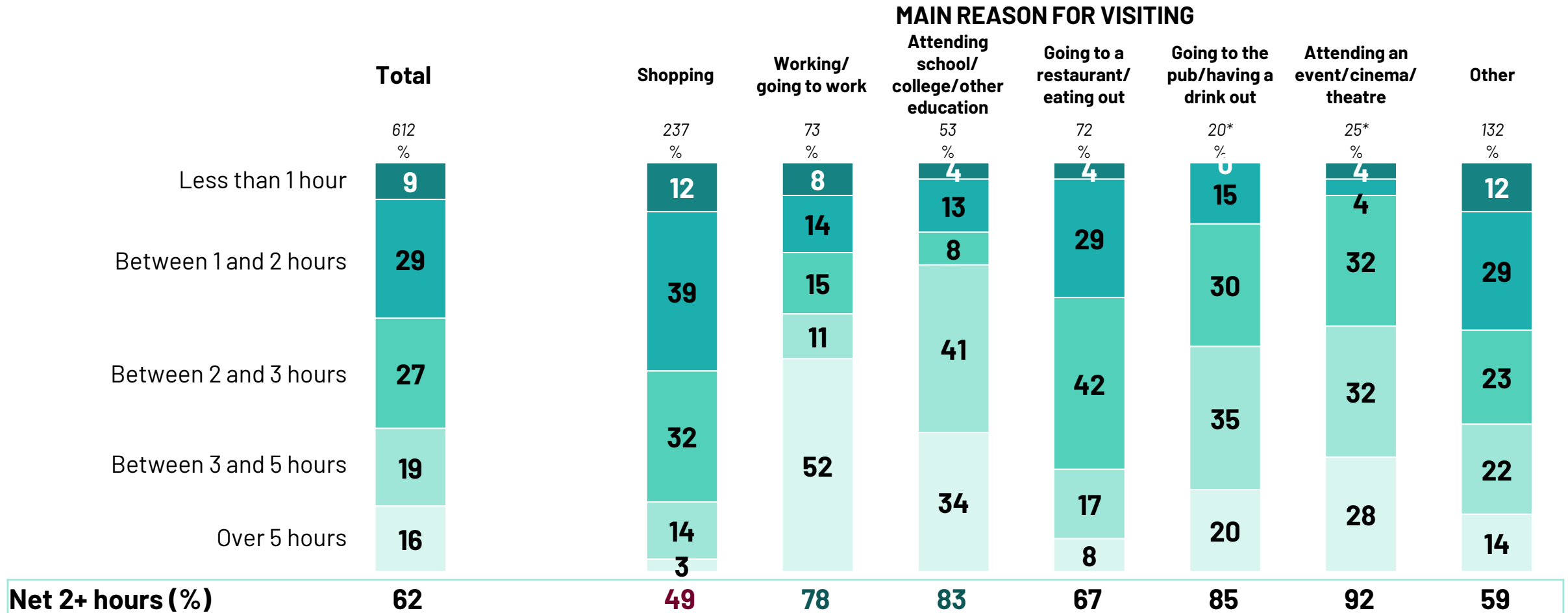
Time spent in the City centre is fairly consistent across demographic groups with a longer time spent among visitors coming from other places in the country.



Base: All +16 in Waterford City Centre: 612
 Q.7 Approximately how long do you expect to spend in the city centre today?

Anticipated length of visit by main reason for visiting

Shopping trips skew shorter while work, education and events run longest.



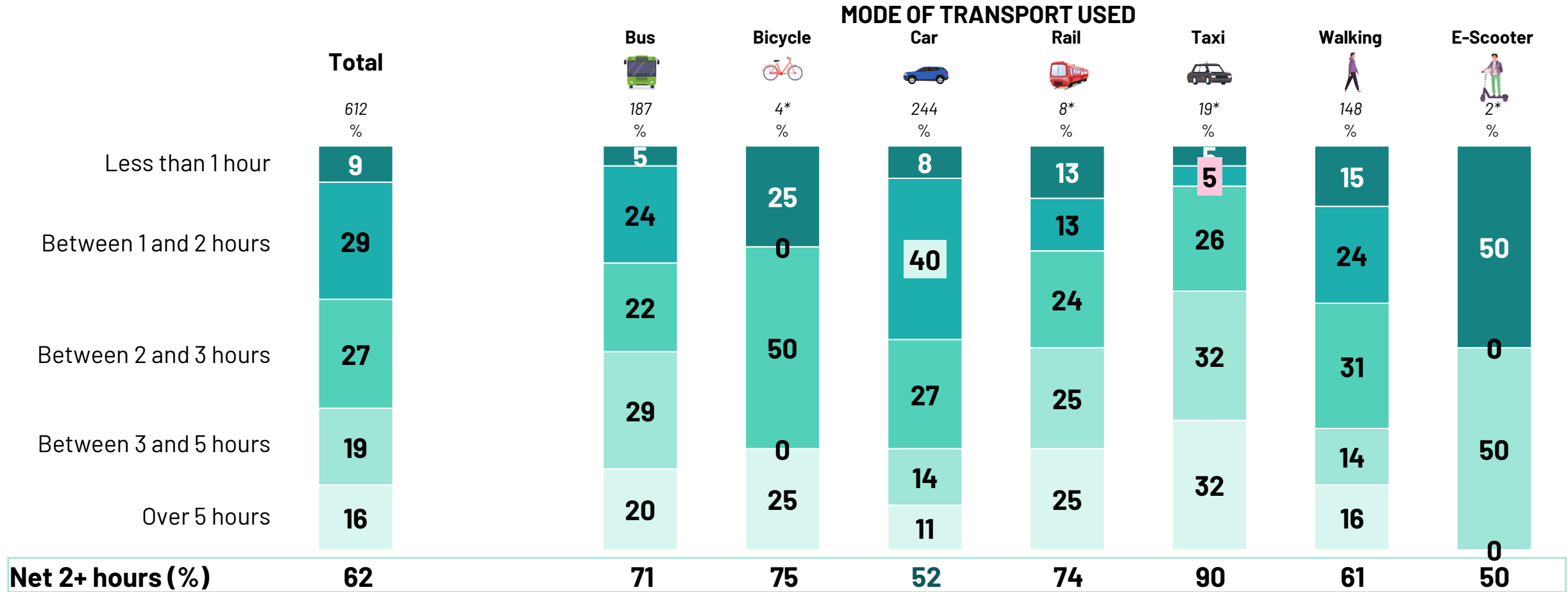
Base: All +16 in Waterford City Centre: 612

Q.7 Approximately how long do you expect to spend in the city centre today?

*Caution: small base

Anticipated length of visit by mode of transport used

Bus passengers generally spend longer in the City centre with 71% of trips lasting 2 or more hours compared to 52% of those who came in a car.



Base: All +16 in Waterford City Centre: 612

Q.7 Approximately how long do you expect to spend in the city centre today?

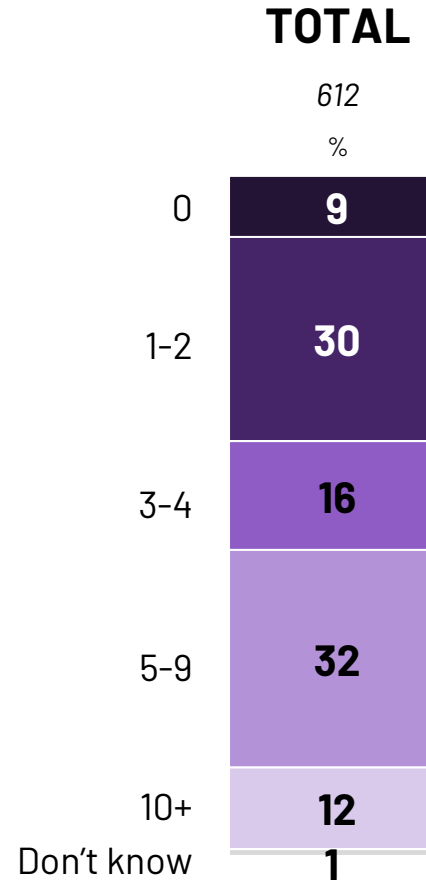
*Caution: small base

Number of visits to Waterford City centre

(past four weeks)

Visit frequency is at an average of 10 visits in four weeks.

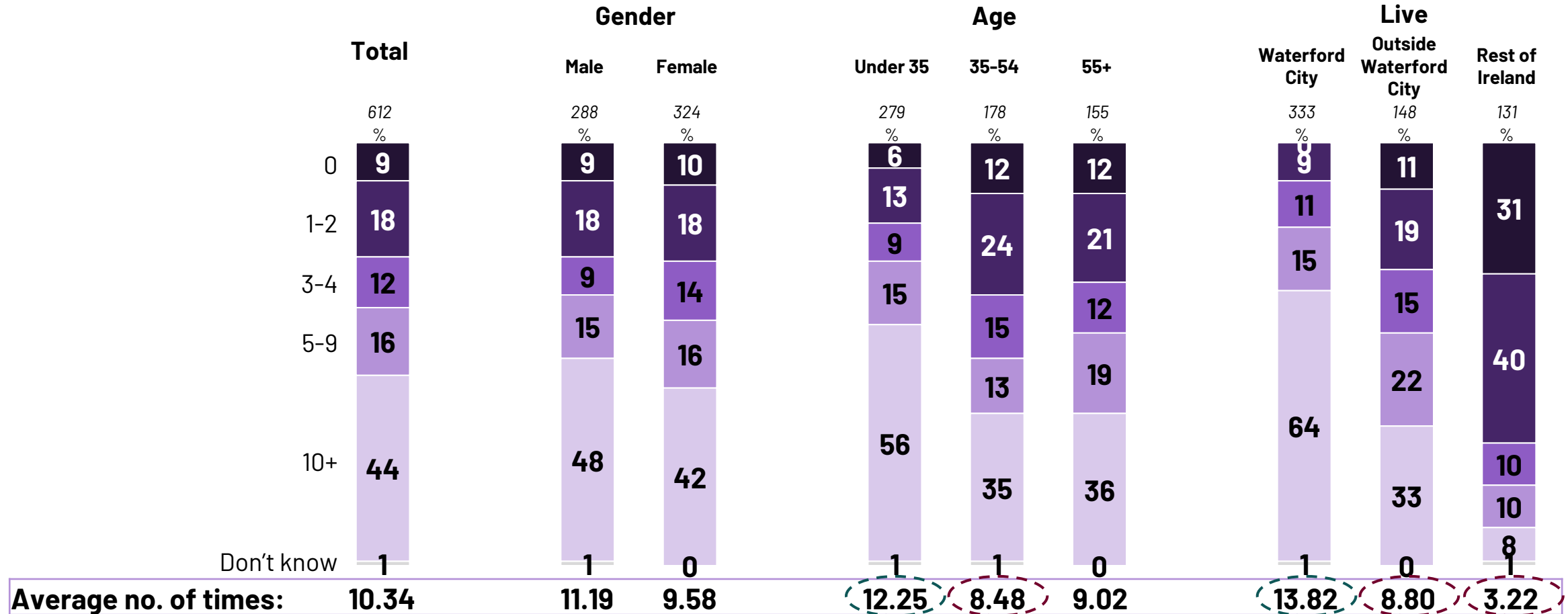
44% of visitors have been at least 5 times in the past month with over one in ten upwards of 10 times.



Average no. of times: 10.34

Number of visits to Waterford City Centre by demos

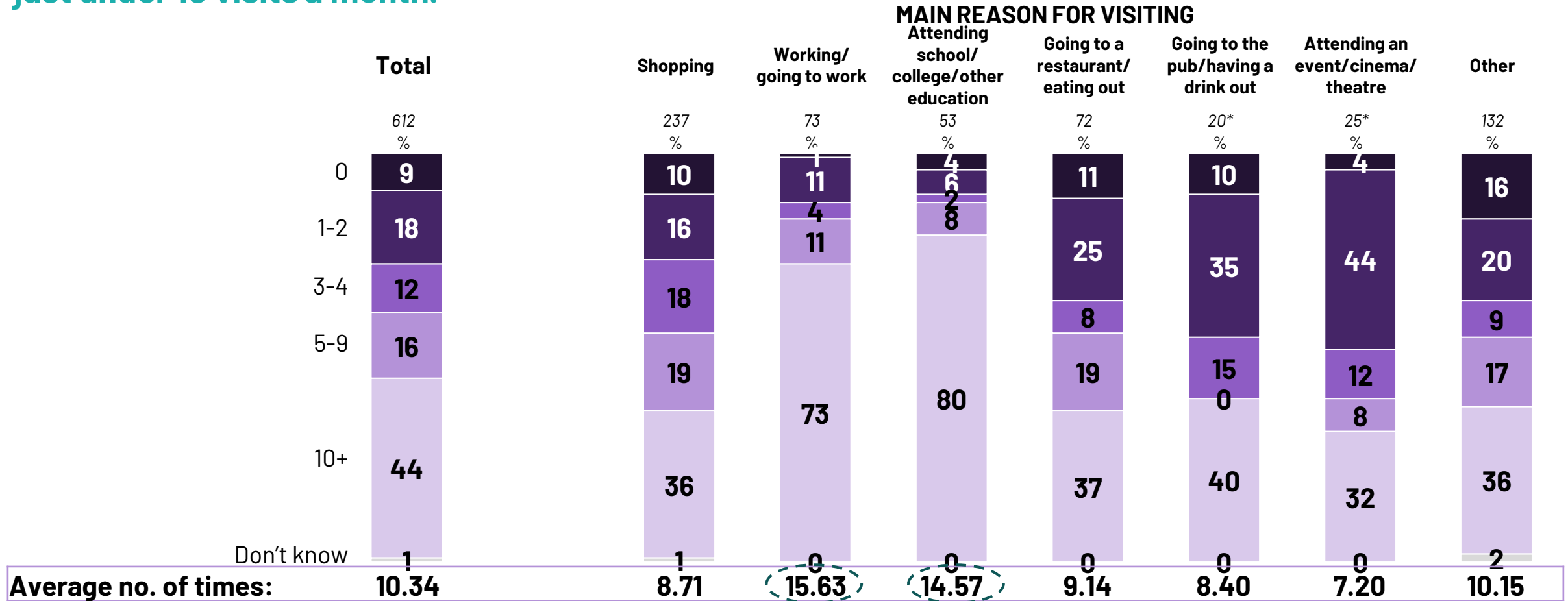
City residents and younger cohorts visit most often while outside city visitors and 35-54-year-olds come less.



Base: All +16 in Waterford City Centre: 612
 Q.8 Think again about the past four weeks, how many times have you visited the city centre?

Number of visits to Waterford City Centre by main reason for visiting

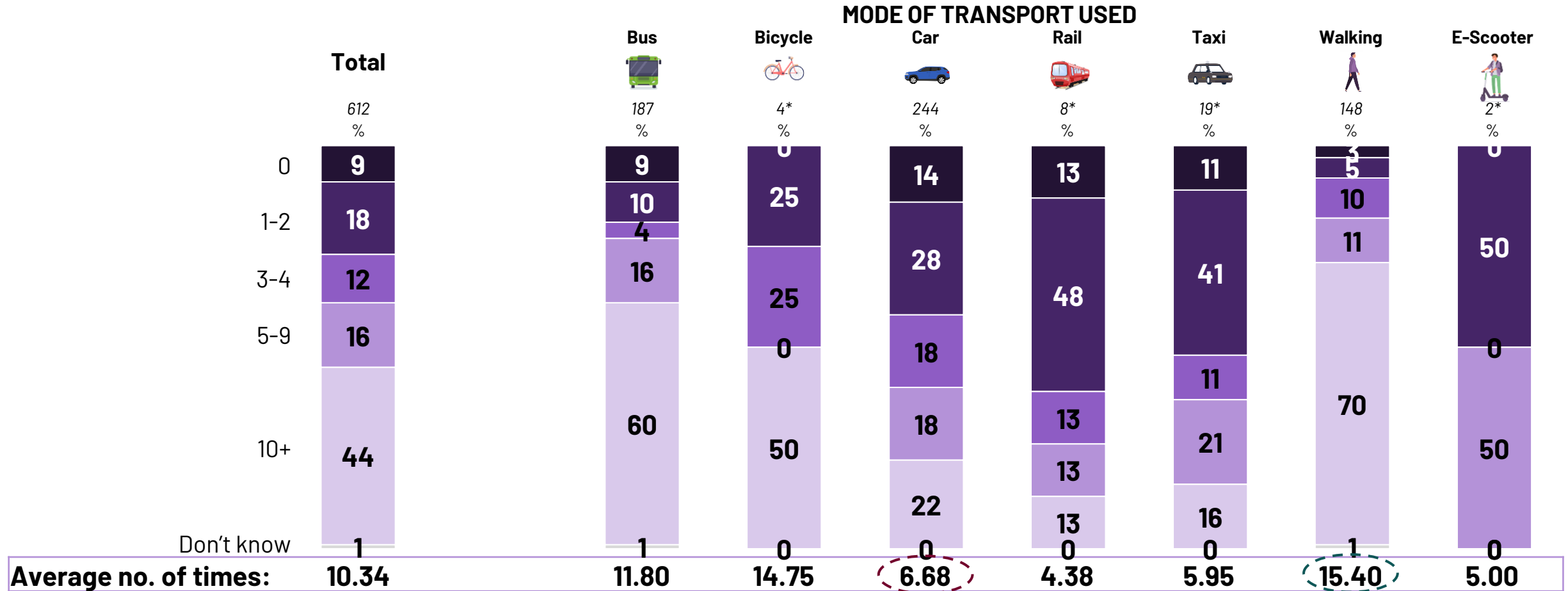
Work and study drive the highest visit frequency while shopping and eating out reasons generate just under 10 visits a month.



Base: All +16 in Waterford City Centre: 612
 Q.8 Think again about the past four weeks, how many times have you visited the city centre?
 *Caution: small base

Number of visits to Waterford City Centre by mode of transport used

Walkers visit most often (average of 15 trips) while car users are least frequent (average of 7 trips).



Base: All +16 in Waterford City Centre: 612
 Q.8 Think again about the past four weeks, how many times have you visited the city centre?
 *Caution: small base

5. ANTICIPATED SPEND

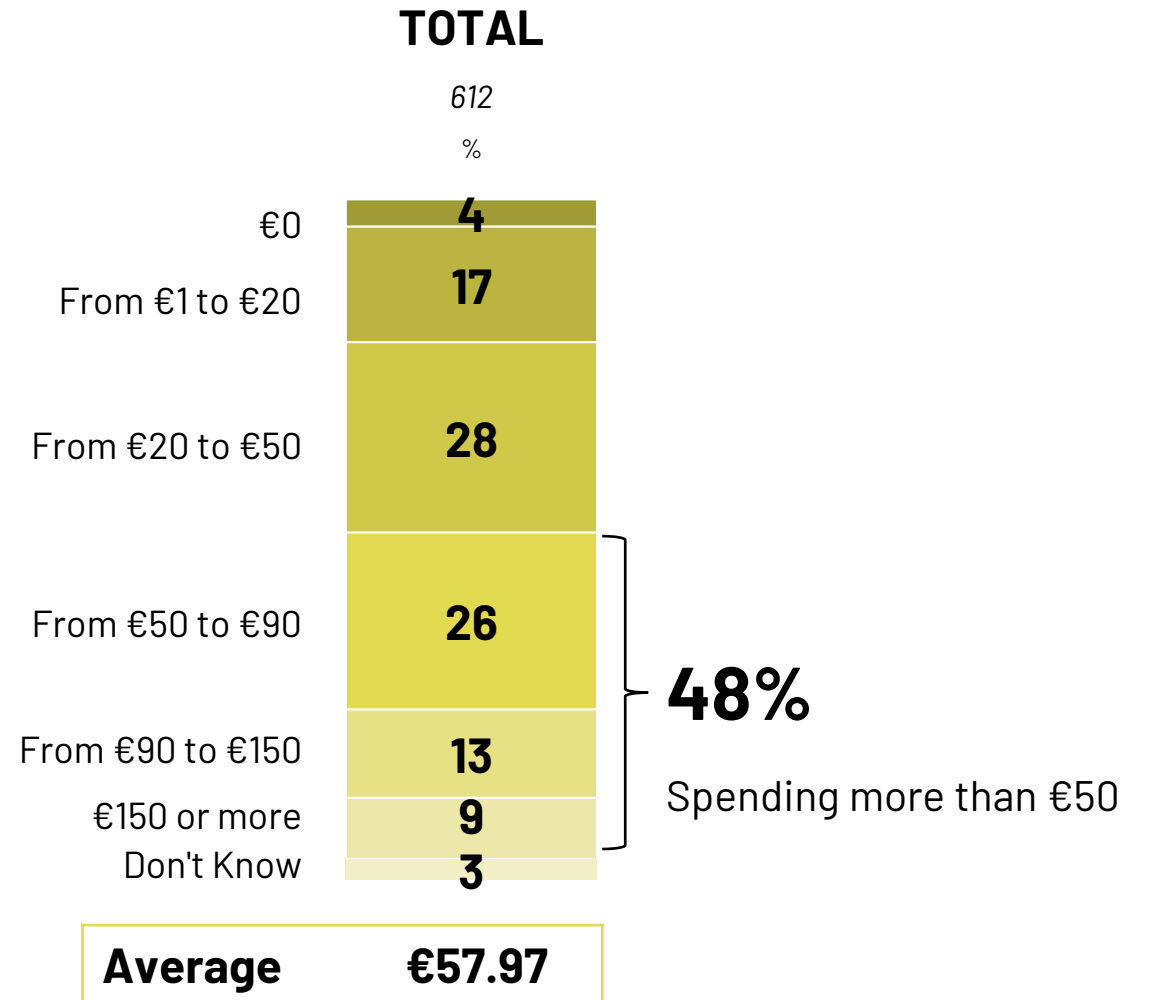


Anticipated spend

(on the day of the interview)

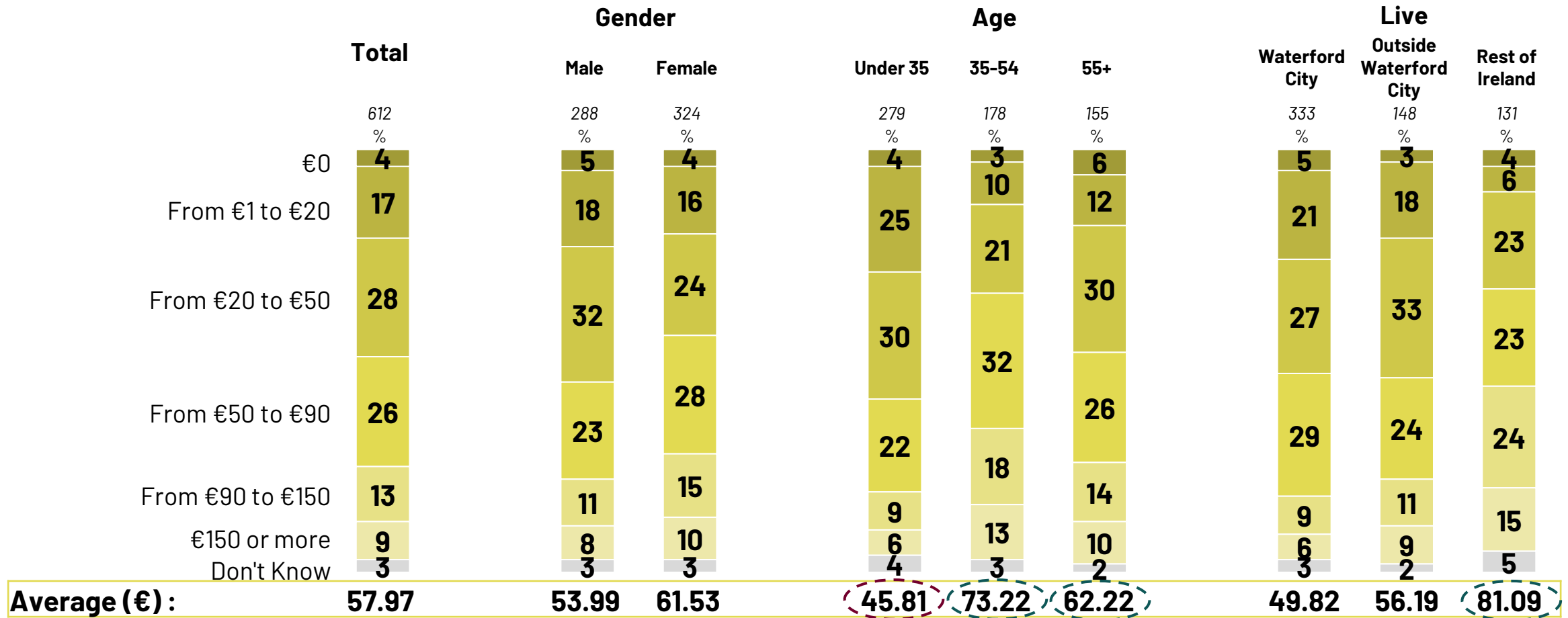
Average intended spend is €57.97 with just over half expecting to spend at least €50.

Only 4% of visitors don't intend to spend anything during their visit.



Anticipated spend by demos

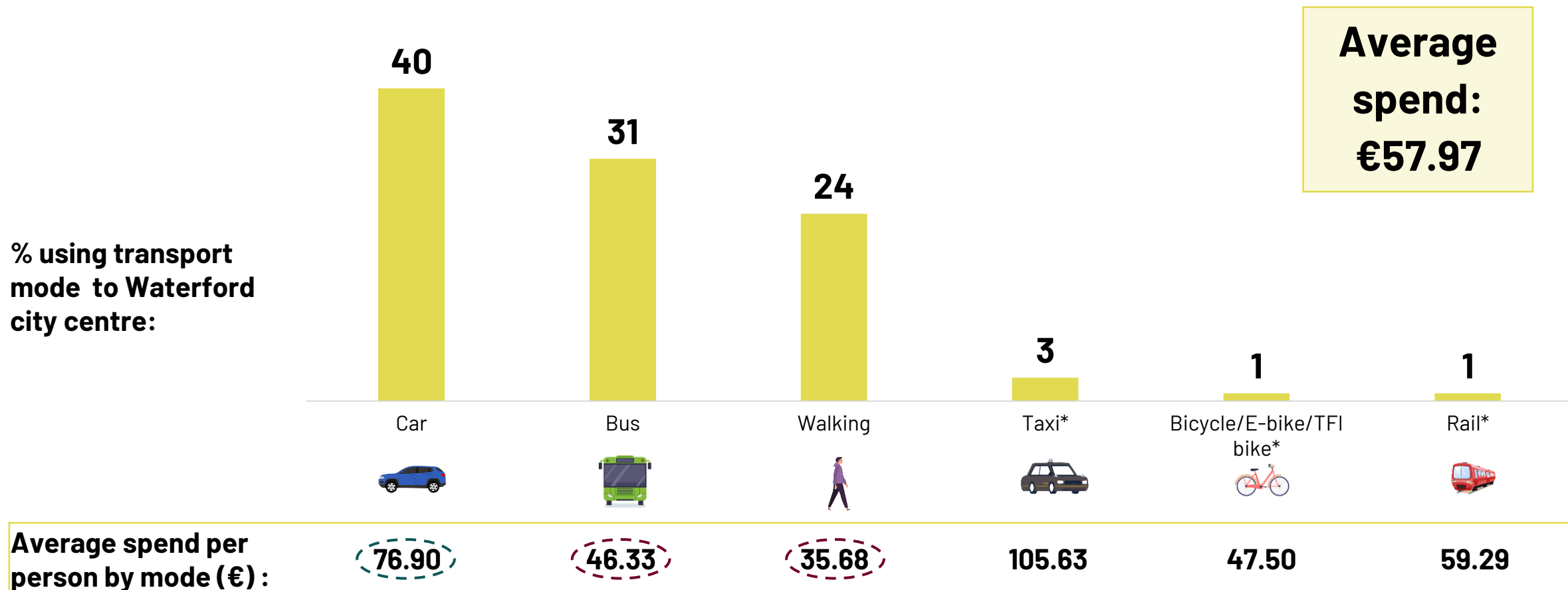
Older and visitors from outside of Waterford spend more per trip while younger visitors and locals spend less but visit often.



Base: All +16 in Waterford City Centre: 612
 Q.6 How much do you personally intend to spend on this trip to the city centre today?

Anticipated spend by mode of transport

Per trip spend is higher than average for car users (€77) compared to bus users (€46) and walkers (€35).



*Caution low base size under n=50

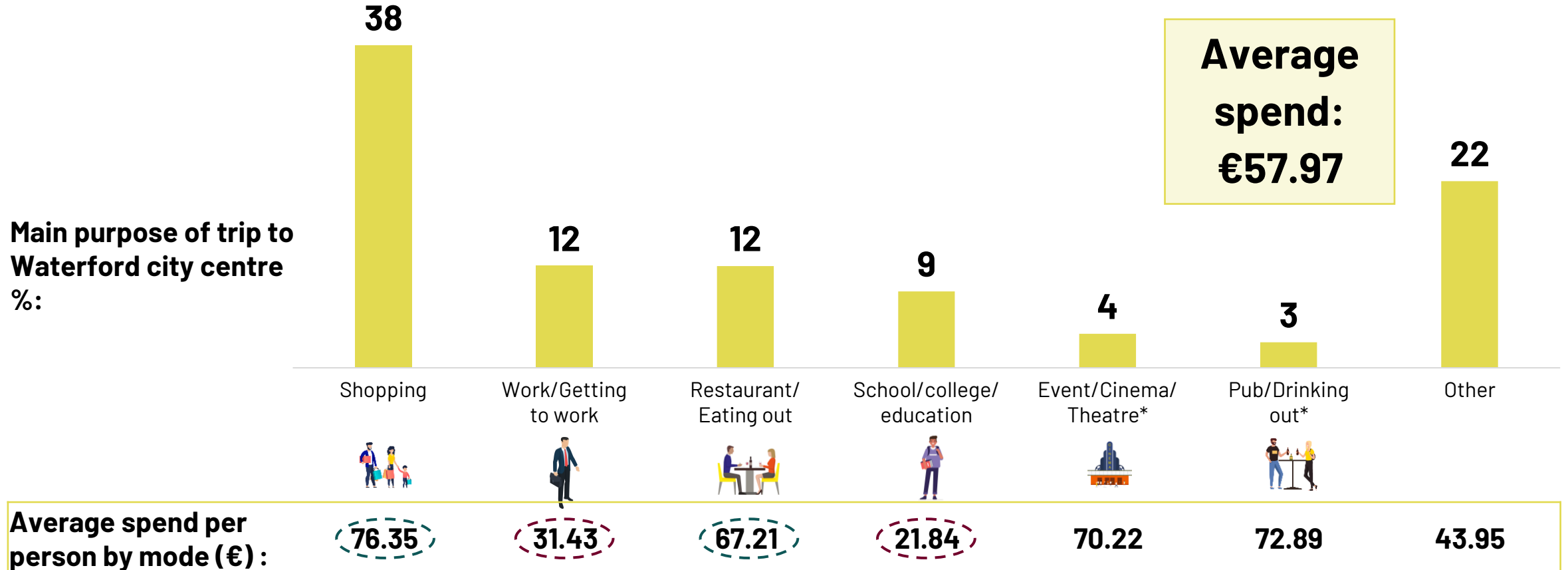
Base: All +16 in Waterford City Centre: 612

Q.4 What was the main mode of transport you used to get into the city centre today?

Q.6 How much do you personally intend to spend on this trip to the city centre today?

Anticipated spend by main purpose of trip

Shopping and eating out deliver the highest spend per person. Work and education are low spend but high frequency.

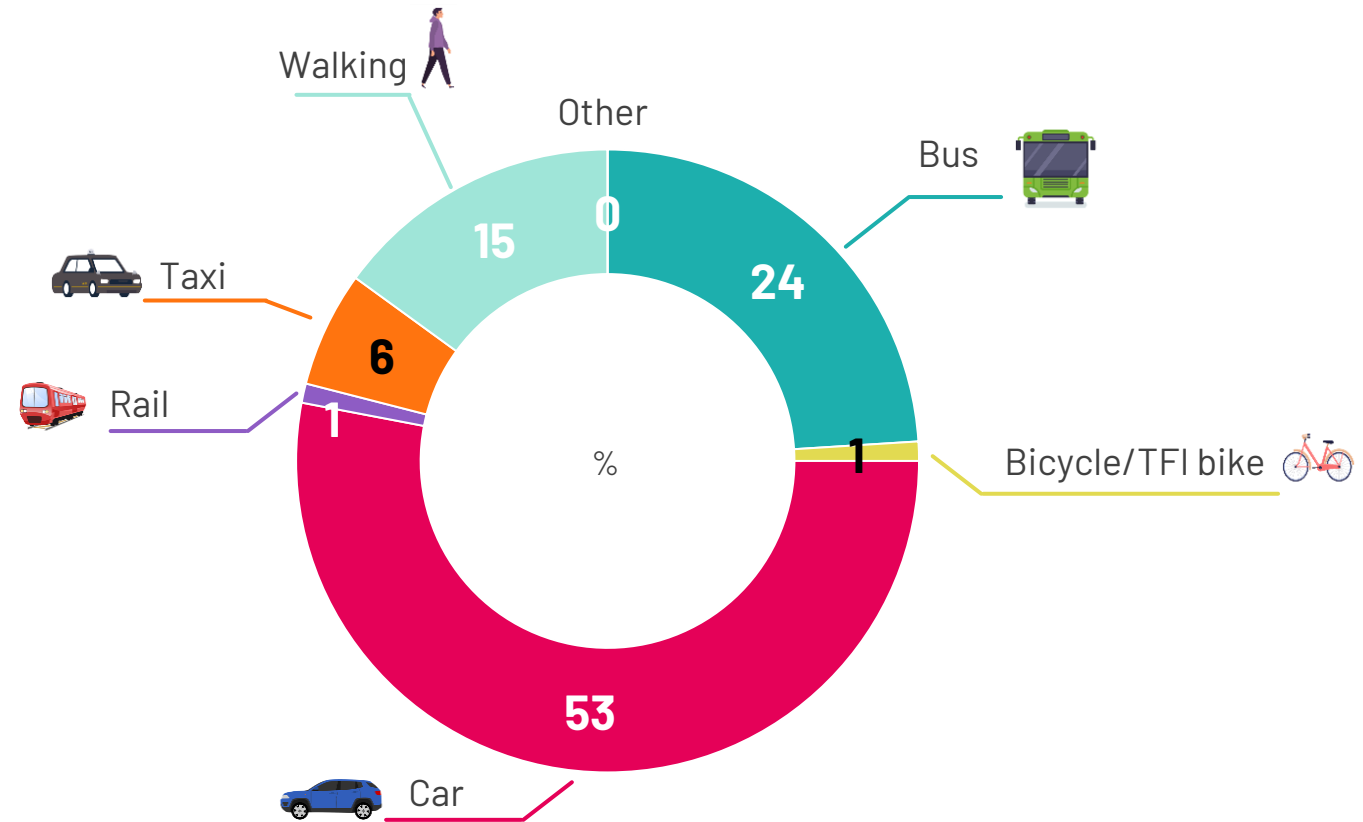


*Caution low base size under n=50

Base: All +16 in Waterford City Centre: 612
Q.6 How much do you personally intend to spend on this trip to the city centre today?

Share of Spend by mode of transport used

Car users contribute over half of the spend in the City center, while bus passengers account for 24% of the spending, and walkers make up 15%.



Share of spend by mode of transport used

Public transport users account for a third of spend in the City centre with sustainable mode users accounting for 41% of spend.

Main mode of transport today:	Total	Bus	*Bicycle/ TFI Bikes	Car	*Rail	*Taxi	Walking	*E-Scooter	NET Public Transport	NET Sustainable
	612	187	4	244	8	19	148	2	214	347
Average spend per mode of transport (on day of interview)	€57.97	€46.33	€47.50	€76.90	€59.29	€105.63	€35.68	€15.00	€52.27	€42.02
Total daily spend (Calculation is sum of spend from all the survey respondents)	€35,410	€8,664	€190	€18,764	€474	€2,007	€5,281	€30	€11,186	€14,581
Share of spend	100%	24%	1%	53%	1%	6%	15%	0%	31%	41%

*Caution low base size under n=50

Base: All +16 in Waterford City Centre: 612

Q.6 How much do you personally intend to spend on this trip to the city centre today?

Net sustainable mode includes Bus, Walking, Rail and Bicycle.

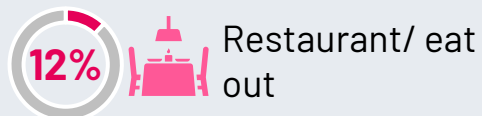
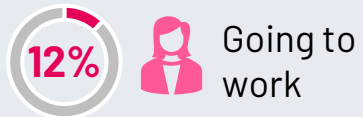
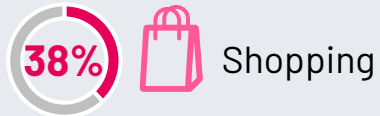
5. SUMMARY OF KEY FINDINGS



Key Findings – Waterford City Centre Shopper Survey

Visits to the city centre

Main reasons:



Time spent:

62% spent more than 2 hours in the city centre

10.3 Average number of visits in the past 4 weeks

Average spend per person



All 16+ in city centre :

€57.97



All using any **sustainable modes**:

€42.02



All using Rail

€59.29



All using car

€76.90



All using Bus

€46.33



All walking

€35.68



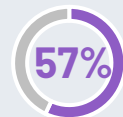
All using bicycle/TFI bikes


€47.50

Mode of transport used


To city centre

Home




 Car: **40%**


39%

 Bus: **31%**

31%

 Walking: **24%**


24%

 Taxi: **3%**

4%

 Bicycle/TFI bikes: **1%**


1%


 Rail: **1%**


1%


Share of estimated daily spend in Waterford city centre




 Bus **24%**

 Car **53%**

 Walking **15%**

 Taxi **6%**

 Rail **1%**

 Bicycle/TFI bikes **1%**

Waterford Shopper Survey 2025 – Summary of the Results

1

Visitors to the City centre are more likely to be 16-35 years olds (46%), classified as ABC1 social grade (68%) and based in the city (54%).

Shopping is the main reason for visiting at 38% with dining and work next at 12% each.

Two in five visitors have more than one reason for visiting the City centre on this occasion.

2

40% travelled by car, 31% by bus and 24% walked. Sustainable modes account for 57% of trips today with public transport at 35% and a similar share on the return leg.

Under 35-year-olds and students are much more likely to use the bus with older adults and those located outside the City more likely to have driven.

3

Just over three in five visitors intend to spend at least 2 hours in the City centre.

Average intended spend is €57.97 and 51% expect to spend more than €50. Per person spend differs by mode with car at €77, bus €46 and walking €36. Public transport users account for 32% of spend while car users account for 53% of spend.

THANK YOU

NAME:

Clare Kavanagh

DETAILS:

Clare.Kavanagh@Ipsos.com

NAME:

Sarah Chapman

DETAILS:

Sarah.Chapman@Ipsos.com



Anticipated spend

(on the day of the interview)

