



Phoenix Park & Visitor Centre

Usage & Understanding
November 2017

Prepared for:



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Research objectives

- The objective was to conduct Visitor Satisfaction and Profiling Research for:



We set out to ..

- a) Profile visitors in terms of demographics, country of residence, distance travelled.
- b) Source of awareness and prompts to visit.
- c) Satisfaction with the attraction both with the experience itself and also with regard to facilities available (cafés, toilets, etc).
- d) Recommendations for improvements.
- e) And provide feedback that could be used to assist the development plan for the visitor centre and the Magazine Fort in the future.

Methodology

- A two pronged approach was adopted
 - ❖ Stage 1: A qualitative investigation of the attractions
 - a) Stage 2 A quantitative review of the attractions
- The survey stage included two locations:-
 - a) Visitor Centre visitor survey – Sample 200
 - b) Phoenix Park visitor survey – Sample 200
- Fieldwork on the project took place on the from the 14th-28th October and from the 18th October – 3rd November, 2017.
- The survey of the visitor centre was designed to produce a representative sample of visitors while also ensuring a reliable sample of overseas travellers.
 - ❖ As such at the interviewing stage, we oversampled this segment and at the analysis stage, we down-weighted it.
- The qualitative stage involved a series of in-depth interviews with customers of the actual Magazine Fort tour (6-8).



2. The Survey Module

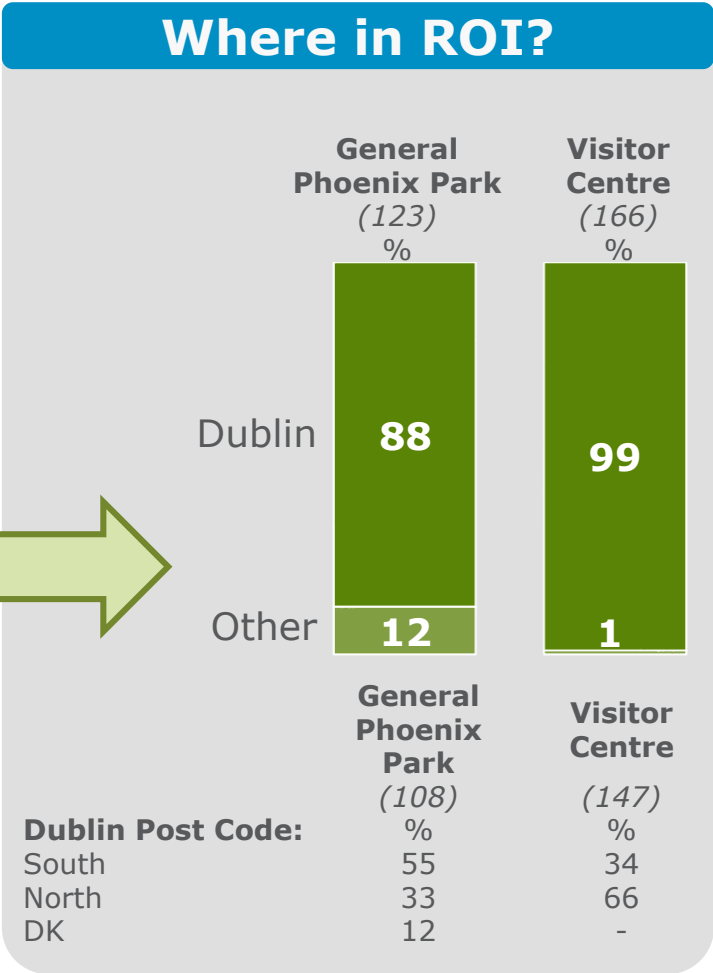
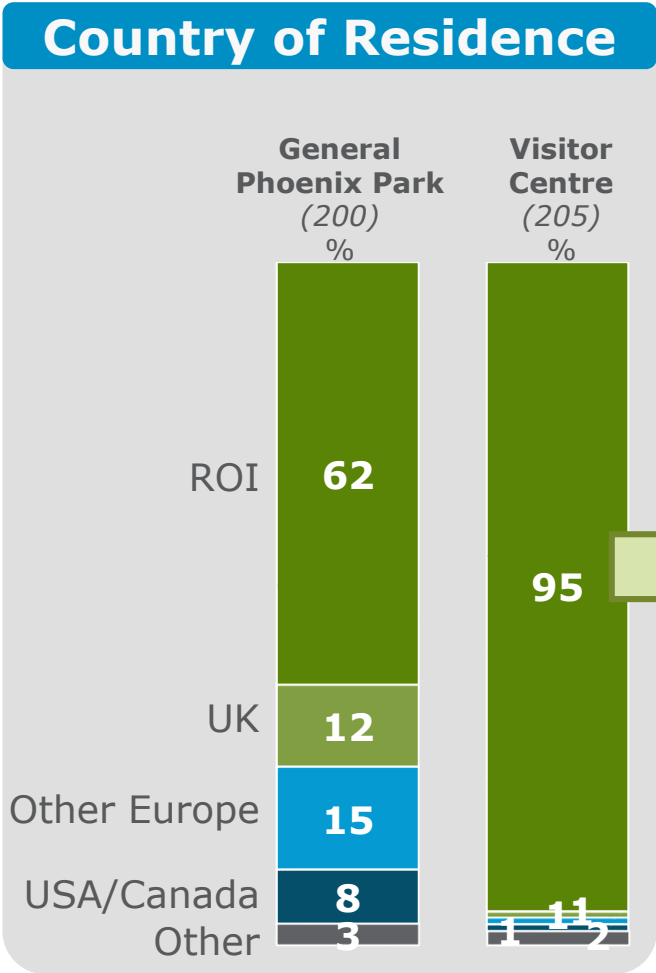
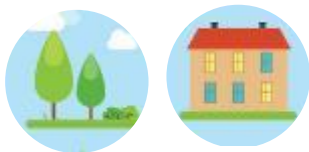


A photograph of a woman with long blonde hair carrying a young child with blonde hair on her shoulders. Both are smiling and laughing. The woman is wearing a light green cardigan over a white top. The child is wearing a grey long-sleeved shirt and pink sandals. They are outdoors in a park-like setting with green trees in the background. A blue diagonal banner is overlaid across the middle of the image.

3. Profile of Visitors



Sample Profile



Mainly ROI but those in the Phoenix Park General Survey, much more broadly based.

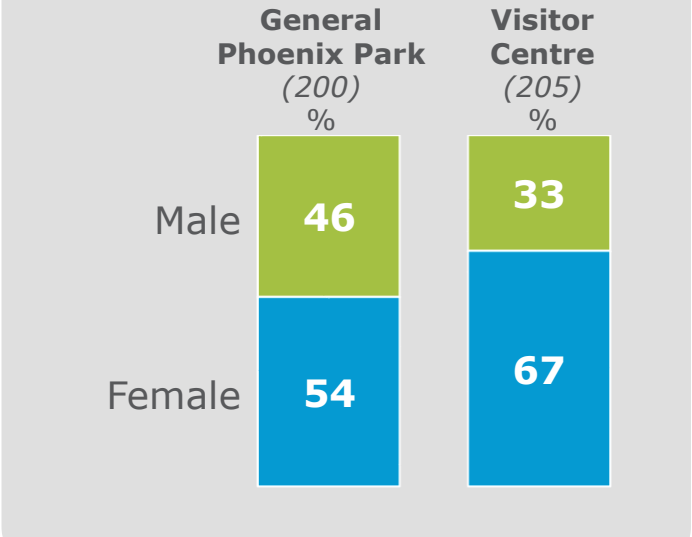
Among Irish visitors, locals dominate!

Large majority (excluding overseas visitors) have been in the Phoenix Park previously particularly those using the Visitor Centre. Frequently driven by locals of course.

Sample Profile

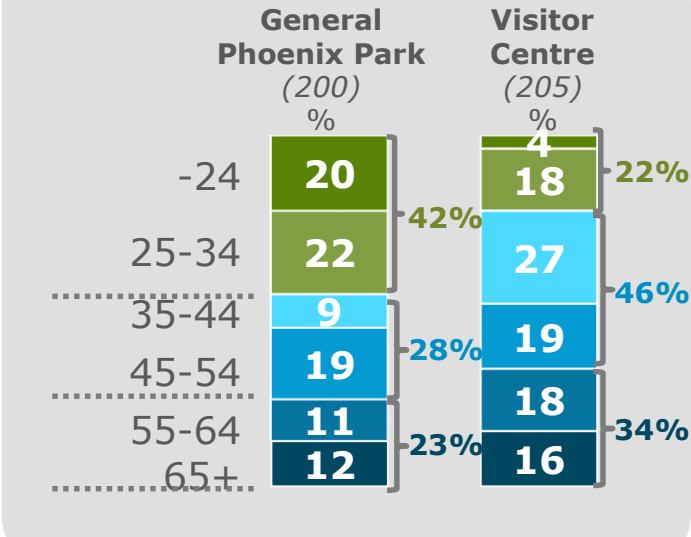


Gender



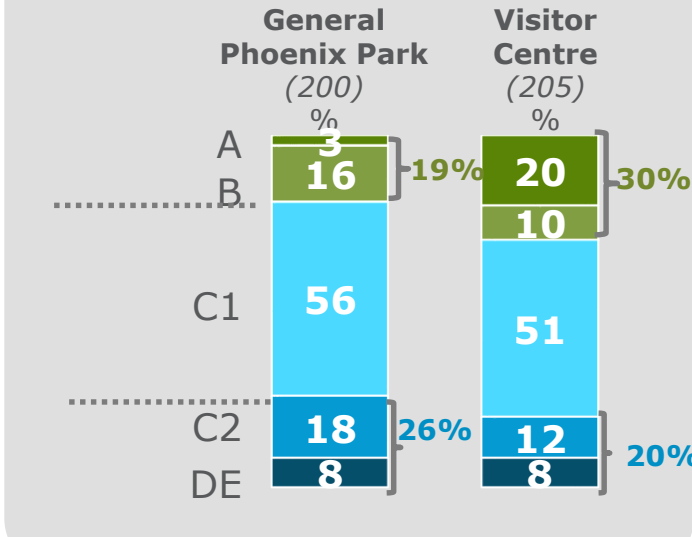
Visitor Centre more female.

Age



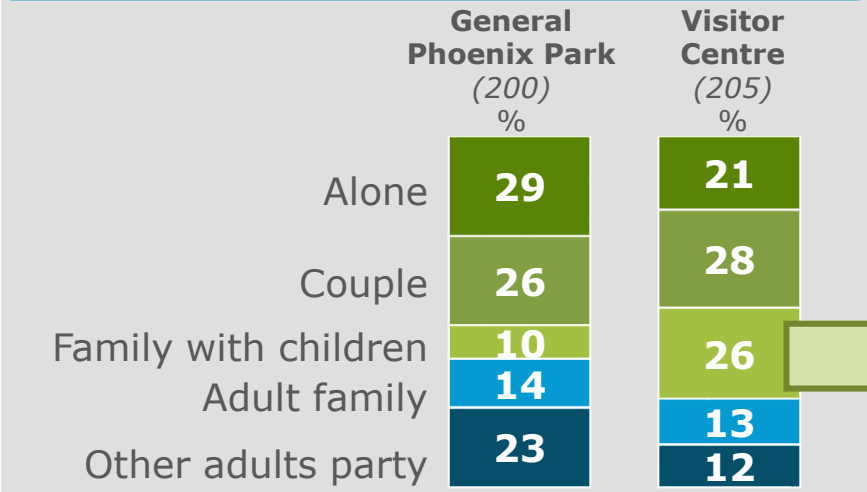
People in Phoenix Park are generally younger than those in the Visitor Centre.

Social Class



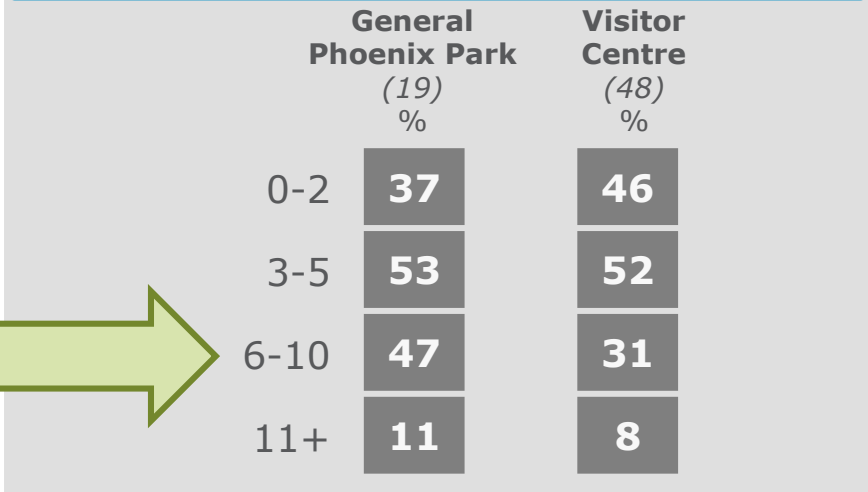
ALL very middle class particularly the Visitor Centre visitor.

Type of Visiting Party



Overall perhaps more adults than might have been anticipated, particularly for the Visitor Centre.

Age of Children



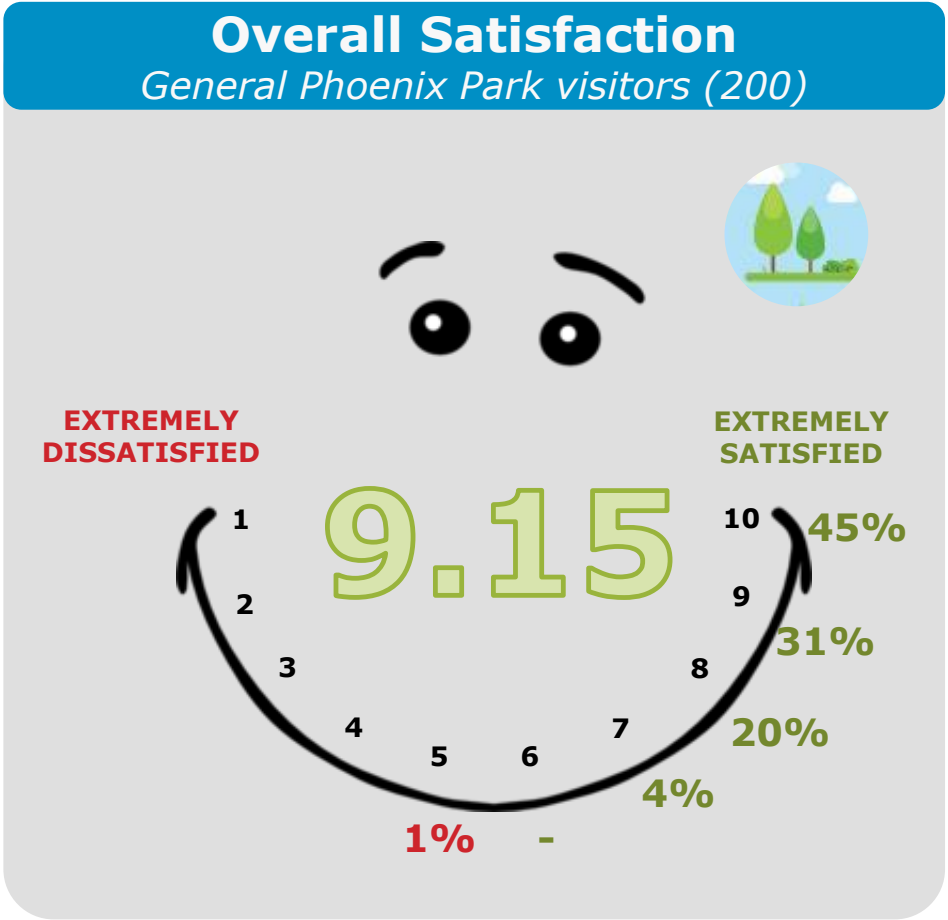
Broad range of children's ages, among those with families.

A romantic couple wearing straw hats are shown in profile, facing each other and making a heart shape with their hands against a warm, golden sunset background. A semi-transparent blue arrow-shaped banner is overlaid across the middle of the image, containing the section title.

4. Overall satisfaction



Satisfaction with experiences both in the Phoenix Park and the Visitor Centre are extremely high. These visitors should be strong ambassadors for the attractions.



Satisfaction is extremely high!

Q.16a How satisfied or otherwise are you with your overall experience of the Phoenix Park?



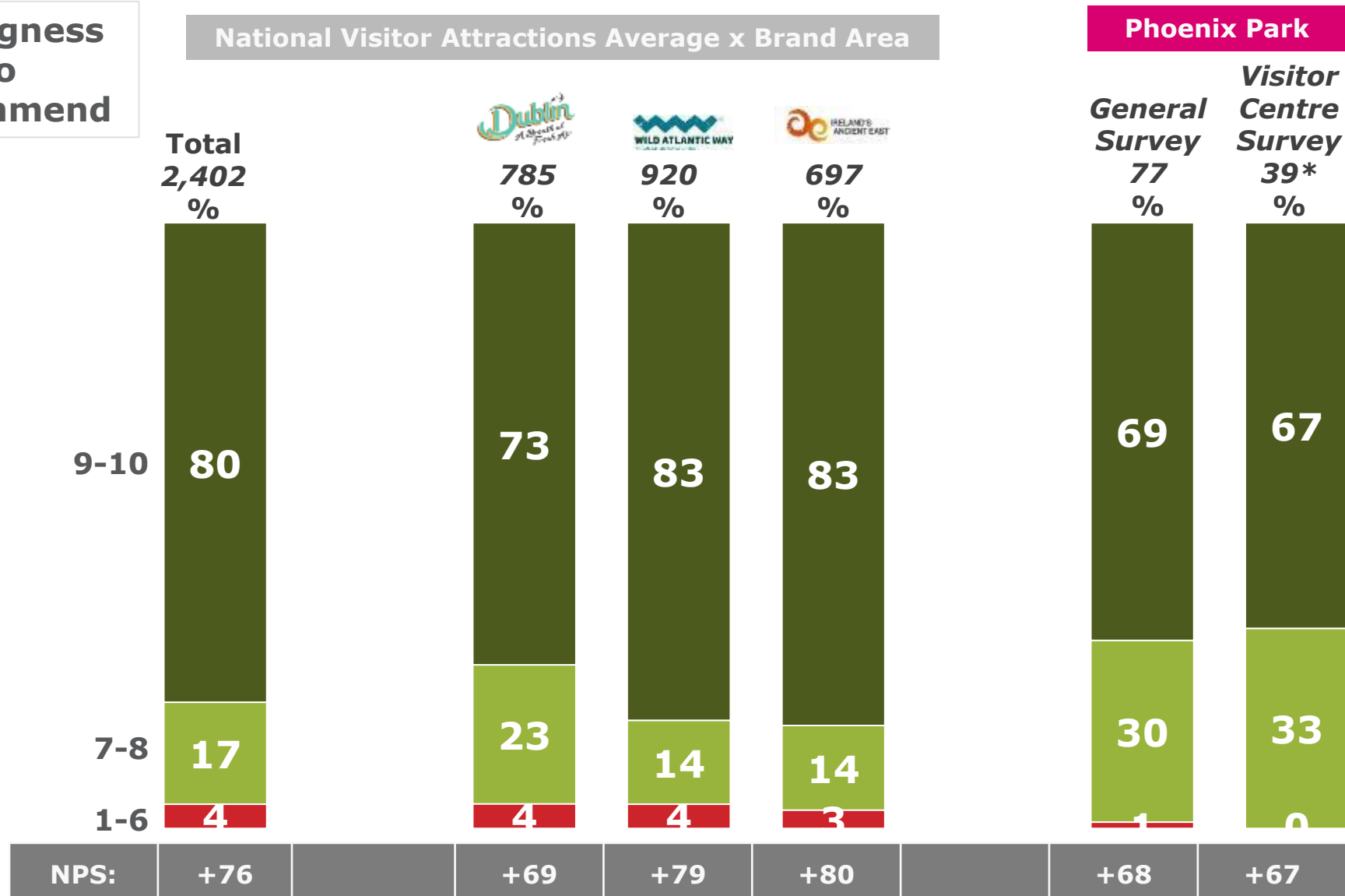
Likelihood to recommend is high. They may need something new or different to prompt them to be active ambassadors!

Q.16b And how likely or unlikely are you to recommend a visit to the Phoenix Park?
Q.24 And how likely or unlikely are you to recommend a visit to the Phoenix Park Visitor Centre?

When compared to national average, the Phoenix Park operates a little below the norm for the overseas visitor

Base: All overseas visitors

**Willingness
to
Recommend**



Q.16b
Q.24

And how likely or unlikely are you to recommend a visit to the Phoenix Park?
And how likely or unlikely are you to recommend a visit to the Phoenix Park Visitor Centre?

Visitors to the Centre loved the café, the walled garden and the playground. Overseas visitors more enthused by the open areas than their local counterparts (who have seen it many times before)



Base: All Visitor Centre visitors - 205

	TOTAL	Local	Domestic	Overseas
Base (unweighted):	205	147	19*	39*
	%	%	%	%
Restaurant/Café/Coffee shop	40	40	32	28
Beautiful Park/Scenery/Walled gardens	35	35	26	33
Family fun/Playground	20	21	16	-
Walking areas	13	14	5	3
Courtyard/Open spaces	13	13	11	21
Peace & quite/Relaxing/Safe	13	14	5	10
History of Phoenix Park/Informative/Interesting	8	7	26	10
Good atmosphere/Friendly staff	8	8	5	13
Convenience – easy to get to, parking facilities	7	7	11	-
Everything/Great facilities	7	7	11	3
Art exhibits	2	1	11	5
Other	15	15	11	23

Q.21

I would now like you to tell me, in your own words, what aspects of the **Phoenix Park Visitor Centre** you found particularly enjoyable?

Key enjoyable aspects

Base: All Phoenix Park Visitor Centre visitors n=205



Art exhibits and visitor centre and about history of park

It's so close by, great general facilities and atmosphere

Easy to park, nice food, stuff for kids

So far the garden has been amazing – such a huge spectacular park and a nice experience

Accessible for children, open spaces

I like that it is such a huge space and that there is such a wide range of activities

We can get lost here – it's lovely

There is a nice family dynamic, blend in coffee and cake with your kids enjoying the confined area.

Everything about it pleasant, good space and light and good food, and good parking

Nice to have coffee and the trees

We just like the nature and its nice to walk and not to feel like you are in a big city

Over half could find nothing disappointing and among the balance, the key criticism is linked to volume of people there – so queues and seating issues in particular.



Base: All Visitor Centre visitors - 205



Q.22

And what aspects, if any, of Phoenix Park Visitor Centre did you find even a little disappointing?

Key areas of criticism:

Base: All Phoenix Park Visitor Centre visitors n=205



The queueing in the café.
The visitor centre and exhibitions inside could be updated, more interactivity and workshops maybe. Maybe thematic or seasonal park related exhibits.

The visitor centre tour and information could be updated, The facilities and toilets could be upgraded. The acoustics upstairs in restaurant can be too loud.

The cafe is too small and you can't bring a buggy in

More toilets especially in summer

A children's exhibition area

Events are not advertised very well.

Better cycling facilities such as a cover over the bike rack, and everywhere in the park should have a dedicated bike lane

More Audio Visuals

More notifications on feeding the animals

Hard for people with walkers

Not enough seats outside and coffee shop too busy

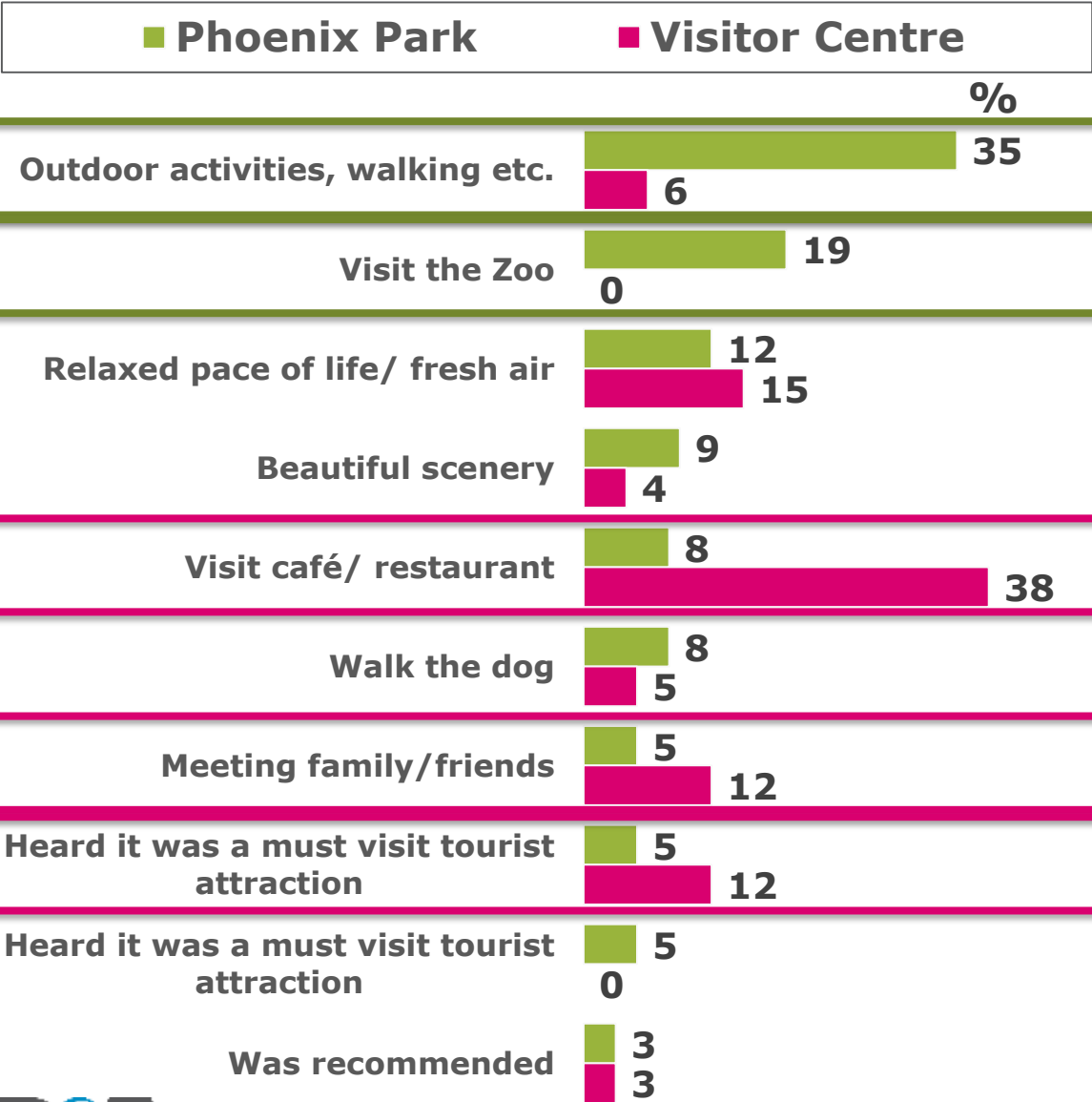
No Wi-Fi

In the walled garden a lot of stuff is dead

5. Why are they coming to the Phoenix Park?



Reasons for visiting Phoenix Park driven by outdoor activities and the zoo while those in the Visitor Centre are primarily going to the Café with secondary drivers being meeting friends and or visiting the play ground



Key reasons for choosing Phoenix Park or Visitor Centre.

- **Reasons for visiting the Phoenix Park or the Visitor Centre are really very different.**
 1. Using the Phoenix Park is largely driven by wanting **to get active, get some fresh air** in a relaxed environment or to go to the zoo.
 2. Going to the Centre is largely driven by a **desire to visit the café/restaurant**, combined with it being a popular meeting place for family and friends. **Only a small minority are driven by the visitor centre itself or any of the aspects within it** – the walled garden has appeal but little is known about much else.

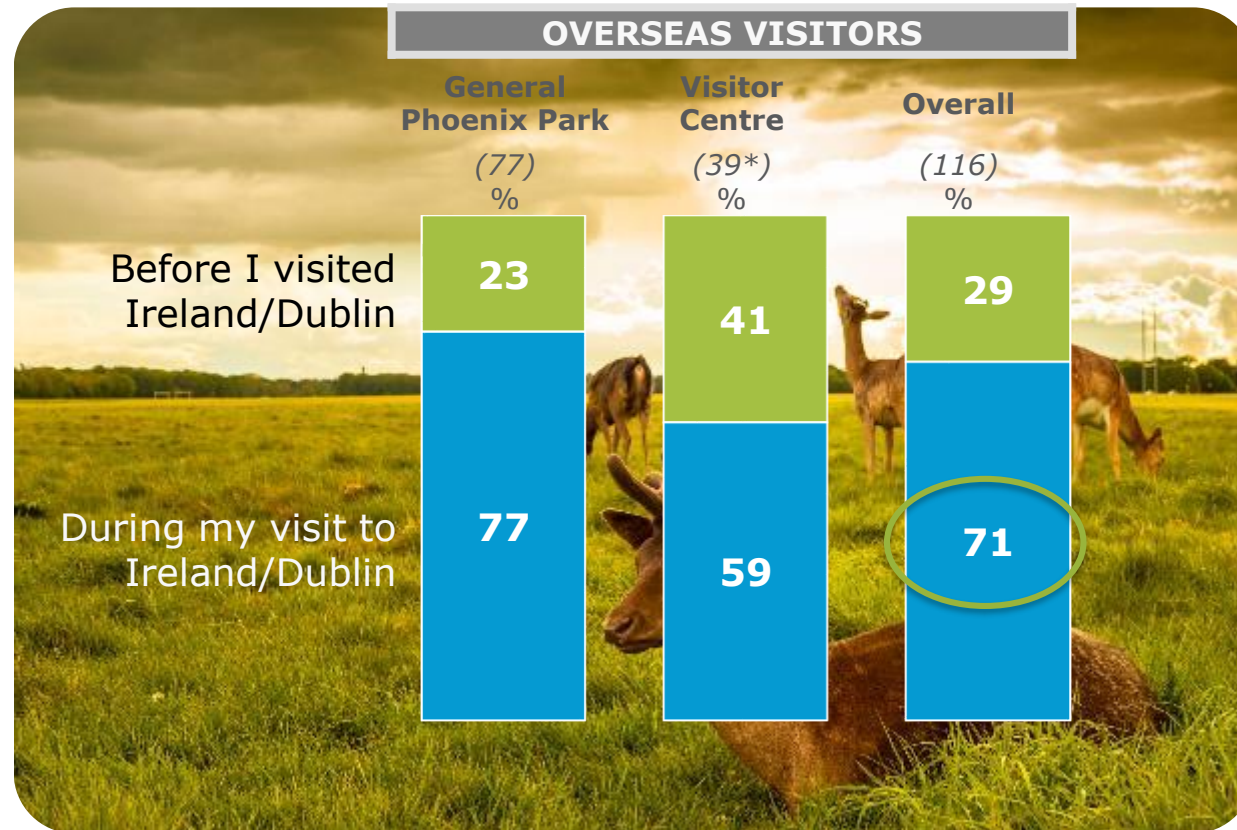


6. Is Phoenix Park on the map for visitors?



Awareness of Phoenix Park comes about mostly during their visit to Ireland/Dublin

Base: All non locals



There is a serious level of dedicated communications required to prompt visits to the Phoenix Park when visitors arrive into Ireland. As such **local** promotion is key for new recruits.

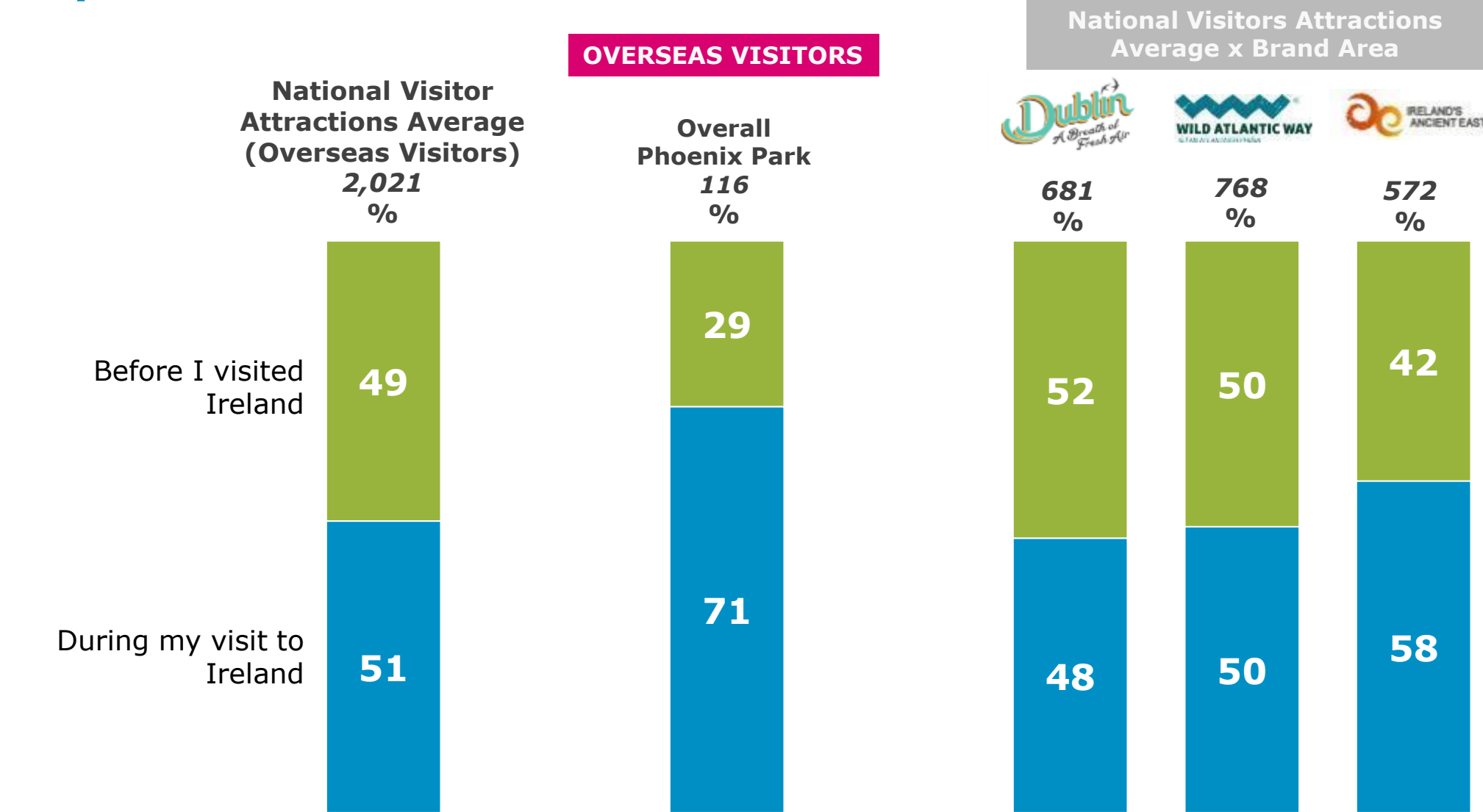
Q.8

When did you first hear of the Phoenix Park?

Q.7

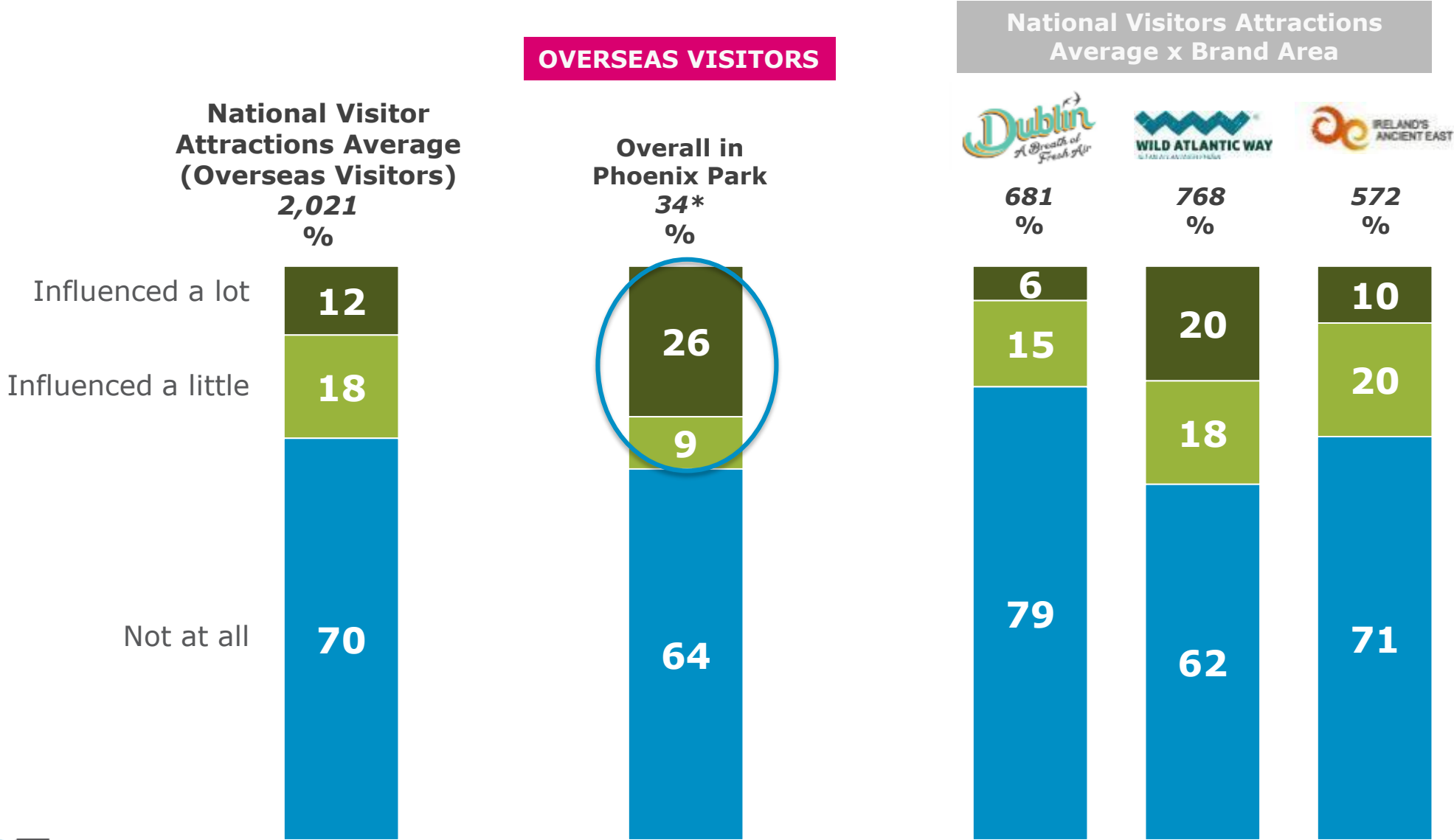
When did you first hear of the Phoenix Park?

From an overseas perspective, the Phoenix Park itself is lower on their radar than visitor attractions in Dublin City itself, the Wild Atlantic Way or Ireland's Ancient East



For those aware, the Phoenix Park does have an encouraging level of influence on prompting visits to Ireland

Base: All overseas visitors aware of Phoenix Park before visiting Ireland



Q.9 To what extent did the Phoenix Park/Phoenix Park Visitor Centre influence your decision to visit Ireland?

***Caution: Small base**

7. Awareness and Usage of Individual Attractions



The majority of those using the Park are not particularly well informed about what is available. Only 40% have visited one of the attractions (on balance it's closer to a third for any individual attraction). Repeat visits are clearly extremely low!

Base: All General Phoenix Park visitors - 200



An Overview



The Detail

	Visited Today %	Ever visited %	Aware %
Phoenix Park Information Centre	4	35	46
A large Children's Playground	2	31	44
The Phoenix Café	4	34	40
A Victorian Walled Kitchen Garden	2	33	39
Ashtown Castle	3	31	38
Indoor exhibition on the history/wildlife of the Phoenix Park	2	29	35
Tour of a historical Magazine Fort	1	23	31

Awareness of individual attractions in the Phoenix Park among local visitors is high but really not on the radar for Overseas Visitors.



Base: All Phoenix Park general survey respondents

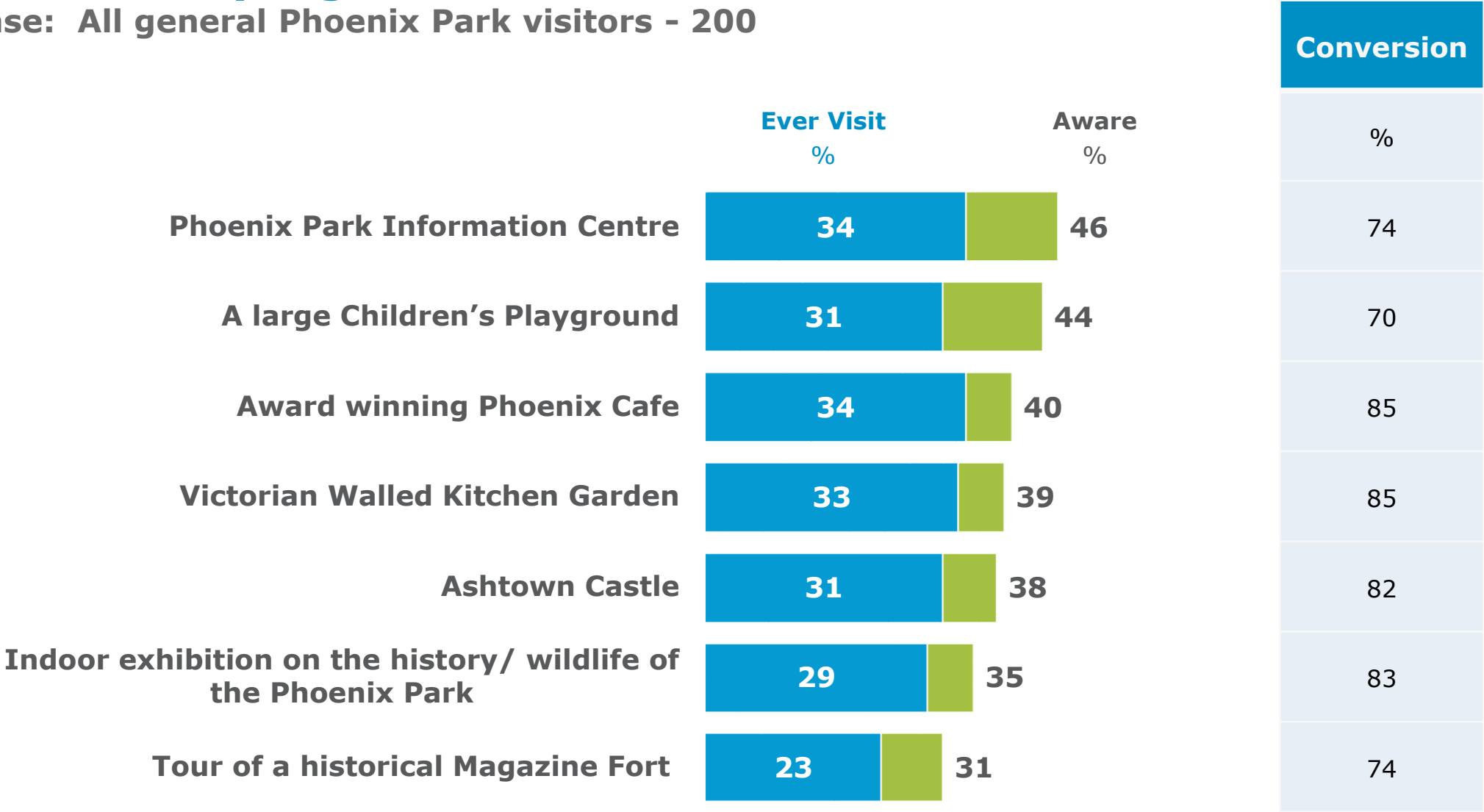
	Aware				Ever Tried				Visit Today			
	TOTAL	Local	Domestic	Overseas	TOTAL	Local	Domestic	Overseas	TOTAL	Local	Domestic	Overseas
Base (unweighted):	200	108	15*	77	200	108	15*	77	200	108	15*	77
	%	%	%	%	%	%	%	%	%	%	%	%
Phoenix Park Information Centre	46	68	53	14	35	58	40	1	4	6	-	1
A large Children's Playground	44	69	33	9	32	55	27	-	2	3	-	-
Award winning Phoenix Cafe	40	62	27	12	34	57	27	3	4	6	-	1
Victorian Walled Kitchen Garden	39	62	33	6	33	56	27	-	2	4	-	-
Ashtown Castle	38	61	40	5	31	53	27	-	3	4	7	1
Indoor exhibition on the history/ wildlife of the Phoenix Park	35	58	13	6	29	51	13	-	2	4	-	-
Tour of a historical Magazine Fort	31	51	20	5	23	40	13	-	1	2	-	-
At least one	54	75	67	33	42	69	40	5	8	11	7	4

***Caution: Small base**

Awareness of individual attractions has definite room for improvement with the clear benefit that conversion to visits is extremely high.



Base: All general Phoenix Park visitors - 200

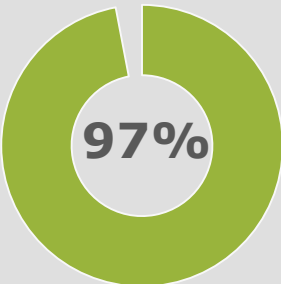


In the Visitor Centre, the café/restaurant drives everything. Other attractions vary in their levels of trial or frequency of usage.

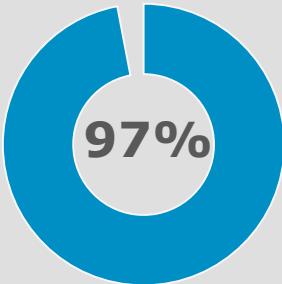


Base: All Phoenix Park Visitor Centre visitors - 205

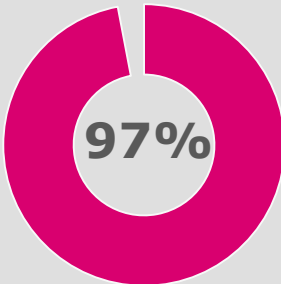
An Overview



Aware of
at least one
attraction



Ever
visited at
least one



Visited
today

The Detail

	Visited Today %	Ever visited %	Aware %
Café/restaurant with indoor/outdoor seating	86	91	94
A Victorian Walled Kitchen Garden	53	80	87
Phoenix Park Information Centre	22	70	82
Large Children's Playground	30	65	81
Ashtown Castle	9	48	69
Indoor exhibition on the history/wildlife of the...	4	52	68
An Art Exhibition (in the Visitor Centre)	5	40	52
Audio visual presentation on Aras an Uachtarain	2	35	47
Tour of a historical Magazine Fort	2	28	46

Awareness of individual attractions in the Visitor Centre among overseas visitors is very low



Base: All Phoenix Park Visitor Centre visitors - 205

	Aware				Ever Tried				Visit Today			
	TOTAL	Local	Domestic	Overseas	TOTAL	Local	Domestic	Overseas	TOTAL	Local	Domestic	Overseas
Base (unweighted):	205	147	19*	39	205	147	19*	39	205	147	19*	39
	%	%	%	%	%	%	%	%	%	%	%	%
A café and restaurant with indoor and outdoor seating	94	96	89	54	91	93	79	51	86	87	74	51
A Victorian Walled Kitchen Garden	87	90	79	21	80	82	74	18	53	54	47	18
Phoenix Park Information Centre	82	84	74	28	70	72	58	18	22	22	21	18
Large Children's Playground	81	84	68	10	65	67	58	8	30	31	26	5
Ashtown Castle	69	71	63	21	48	50	32	10	9	10	-	10
An indoor exhibition on the history and wildlife of the Phoenix Park	68	71	53	13	52	54	47	3	4	4	11	3
An Art Exhibition (in the Visitor Centre)	52	54	47	3	40	42	32	-	5	5	5	-
Audio visual presentation on Aras an Uachtarain	47	49	42	3	35	36	32	-	2	2	-	-
Tour of a historical Magazine Fort	46	48	32	-	28	29	11	-	2	2	-	-
At least one	97	98	95	64	96	97	89	59	95	97	94	59

***Caution: Small base**

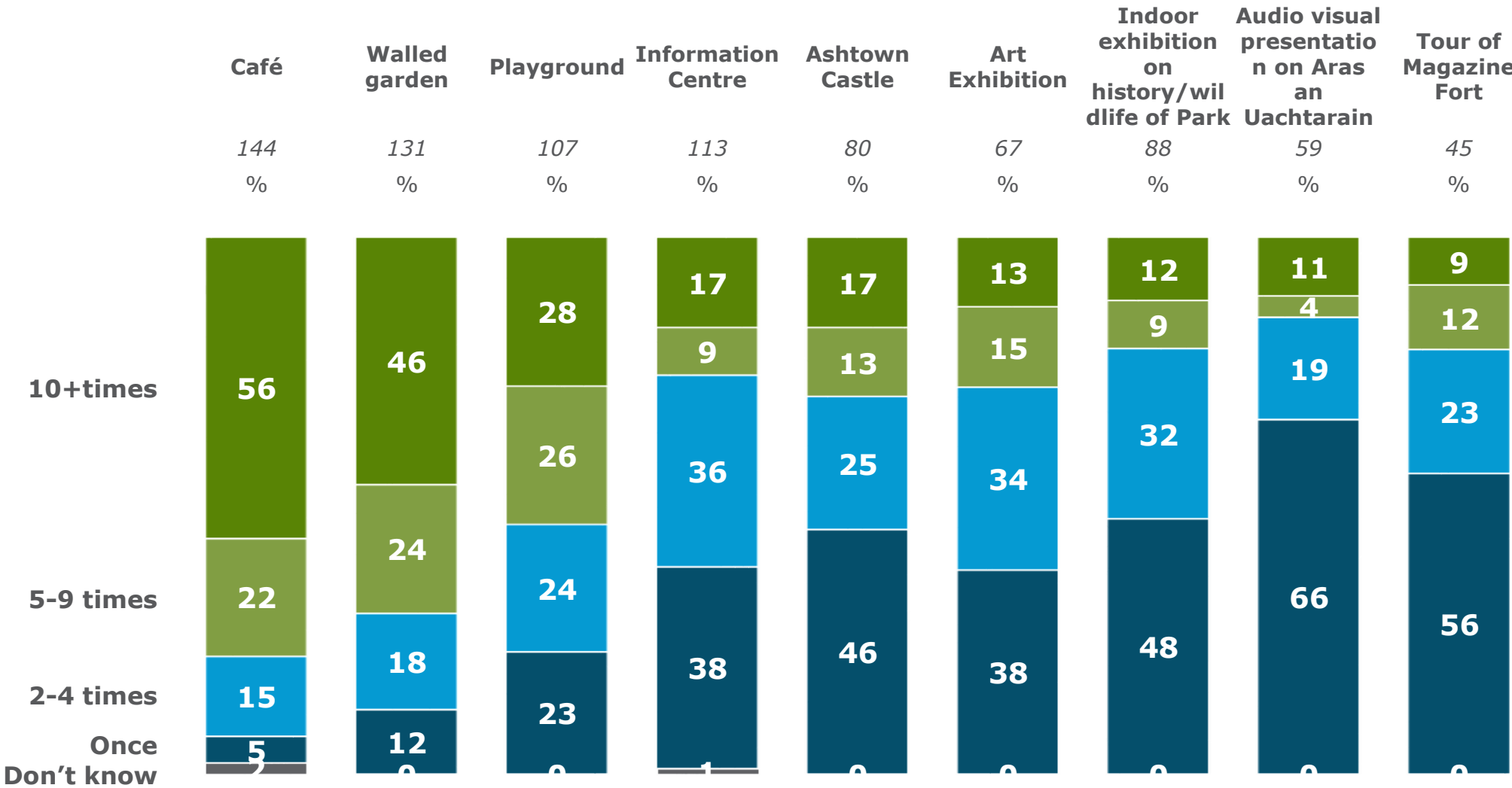
Q.16
Q.17
Q.18

Prior to this interview, which of the following were you aware were present in the Phoenix Park Visitor Complex?
Which of the following have you already visited today or did you plan to visit (before this interview)?
Which of the following have you ever visited in the Phoenix Park before today?

Frequency of visits to the complex demonstrates the importance of the café and walled garden to footfall!



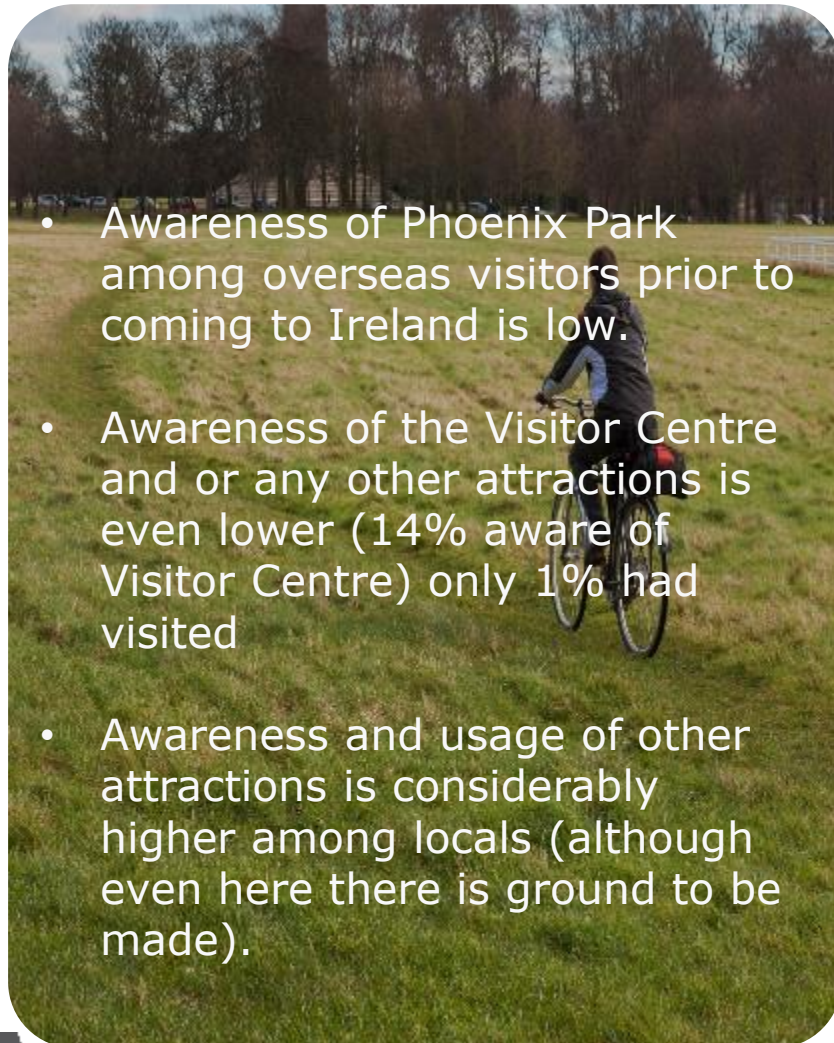
Base: All Phoenix Park Visitor Centre visitors – ever visited



Summary:



Phoenix Park



- Awareness of Phoenix Park among overseas visitors prior to coming to Ireland is low.
- Awareness of the Visitor Centre and or any other attractions is even lower (14% aware of Visitor Centre) only 1% had visited
- Awareness and usage of other attractions is considerably higher among locals (although even here there is ground to be made).



Phoenix Park Visitor Centre



- Awareness of individual elements of the Visitor Centre and trial high from locals but very low among Overseas Visitors.
- On any day, footfall is driven by the café, garden and playground.
- Overseas visitors don't use the Visitor Centre either (18%) but do use the café!



8. Communications



Understanding the line of communication from an overseas or domestic visitor perspective.

PHYSICAL

While I was in Phoenix Park
(saw signs),
Saw from another attraction,
At another visitor attraction(s)
in Ireland

DIGITAL

Phoenix Park Visitor Centre's own
website,
Other website,
Internet,
Social Media T
witter/Facebook

ANY PRINT

Article(s) in newspaper(s) /
magazine(s)
Guide Books
Brochures/promotional
literature on Ireland

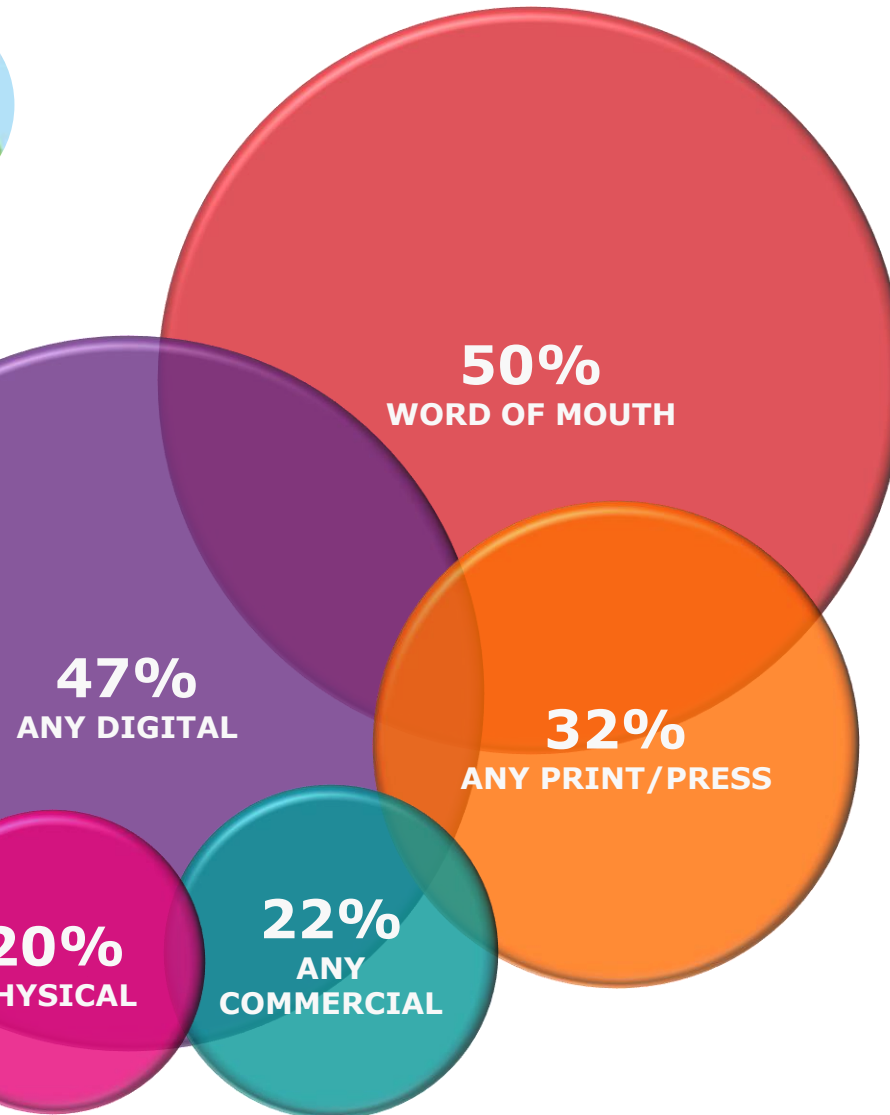
ANY COMMERCIAL

Travel Agent/Tour Operator,
Travel programme on TV or
radio,
Tourist Board
Advertising for Ireland

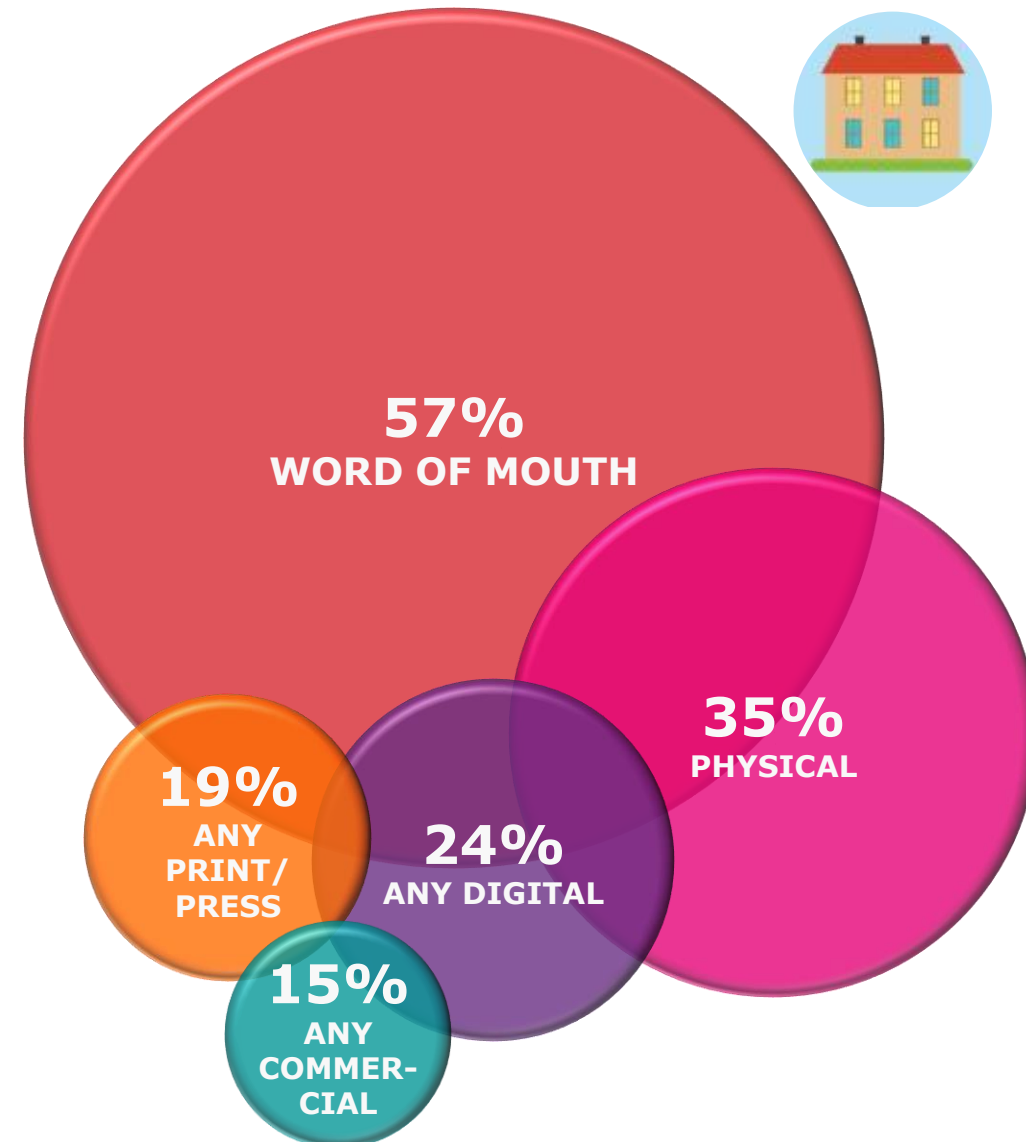
Source of Awareness – Summary: **Word of Mouth critical. Digital much more valuable for the Phoenix park while physical signage more important for the Visitor Centre**

Base: All overseas and domestic visitors

Phoenix Park



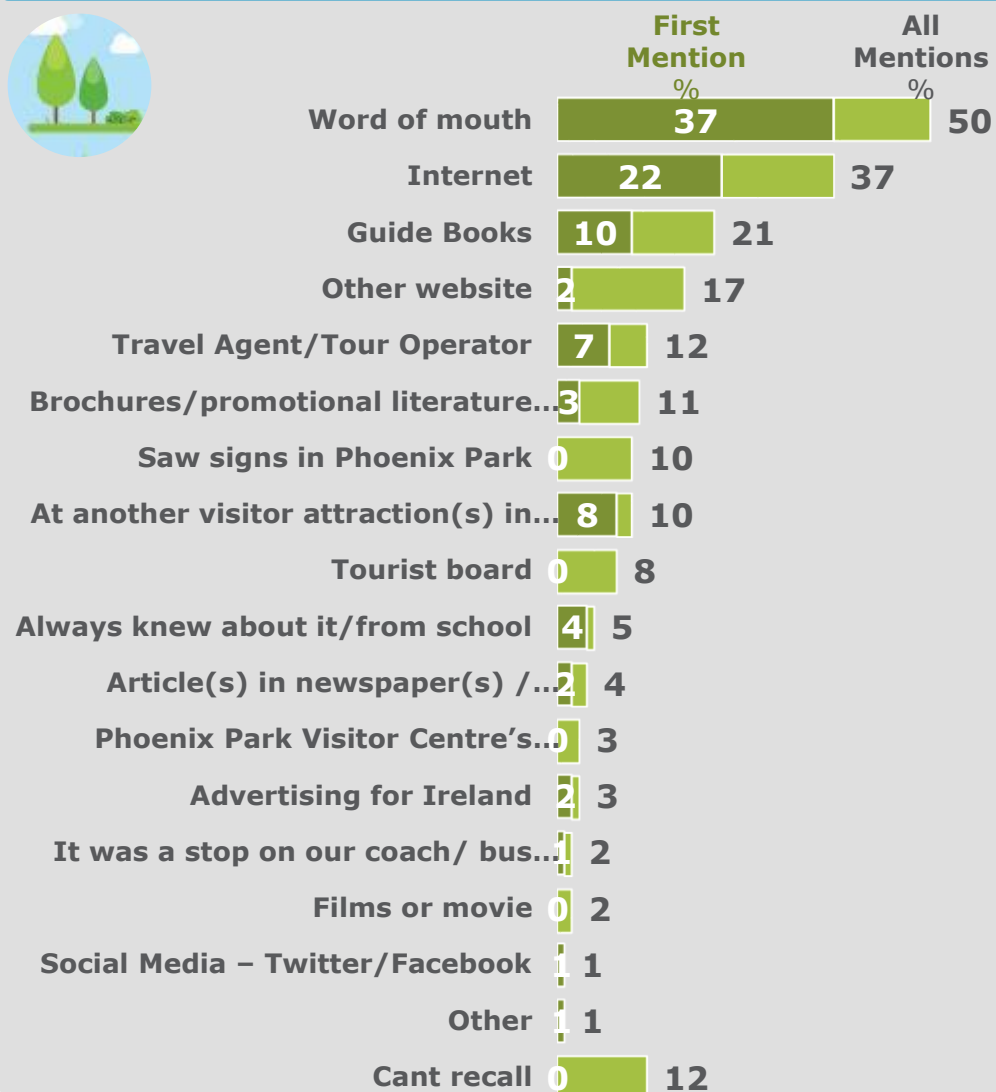
Phoenix Park Visitor Centre



Source of Awareness: the detail

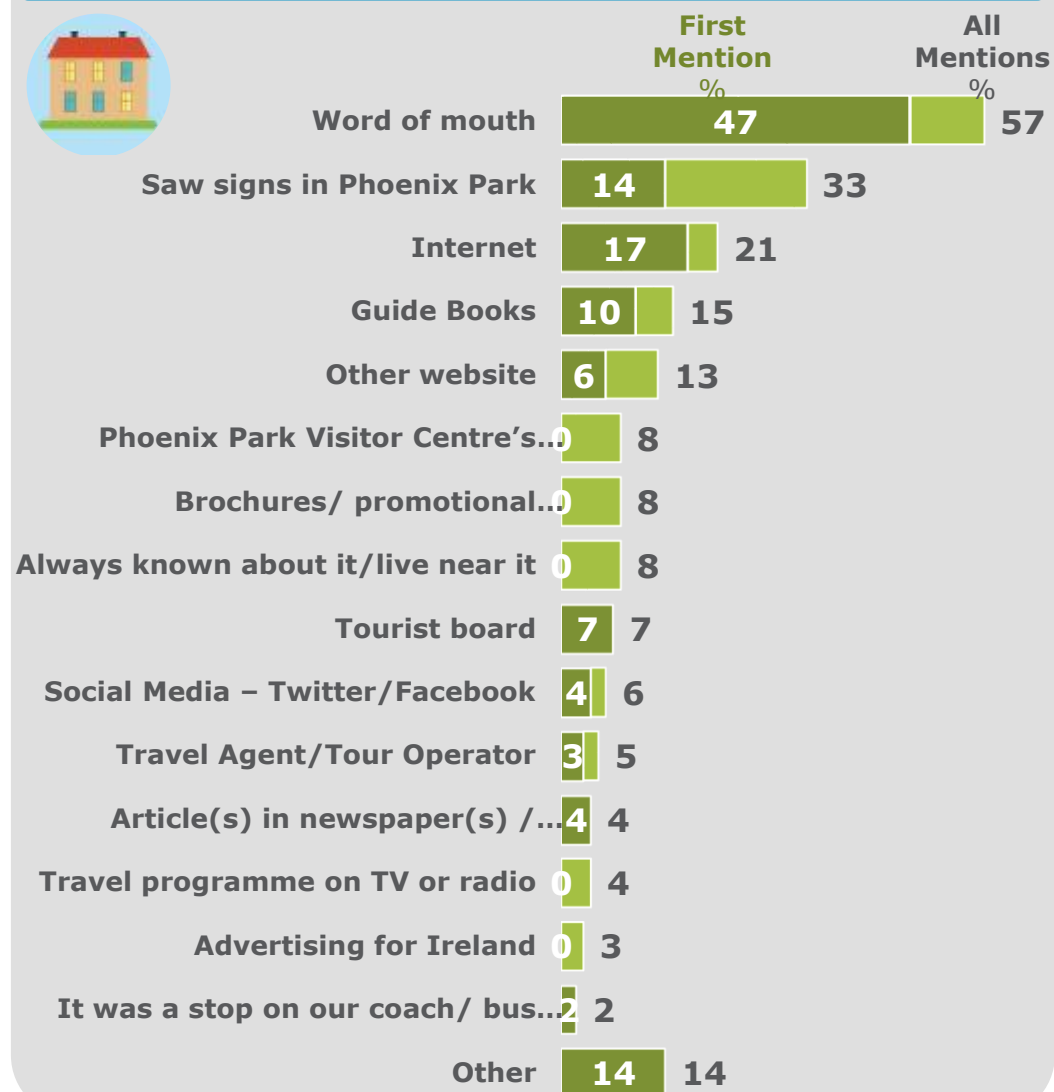
Phoenix Park

General Phoenix Park non local visitors (92)




Phoenix Park Visitor Centre

Phoenix Park Non Local Visitor Centre visitors (58)



Source of Awareness

Base: Domestic and overseas visitors

	 Phoenix Park			 Phoenix Park Visitor Centre		
	TOTAL	Domestic	Overseas	TOTAL	Domestic	Overseas
Base (unweighted):	92	15*	77*	58	19*	39*
	%	%	%	%	%	%
Word of Mouth	50	41	52	58	74	53
Digital	47	13	53	25	5	32
Print	32	-	38	20	-	26
Commercial	22	20	22	15	21	13
Physical	20	40	16	36	32	37

Digital more important for overseas visitors.
Signage working stronger for Domestic visitors (but footfall low for this target)

All coms important for overseas visitors.

Word of mouth and signage much more important for Phoenix Park when compared with norms.



	National Visitor Attraction Average	Any Mention	
		All Overseas Visitors to Phoenix Park	All Overseas Visitors to Phoenix Park Visitor Centre
Base (unweighted):	2,021	92	58
	%	%	%
Word of mouth	39	50	57
Guide Books	34	21	15
Internet	33	37	21
Travel Agent/Tour Operator	20	12	5
Brochures/promotional literature on Ireland	18	11	8
Tourist board	12	8	7
Phoenix Park Visitor Centre's own website	9	3	8
Advertising for Ireland	8	3	3
At another visitor attraction(s) in Ireland	6	10	-
Other website	5	17	13
Article(s) in newspaper(s) / magazine(s)	4	4	4
Social Media – Twitter/Facebook	4	1	6
Travel programme on TV/radio	4	-	4
Films or movie	3	2	-
Saw signs in Phoenix Park	-	10	33
Always knew about it/from school	-	5	8
It was a stop on our coach/ bus route	-	2	2
Other	9	1	14

Q.11

Where did you first hear of the Phoenix Park?

Q.13

Where did you first hear of the Phoenix Park Visitor Centre Complex?

About a third of (non local) Park visitors are visiting some other Dublin City attraction on the day

Base: All NON LOCAL visitors



	Phoenix Park	Phoenix Park Visitor Centre
Base (unweighted):	92	58
	%	%
Trinity College	14	13
Temple Bar	14	15
Kilmainham Gaol	10	10
Christchurch/ Saint Patricks Cathedral	10	2
Dublin Castle	9	8
National Museum of Ireland Collins Barracks	4	2
National Museum of Ireland Kildare Street	4	1
Irish Museum of Modern Art	3	2
National Gallery of Ireland	2	2
Guinness's	1	2
Little Museum of Dublin	1	2
Teelings Distillery	1	-
Dublin Zoo	1	-
Clontarf Castle	1	-
Glasnevin Cemetery	-	2
Chester Beatty Library	-	2
Botanic Gardens	-	2
None of these/Not visiting other attractions today	65	63

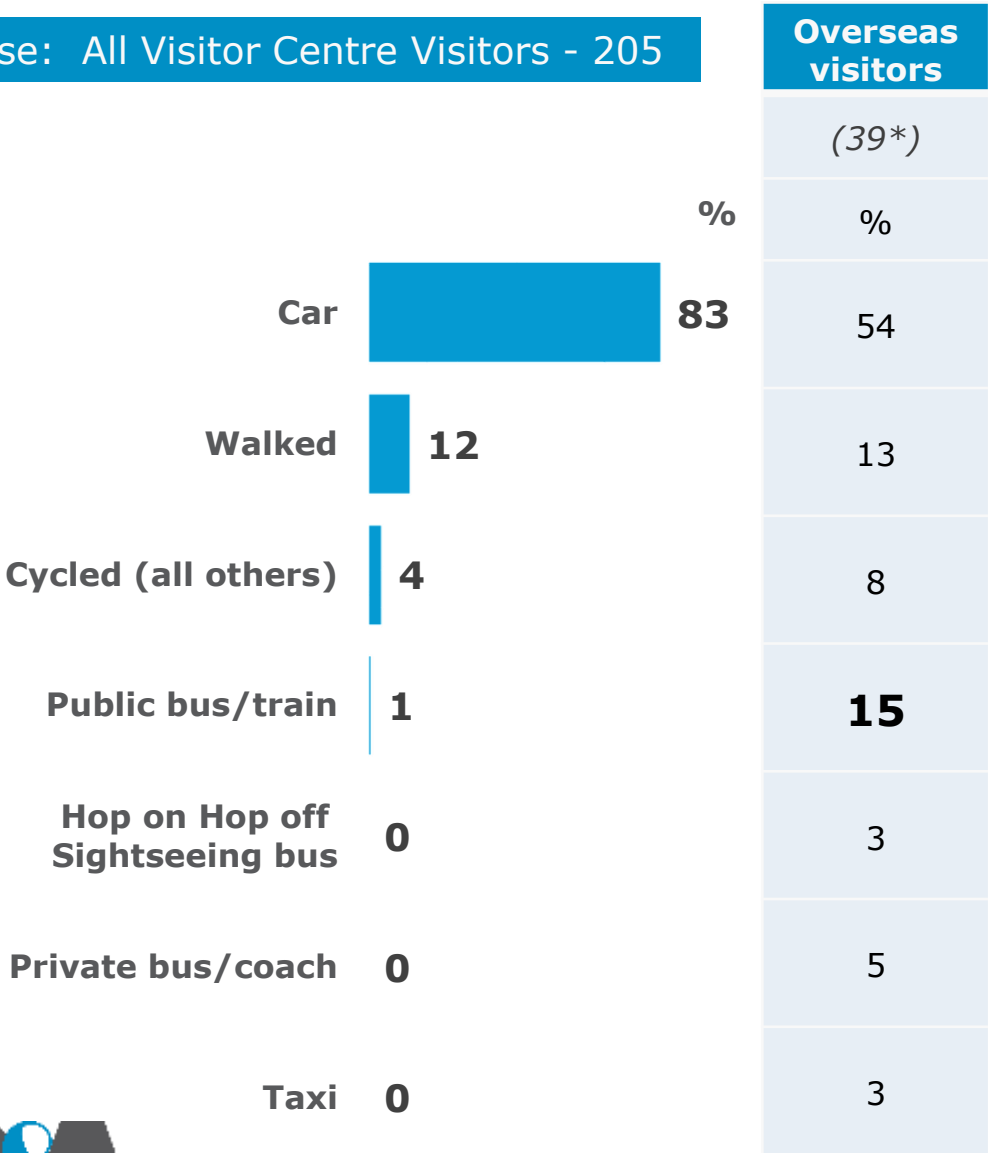
A photograph of a modern wooden building and a stone tower, viewed through a wooden frame. The wooden building on the left has a curved roof and large windows. The stone tower in the background is a multi-story structure with a gabled roof. The scene is set in a grassy area with a gravel path. A blue arrow-shaped graphic points to the right, containing the text.

9. The Visitor Centre Experience

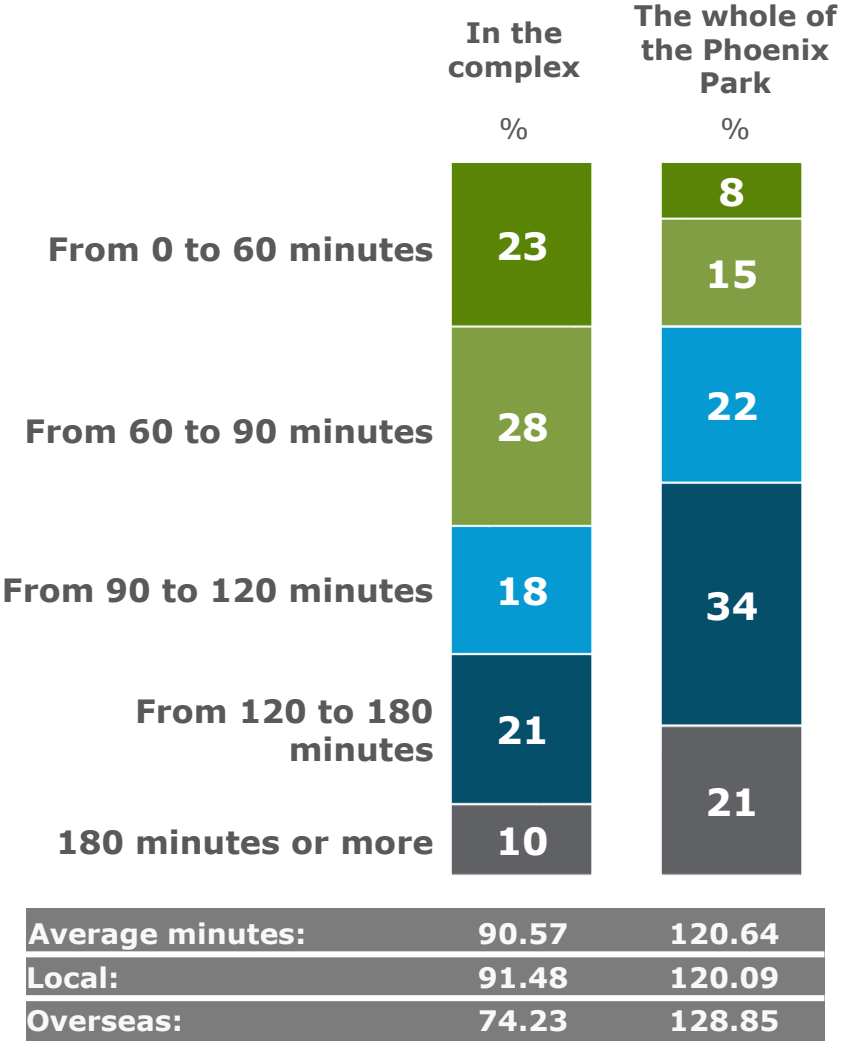


Majority of Visitor Centre visitors arrive by car and spend about an hour and a half there. Overseas visitors spend a little less time in the complex and a little more time in the Phoenix Park itself, when compared with locals.

Base: All Visitor Centre Visitors - 205



TIME SPENT ON THE VISIT



Q.4

And how did you travel to the Phoenix Park Visitor Centre Complex today?

Q.5

Overall, how long will you spend/did you spend today in (minutes)?

Reasons to visit Visitor Centre: Driven by participating in one activity which is primarily the café.



Reasons for visit



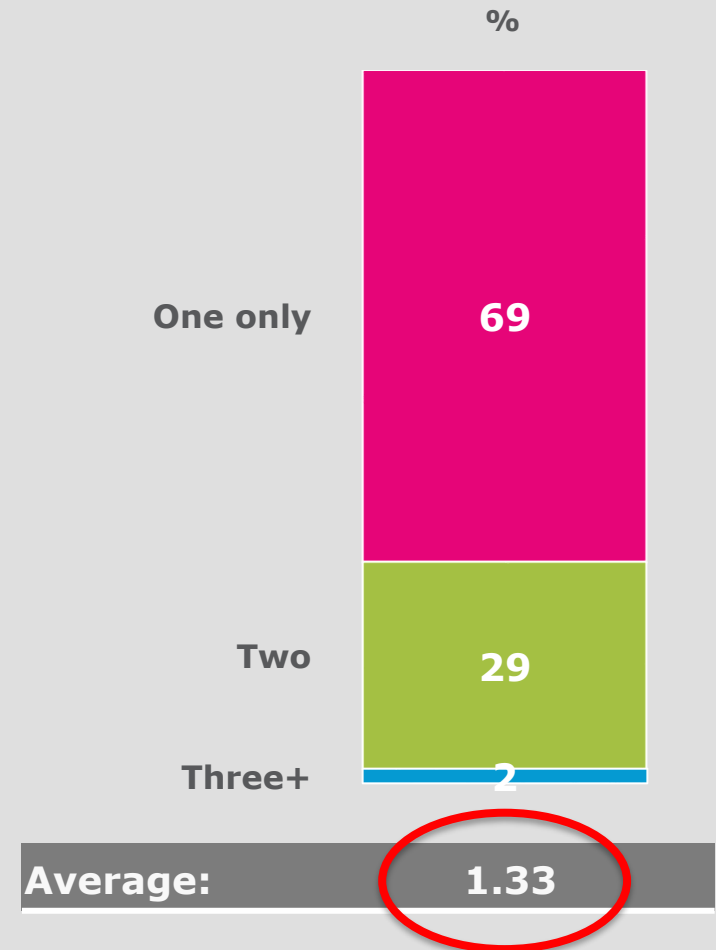
63%

Any Visitor Centre complex reason

38%

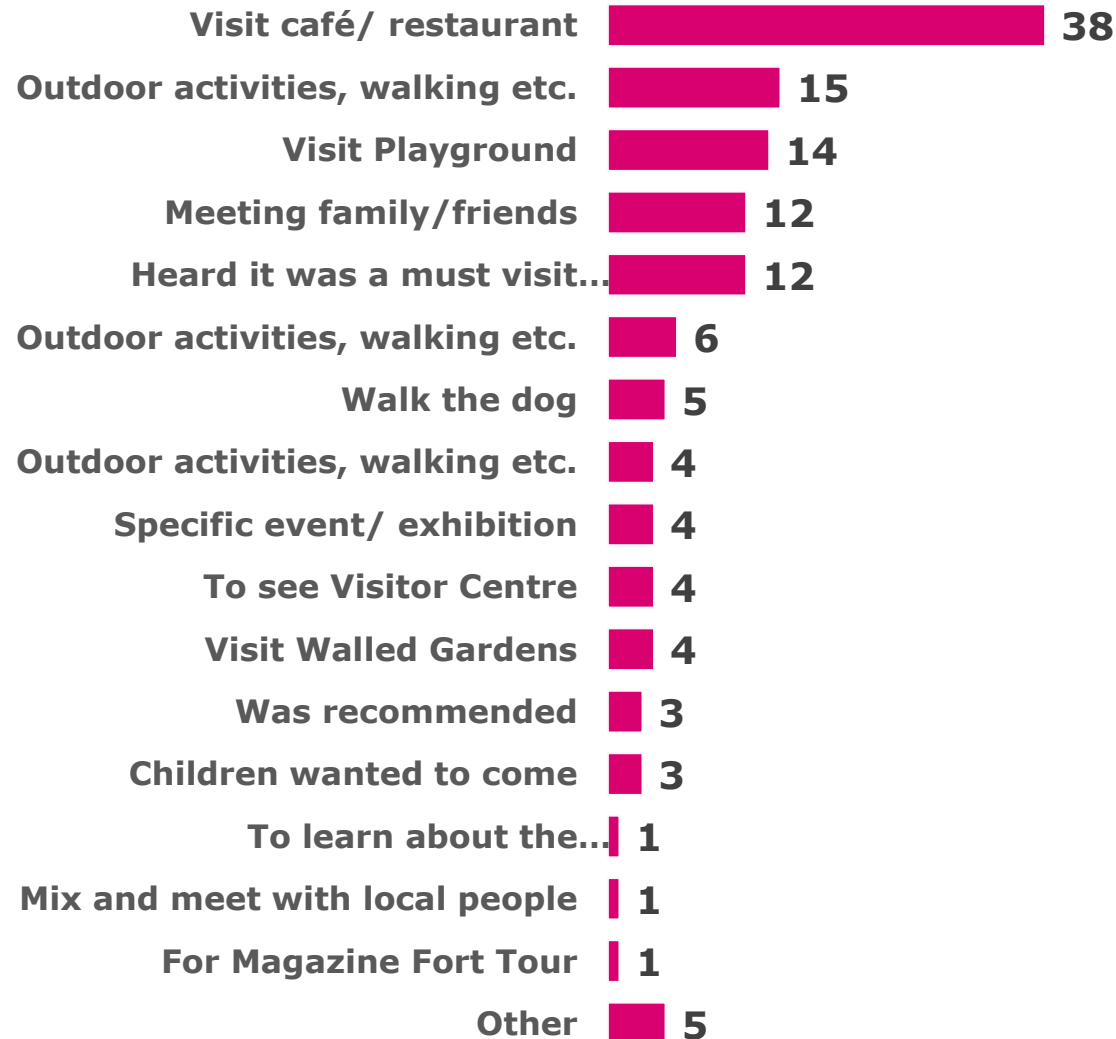
TO GO TO THE CAFÉ

Number of activities intended during visit



Reasons for visiting **Visitor Centre** are primarily going to the **Café** with secondary drivers outdoor activities, visiting the playground and meeting family or friends

Base: All Visitor Centre respondents

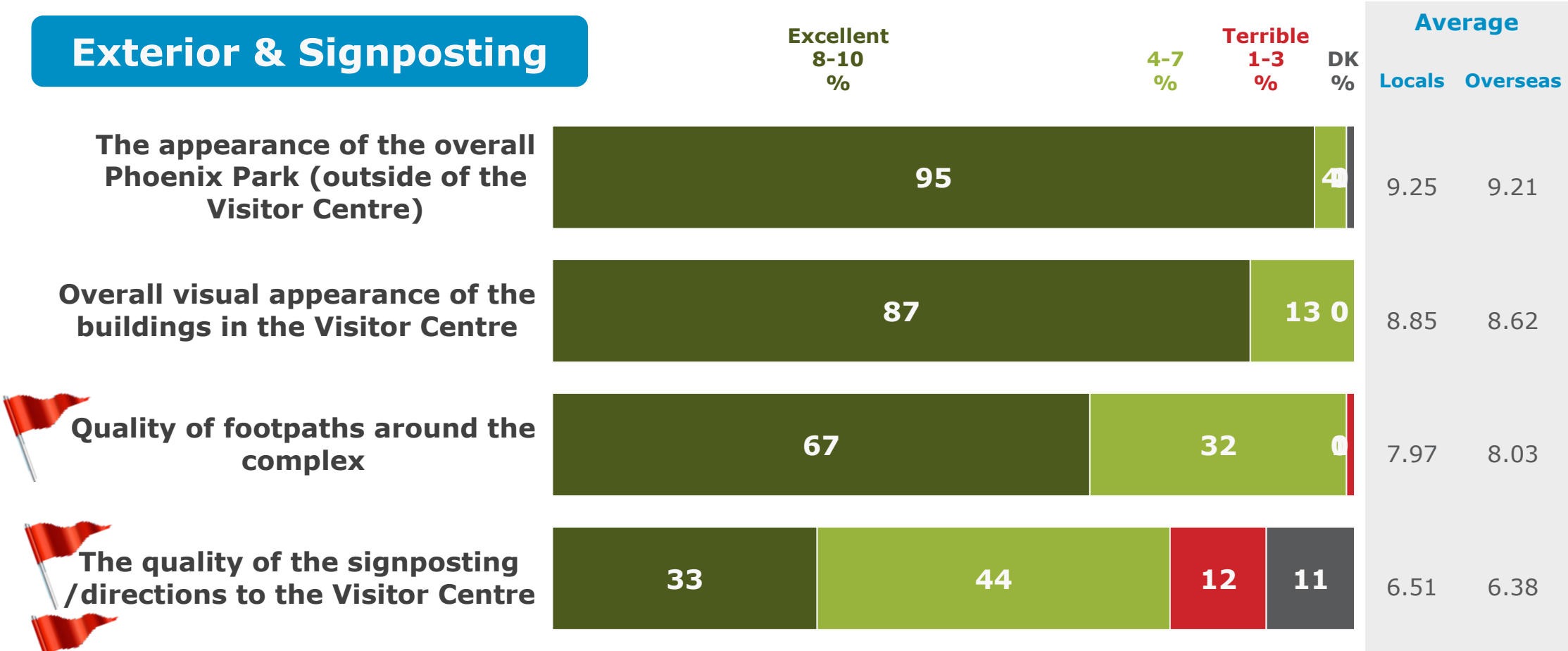


Rating of individual elements of the Complex

Base: All Visitor Centre respondents - 205



Exterior & Signposting



Rating of individual elements of the Complex

Base: All Visitor Centre respondents - 205



Interior Layout

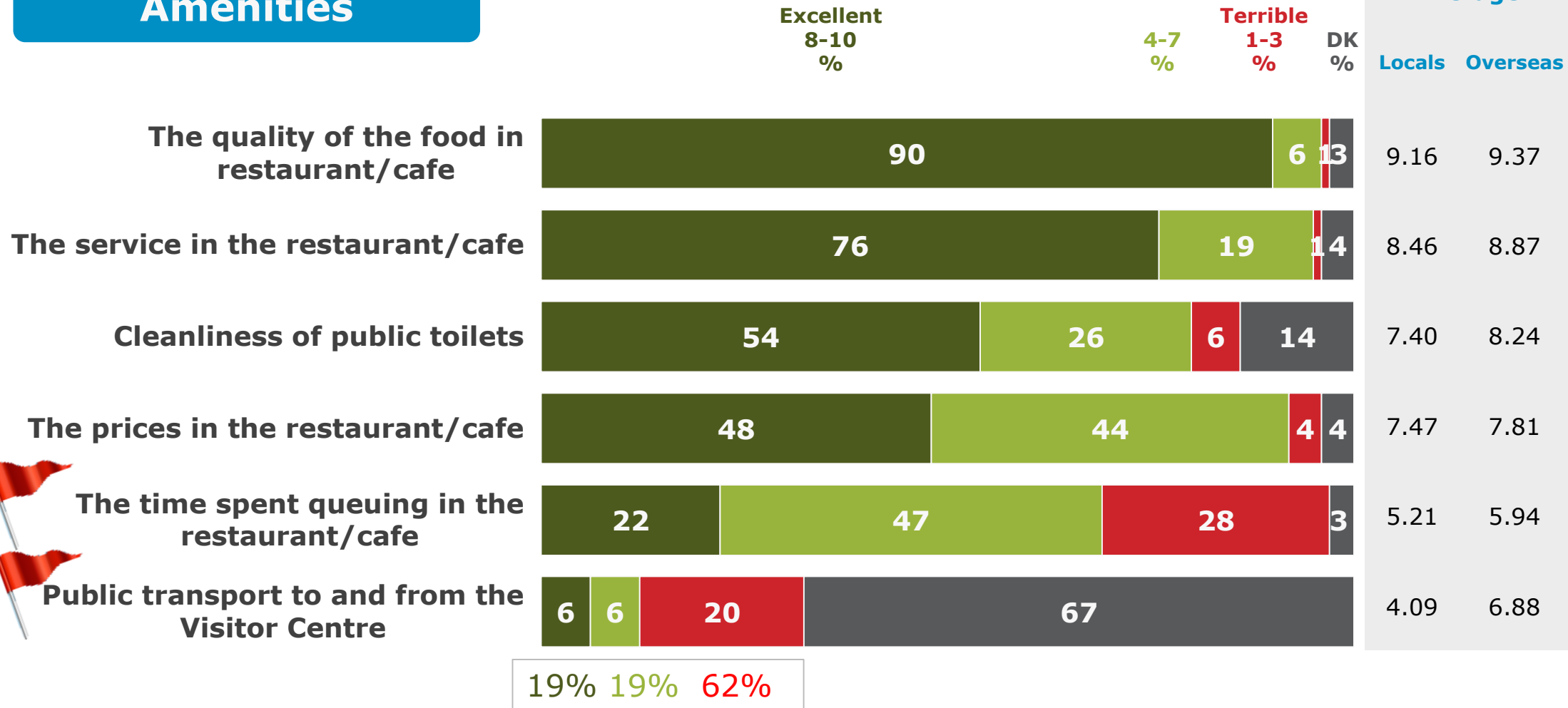




Rating of individual elements of the Complex

Base: All Visitor Centre respondents - 205

Amenities



Q.23

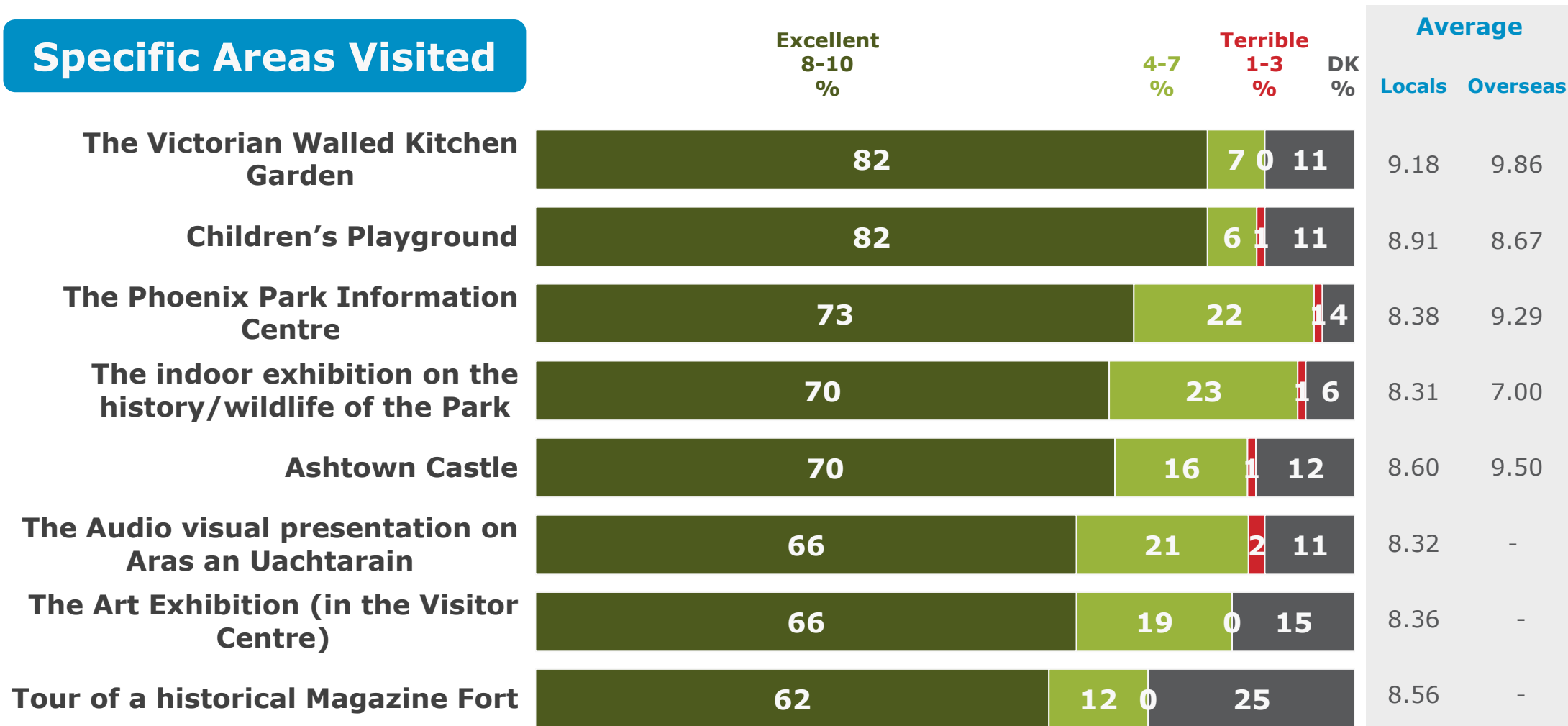
Now I would like to ask you to rate a series of specific aspects of your visit to the Phoenix Park Visitor Centre. For each one I read out, I would like you to rate it on a ten point scale where ten means you think it was excellent, and 1 means you think it was terrible.



Rating of individual elements of the Complex

Base: Visitor Centre respondents –visitors to each area

Specific Areas Visited



Q.23

Now I would like to ask you to rate a series of specific aspects of your visit to the Phoenix Park Visitor Centre. For each one I read out, I would like you to rate it on a ten point scale where ten means you think it was excellent, and 1 means you think it was terrible.

Key drivers of overall satisfaction are the open spaces, service in the café, and the appearance of everything

Base: All visiting the centre

Share of contribution to overall satisfaction	
Presentation of squares and open spaces in the Visitor Centre complex	14.30%
The service (professional/efficient) in the restaurant/cafe	13.70%
Overall visual appearance of the buildings in the Visitor Centre complex	10.90%
The appearance of the overall Phoenix Park (i.e. outside of the Visitor Centre complex)	10.90%
The quality of the food in restaurant/cafe	10.70%
The Victorian Walled Kitchen Garden	9.00%
Quality of green open spaces/ surrounding landscape in the Visitor Centre complex	8.20%
The prices in the restaurant/cafe	7.30%
How easy was it to find your way around the grounds of the Visitor Centre complex? (i.e. to know where the various facilities and attractions are to be found?)	6.60%
Quality of footpaths around the complex	2.70%
Children's Playground	2.10%
The information centre with full details on the range of attractions, tours and activities available in Phoenix Park	1.40%
The quality of the signposting /directions to the Visitor Centre complex	1.10%
The time spent queuing in the restaurant/cafe	1.10%
Public transport to and from the Visitor Centre complex	0.00%
Cleanliness of public toilets	0.00%
The indoor exhibition on the history and wildlife of the Phoenix Park	0.00%
The Audio visual presentation on Aras an Uachtarain (home of the president of Ireland)	0.00%
The Art Exhibition (in the Visitor Centre)	0.00%
Ashtown Castle	0.00%
Tour of a historical Magazine Fort which was used to store gun powder and ammunition.	0.00%



10. Magazine Fort Tour Qualitative Review



Summary Qualitative Overview

- The qualitative study was conducted during and after the tour of the Magazine Fort with both domestic and overseas attendees; feedback was also retrieved during the main survey itself.
- The qualitative interviews identified a clear set of factors in the review of the Magazine Fort Tour in relation to perceived strengths and development areas:

Valuing the Journey

Bringing the Park into the Fort

Storytelling & Performance

Health & Safety

Valuing the Journey: Qualitative Review

- That the **shuttle bus encompasses a broader introduction to the Park** itself is considered a real bonus by attendees:
- The level of Park detail provided via the journey is just right:
 - ❖ The stop at Áras an Uachtaráin
 - ❖ The oldest polo ground in the world and the creation of the cricket ground,
 - ❖ The Wellington monument
 - ❖ And how the Phoenix Park got its name.
- The shuttle bus ride serves to:
 - ❖ Establish the emphasis on storytelling
 - ❖ Build expectations for the arrival at the Fort itself

Storytelling & Performance: Qualitative Review

- The **role of the tour guides** is essential in the enjoyment derived from the visitor experience.
- The range and richness of the background stories they impart exceeds expectations:
 - ❖ The story of Dublin castle going on fire, munitions moved to the Royal Hospital and then creation of the fort in the park
 - ❖ The fort being subject to two notable raids in the 20th century.
 - ❖ The link with 1916 is of particular interest
- There is the opportunity to continue this movement through history:
 - ❖ Why did the Fort fall into such disrepair?
 - ❖ And what provoked the desire to restore and renovate.

Storytelling & Performance: Qualitative Review

- The emphasis on **design and architecture** as visitors move around the Fort can also provoke fascination
 - ❖ The highlight being the raised floor design to keep the powder dry
 - ❖ The striking visual impact of the Blast Wall
 - ❖ The design of the turrets, the grooves in the wall for muskets etc.
- Memorably recalled moments included unusual **story vignettes** around people, rituals and events:
 - ❖ The horses wearing slippers on their hooves to avoid friction
- .. and the Tour Guide asserting the quality of the interior acoustics by singing Molly Malone!
- Such moments should be developed further and include where possible anecdotes around the military personalities and the safety rituals of the army staff.
- These vignettes are typically considered delightful by visitors and their idiosyncratic charm entirely in keeping with an 'Irish' experience (not taking ourselves too seriously etc.)

Storytelling & Performance Informing Marketing

- Visitor feedback identifies that **the name 'Magazine Fort'** does not always readily convey a specific function:
 - ❖ The word 'Magazine' can be unknown to the lay visitor (as opposed to military aficionados)
 - ❖ This may prove to be especially apparent when the Tour attracts a broader visitor profile.
- Marketing of the Tour will do well to ensure the nature and role of the Fort is clearly conveyed
 - ❖ Especially as the storage of ammunitions, gunpowder, potential explosions etc. are all 'exciting' in and of themselves
- Consideration should also be given to incorporating the storytelling nuggets into the marketing of the Fort:
 - ❖ 'Learn why.....'

Bringing the Park into the Fort: Qualitative Review

- That the Tour of the Fort seizes on the advantage of the great views available from the Fort is a further perceived strength.
- The tour guides skilfully **use the views to extend the range of the storytelling**:
 - ❖ The view of the Memorial gardens
 - ❖ The Viking burial grounds in Kilmainham being the largest outside Scandinavia
 - ❖ British artillery fire hitting the wall of St. Marys Hospital
- All of these examples serve to firmly situate the Magazine Fort within the broader context of the Phoenix Park;
 - ❖ and complement the inclusive impression given by the initial Shuttle Bus ride.

Health & Safety: Qualitative Review

- The tour guides are very attentive in stressing the Health & Safety requirements of visiting the Tour in its' current state.
- While understandable, this can distract from the enjoyment of the experience for some visitors.
 - ❖ It also appears self-evidently not an appropriate venue for young children.
- We must be conscious that the condition of the Fort and grounds at the moment will likely be mentioned in the word of mouth that will be generated by the 'early adopter' visitors to date.

Considerable Potential

- The response to the tour was very favourable and visitors were very open about the range of potential developments for the Fort:
 - ❖ Use as a venue to provide broader details of Military history
 - ❖ Recreate the past inside the magazine via multimedia/ holograms etc
 - ❖ Café and conferences rooms
 - ❖ Tablets (Interactive story)
 - ❖ Concerts/ Plays
- But primarily they desire the Fort Tout itself to be developed through renovation and to provide more exterior and interior access to the Fort grounds – with the associated benefits to the story delivered.

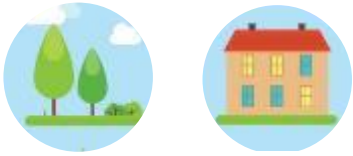


11. Potential for Attractions

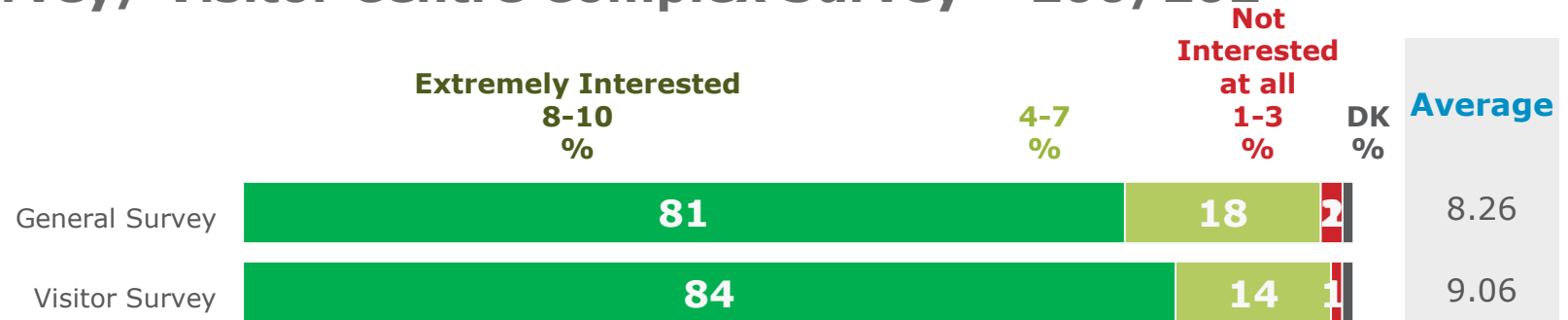


Interest in café, walled garden, Ashtown Castle, and the Centre extremely high.

Base: All General Survey/ Visitor Centre Complex Survey – 200/202



The café and restaurant



The Victorian Walled Kitchen Garden



Ashtown Castle



Phoenix Park Information Centre

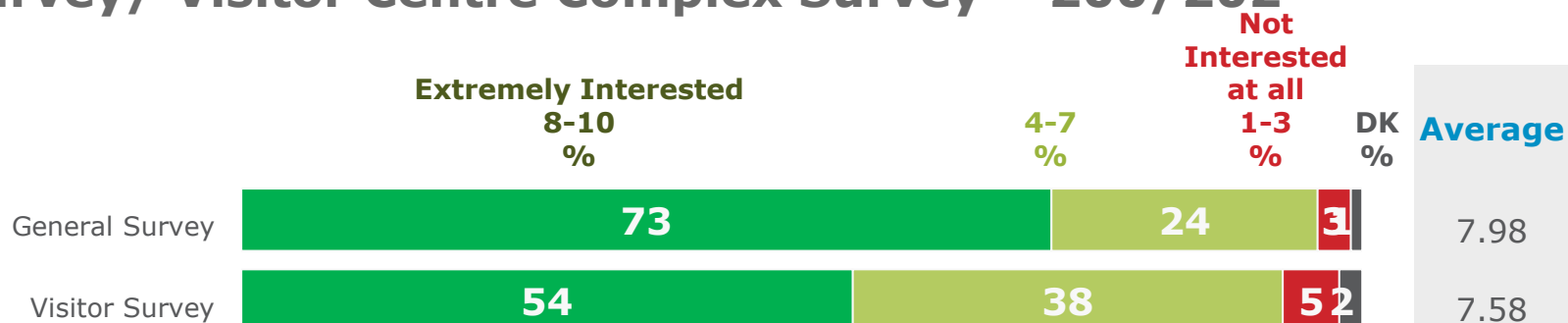


High interest in visiting all elements of the Visitor Centre Complex

Base: All General Survey/ Visitor Centre Complex Survey – 200/202



An indoor exhibition on the history and wildlife of the Phoenix Park



Tour of the Magazine Fort



Playground



Art Exhibition (in the Visitor Centre)



Audio visual presentation on Aras an Uachtarain

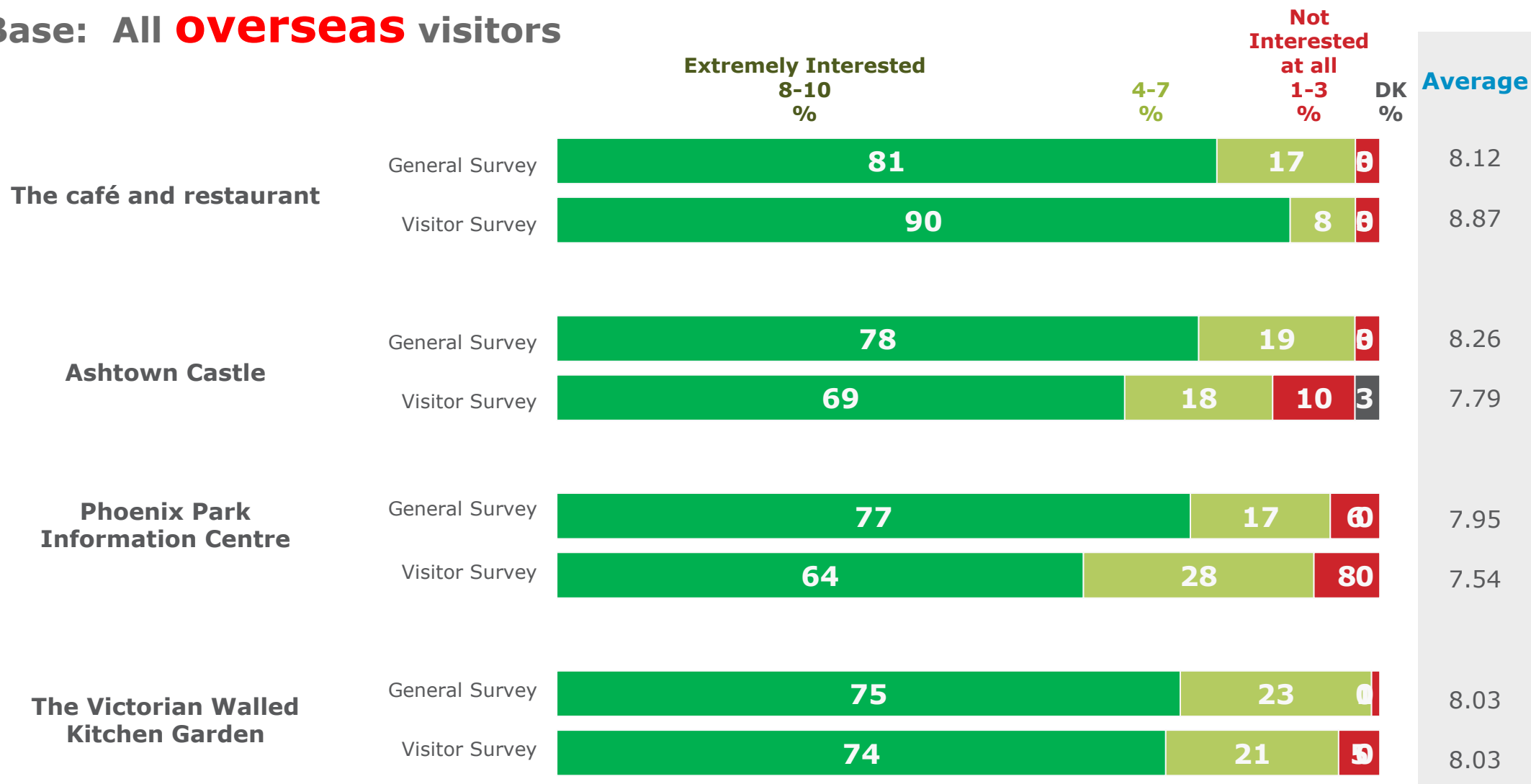


Q.15/Q.20

Please tell me how interested you would be in visiting each of the following?

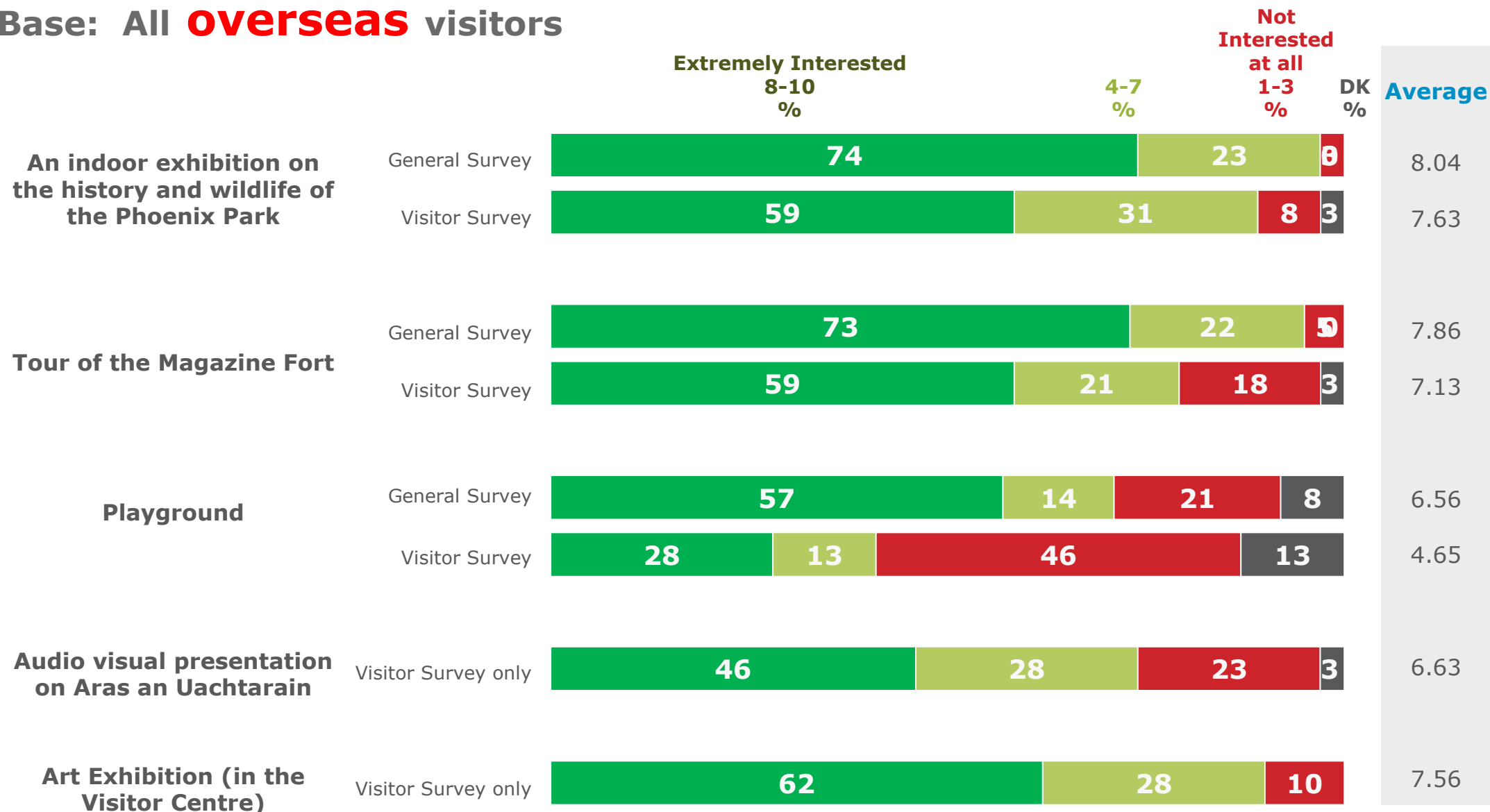
Level of interest in attractions extremely high among Overseas Visitors

Base: All **overseas** visitors



Interest in exhibition on Park's history and wildlife is very high among overseas visitors

Base: All **overseas** visitors





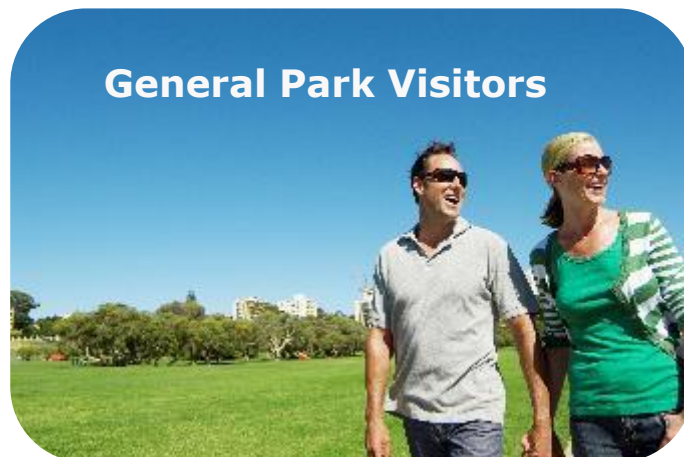
11. Key Findings



Key Findings

The key findings of this survey are as follows:

- The very large majority of visitors to the Phoenix Park and particularly those visiting the Visitor Centre are Irish and are familiar with the Park.
- There is evidence that about a third of visitors are new recruits (presumably this is transient and constant)
- After that the profile is very different between the General Park user and the Visitor Centre user. Those in the park are generally more broadly based in gender and age terms (although are younger than those using the centre). The composition of the parties is also broad but adult (people come on their own, as a couple, adult family and with friends but only 10% come with children). It is middle class.
- This compares with a more female audience for the Visitor Centre. It is older, even more middle class and while the type of party is largely adult, in this case a quarter come with children across a wide range of ages.



Key Findings

Overall Satisfaction

- **Satisfaction with the visit to the Phoenix Park is exceptionally high.** Average score out of 10 is 9.15 with as many as 45% giving the Park a 10 out of 10. In terms of an NPS or net promotion score both the Phoenix Park and the Visitor Centre perform extremely well.

Motivations to Visit Attraction

- The key reasons for coming to the **Phoenix Park are two-fold – outdoor activities such as walking, getting exercise or visiting the zoo.** In third place people like to come because it provides a relaxed pace of life and they can get some fresh air.
- For those visiting the Centre, the **driver is most definitely to visit the café.** However they are interested in a little more than this which also includes getting a bit of fresh air, meeting family and friends, visiting the playground (for some) with some also having been told it was a good visitor attraction.

Key Findings

Awareness & Usage of Individual Attraction

- The majority of those using the Park **are not well informed** about all of the attractions that are available in the Visitor Centre Complex. Only just over half are aware of at least one attraction meaning there is quite some distance to go in promoting what is available.
- Only a third of overseas visitors in the Park are aware of any of the attractions in the Visitor Centre Complex. , let alone where they are. Only 14% are aware of the Information Centre itself and only 5% had visited any one single attraction in the Centre Complex.
- **Lack of awareness is therefore acting as a barrier to growing footfall and interest** in the Visitor Centre Complex.
- From the half who know something, a high of 42% have visited one of these attractions. As such, conversion to visit is very high (above the 75% mark) and so it indicates that creating awareness does have a very positive impact for the attractions.
- However, it is important to note that only 8% are visiting an attraction on the day of interview (clearly they do not believe there is something worth going back for!).
- For those in the Visitor Centre, the café definitely drives footfall followed by the walled garden and the large playground. The Information Centre only comes in fourth position in terms of having been used on the day (22% of all visitors)

Key Findings

Communications

- Currently awareness of the Park is being driven by word of mouth and digital activity while the Centre itself even more so by word of mouth and also physical signs. The manner in which people become aware of both is significantly behind the national norms for other tourist attractions (guide books, tour guides etc.).

The litmus test

- People who do visit the Visitor Centre do enjoy themselves and rate each of the attractions very highly.
- Importantly, when asked about potential interest in the attractions available, interest is high both for domestic and overseas visitors (the playground less so for overseas visitors).
- This study provides clear evidence that there is development potential for the Phoenix Park Visitor Centre and its individual attractions.
 - ❖ There is a definite issue with awareness of the Park prior to visitors arriving
 - ❖ There is second barrier in awareness of the Visitor Centre and what it has to offer
 - ❖ Once there, the current goal is the café when there is a clear and definite interest in so much more!



THANK YOU

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