

# Dublin Visitor Study

March 2016

# Table of Contents

Introduction	3
Executive Summary	4
Methodology Overview	6
Initial Findings - All Responses	7
Demographics, Origin & Visitation	8
Non-Visitors	16
Advertising	22
Potential Visitors	28
Visitor Patterns	32
General Perceptions	48
Visitor Perceptions	52
Planning & Inspiration	65
Segment Comparisons: Visitor & Non-Visitor	72
Segment Comparisons: Event & Attraction	79
Year-to-Year Comparisons	89
Demographics & Visitation	90
Non-Visitors	93
General Perception	96
Visitor Patterns	98
Advocacy Comparisons	103
Experience Ranking	105
Advertising	107
Findings Summary & Key Takeaways	110



# Introduction

North Star Destination Strategies has been working with communities for more than a 15 years, helping them uncover, define, implement and integrate their own unique competitive identities. Our experience has shown that there is no substitute for comprehensive research when it comes to establishing a bedrock of solid support for all future marketing efforts. But savvy destination leaders are realizing that research shouldn't end just because a brand identity is in place. Ongoing research efforts offer numerous benefits that allow destinations to refine, reinforce or redirect their competitive growth strategies to ensure ongoing success.

In 2006, the Dublin Convention and Visitors Bureau partnered with North Star on an initial destination branding project. The initiative uncovered a competitive identity based on the area's relationship to Dublin, Ireland, which posits that despite a lack of Irish heritage, travelers expect an authentic Irish experience. Recommendations included fully embracing Dublin's connection to Ireland because "although you may not have true Irish in your blood, you certainly have it in your heart." Thus, the line "Irish is an Attitude" was developed to identify Dublin as a destination.

In 2011, the Dublin Convention and Visitors Bureau again partnered with North Star to evaluate any changes in brand image and perceptions among consumers, quantify visitation patterns and separately identify and compare core segments. Now again in 2016, the Dublin Convention and Visitors Bureau has partnered with North Star to compare and contrast the findings from the previously conducted studies to offer insight and direction for moving forward.

The study that follows provides a detailed understanding of visitation patterns and perceptions associated with Dublin, which is a critical part of crafting marketing strategies that will attract more visitors, more often. The Executive Summary represents a snapshot of the critical insights from the research. Detailed findings are compiled in the Final Research report that follows.



# Executive Summary

## All Responses

Overall, Dublin visitors are very loyal and satisfied with their experience. 40% of Dublin visitors have visited 4 or more times in the past two years and 93% of visitors said they were likely to return. Satisfied visitors that return again and again are essential for long-term growth and should be celebrated as a major success for Dublin.

Your visitors responded overwhelmingly in the affirmative (96%) that they were able to find enough resources to plan their trip and those respondents listed your website as their leading and most trustworthy source (32%) of information for travel to Dublin.

Visitors are mostly regional (within driving distance) as “personal car” was by far the most-used method of travel. When your visitors stayed overnight, most stayed in a hotel (72%), in Dublin (67%) for two nights (45%).

In terms of descriptors and perceptions, Dublin’s “Irish” reputation remains the dominant perception across all audiences for aided and unaided questions (open-ended and multiple choice). This is communicated by the word cloud and multiple choice response (31%) and the “Irish-theme” descriptor ranking (9.05/10). This represents continued success and improvement in the appreciation of the “Irish” centered brand both quantitatively and qualitatively since the 2011 study.

The most trustworthy source of information from both your visitors and potential visitors (those who said they have not visited, but are likely to do so in the future) is the DCVB’s website. Typically the most trustworthy source of information from North Star studies (confirmed by Edelman’s Trust Barometer) is peer-to-peer. This indicates that additional investment in online marketing would be valuable.

## Cross Tabulation & Core Segments

Response rates were sufficient to allow for two core cross tabulations: visitors compared to non-visitors and event visitors compared to attraction visitors.



# Executive Summary

## **Cross Tabulation & Core Segments (Visitor and Non-Visitor)**

Visitors comprised 61% of all responses and non-visitors comprised 39%. Non-visitors believed Dublin is “Irish-inspired” to a greater degree than visitors (41% and 26% respectively). This is indicative of the fact that Dublin’s brand marketing has a greater concentration of “Irish-inspired” communication content than the experience Dublin itself offers. That said, “Irish theme” was the dominant descriptor for both visitors and non-visitors.

In terms of primary purpose of visitation, your attractions (Zoo and Aquarium) and core events (Irish Festival and Memorial Tournament) are your top trip purposes for both visitors and potential visitors.

In general both visitors and non-visitors gave Dublin assets high marks. Visitor rankings are greater than non-visitor rankings in every category with the exception of “Irish theme” with a slight difference of 9.01 for visitor ranking and 9.11 for non-visitor ranking.

## **Cross Tabulation & Core Segments (Event and Attraction Visitors)**

This cross-tabulation was formulated by those who indicated they visited Dublin for an event (Irish Festival, Memorial Tournament, etc) and those who had visited Dublin for an attraction (Zoo, Zoombezi Bay, etc). The event visitor skewed slightly older with 35% of the respondents in the 55-64 range, as compared to the attraction visitors who had their largest representation in the 44-54 range (30%).

Attraction visitors are slightly more likely to be high volume visitors (4 or more times in the past two years) at 37% compared to 32% of the event visitors in the same category. Event visitors, however, are slightly more likely to change their perception upon visitation at 43% compared to the attraction visitors at 37%. Advertising recall and influence were roughly the same for both audiences.

The event visitors described Dublin as “Irish-inspired” at a slightly higher rate of 37% compared to 29% for the attraction visitors. It was, however, the top descriptor for both.

The following report includes several more details across all categories and highlights key takeaways based on data.



# Methodology Overview

## Respondents

The survey link was emailed to 8,600 inquiry e-mail records spanning from 2009 - 2016. An example of those invitations can be found in Appendix A. The average open rate and click-through rate for these emails was 20% and 30% respectively. Based on this open rate and subsequent total survey responses, the response rate for those that opened the email was 13.48%.

The survey was open from January 18, 2016 to February 22, 2016.

The survey collected 232 respondents not terminated due to age (under 18) or being from Dublin, Ohio. Given that the entire visitor population is roughly 2.6 million (as indicated by the Dublin CVB 2015 Annual Report), this survey has a 95% confidence level and a +/- 6.43 confidence interval. Data in charts is rounded and in some cases the represented data does not equal 100, but is accurate.

## Methodology

North Star developed a survey instrument based on the DCVB's primary goals, objectives and marketing needs as well as the desire to measure changes from the previously conducted study in 2011. The survey instrument was designed to elicit reactions from Dublin consumers and potential consumers of Dublin as a destination, and compare responses to various visitor types. Questions were comprised of both open-ended and multiple-choice questions. Survey flow was designed to route respondents through the appropriate follow-up questions based on previous answers. The survey instrument can be found in Appendix B. The raw open-ended responses can be found in Appendix C. To improve response rate, the DCVB included an incentive of a chance to win four free Columbus Zoo or Irish Festival passes. Those who entered and three winners selected randomly in order of their selection are attached in Appendix D.



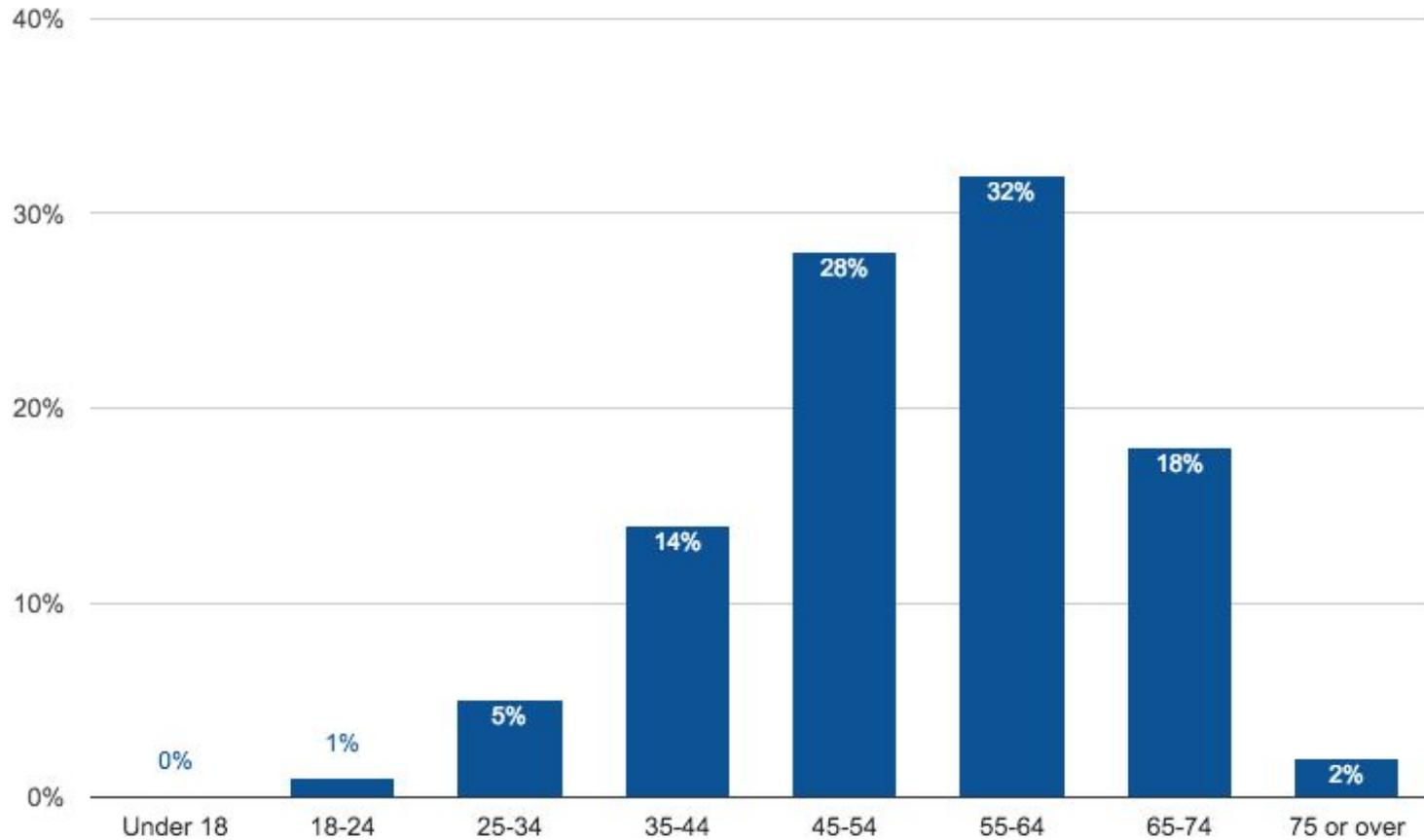
# Initial Findings

## All Responses

# Demographics, Origin and Visitation

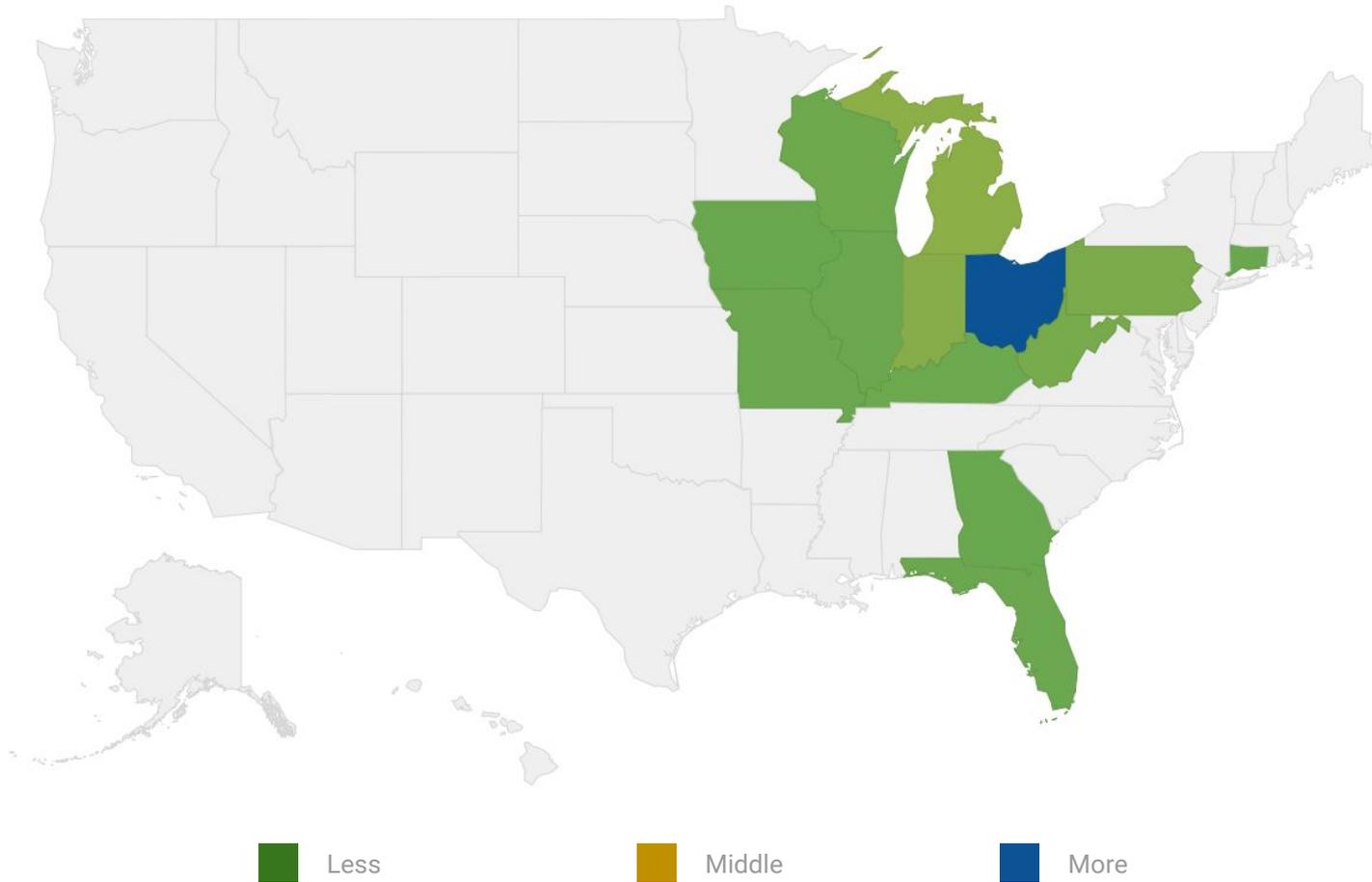
# Demographics, Origin and Visitation

Which of the following includes your age?



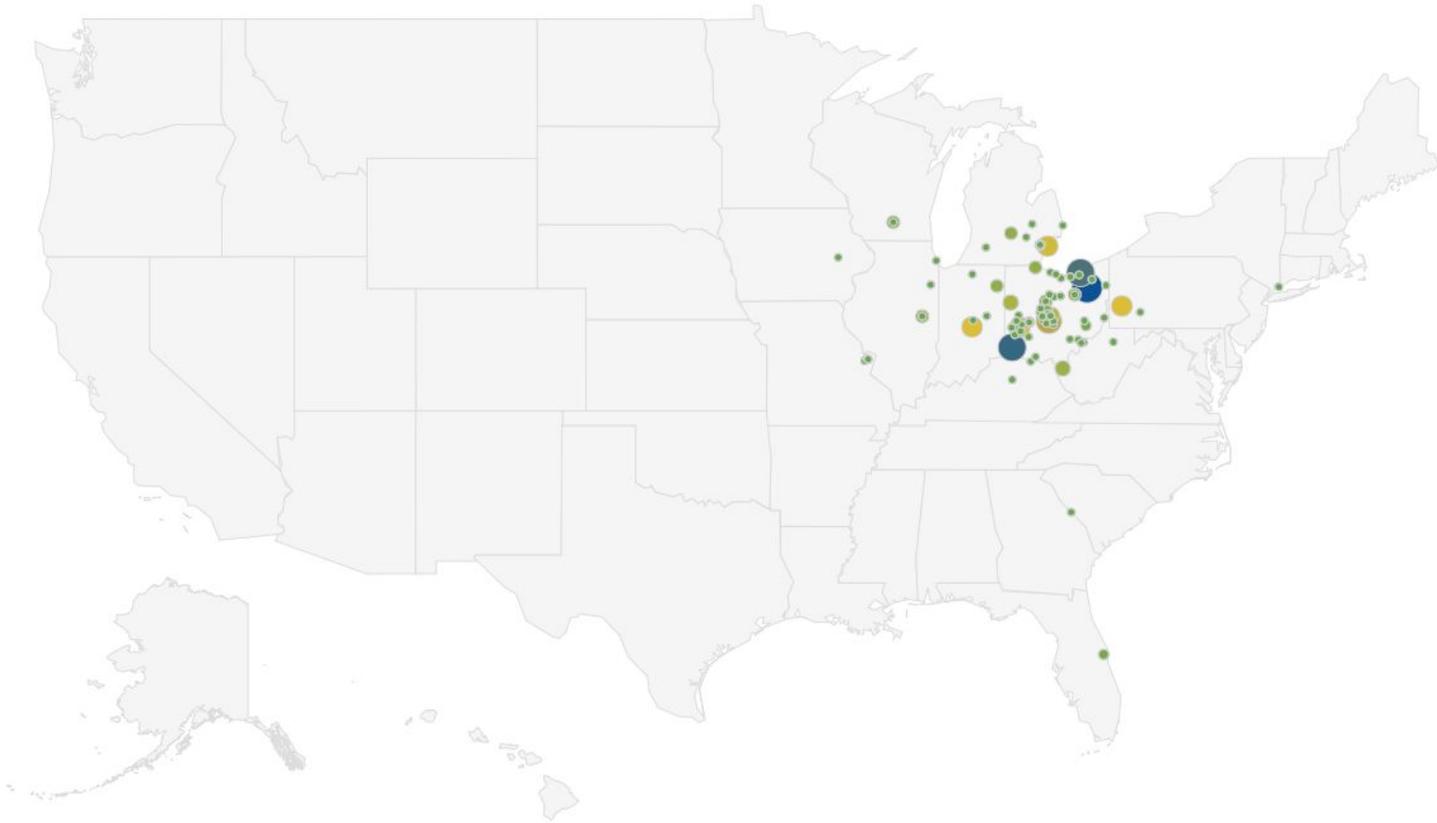
# Demographics, Origin and Visitation

In which community do you currently reside?



# Demographics, Origin and Visitation

In which community do you currently reside?



Less

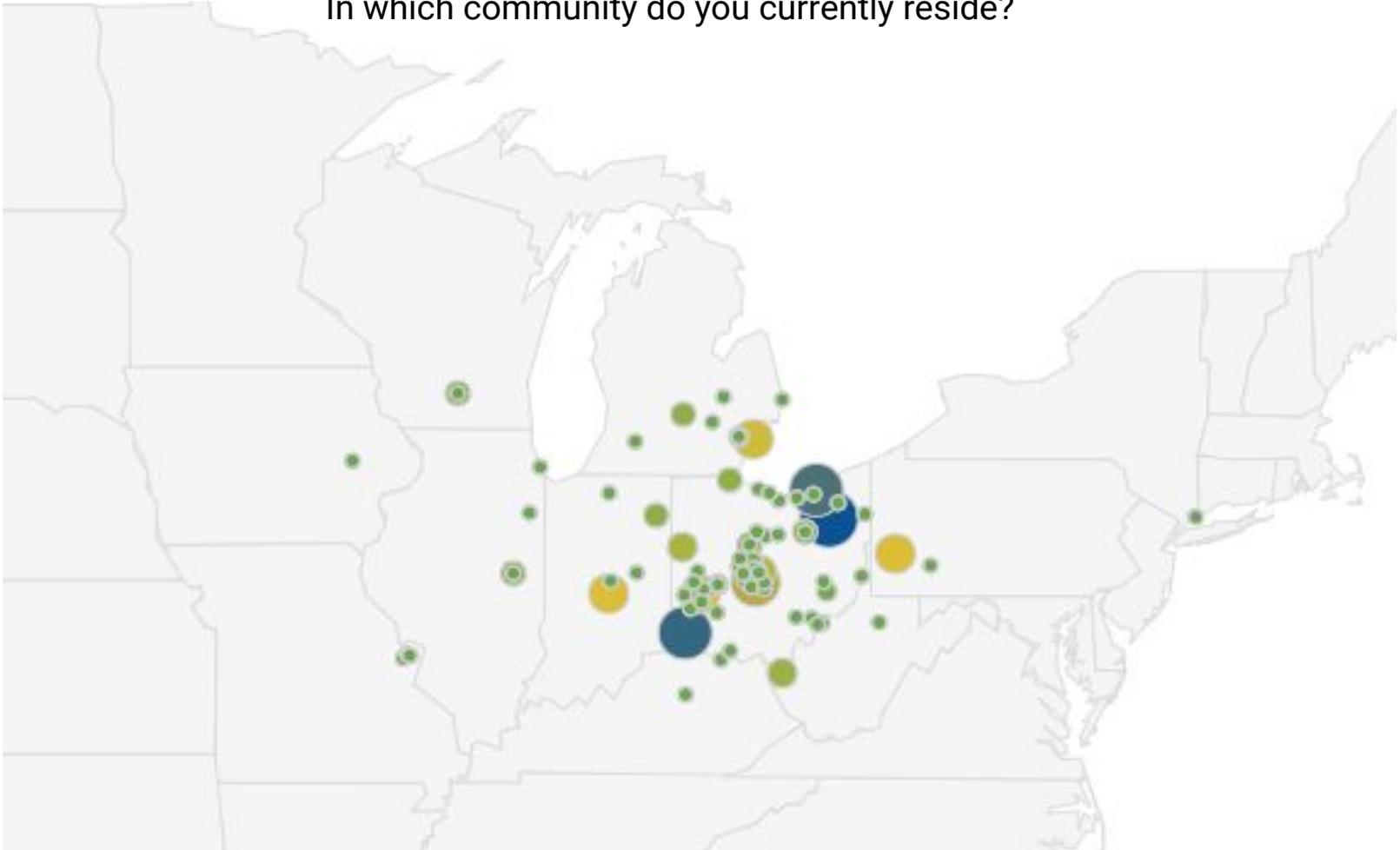
Middle

More



# Demographics, Origin and Visitation

In which community do you currently reside?



Less

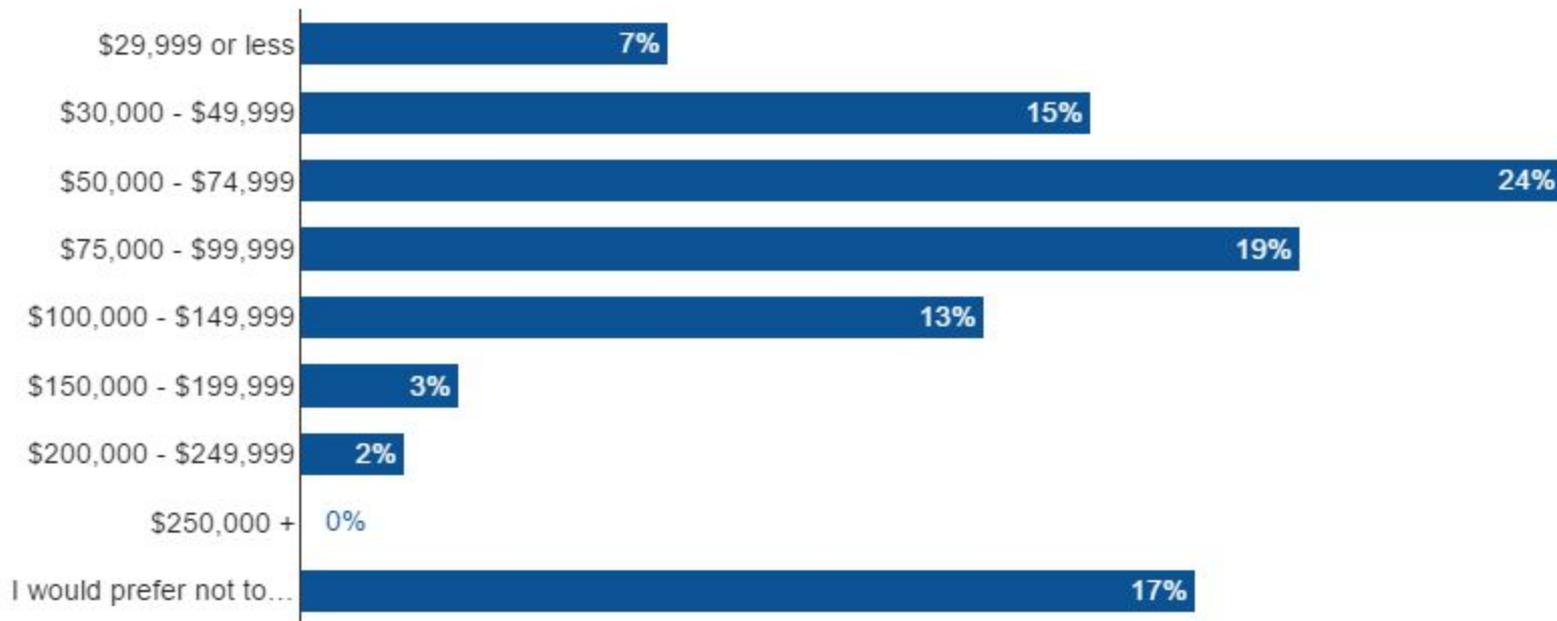
Middle

More



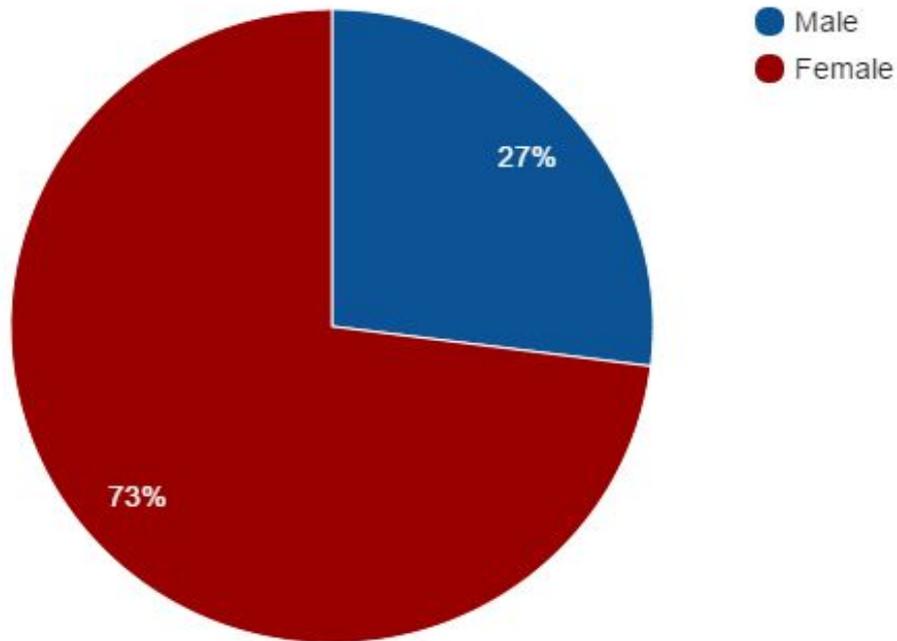
# Demographics, Origin, and Visitation

Which of the following levels matches your total household income?



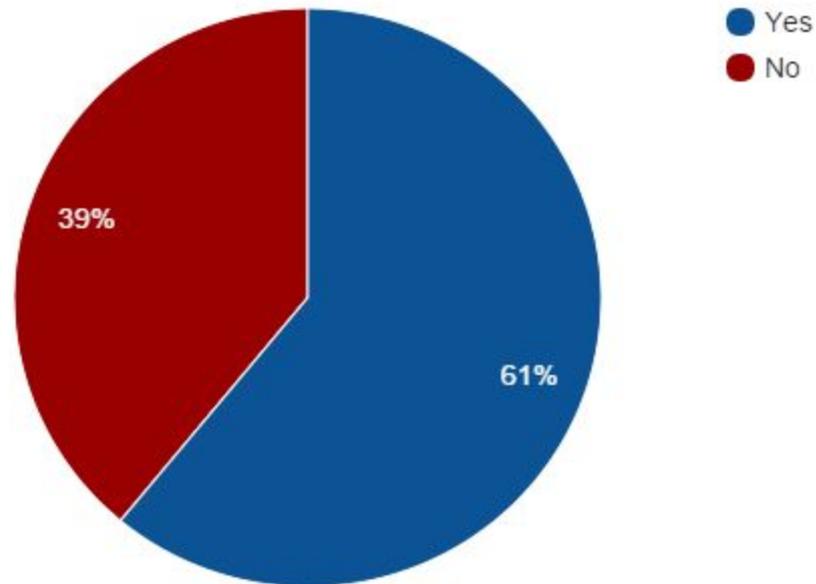
# Demographics, Origin and Visitation

What is your gender?



# Demographics, Origin and Visitation

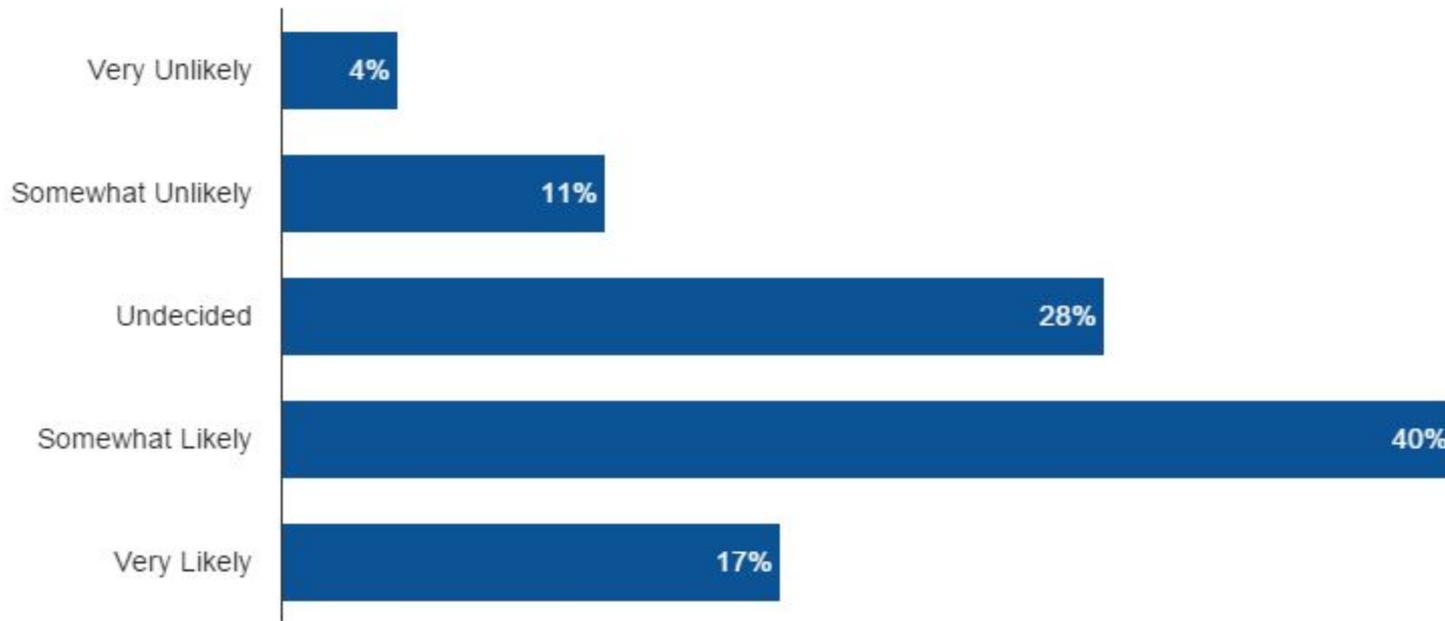
In the past two (2) years, have you visited or been to Dublin, Ohio?



# Non-Visitors

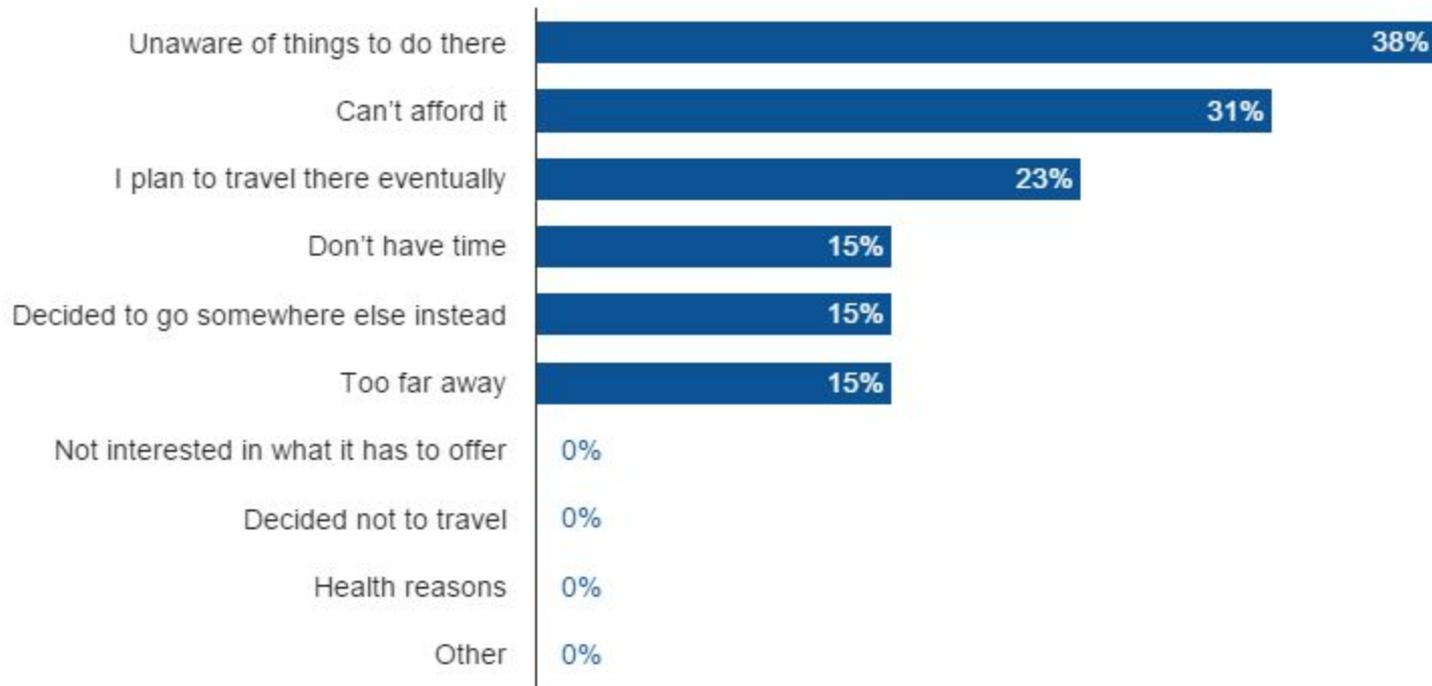
# Non-Visitors

How likely are you to visit in the next year?



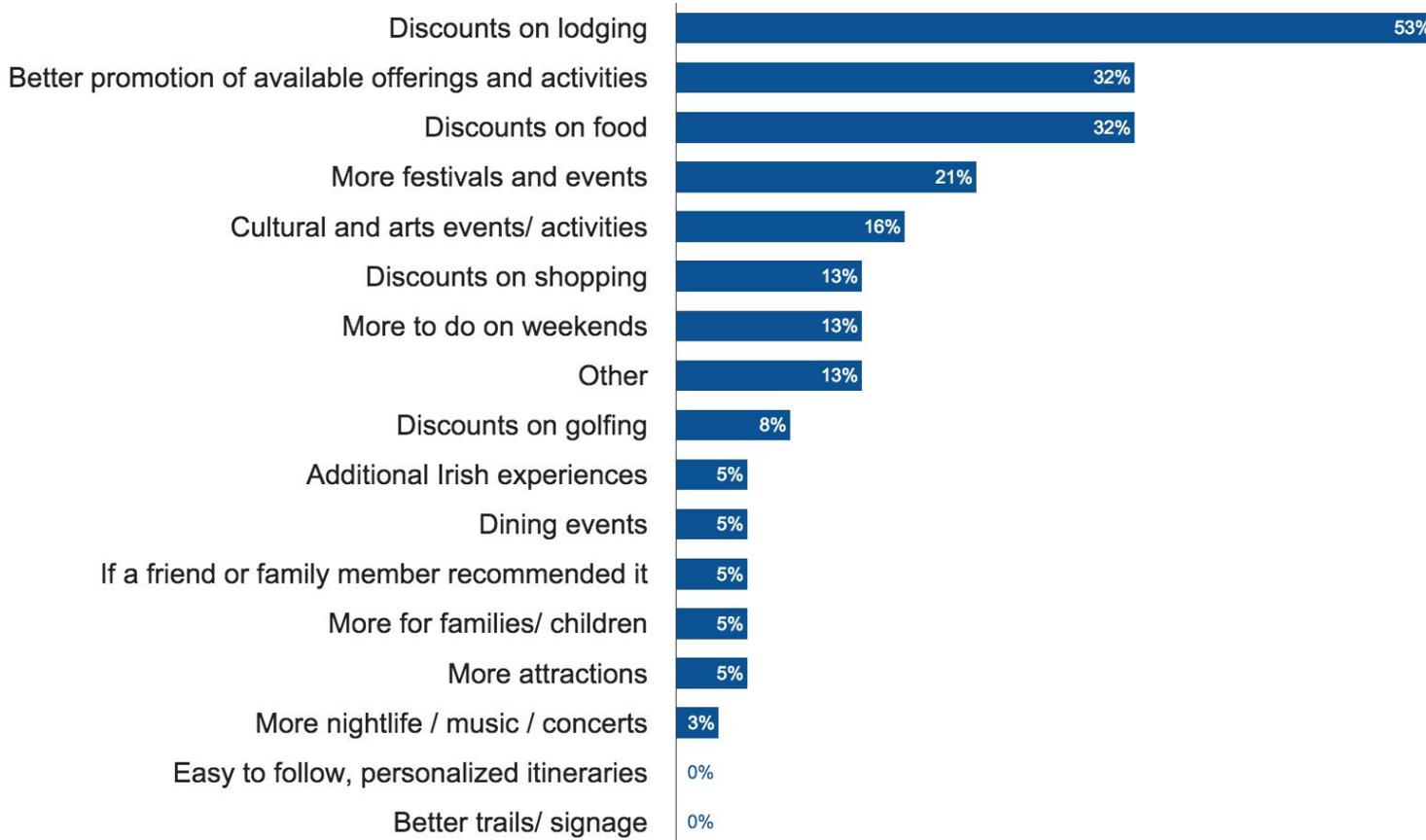
# Non-Visitors

Why are you unlikely to visit? Choose all that apply.



# Non-Visitors

What would make you more likely to travel to Dublin, Ohio? Choose all that apply.



# Non-Visitors

What is your most trustworthy source of travel information?



# Non-Visitors

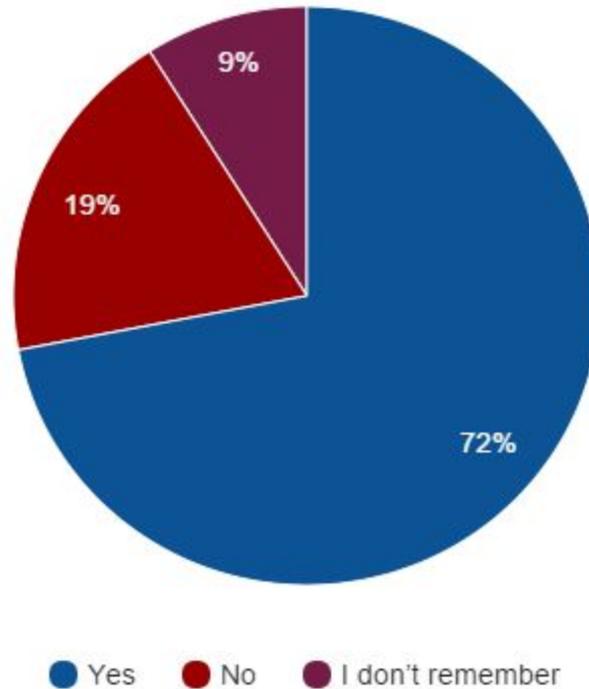
Which websites or online sources do you trust?  
(Open-Ended)



# Advertising

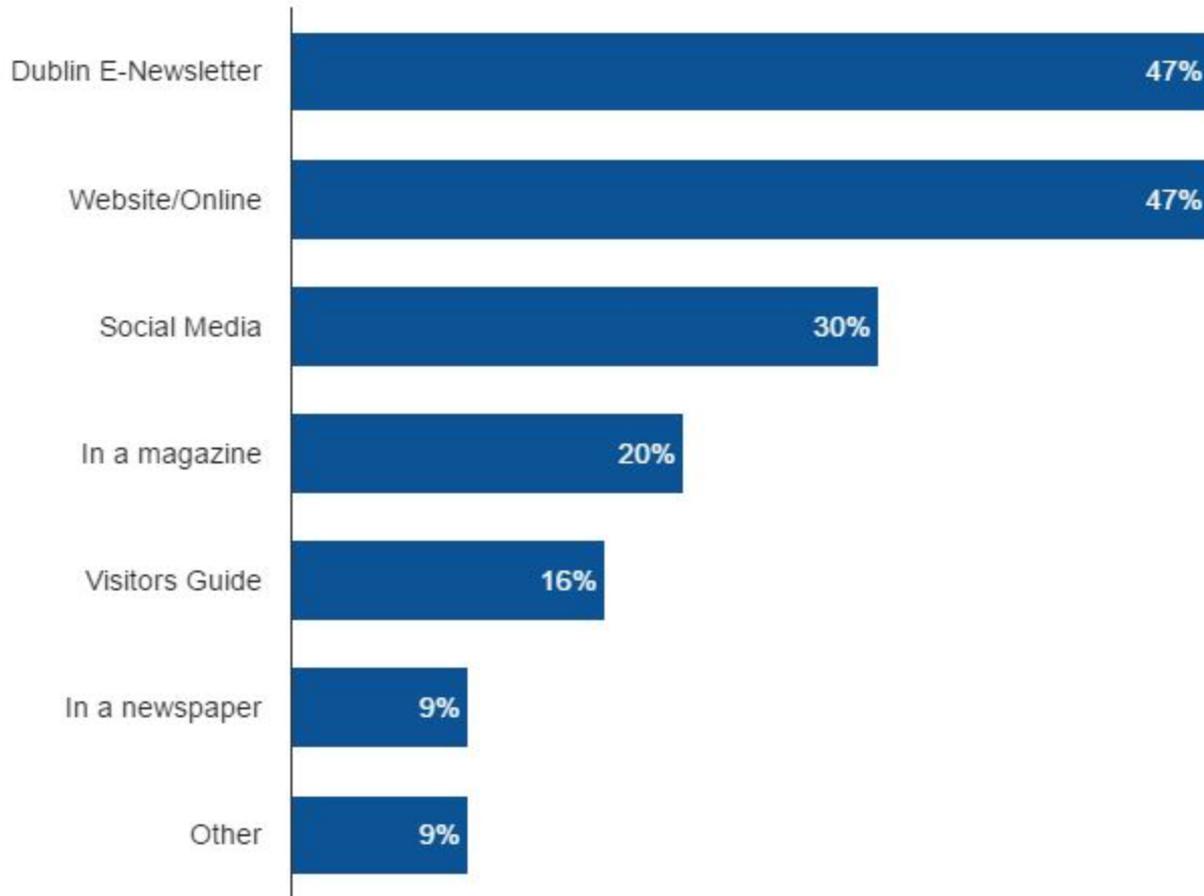
# Advertising

In the past 12 months, do you recall seeing or hearing any advertisements for Dublin, Ohio?



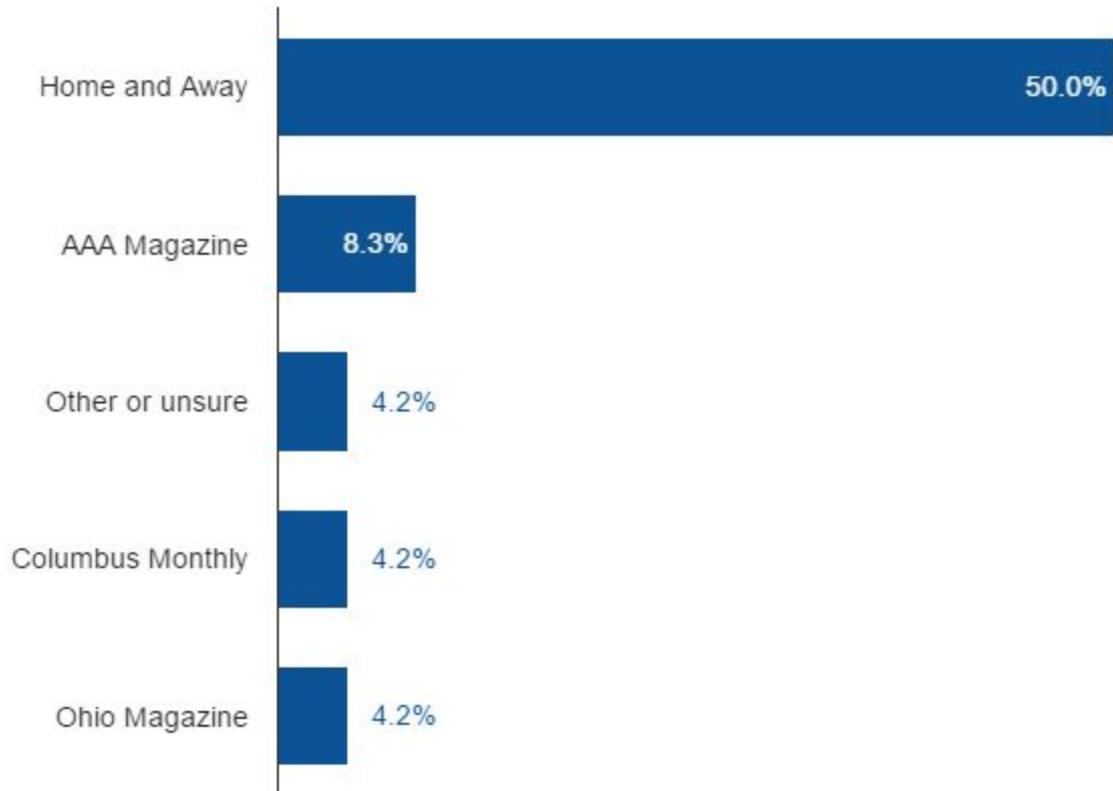
# Advertising

Where did you see the ad(s)? Choose all that apply.



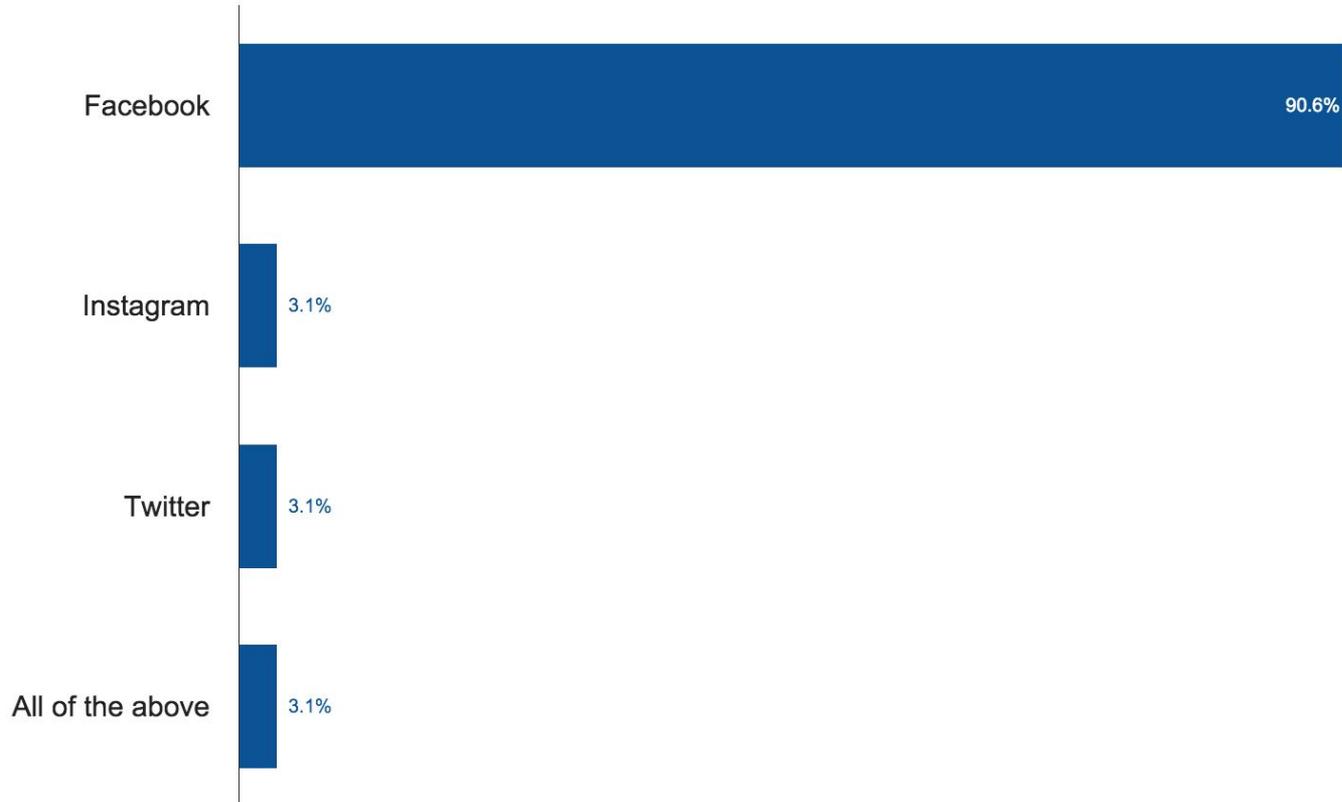
# Advertising

In which magazine did you see the Dublin ad(s)?  
(Open-Ended)



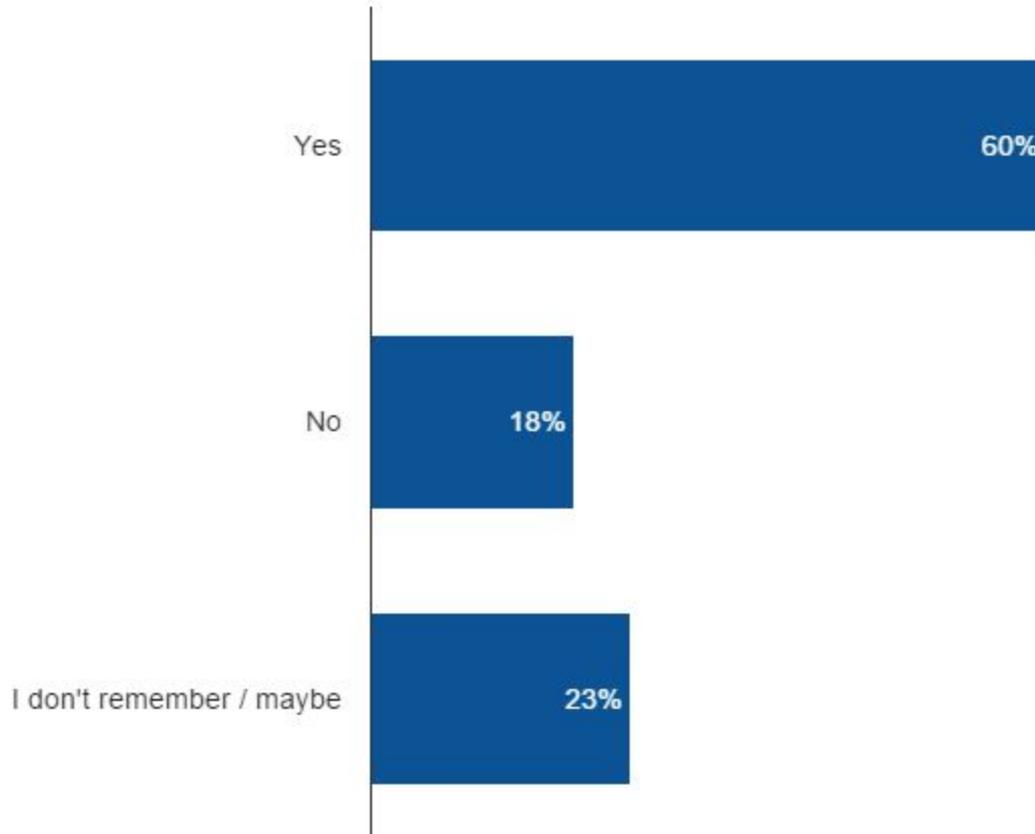
# Advertising

On which social media site did you see the Dublin ad(s)?



# Advertising

Were you influenced at all by an advertisement and/or the information you received in your decision to visit Dublin, Ohio?



# Potential Visitors

(Respondents who indicated that they have not visited in the past two years, but are likely to visit in the future)

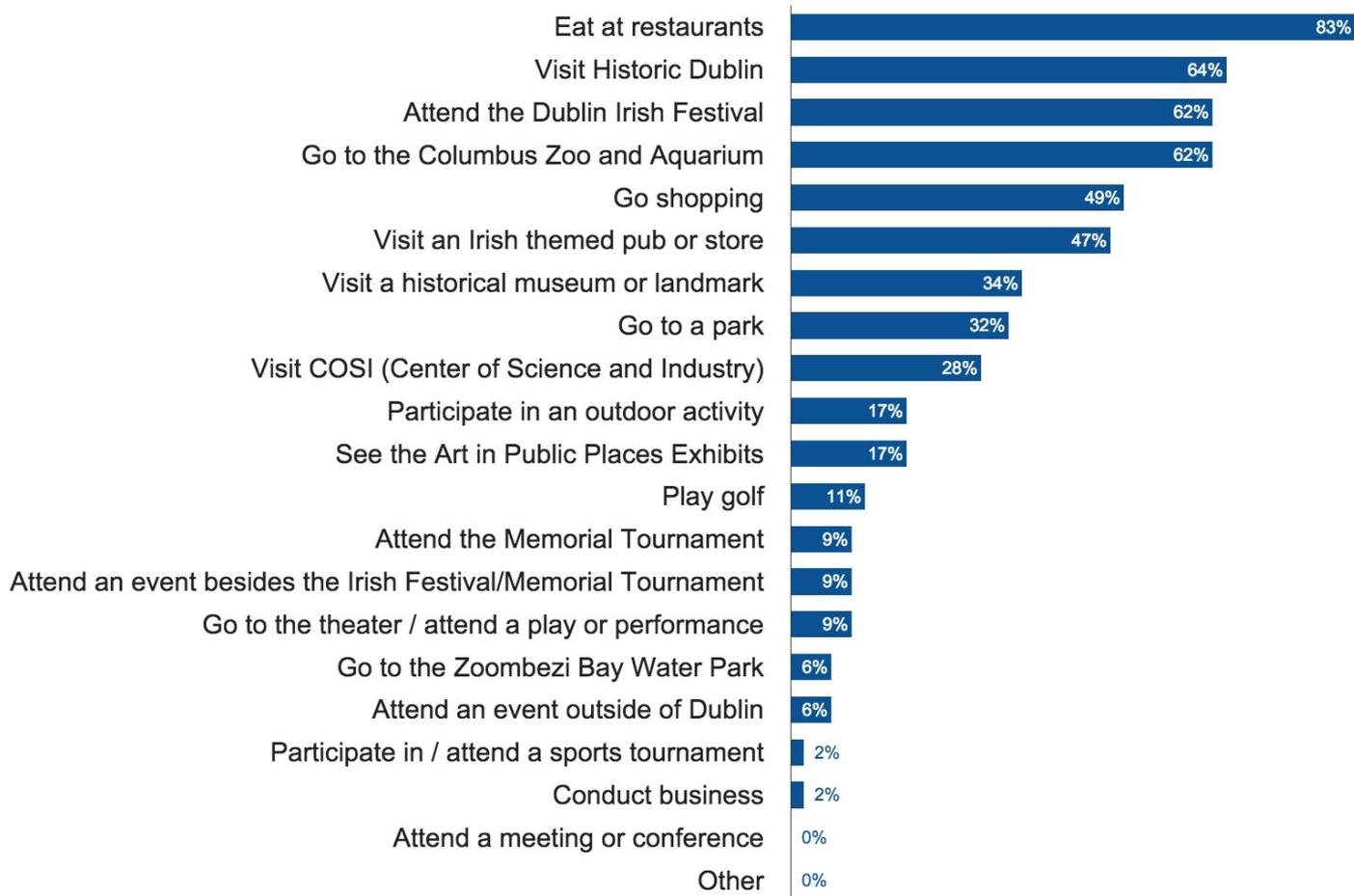
# Potential Visitors

If/when you do visit Dublin, what will be the primary purpose of your trip?



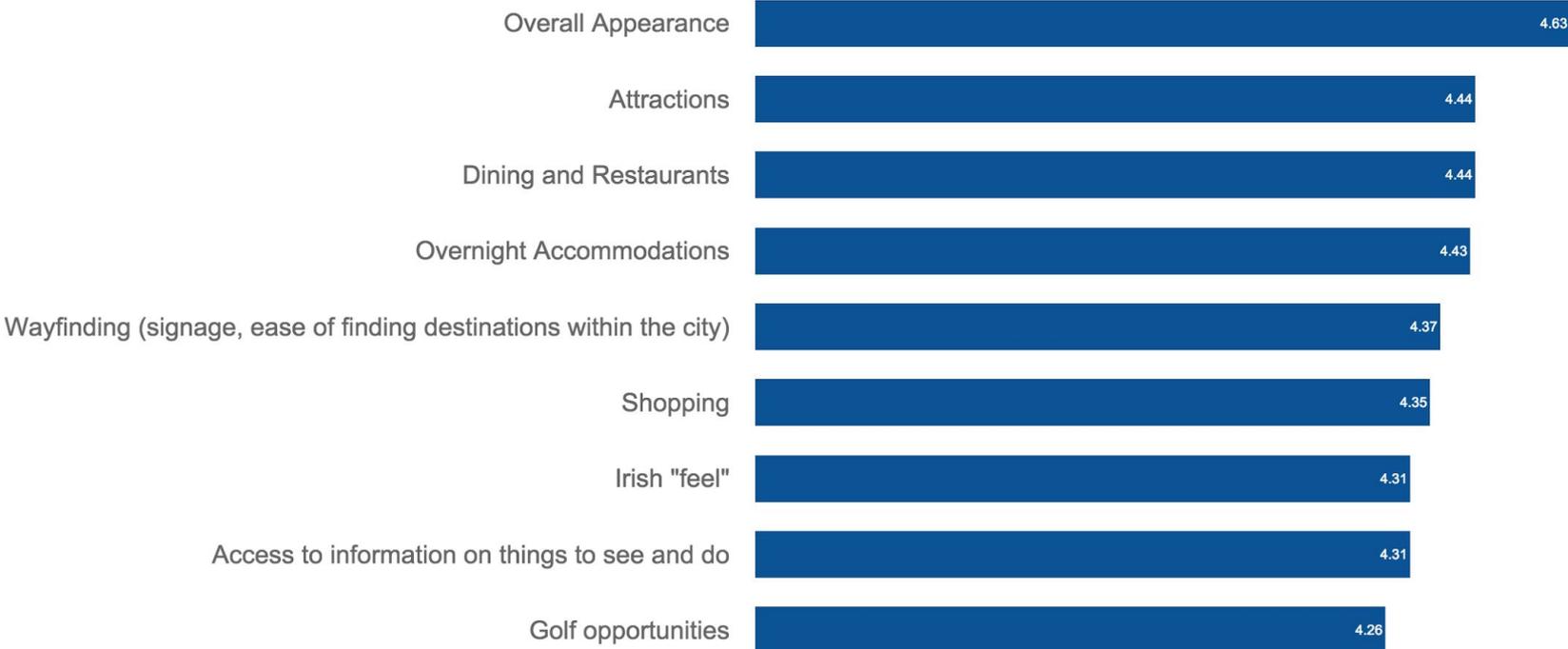
# Potential Visitors

When you do visit Dublin, which of the following do you plan to do or would you like to do?  
Choose all that apply.



# Potential Visitors

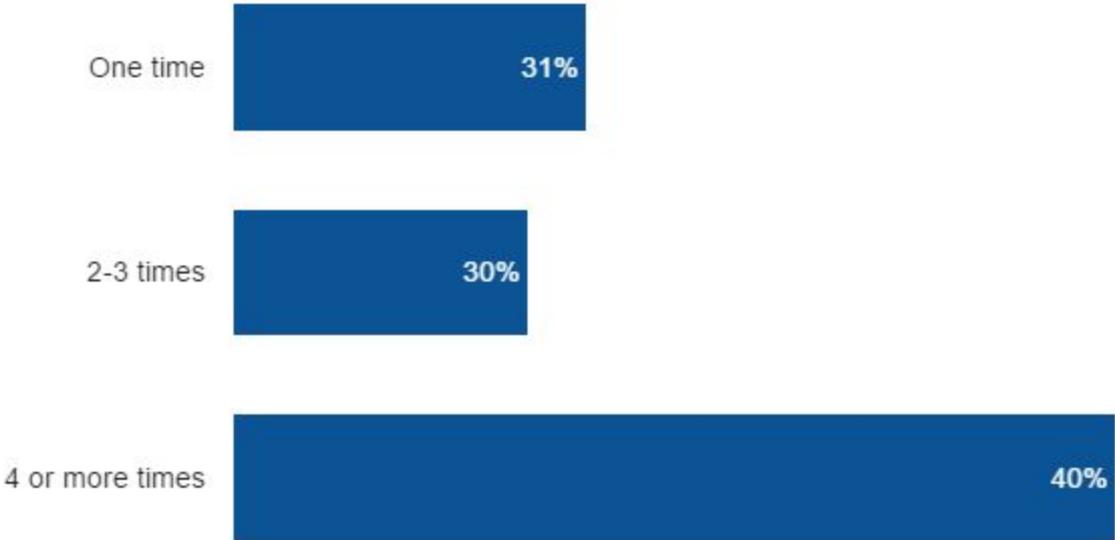
Based on your perceptions, how would you rate the following aspects of Dublin, Ohio?  
(Where 5 is "Very Good" and 1 is "Very Poor")



# Visitor Patterns

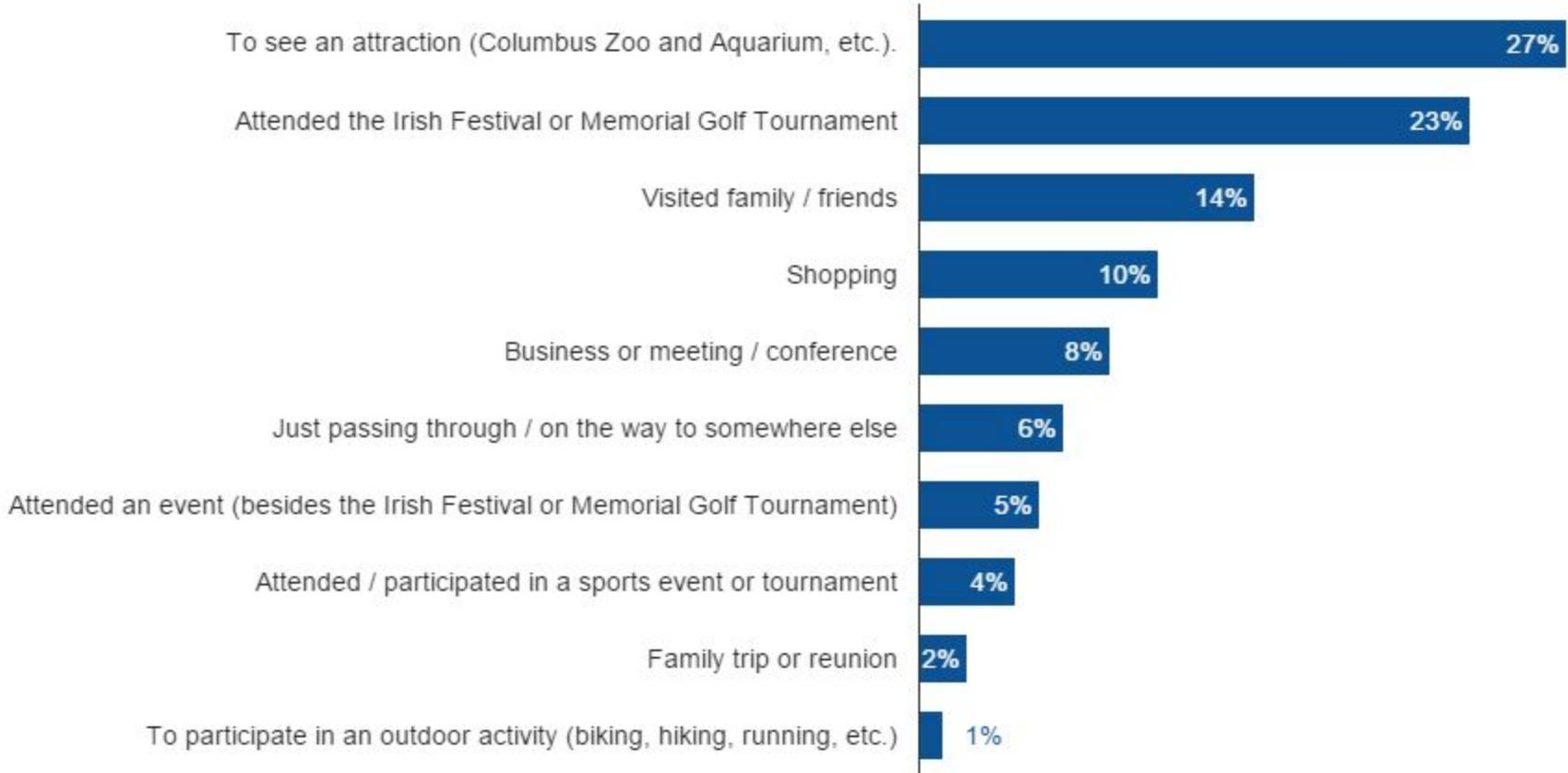
# Visitor Patterns

How many times have you visited Dublin, Ohio in the past 2 years?



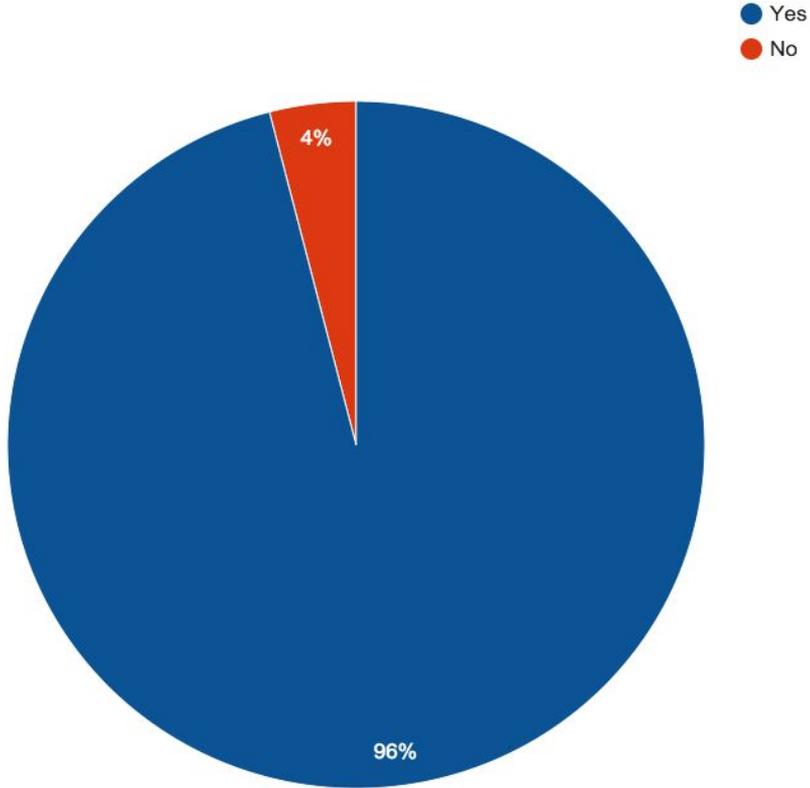
# Visitor Patterns

What was the primary purpose of your most recent trip?



# Visitor Patterns

While you were in Dublin, were you able to find enough resources to help you plan your trip?



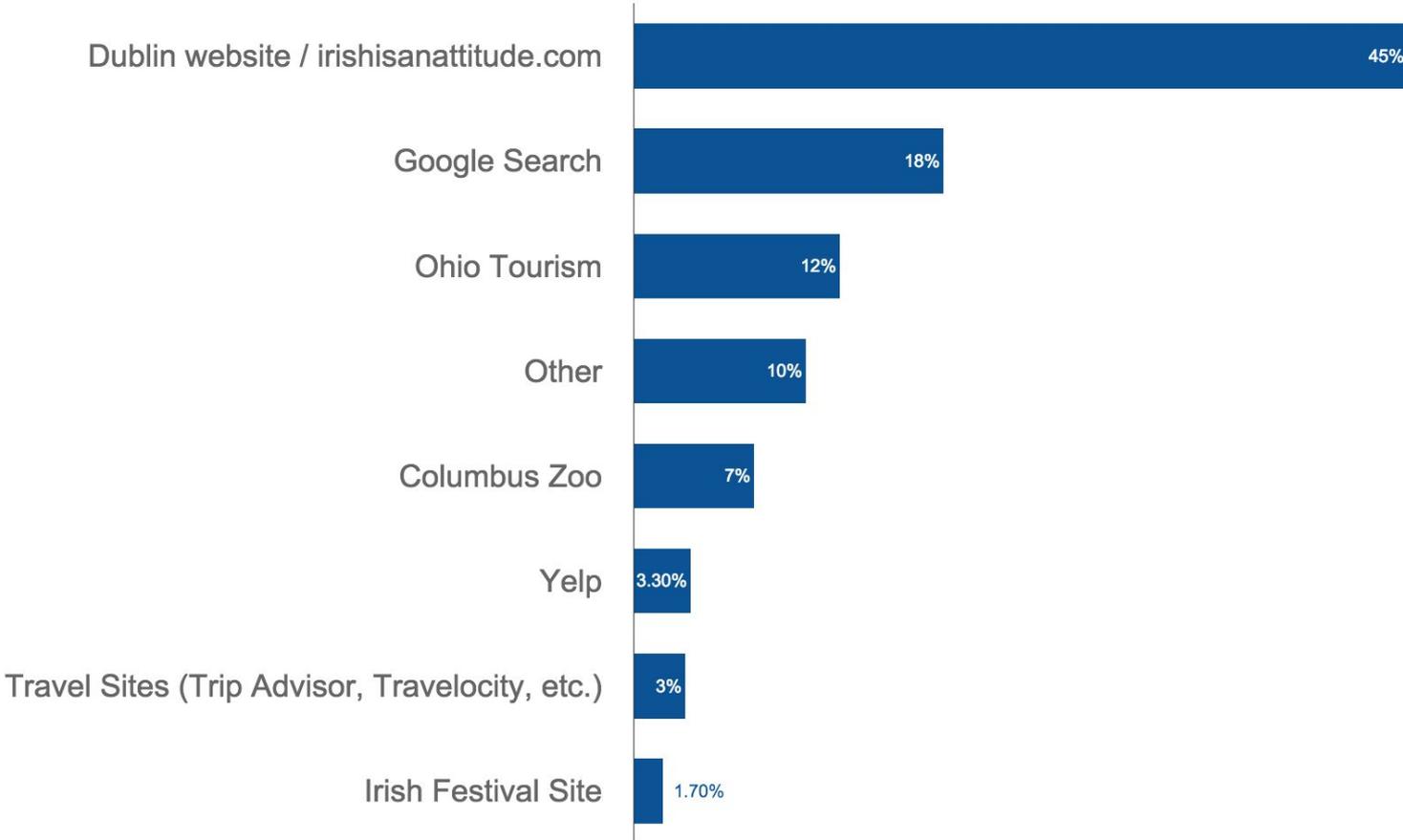
# Visitor Patterns

While you were in Dublin, what resources did you use? Choose all that apply.



# Visitor Patterns

Which websites or online resources did you use?  
(Open-Ended)



*Other: Experience Columbus, Hocking Hills*



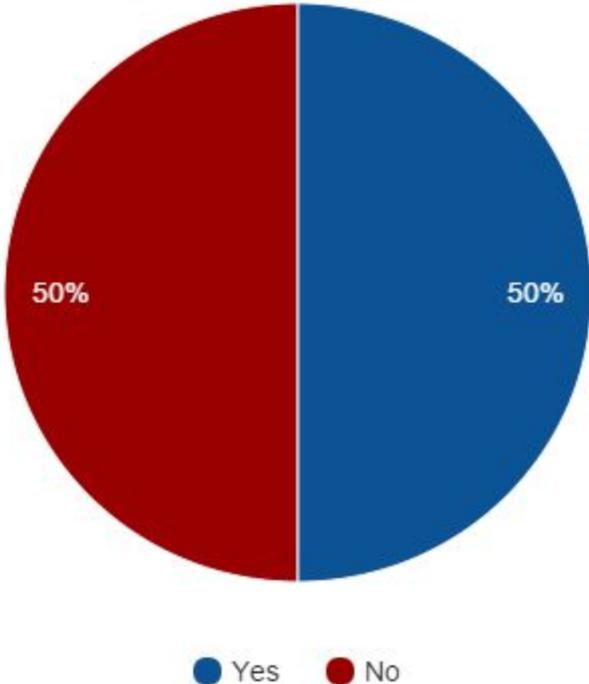
# Visitor Patterns

How did you travel to Dublin, Ohio? Choose all that apply.



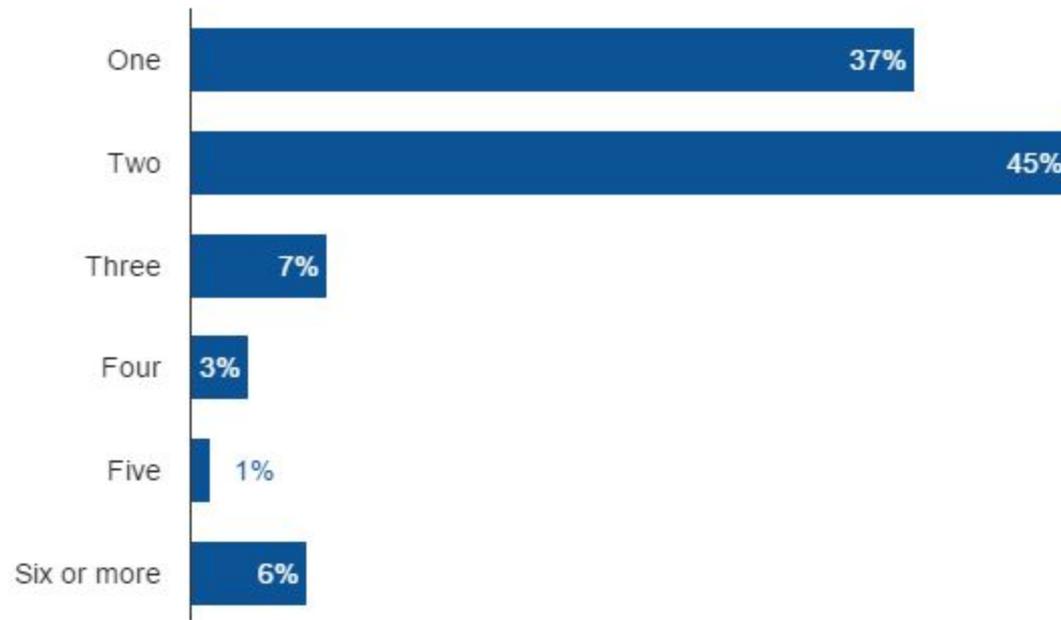
# Visitor Patterns

Did you stay overnight in Dublin during your most recent visit?



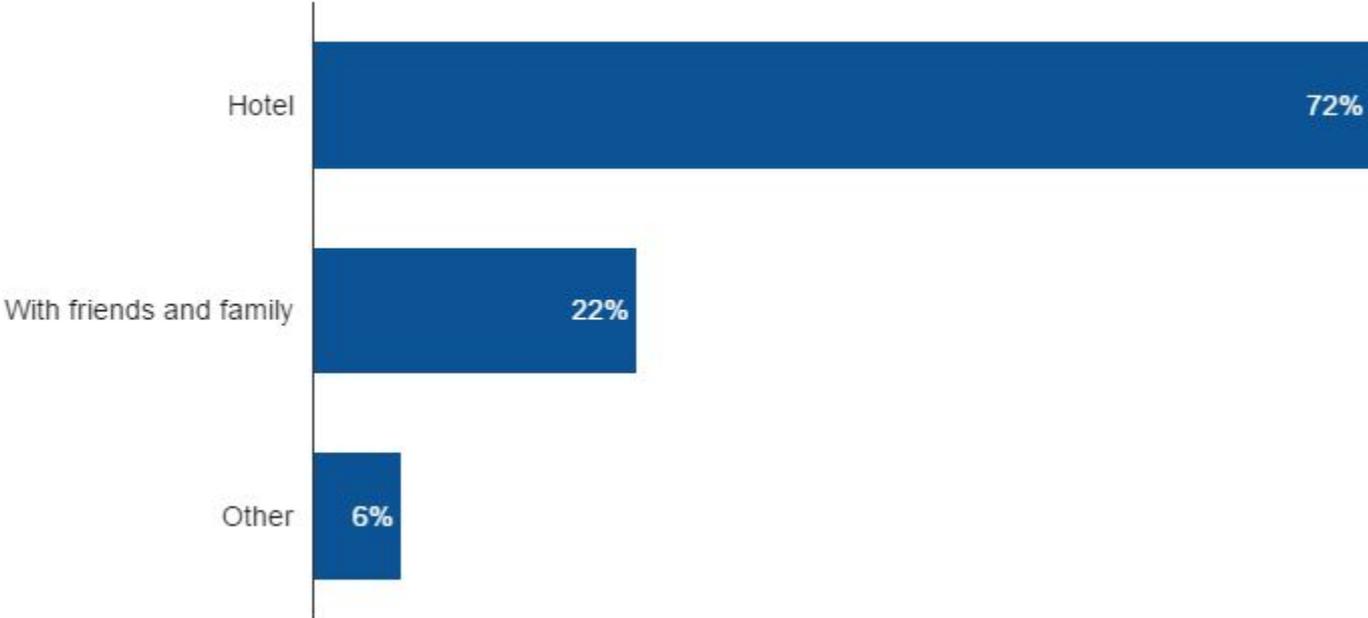
# Visitor Patterns

How many nights did you stay?



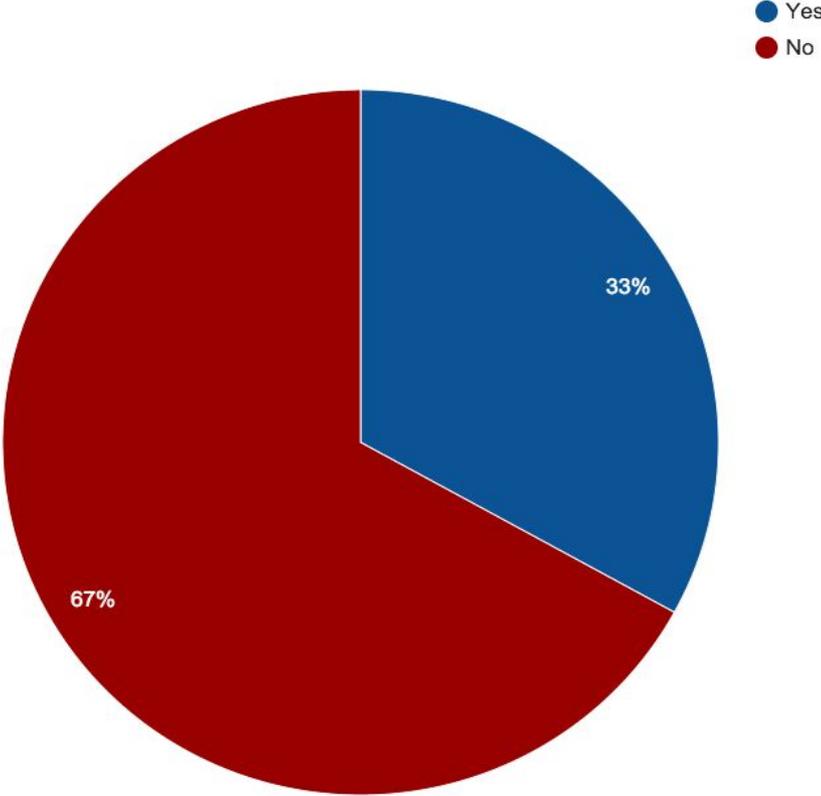
# Visitor Patterns

Where did you stay?



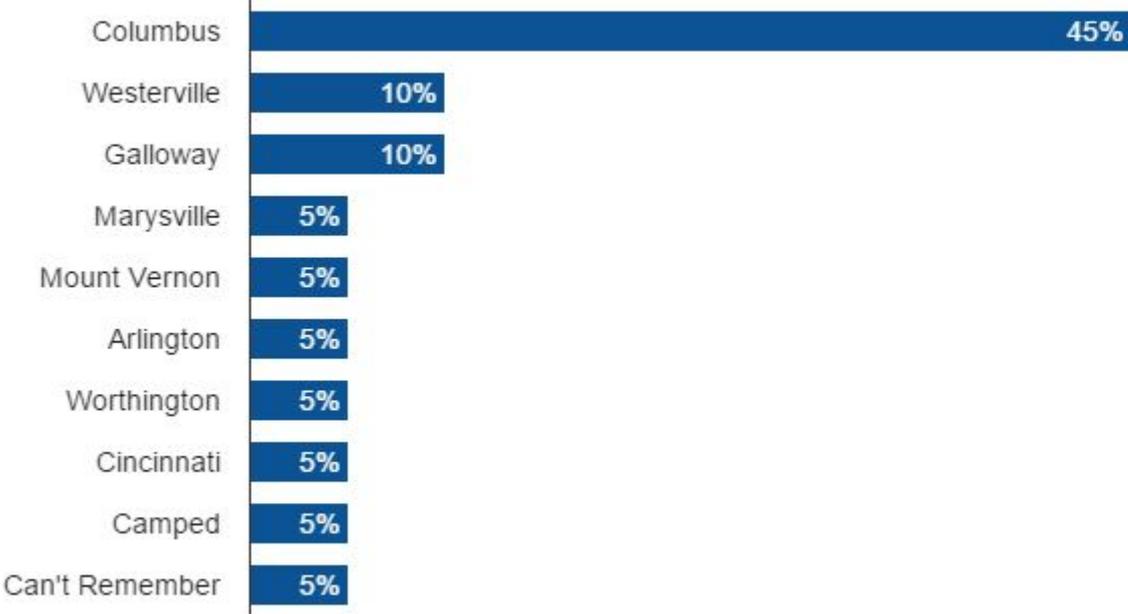
# Visitor Patterns

Did you stay overnight in a nearby city or destination other than Dublin?



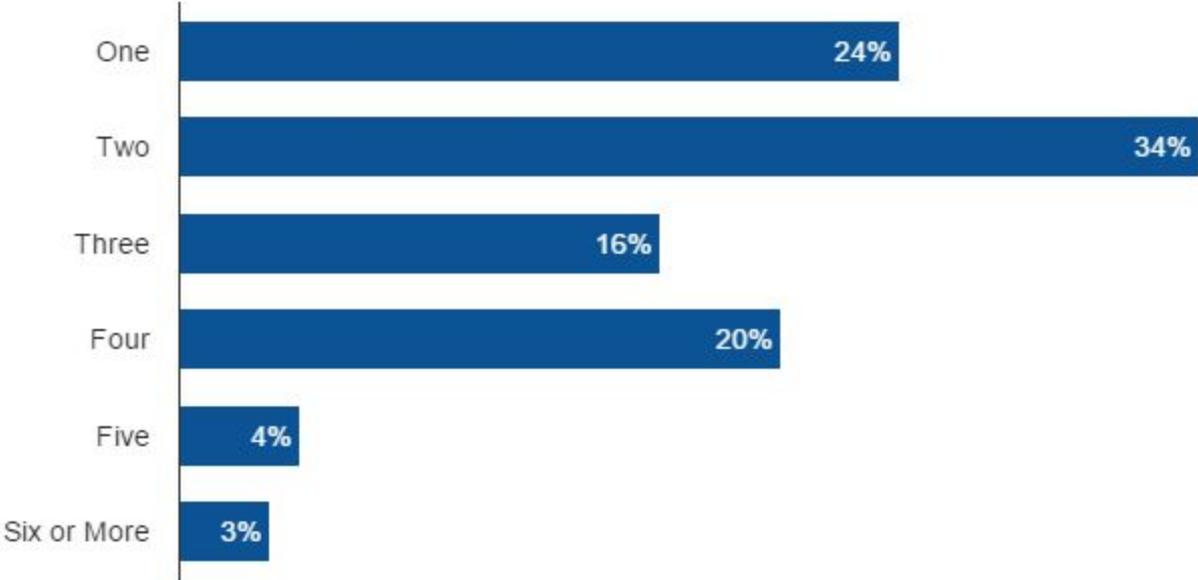
# Visitor Patterns

Where did you stay?



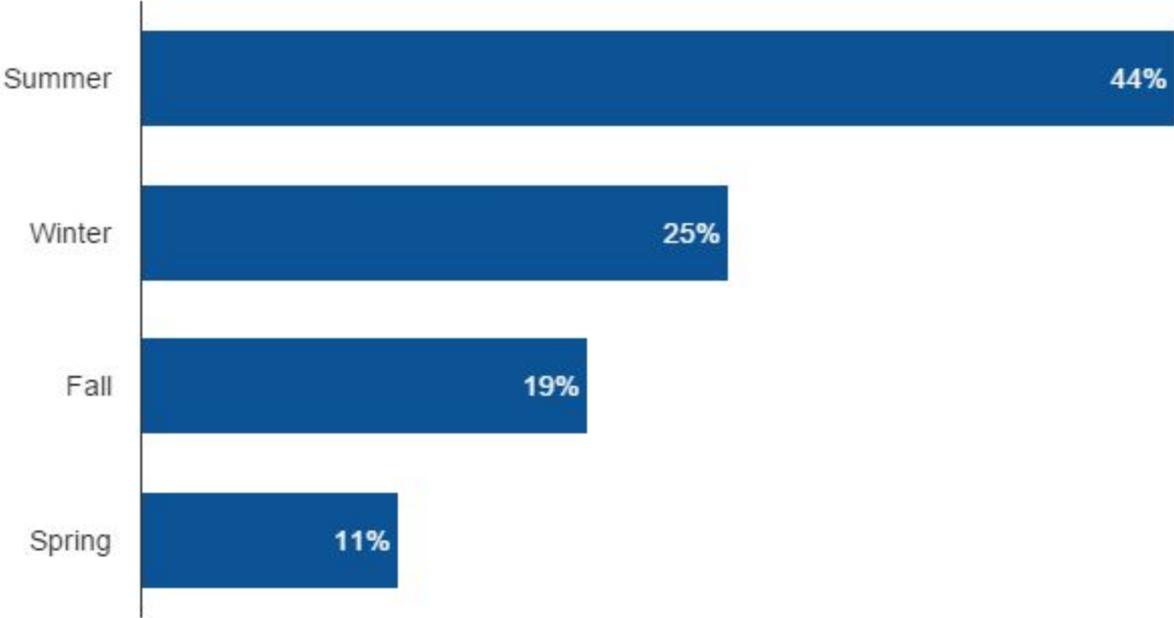
# Visitor Patterns

How many people did you travel with including yourself on your most recent visit?



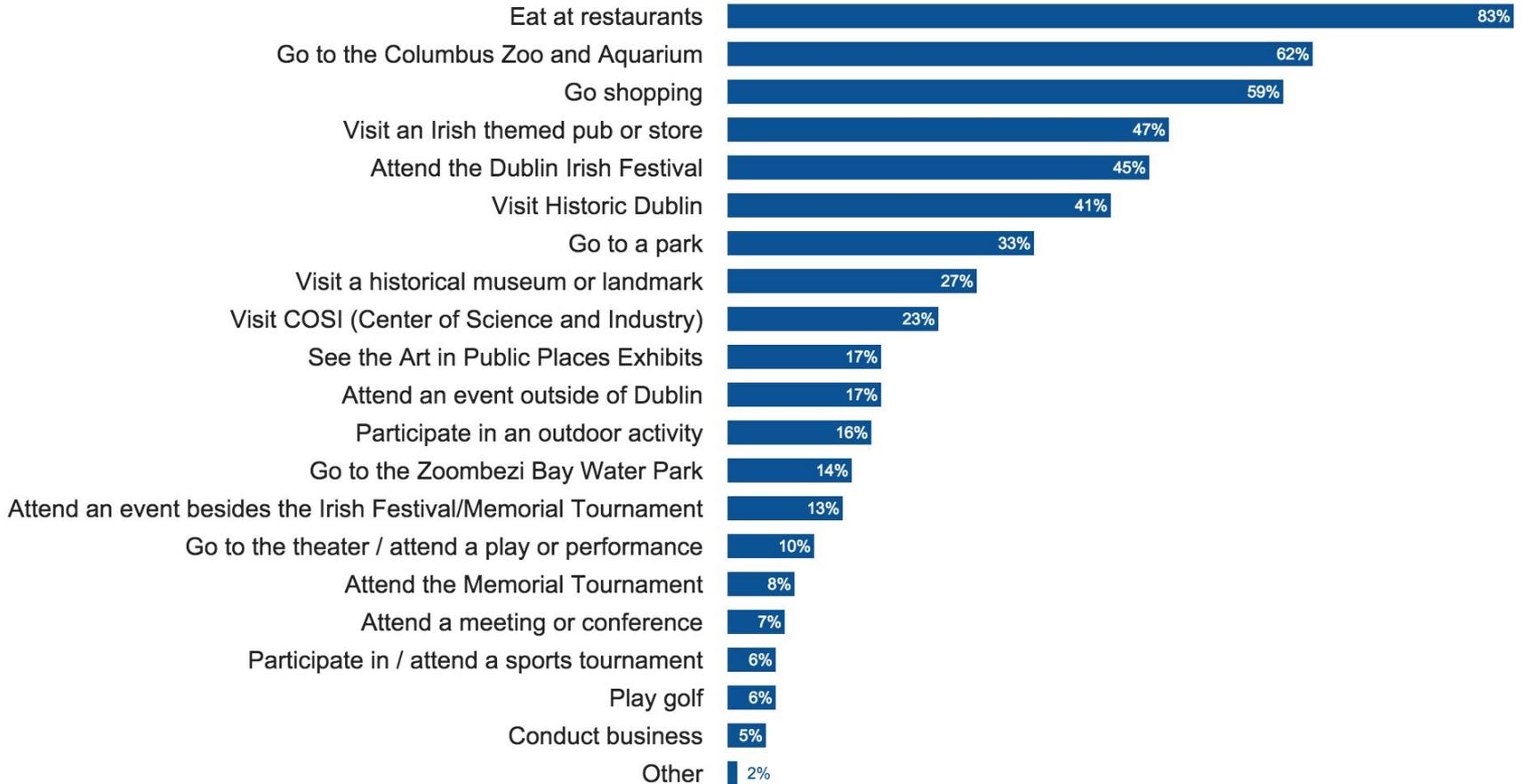
# Visitor Patterns

In what season did you travel to Dublin on your most recent visit?



# Visitor Patterns

While you were visiting Dublin, which of the following did you do? Choose all that apply.



# Visitor Patterns

How likely would you be to take another trip to Dublin, Ohio?

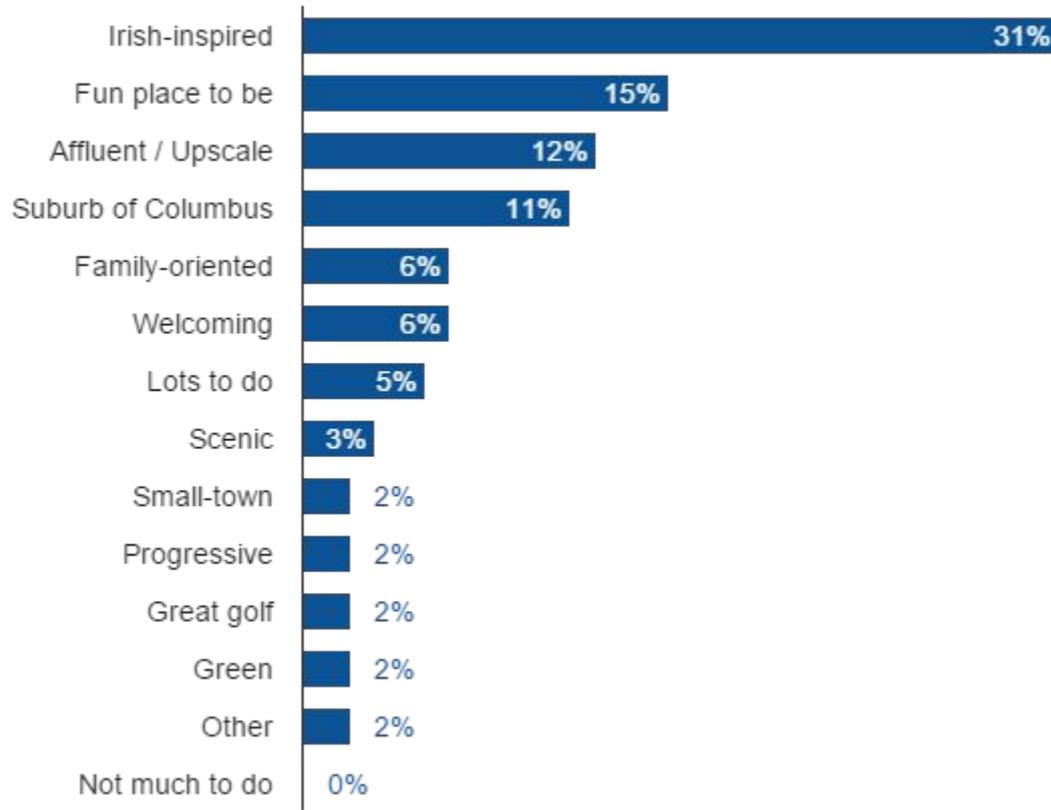


# Overall Perceptions



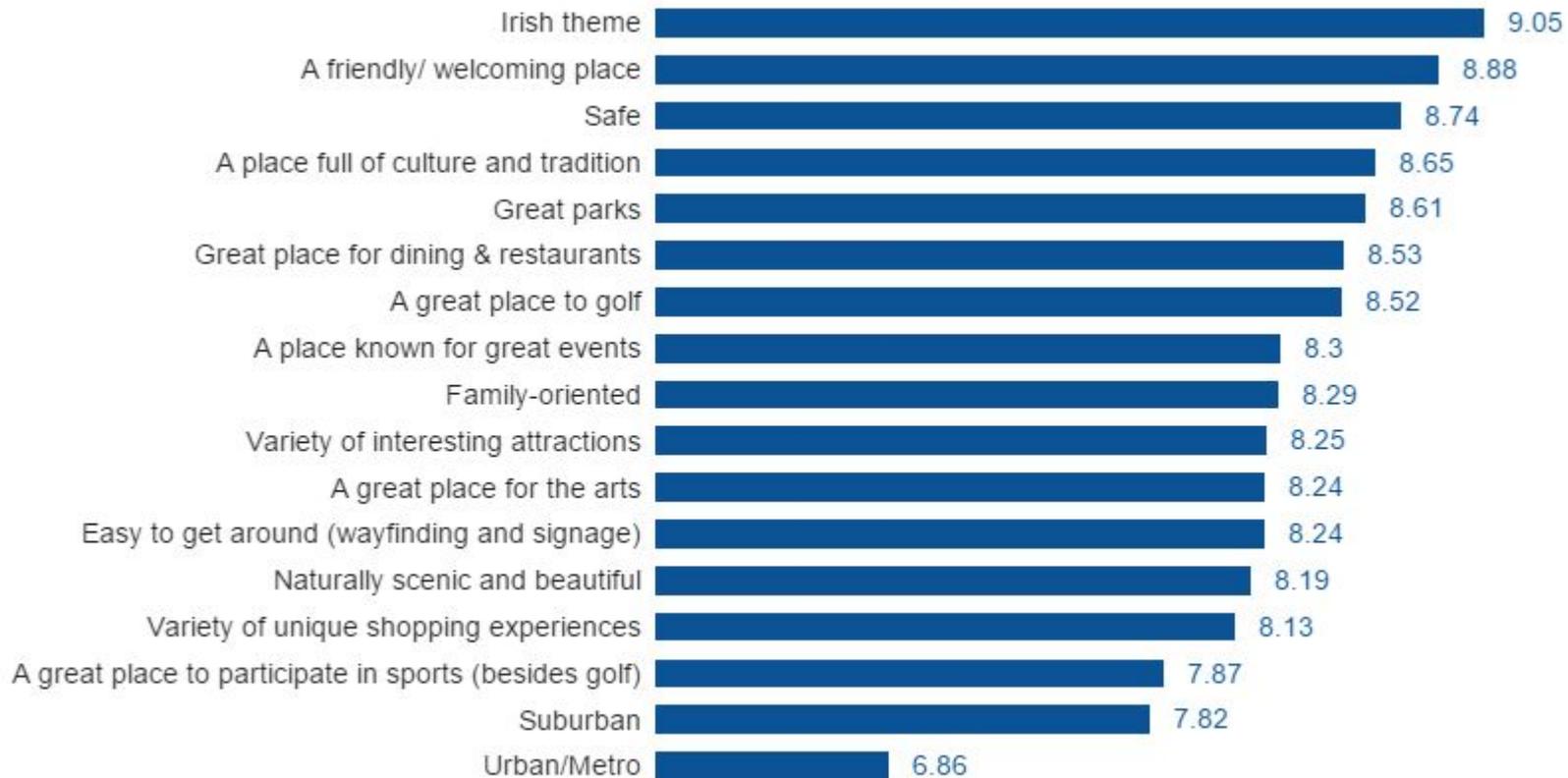
# Overall Perceptions

Based on your current perceptions, what is the best phrase or adjective to describe Dublin, Ohio?



# Overall Perceptions

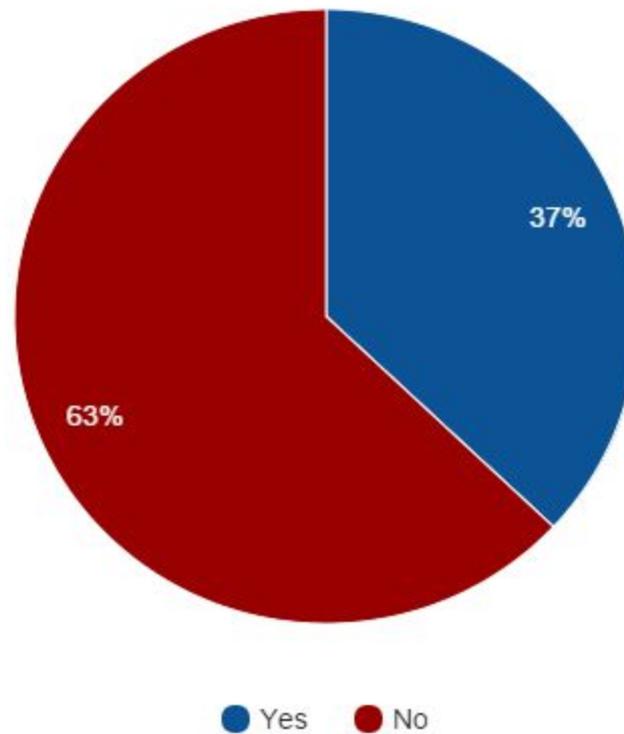
Based on your current perceptions, how well do the following descriptions match your ideas of Dublin, Ohio? (On a scale of 1-10 with 1 being "does not match" and 10 being "exact match.")



# Visitor Perceptions

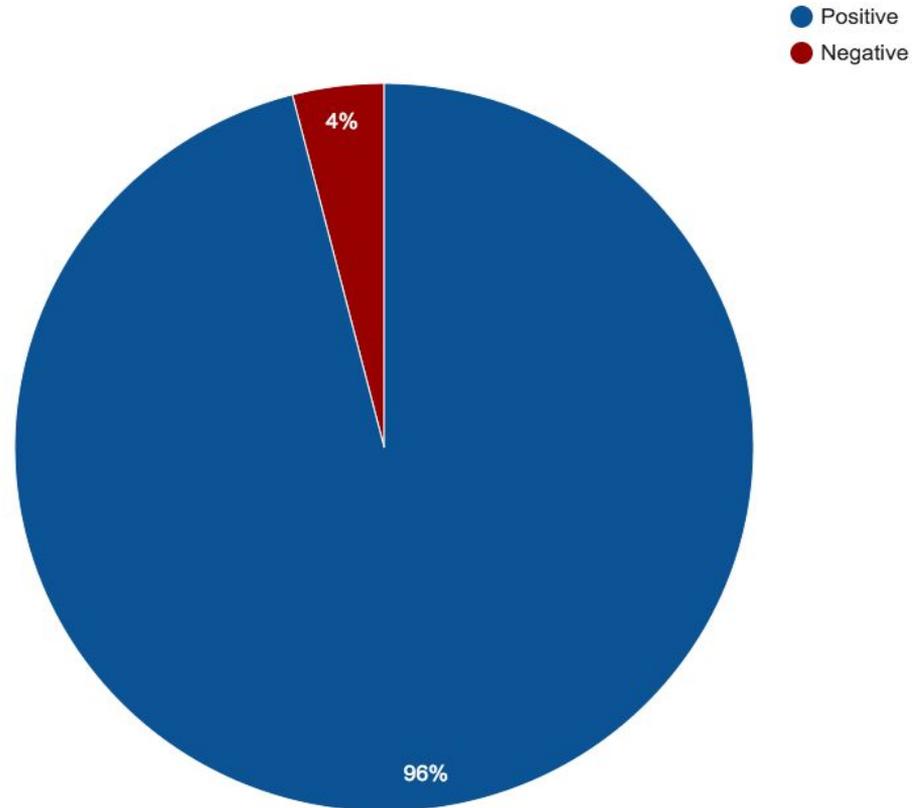
# Visitor Perceptions

Did your perception of Dublin, Ohio change once you visited the region?



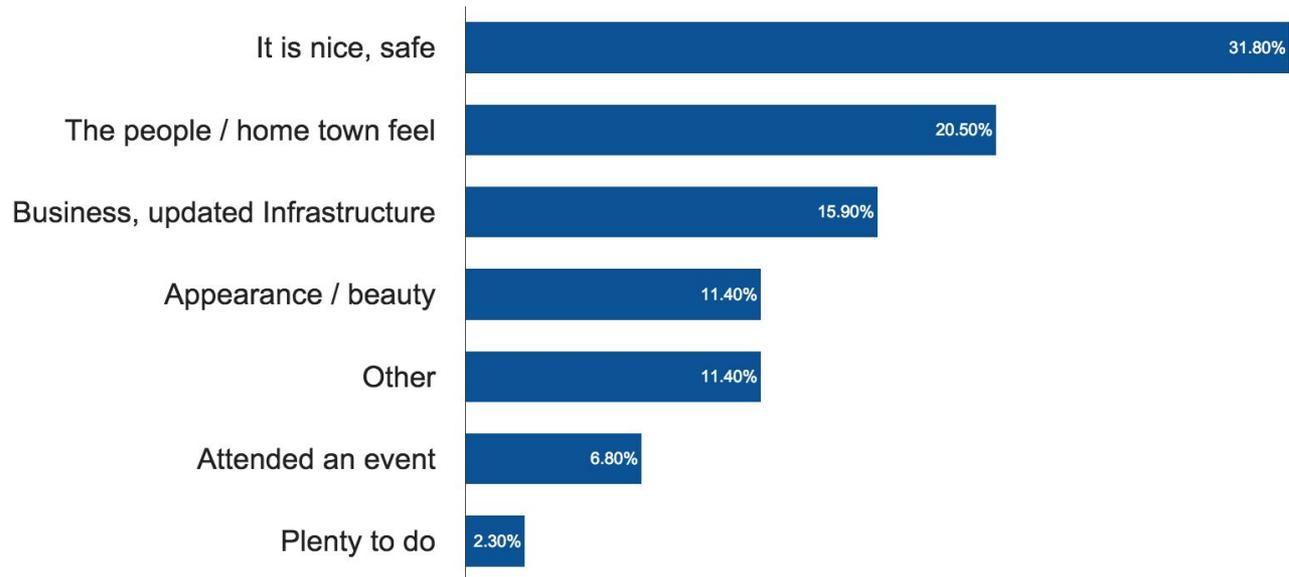
# Visitor Perceptions

Did your perception change in a positive or negative way?



# Visitor Perceptions

What changed your perception of Dublin, Ohio?  
(Open-Ended)



# Visitor Perceptions

What changed your perception of Dublin, Ohio?

31.8% of respondents reported that their perception changed based on how safe and nice Dublin is. Their responses include:

- “Clean, nice area to walk around and shop.”
- “It’s better than I imagined.”
- “It’s a beautiful upscale area that made us feel safe and comfortable.”

20.5% of respondents cited the people of Dublin and the hometown feel they inspire. Their responses include:

- “How friendly everyone was”
- “Nice, hometown feel”

15.9% spoke about the updated infrastructure and business in the city. Their responses include:

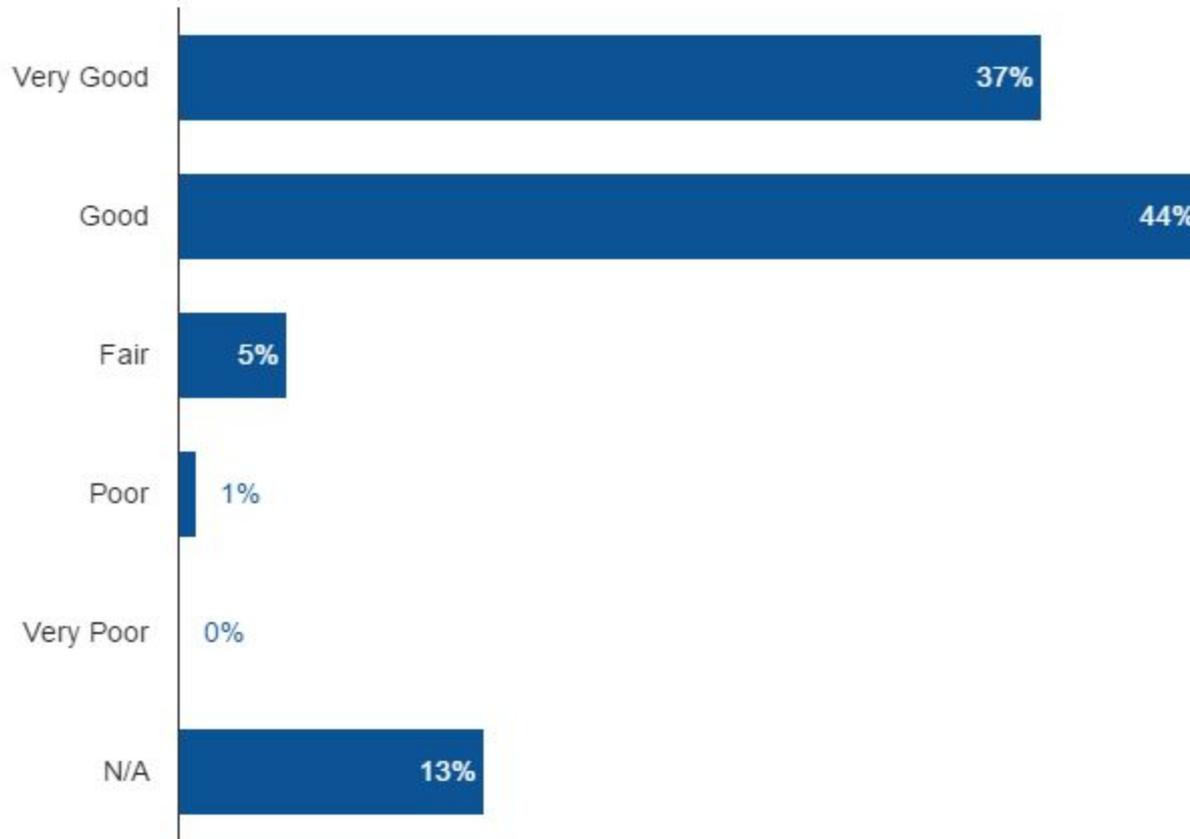
- “New development”
- “Updated/ new hotels”
- “Growth”



# Visitor Perceptions

Based on your most recent trip, how would you rate the following aspects of Dublin, Ohio?  
(select N/A if you did not experience a particular aspect).

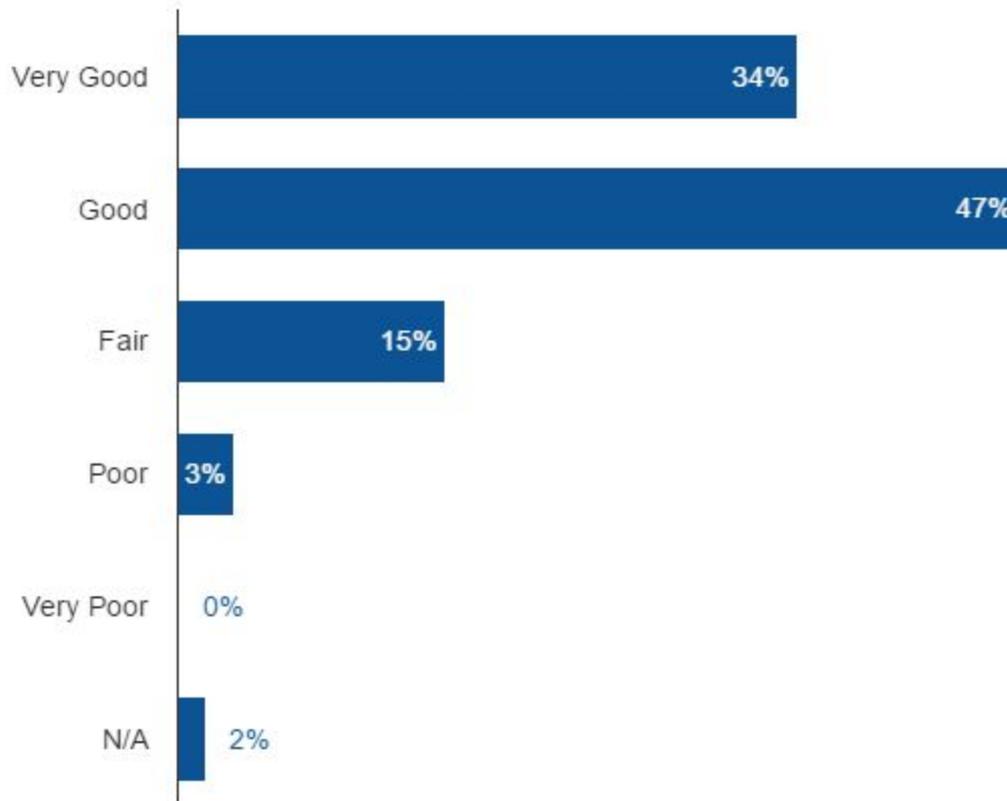
## *Shopping*



# Visitor Perceptions

Based on your most recent trip, how would you rate the following aspects of Dublin, Ohio?  
(select N/A if you did not experience a particular aspect).

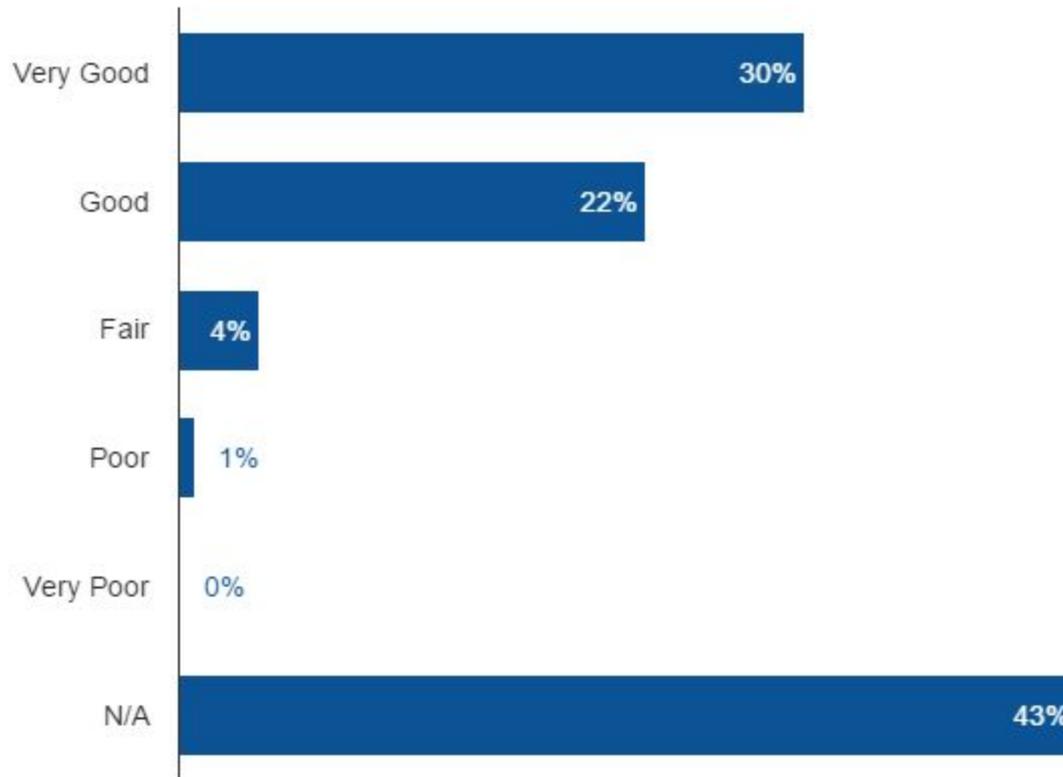
## Wayfinding



# Visitor Perceptions

Based on your most recent trip, how would you rate the following aspects of Dublin, Ohio?  
(select N/A if you did not experience a particular aspect).

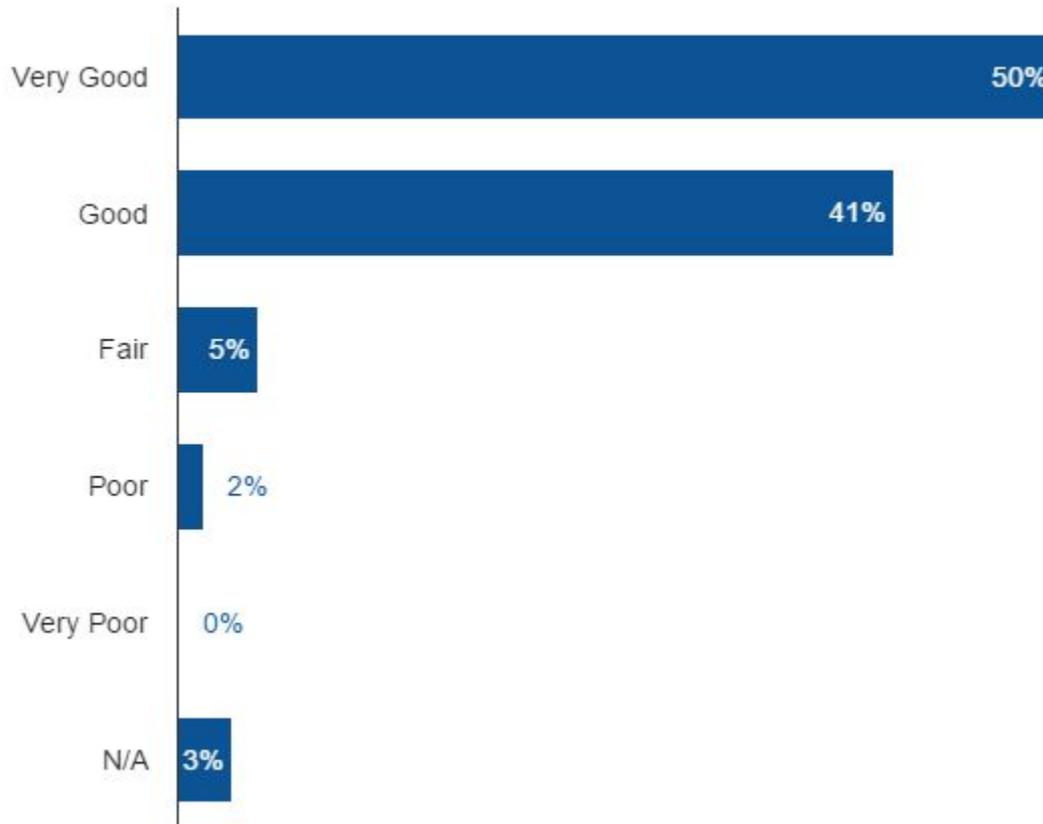
## *Overnight Accommodations*



# Visitor Perceptions

Based on your most recent trip, how would you rate the following aspects of Dublin, Ohio?  
(select N/A if you did not experience a particular aspect).

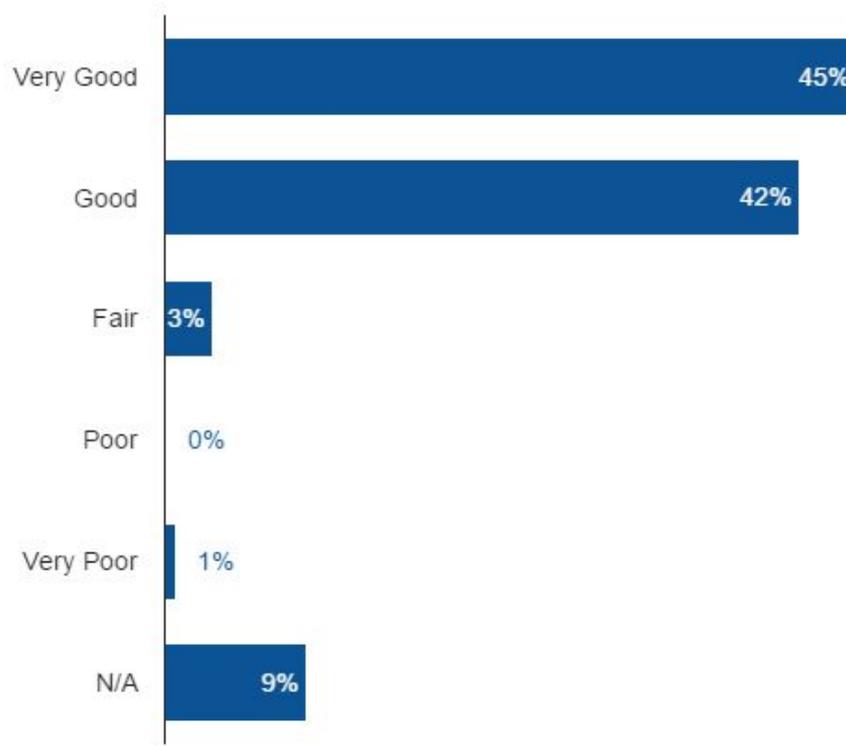
## *Dining and Restaurants*



# Visitor Perceptions

Based on your most recent trip, how would you rate the following aspects of Dublin, Ohio?  
(select N/A if you did not experience a particular aspect).

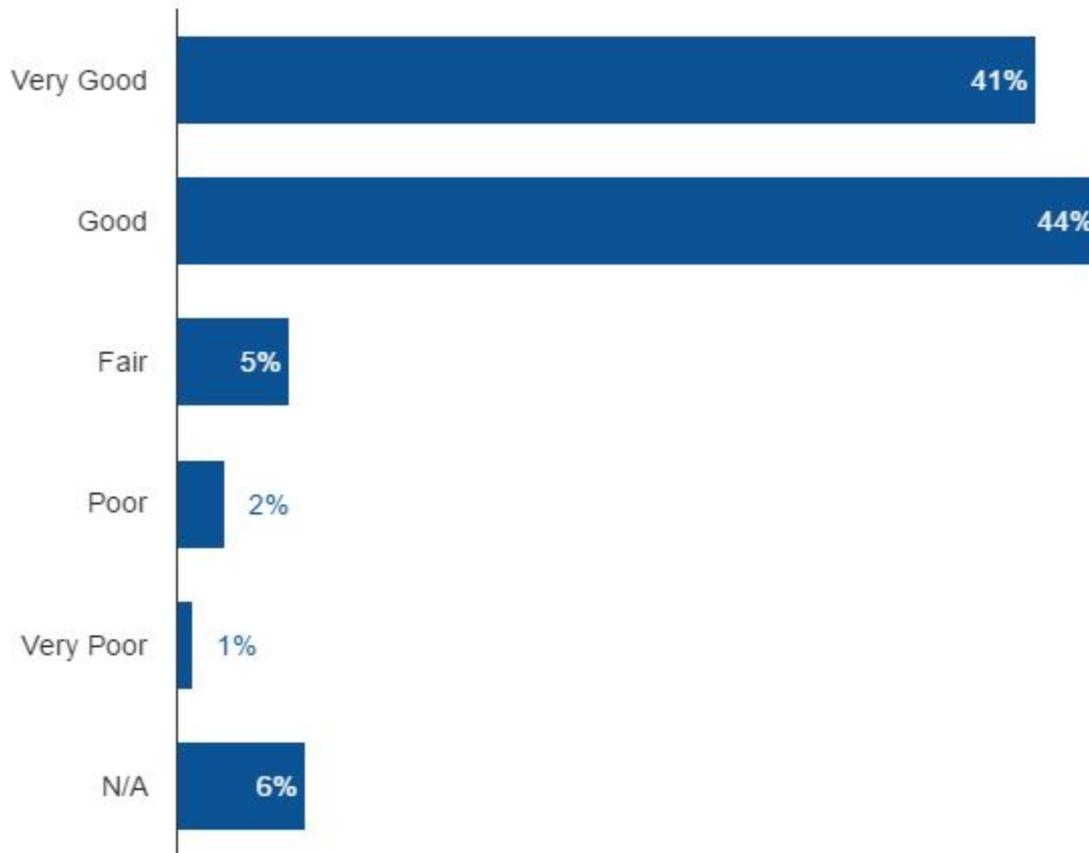
## *Attractions*



# Visitor Perceptions

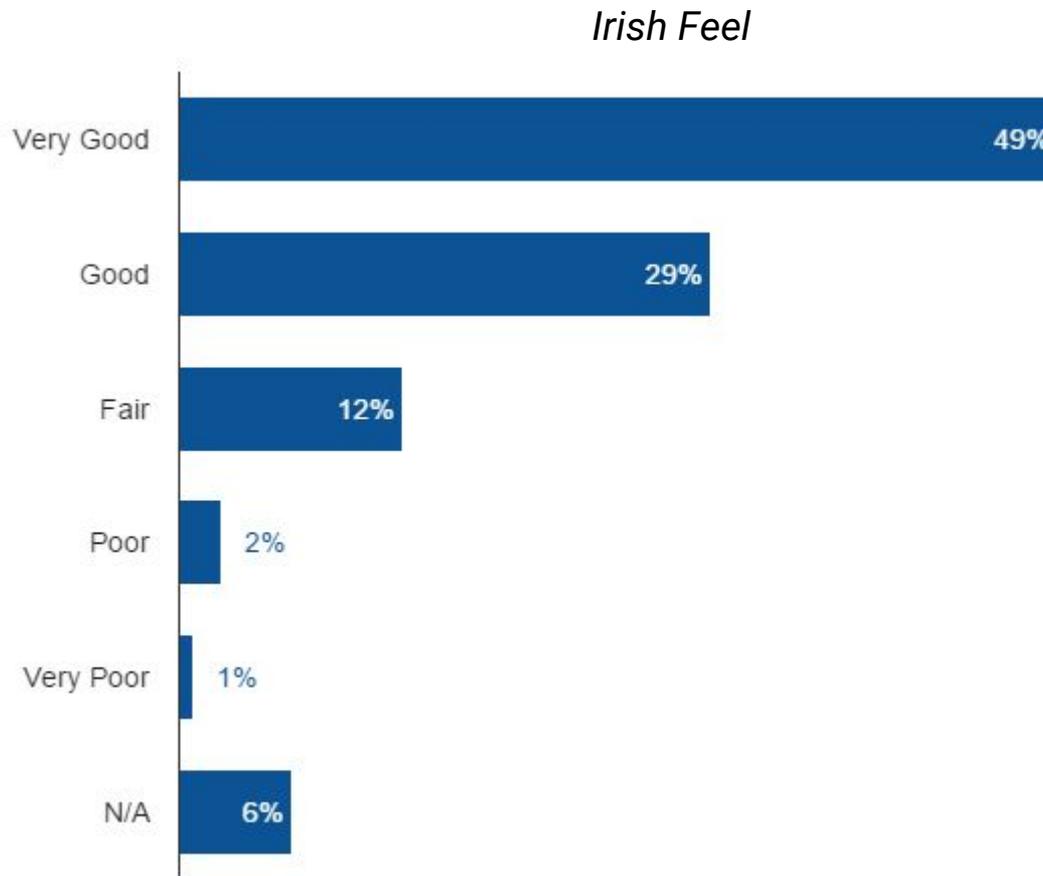
Based on your most recent trip, how would you rate the following aspects of Dublin, Ohio?  
(select N/A if you did not experience a particular aspect).

## *Access to information on things to see and do*



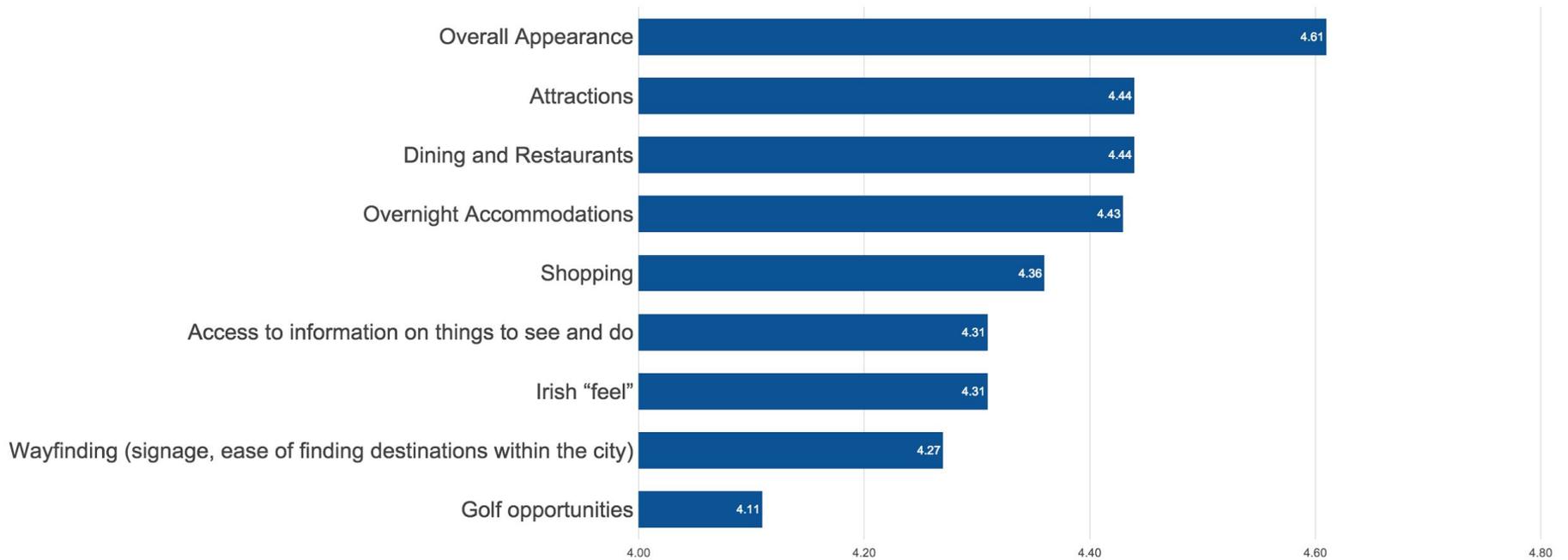
# Visitor Perceptions

Based on your most recent trip, how would you rate the following aspects of Dublin, Ohio?  
(select N/A if you did not experience a particular aspect).



# Visitor Perceptions

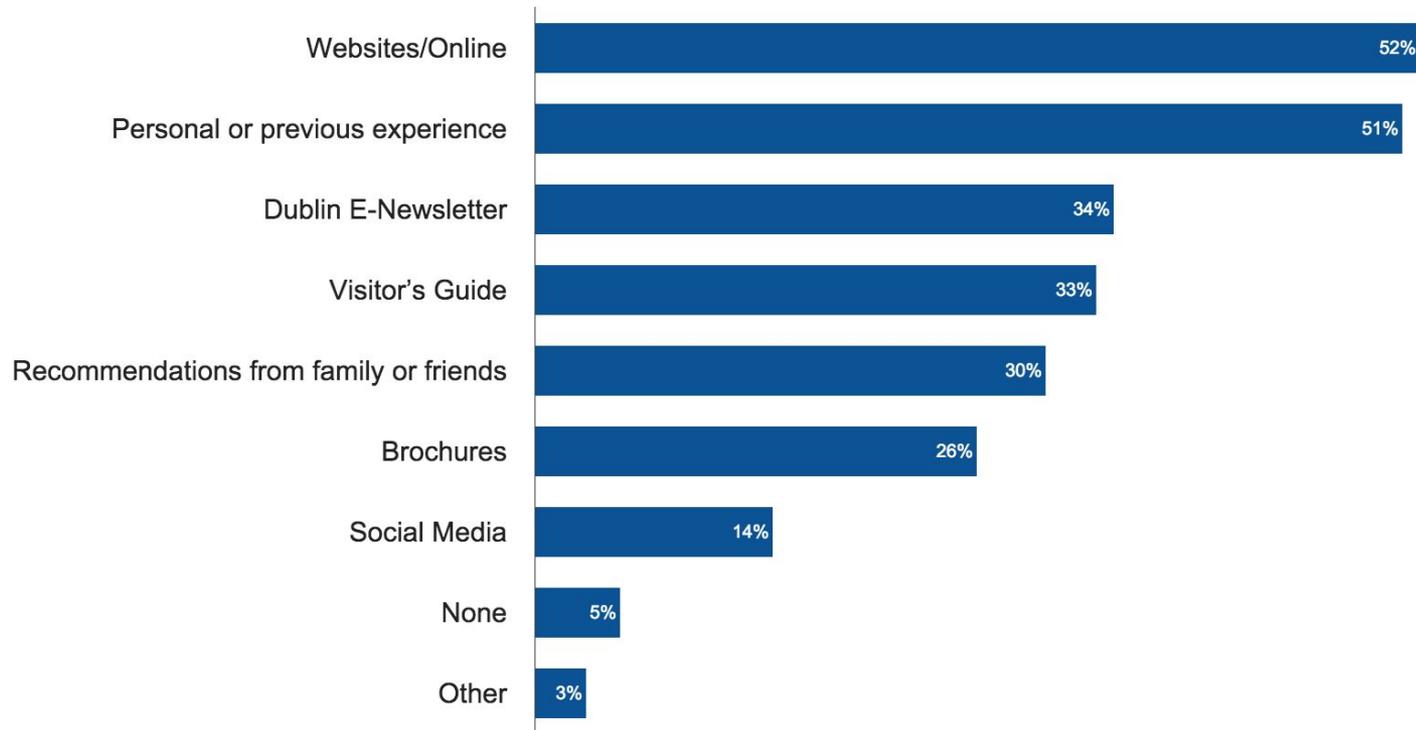
Based on your most recent trip, how would you rate the following aspects of Dublin, Ohio?  
(Where 5 is "Very Good" and 1 is "Very Poor").



# Consumer Planning

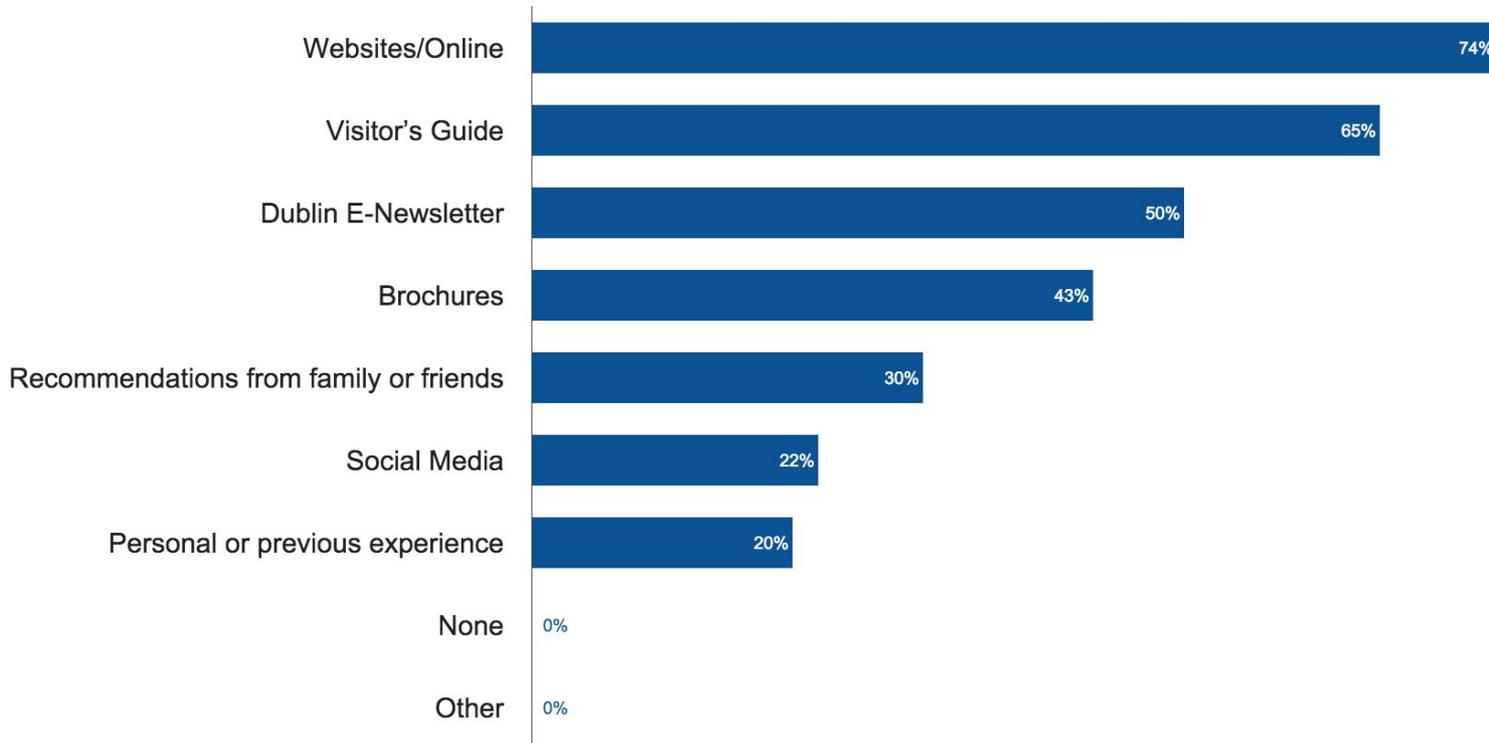
# Consumer Planning - Visitor

What resources did you use to plan or get information for your trip to Dublin? Choose all that apply.



# Consumer Planning - Non Visitor

What resources do you think you will use to plan or get information for your trip to Dublin?  
Choose all that apply.



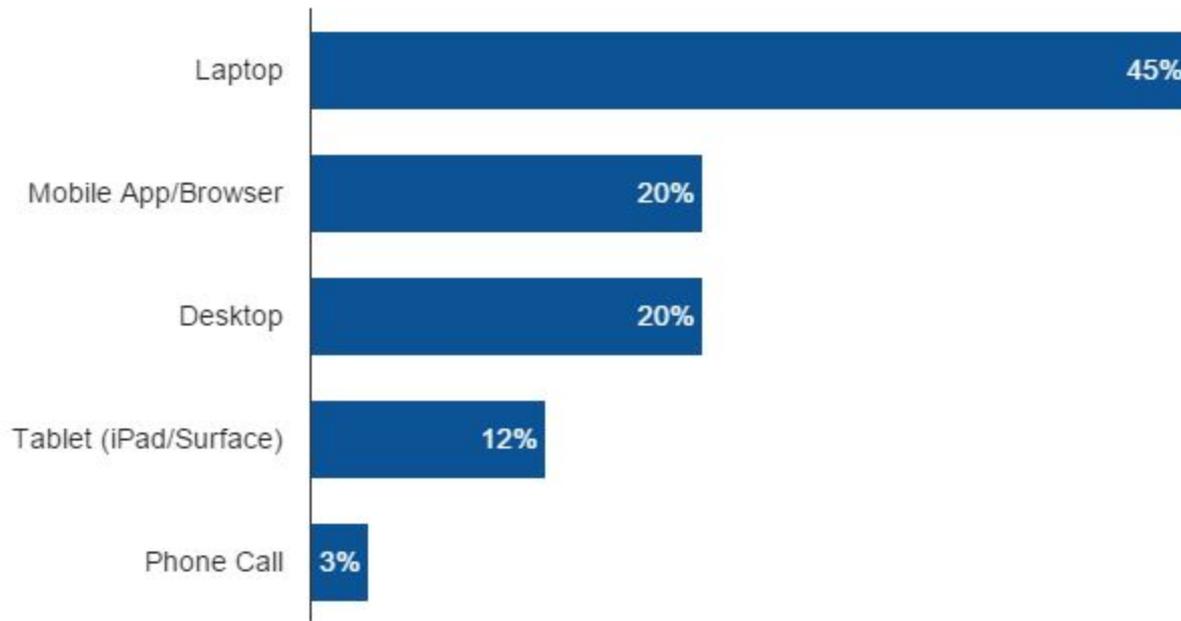
# Consumer Planning

Which website/online resource ?



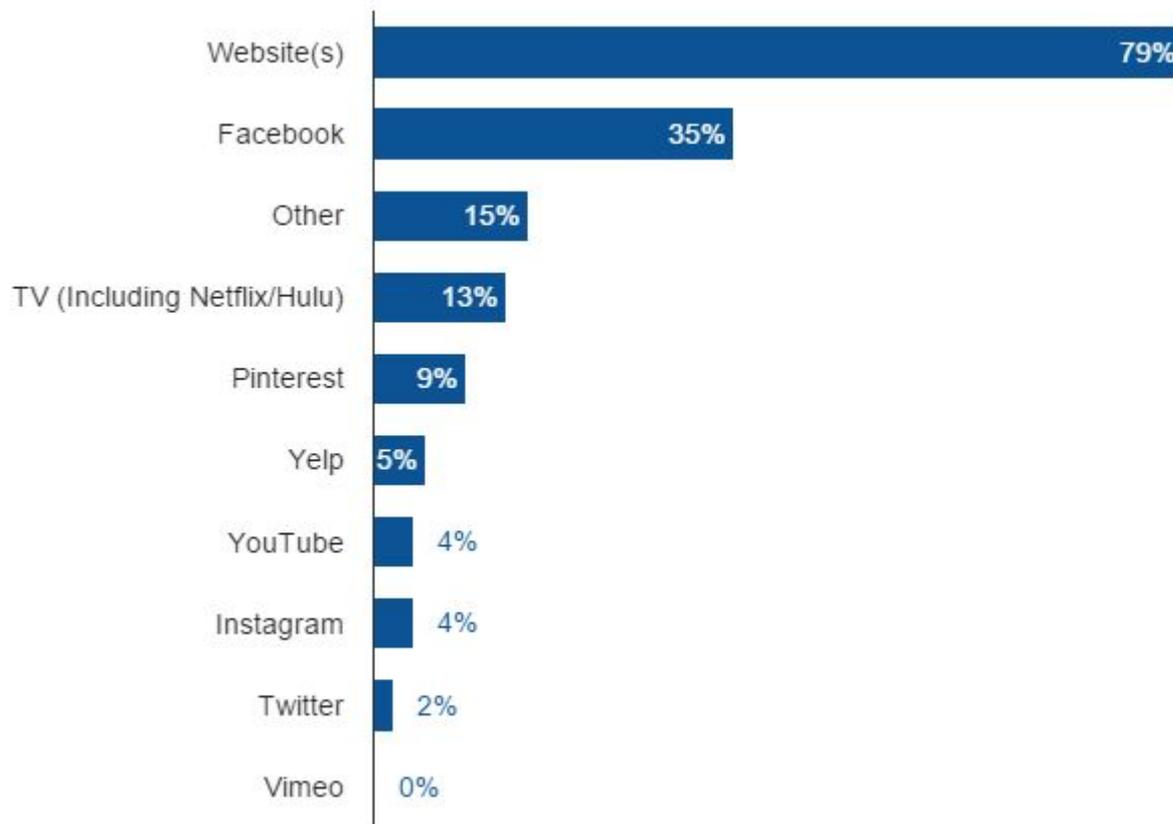
# Consumer Planning

Which device do you use for your travel planning most?



# Consumer Planning

Where do you find your online inspiration (your ideas) for travel? Choose all that apply.



# Consumer Planning

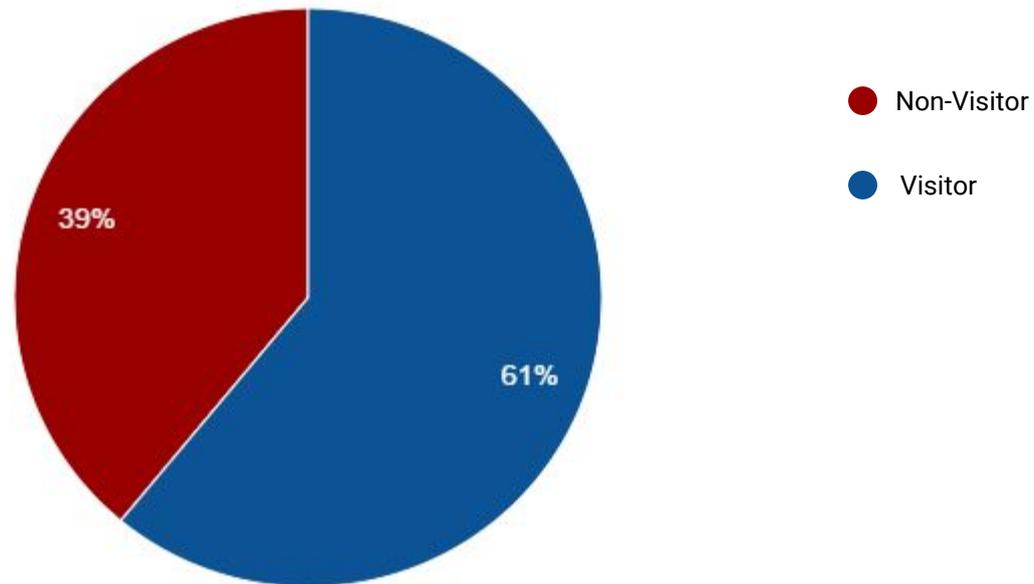
How would you prefer to receive information on things to see and do in Dublin, Ohio? Choose all that apply.



# Visitor & Non-Visitor Comparisons

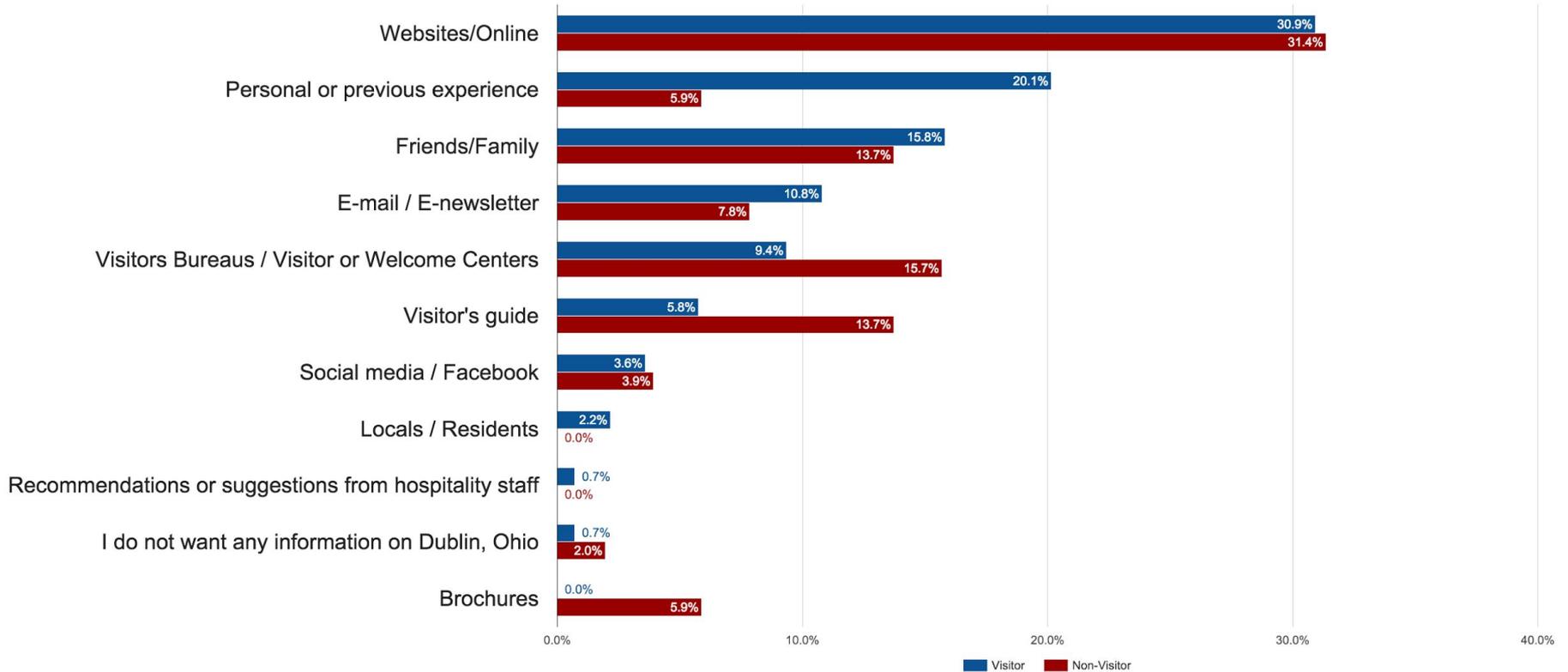
# Visitor & Non-Visitor Comparisons

Percentage of Visitors and Non-Visitors



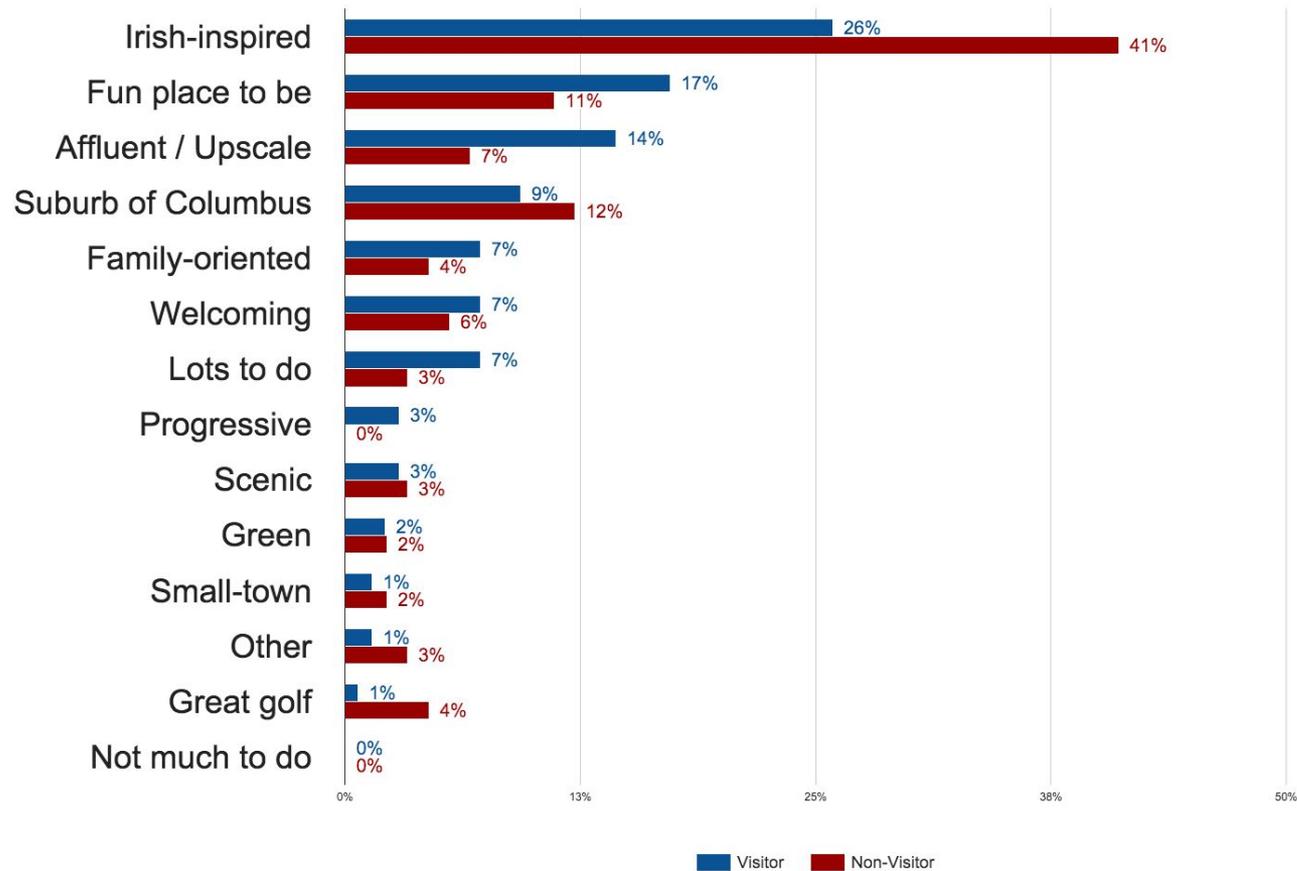
# Visitor & Non-Visitor Comparisons

What is your most trustworthy source of travel information?



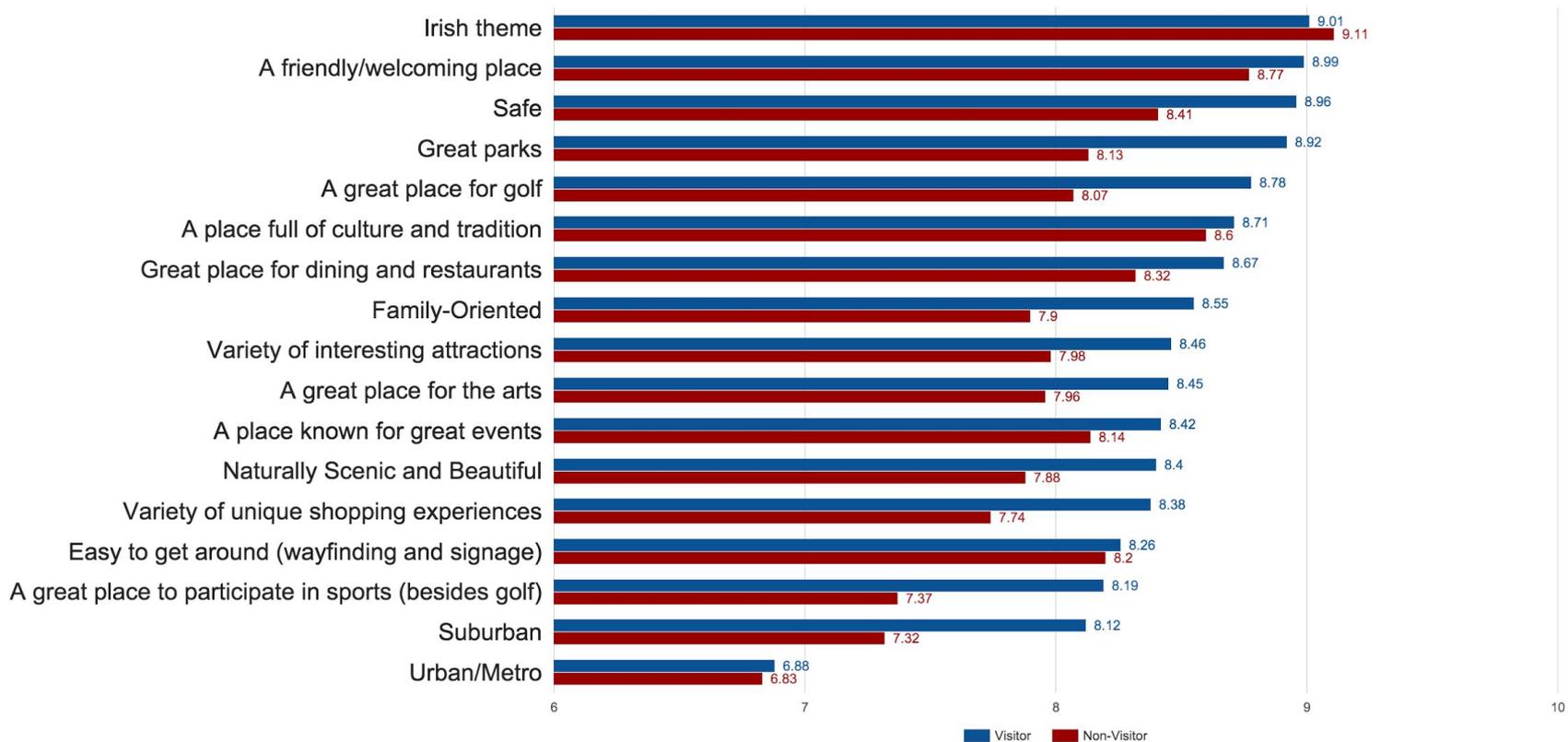
# Visitor & Non-Visitor Comparisons

Based on your current perceptions, what is the best phrase or adjective to describe Dublin, Ohio?



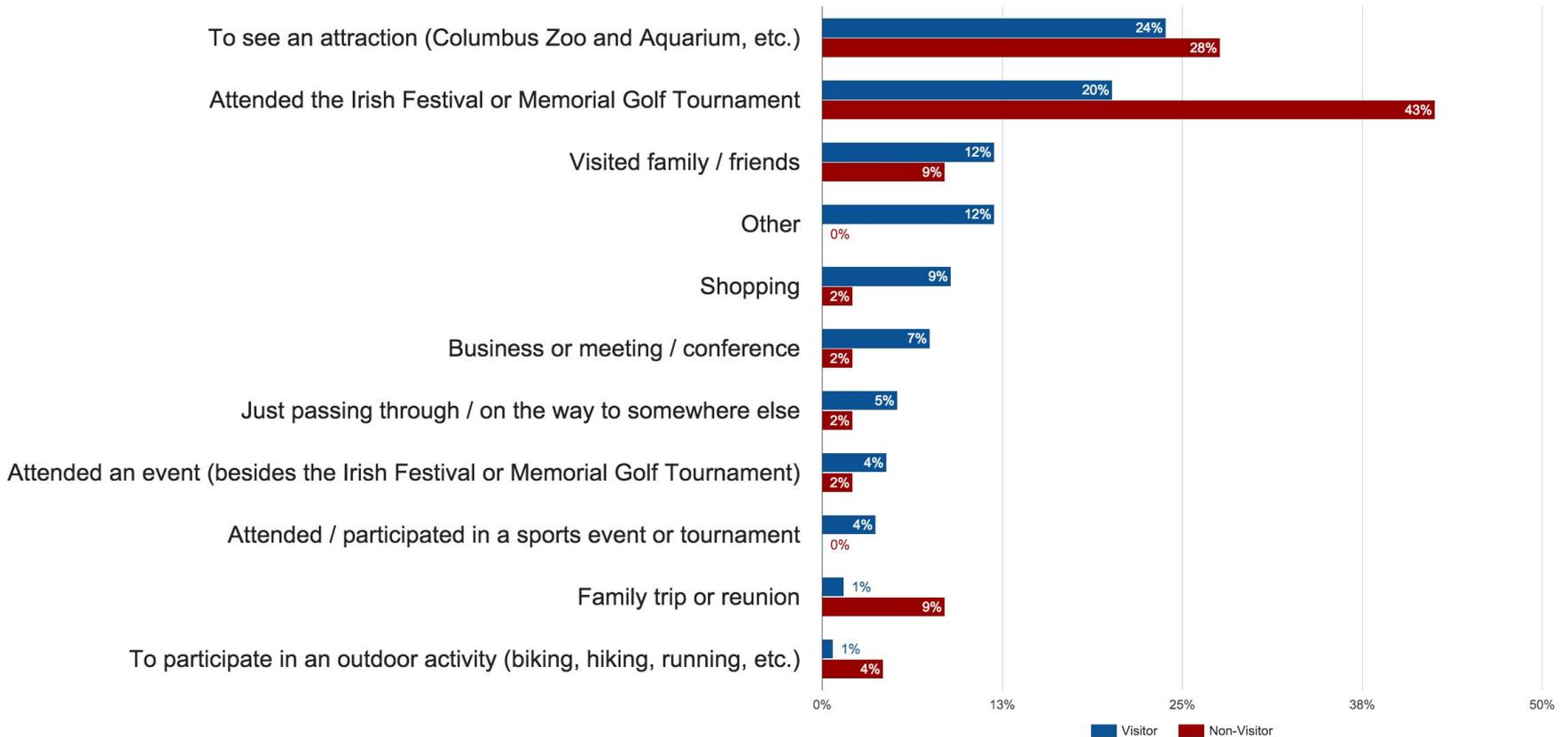
# Visitor & Non-Visitor Comparisons

Based on your current perceptions, how well do the following descriptions match your ideas of Dublin, Ohio? (On a scale of 1-10 with 1 being “does not match” and 10 being “exact match.”)



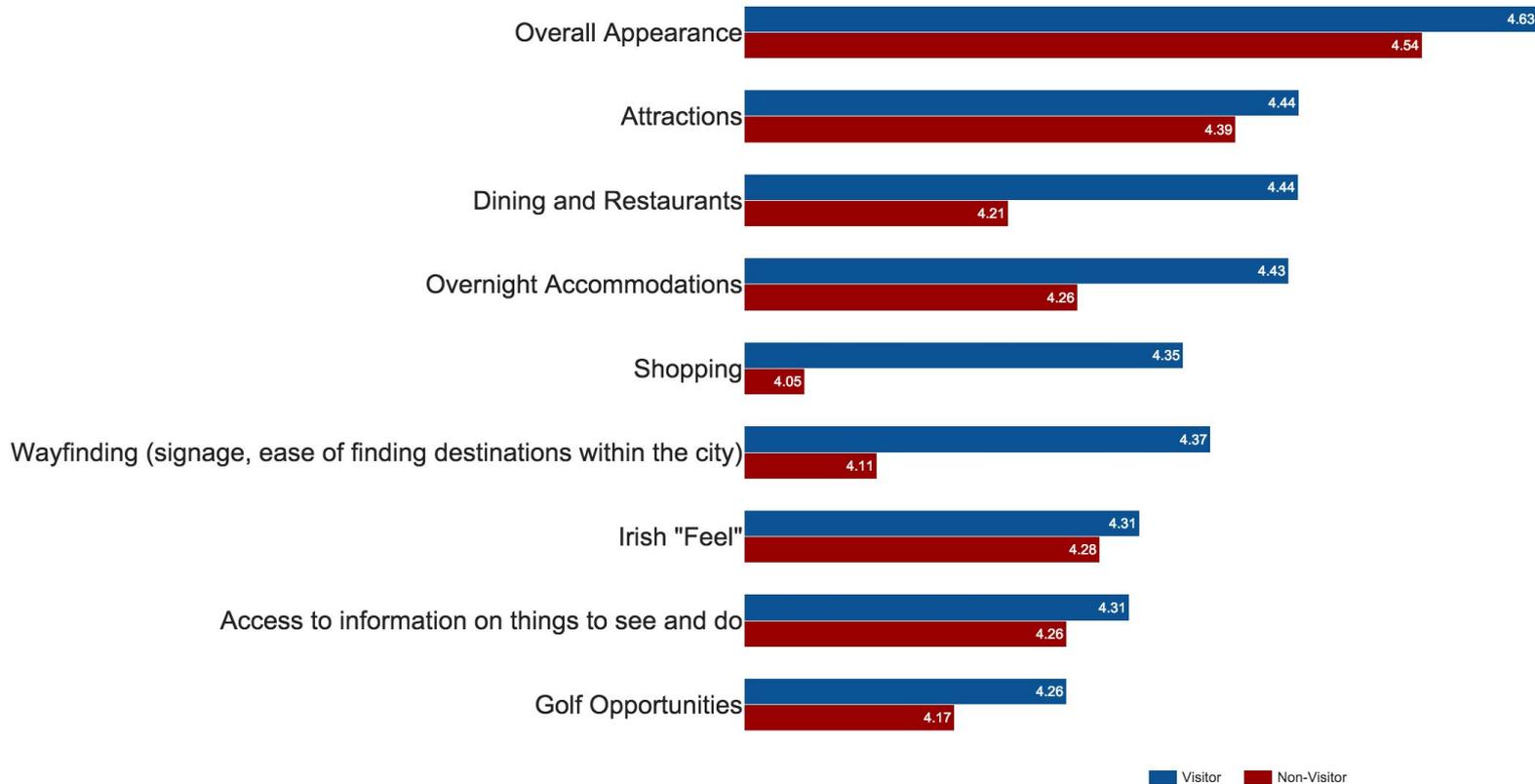
# Visitor & Non-Visitor Comparisons

What was (or will be) the primary purpose of your most recent trip?



# Visitor & Non-Visitor Comparisons

Based on your most recent trip, how would you rate the following aspects of Dublin, Ohio?  
(Where 5 is "Very Good" and 1 is "Very Poor").

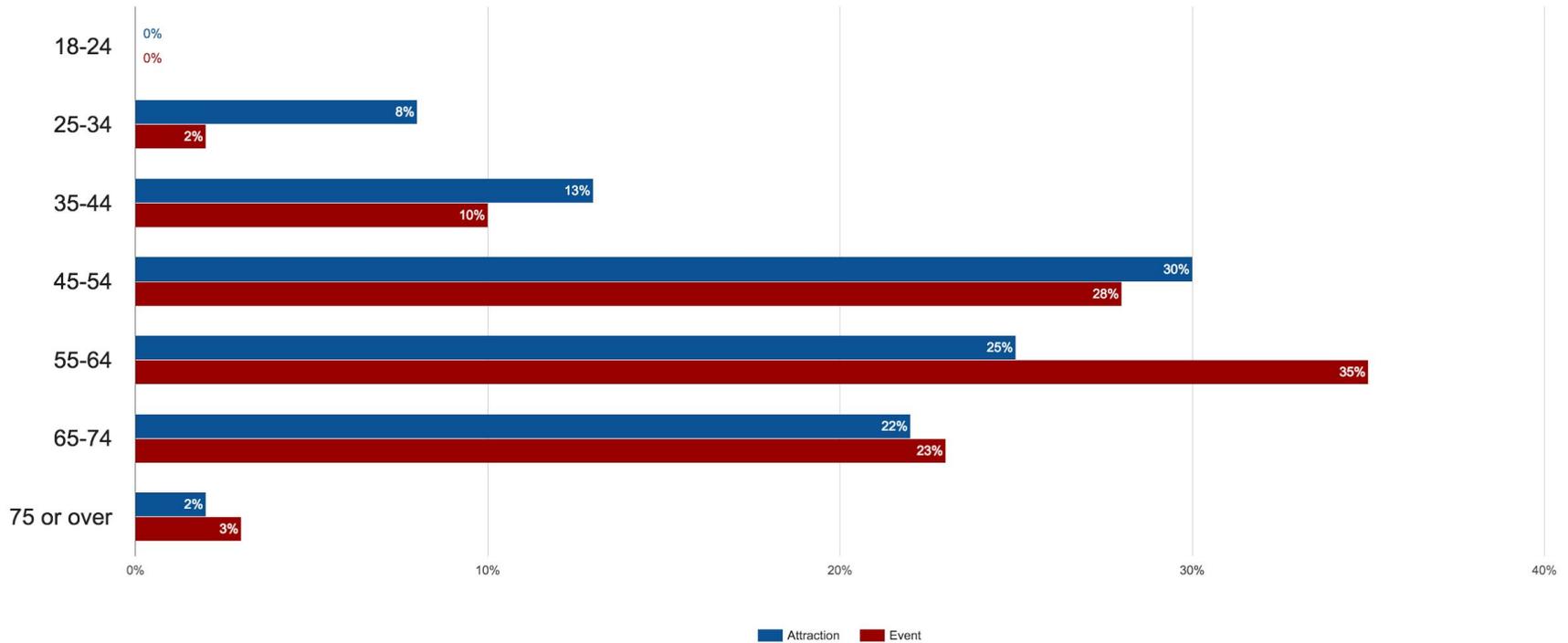


# Core Visitor Segment Comparisons

## Event & Attraction

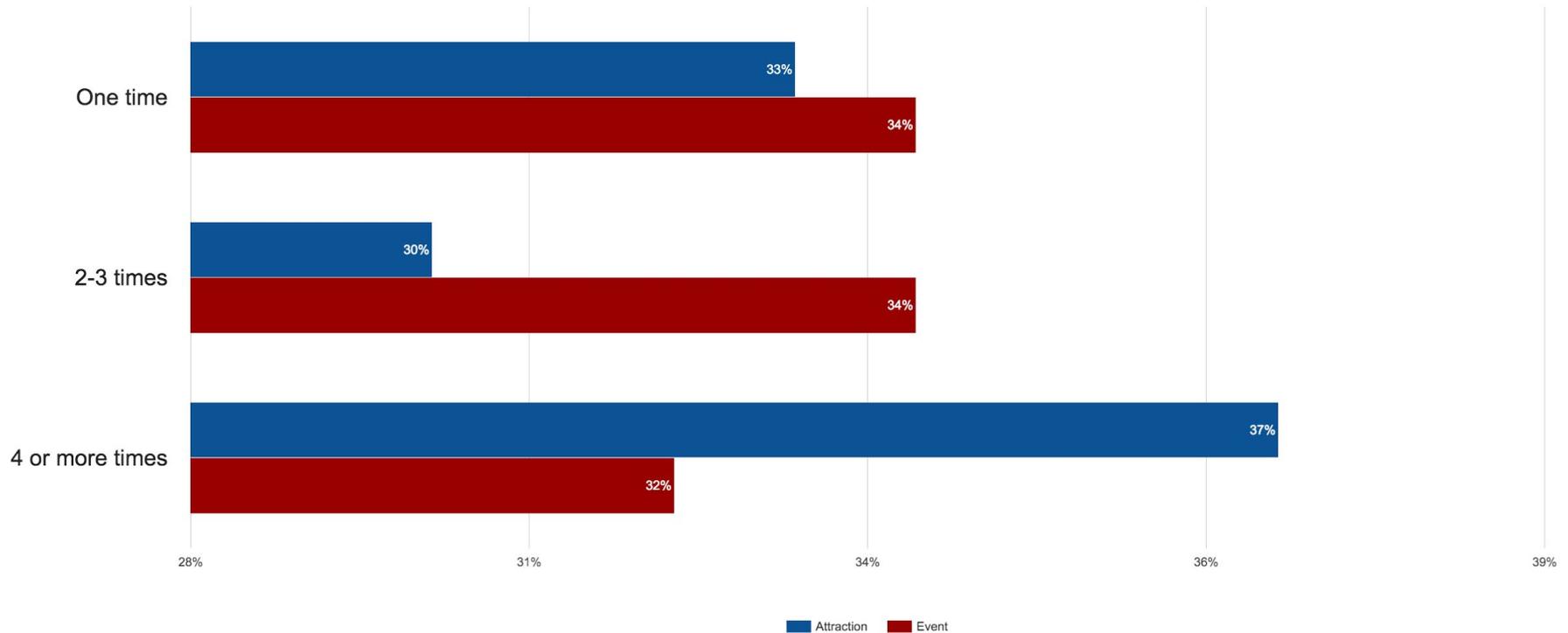
# Core Segments Comparison

Which of the following includes your age?



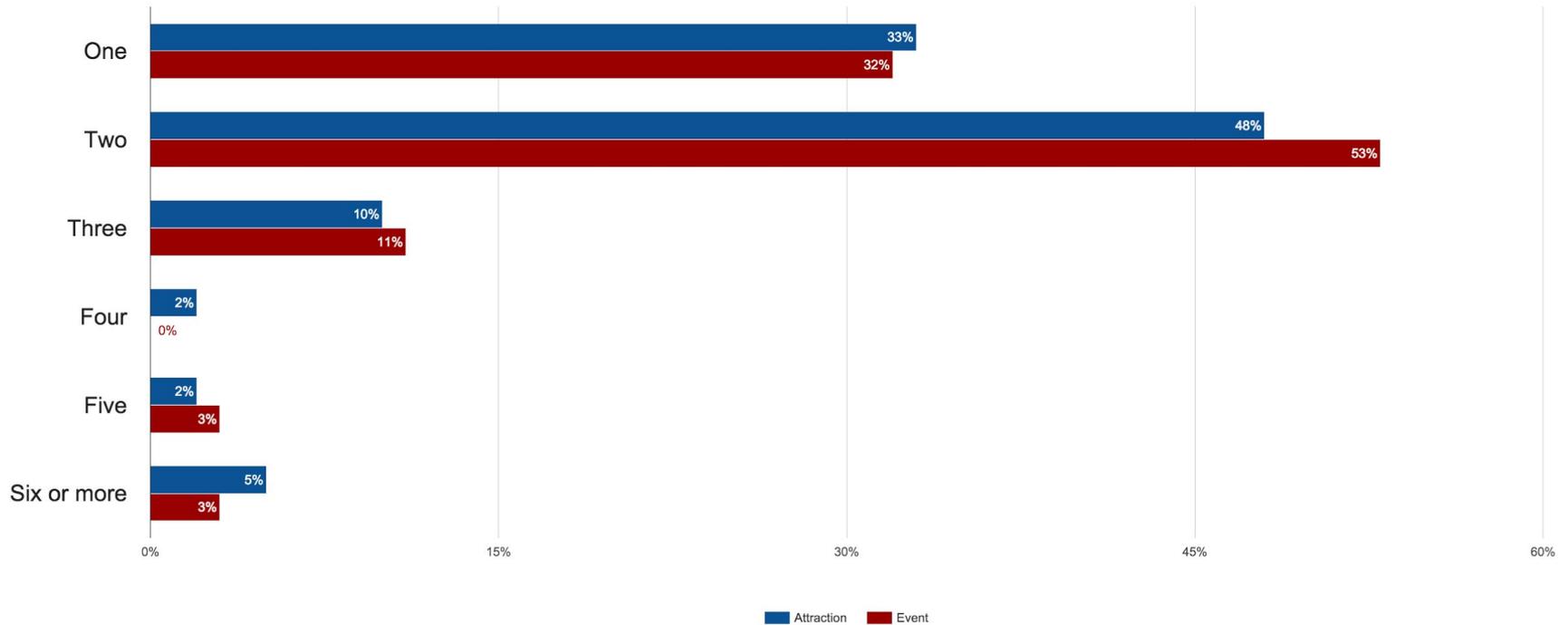
# Core Segments Comparison

How many times have you visited Dublin, Ohio in the past 2 years?



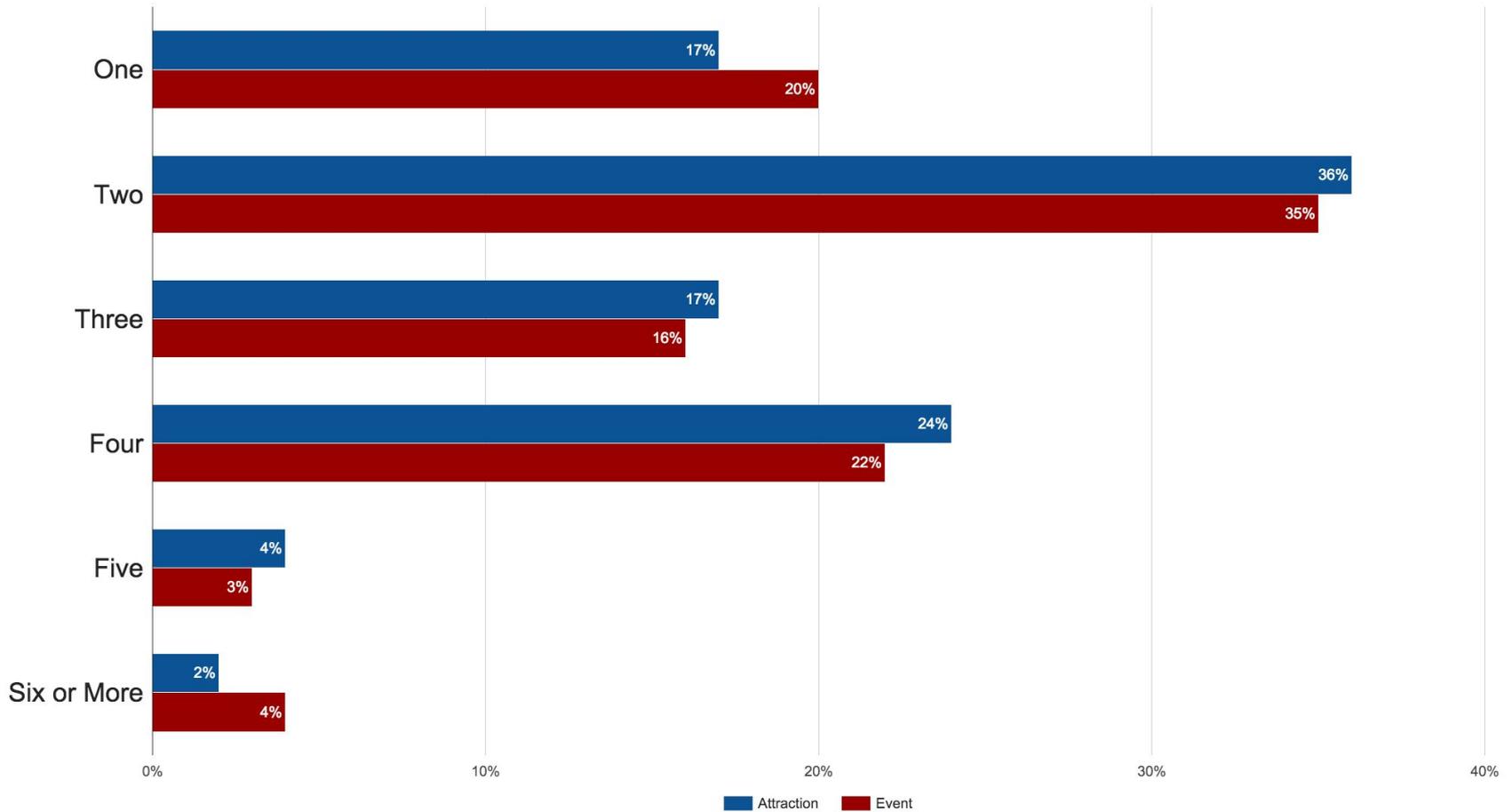
# Core Segments Comparison

How many nights did you stay?



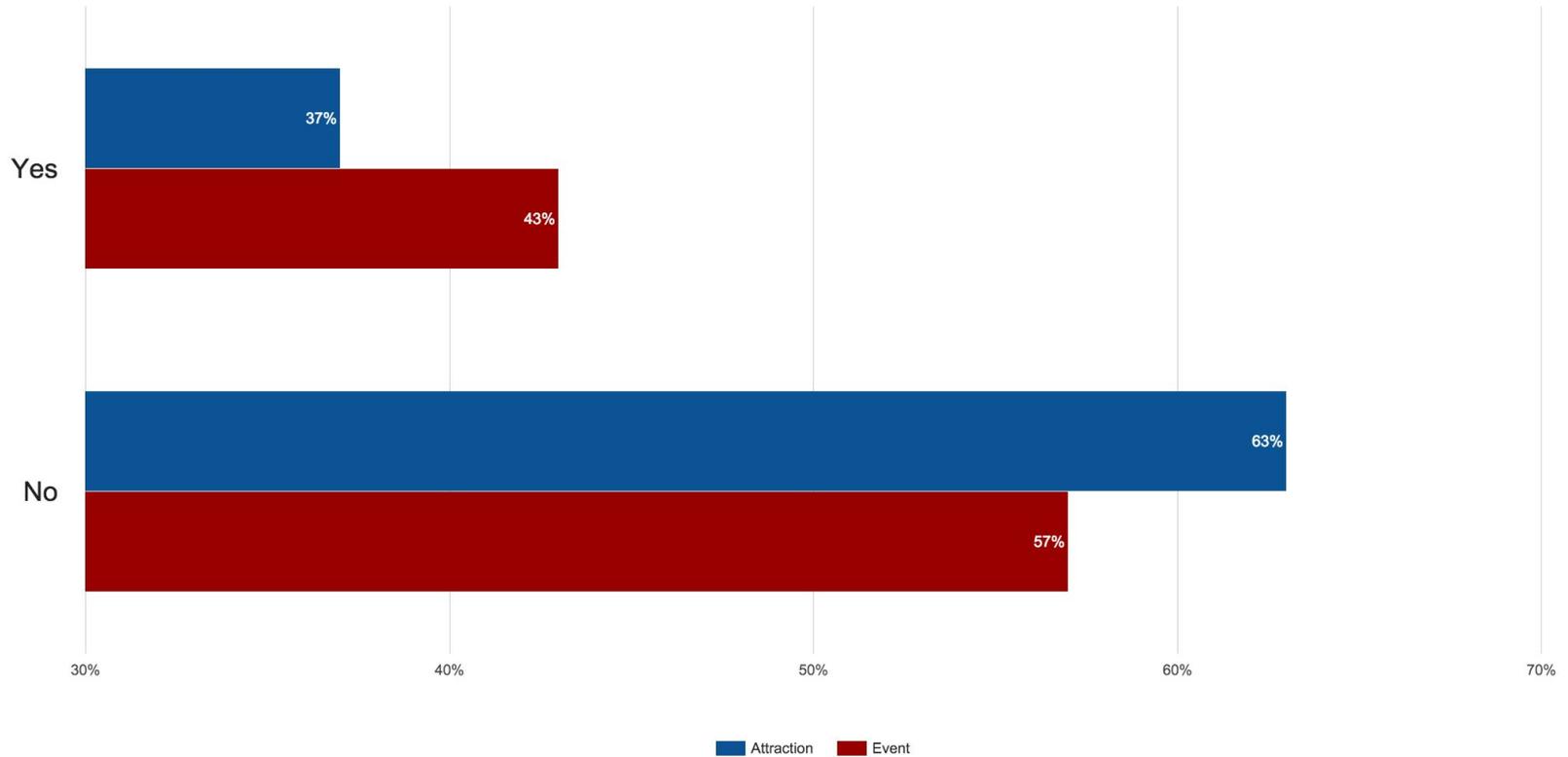
# Core Segments Comparison

How many people did you travel with including yourself on your most recent trip?



# Core Segments Comparison

Did your perception of Dublin, Ohio change once you visited the region?

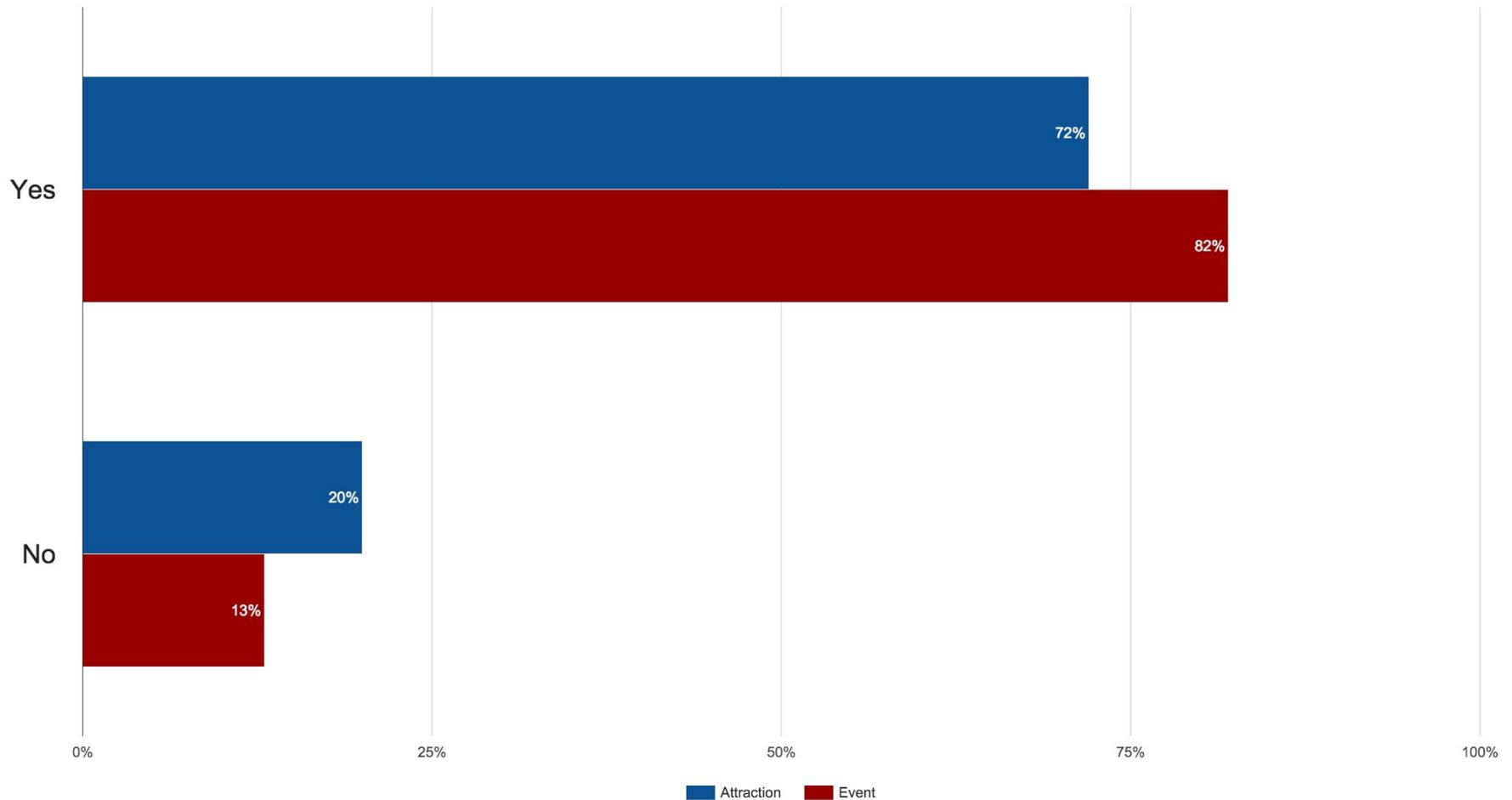


Perception change was overwhelmingly positive 90+%



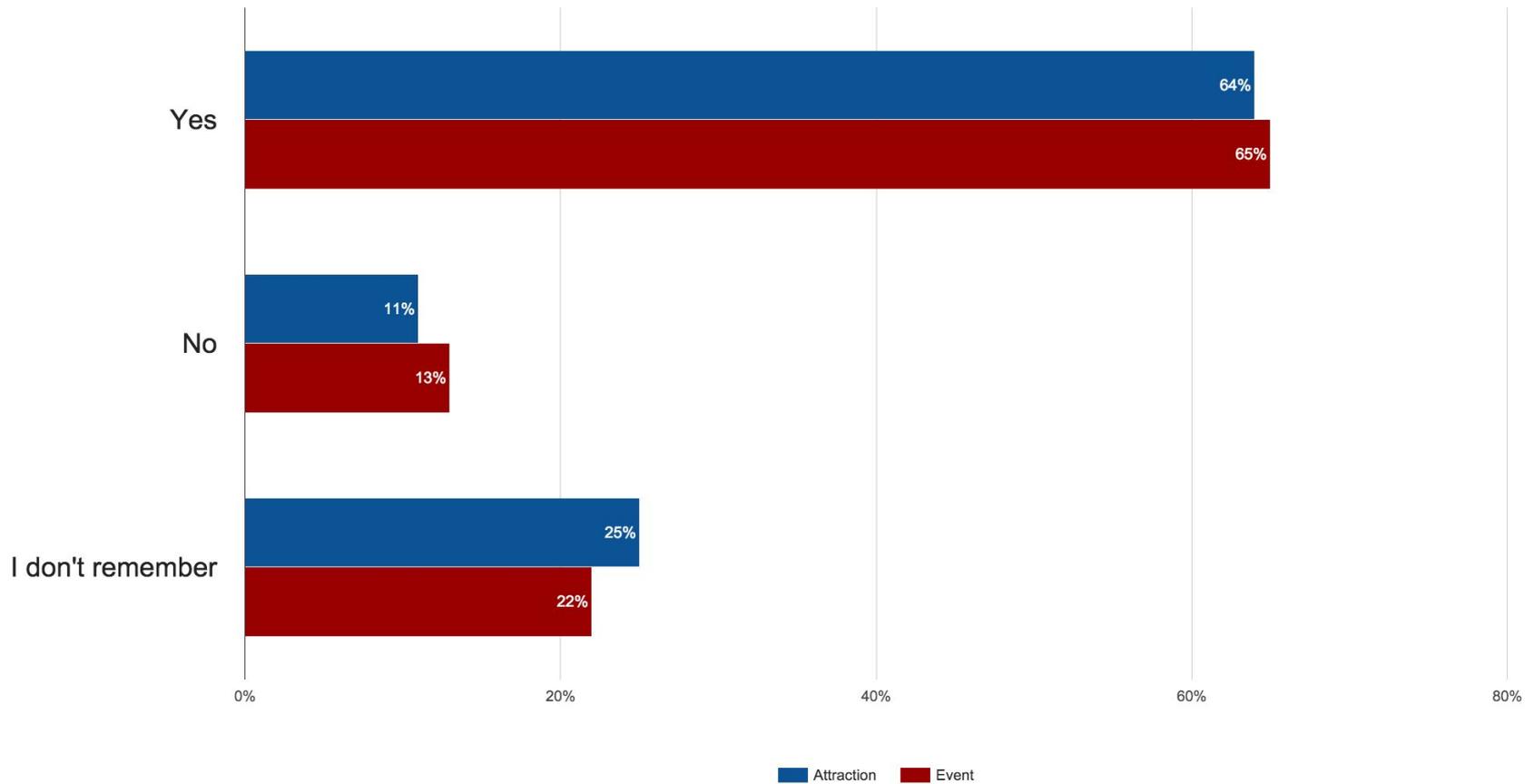
# Core Segments Comparison

In the past 12 months, do you recall seeing or hearing any advertisements for Dublin, Ohio?



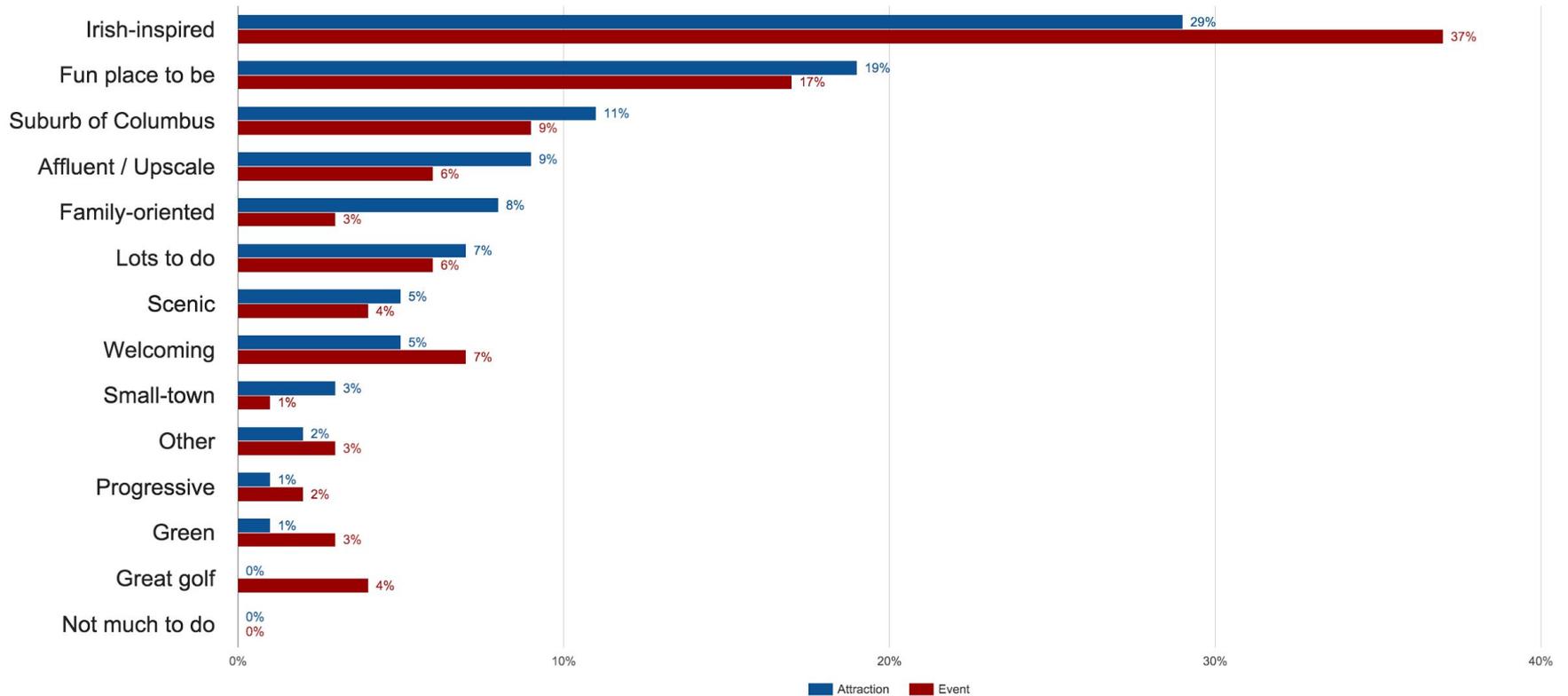
# Core Segments Comparison

Were you influenced at all by an advertisement and/or the information you received in your decision to visit Dublin, Ohio?



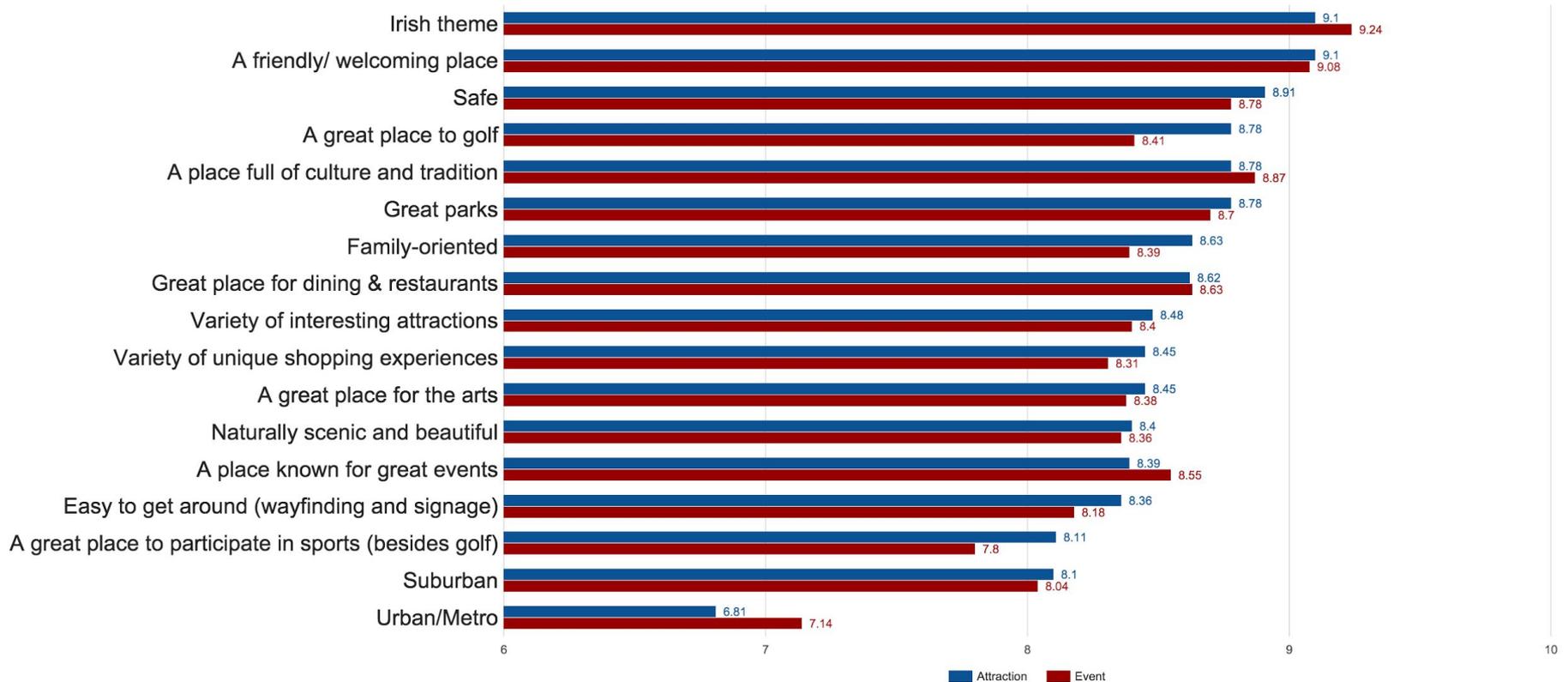
# Core Segments Comparison

Based on your current perceptions, what is the best phrase or adjective to describe Dublin, Ohio?



# Core Segments Comparison

Based on your current perceptions, how well do the following descriptions match your ideas of Dublin, Ohio? Match the following on a scale of 1-10 with 1 being "does not match" and 10 being "exact match."



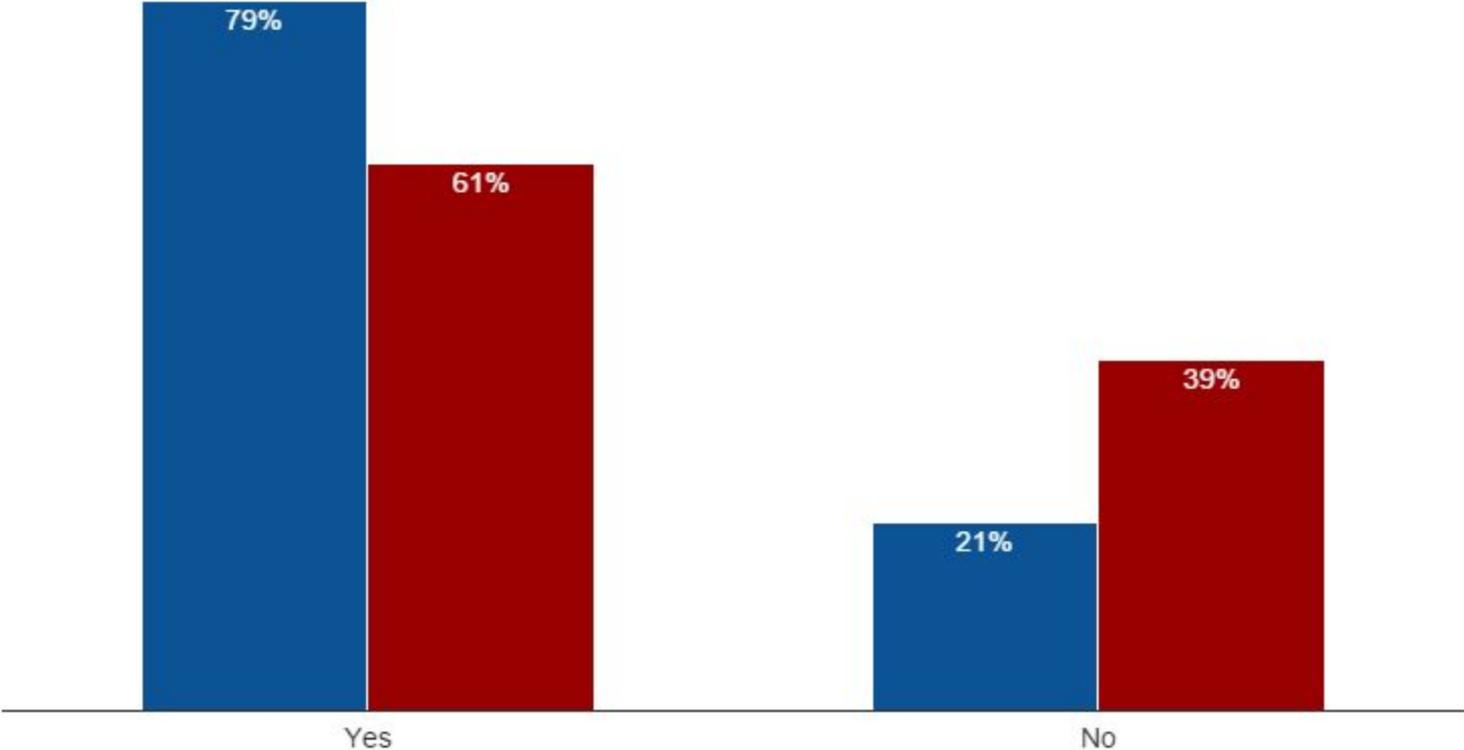
# Year-to-Year Comparisons

## 2011 & 2016

# Demographics and Visitation

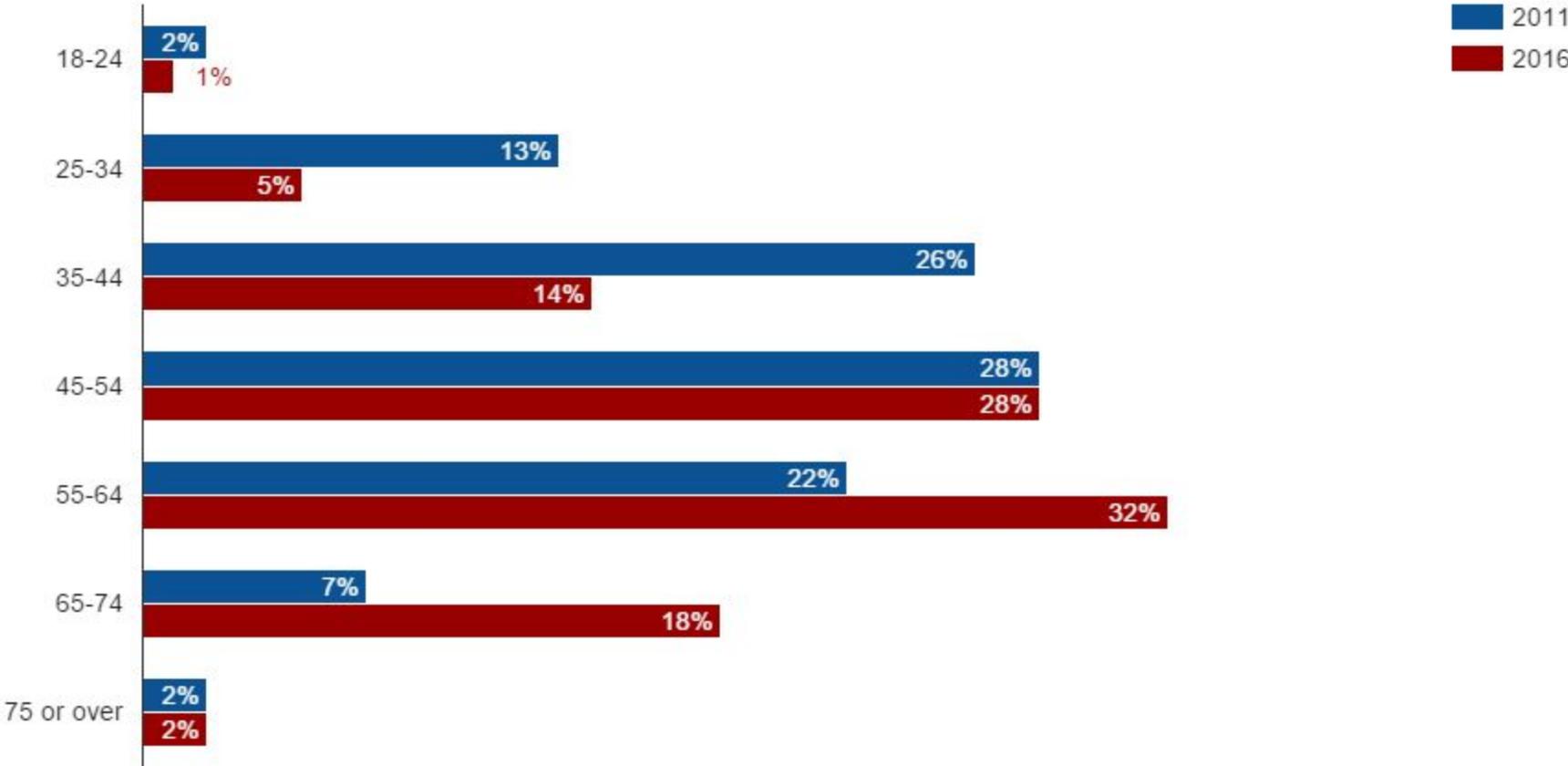
# Demographics, Origin, and Visitation

In the past two (2) years, have you visited or been to Dublin, Ohio?



# Demographics, Origin, and Visitation

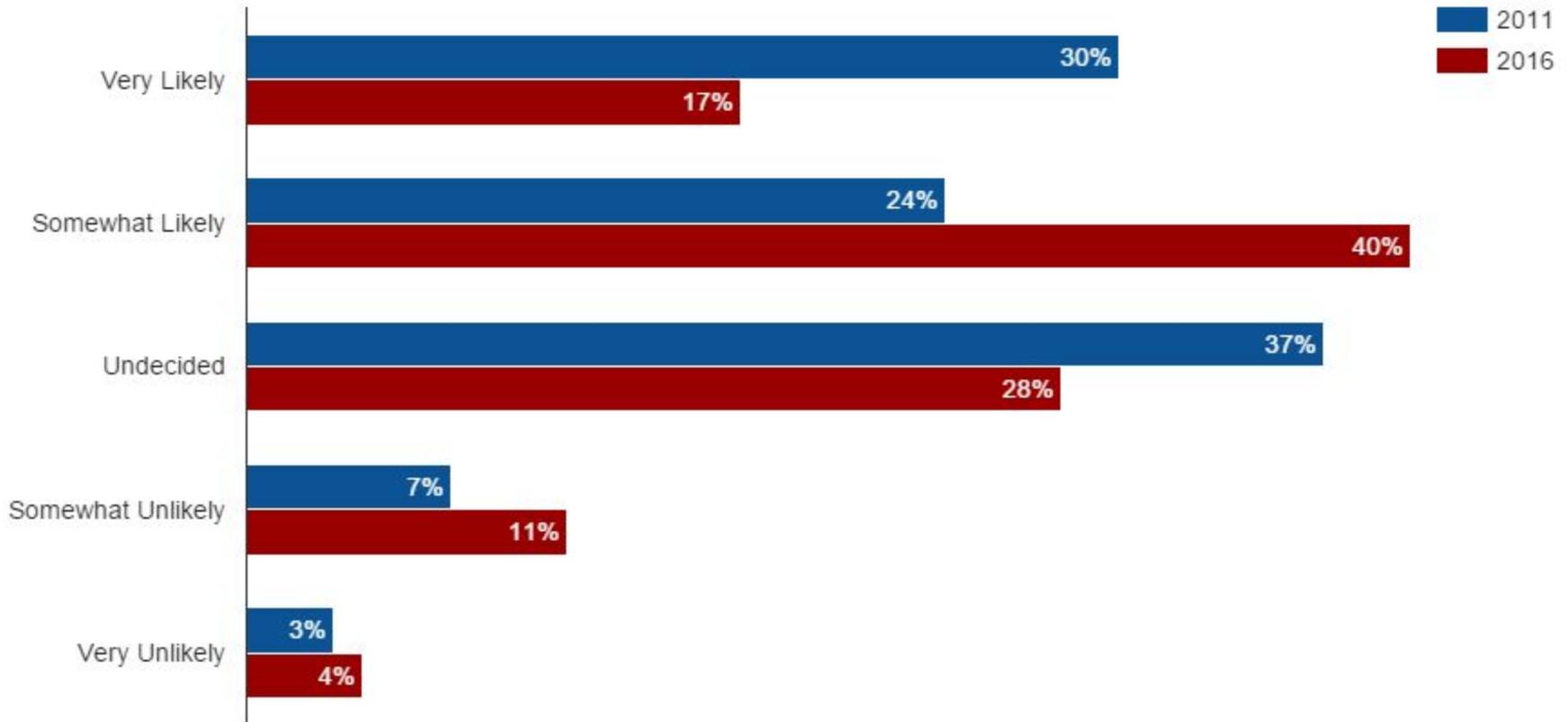
Which of the following includes your age?



# Non-Visitors

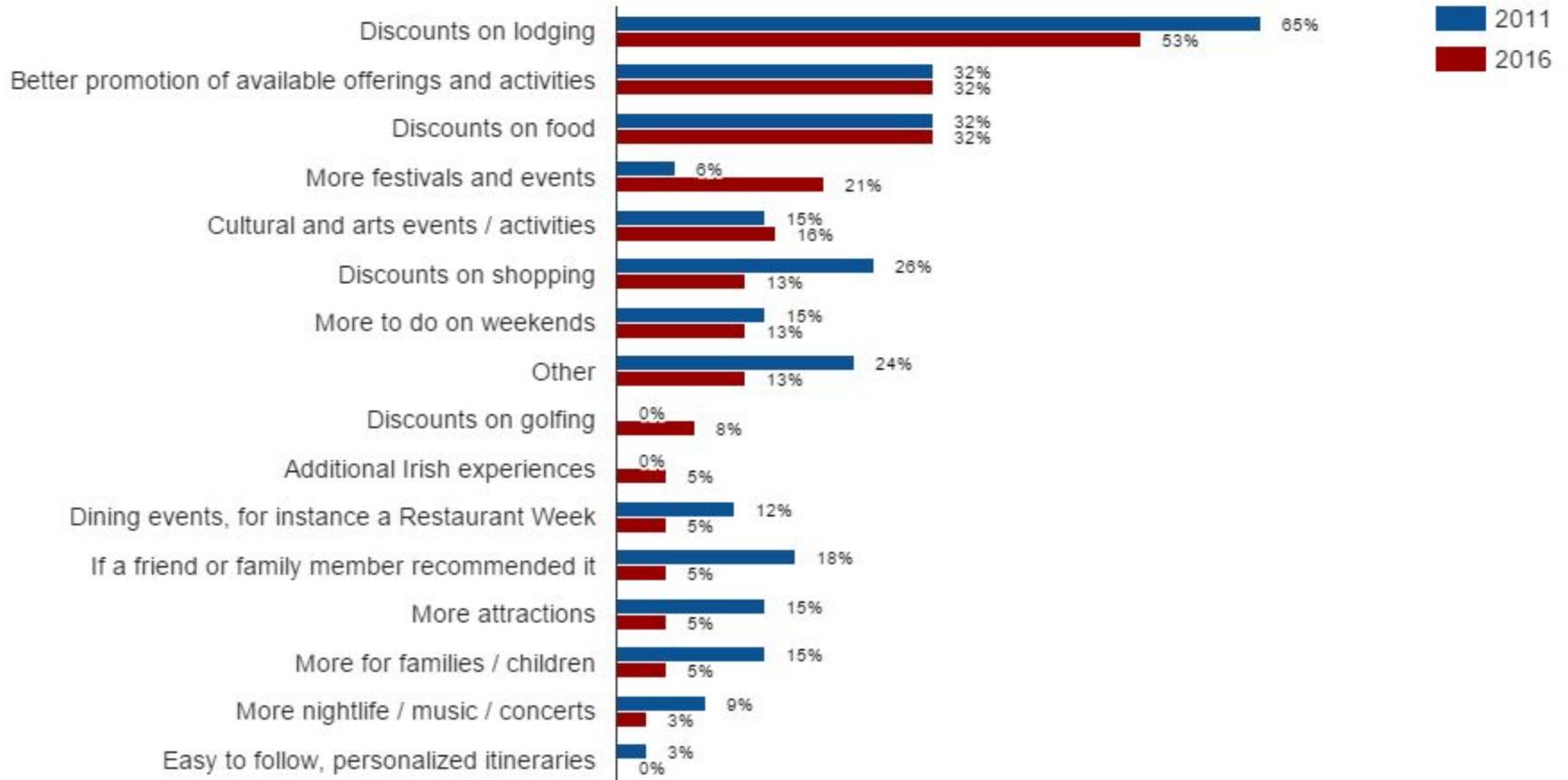
# Non-Visitors

How likely are you to visit in the next year?



# Non-Visitors

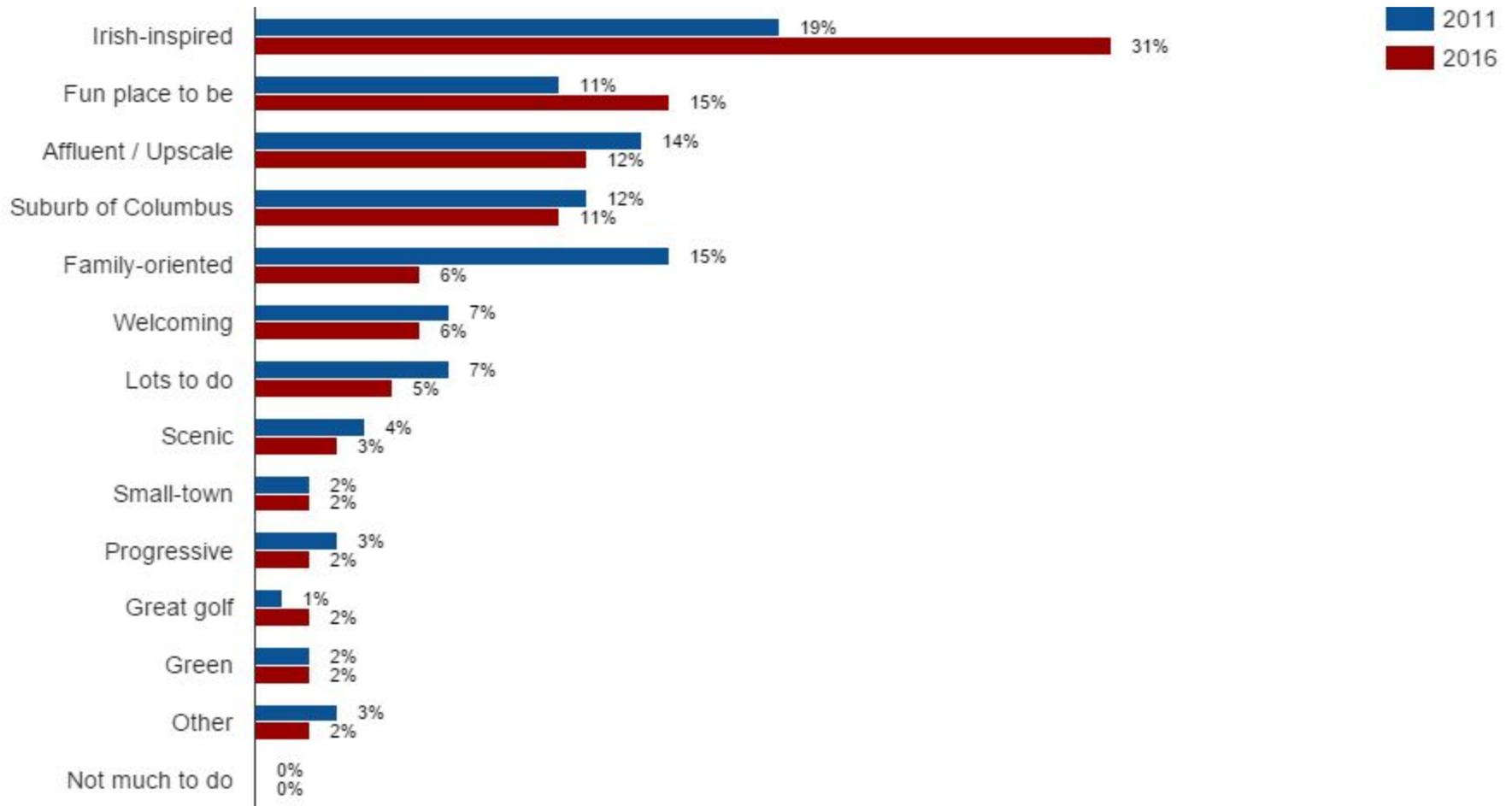
What would make you more likely to travel to Dublin, Ohio? Choose all that apply.



# Perceptions

# Perceptions

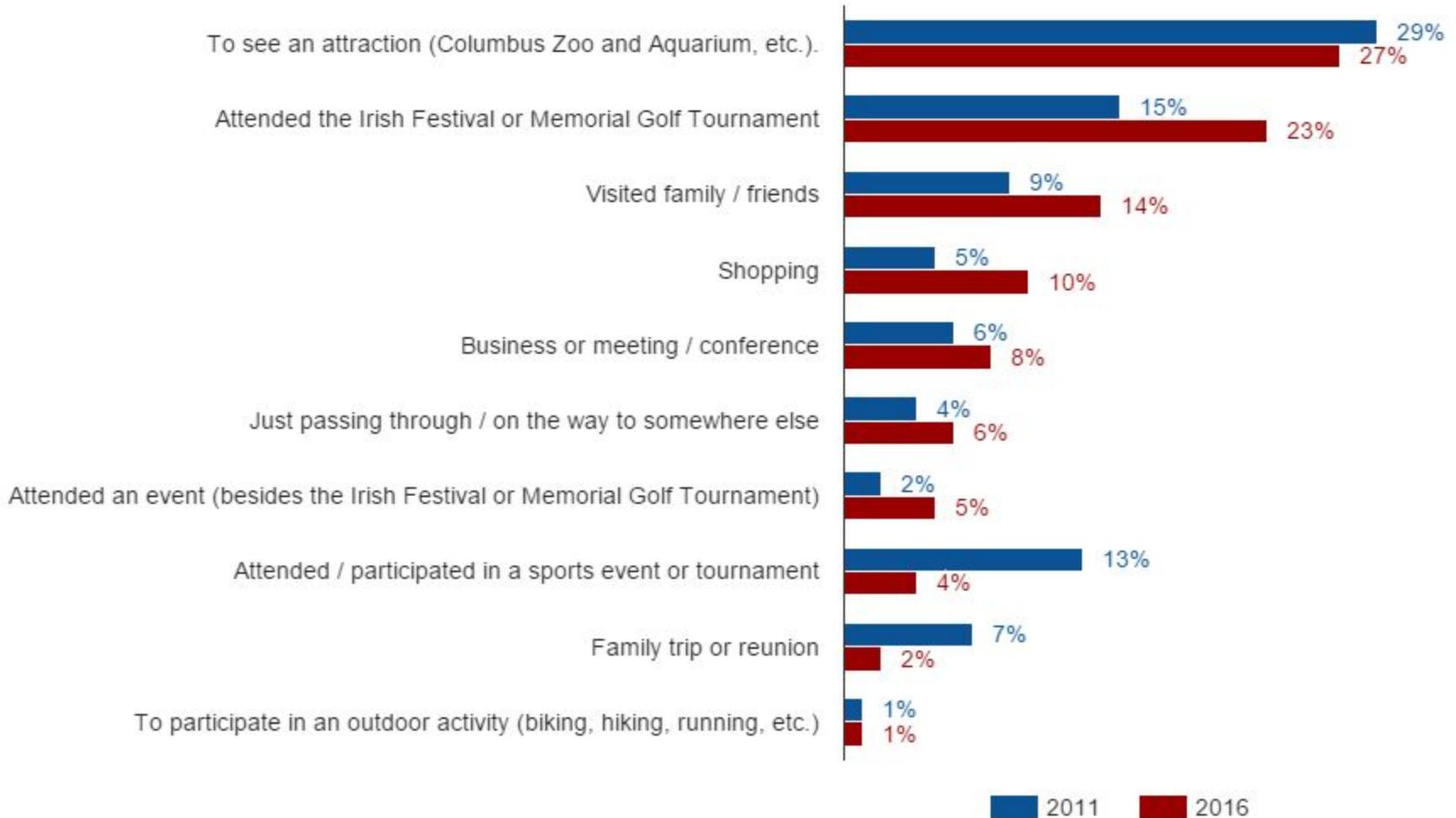
Based on your current perceptions, what is the best phrase or adjective to describe Dublin, Ohio?



# Visitor Patterns

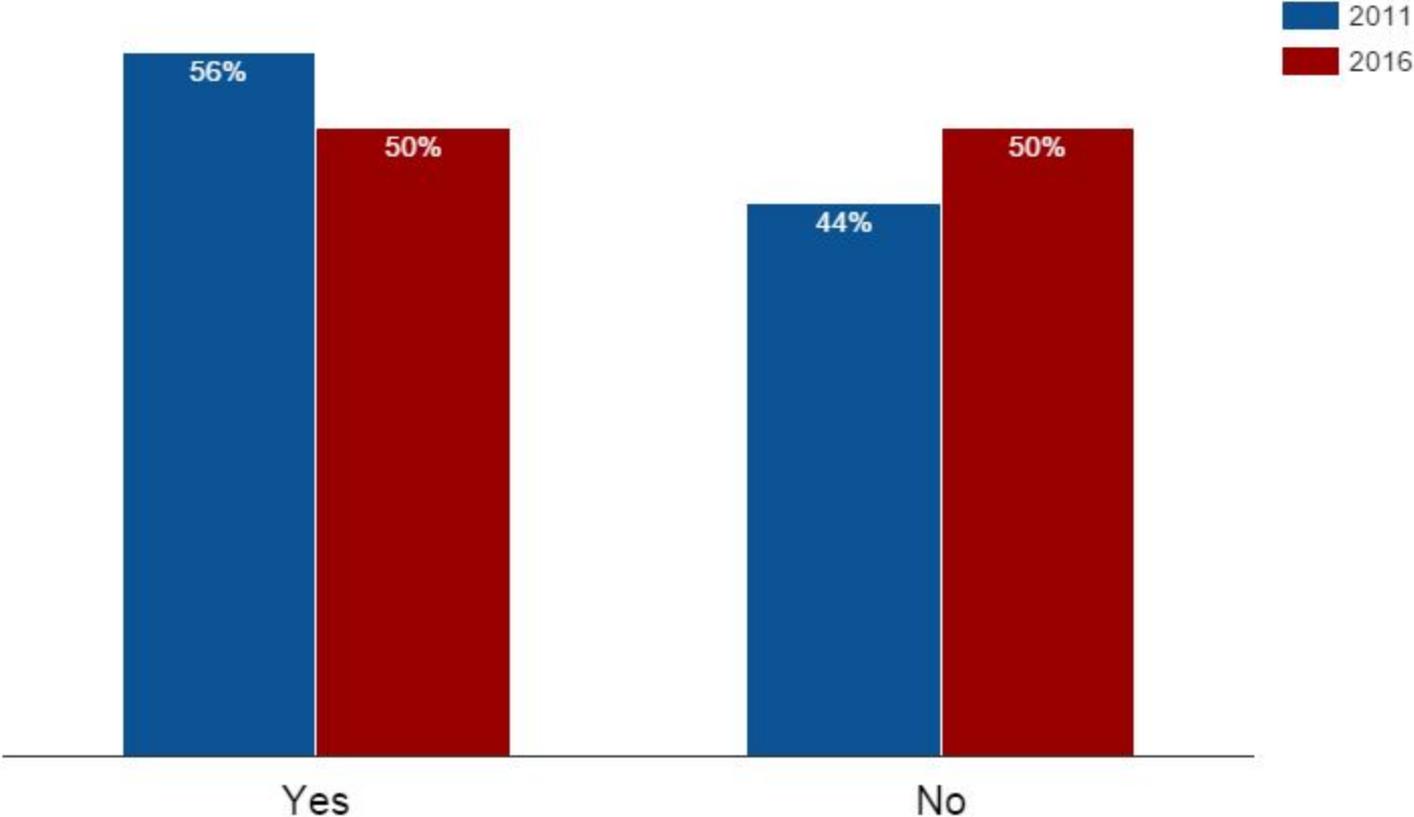
# Demographics, Origin, and Visitation

What was the primary purpose of your most recent trip?



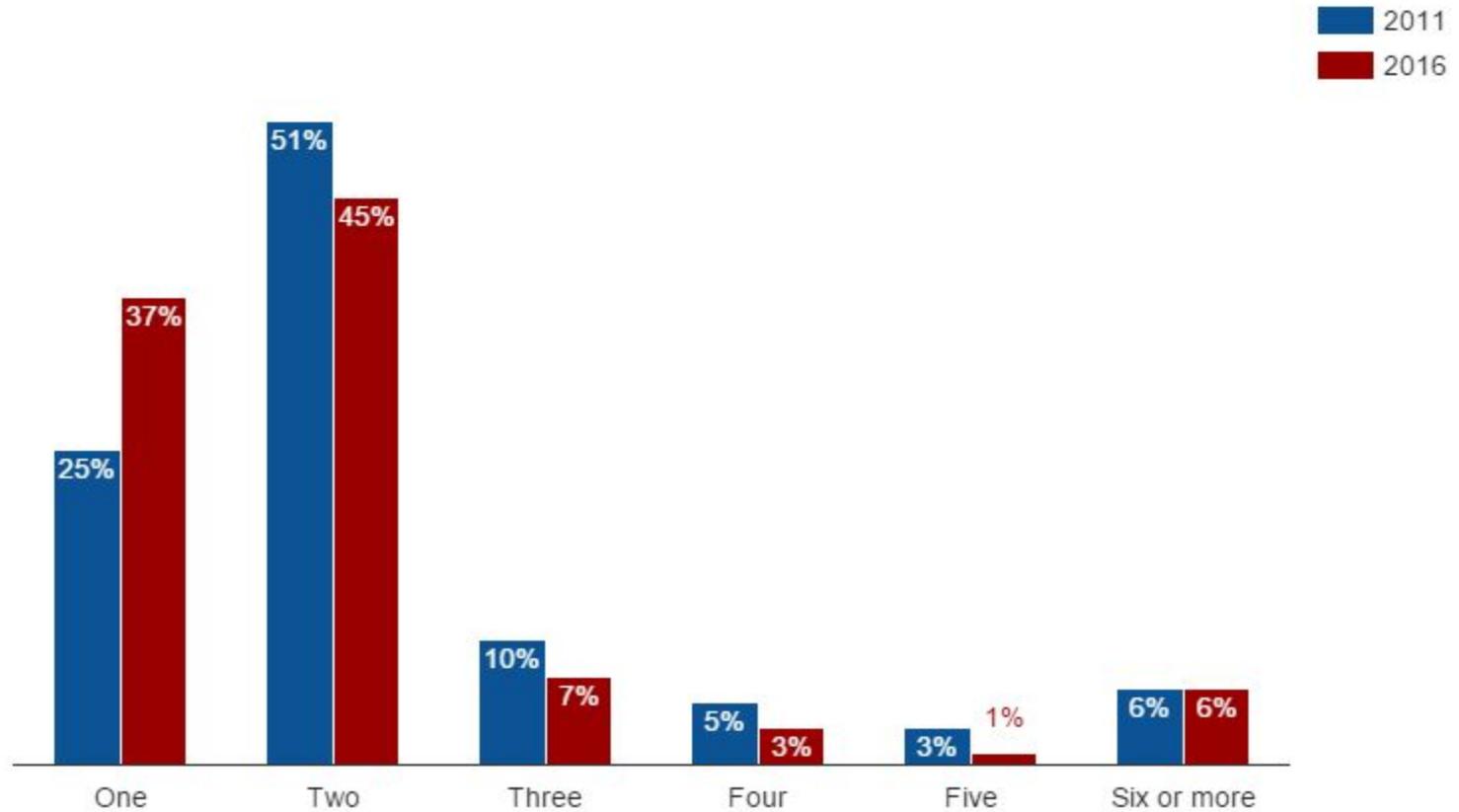
# Visitor Patterns

Did you stay overnight in Dublin during your most recent trip?



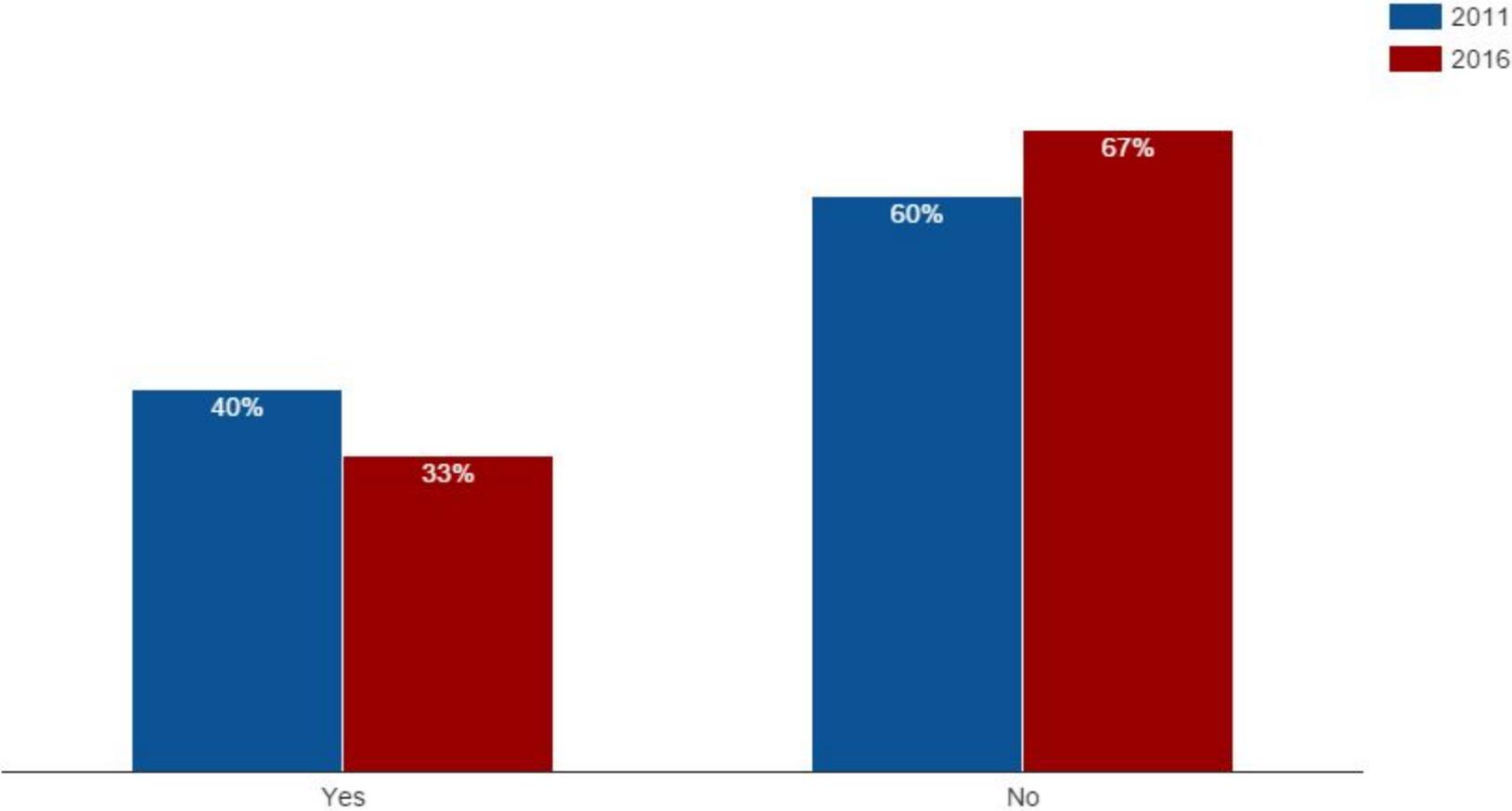
# Visitor Patterns

How many nights did you stay?



# Visitor Patterns

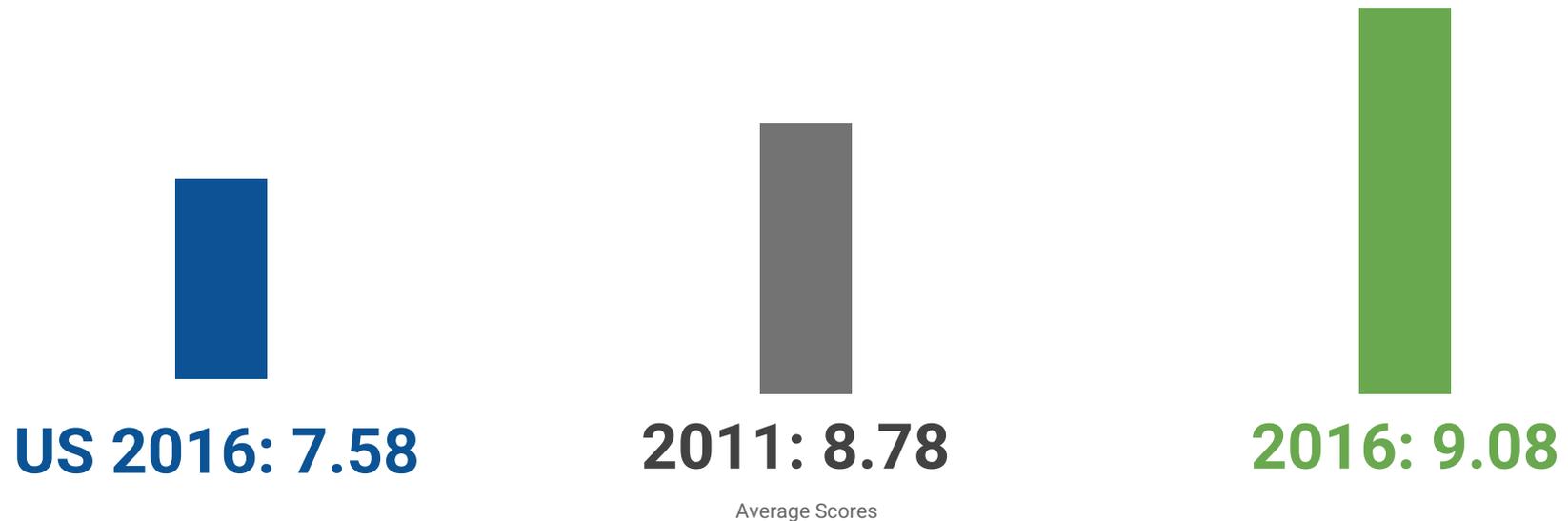
Did you stay overnight in a nearby city or destination other than Dublin?



# Advocacy Comparisons

# Advocacy Comparisons

On a scale of 1-10, with 1 being lowest and 10 being highest, how likely would you be to recommend traveling to Dublin, Ohio to a friend, family, or colleague?



Significant research on a wide variety of customer satisfaction metrics found a single powerful question has the greatest ability both to measure current visitation satisfaction and predict future destination growth. That question, “Would you recommend traveling to a destination to a friend or colleague?” is powerful because it surpasses the basic model where money is spent for products or services. People who score their destination high on the Brand Barometer actively attract visitors through positive word-of-mouth marketing. It is very personal. By making a strong recommendation, they are willing to risk their own character, trustworthiness and overall reputation for no tangible reward. We compare against the United States average and the previously conducted study to focus on the delta growth in visitation advocacy.

\*Research conducted by Satmetrix Systems, Inc., Bain & Company and Fred Reichheld, author of “The One Number You Need to Grow,” Harvard Business Review (Dec. 2003).



# Experience Ranking

# Experience Ranking Comparison

On a scale of 1-10, with 1 being the worst possible experience and 10 being the best possible experience, how would you rate the experience of your most recent visit to Dublin, Ohio?



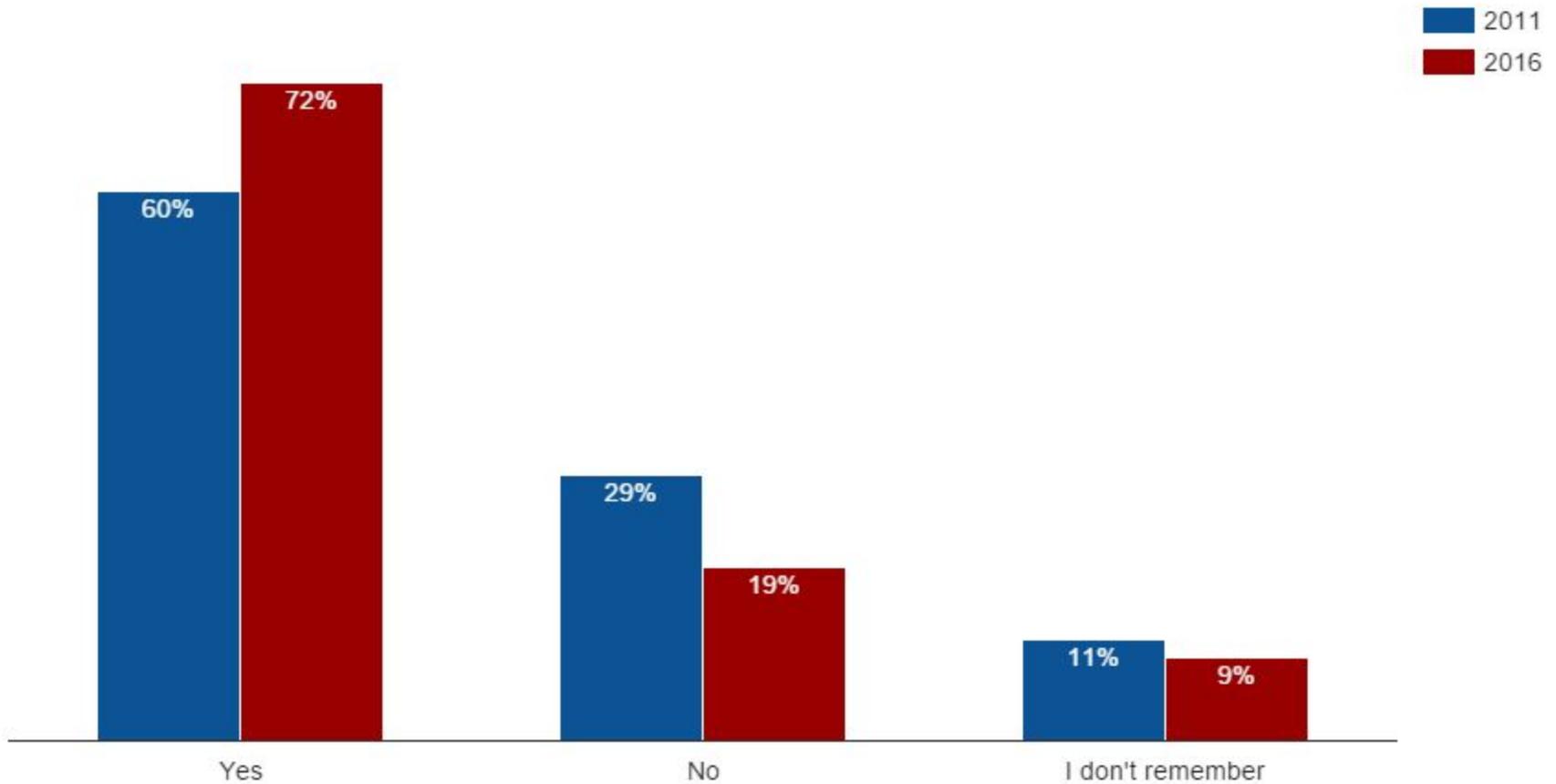
Dublin showed a slight improvement in overall experience ranking from the previously conducted study from 8.68 to 8.85.



# Advertising

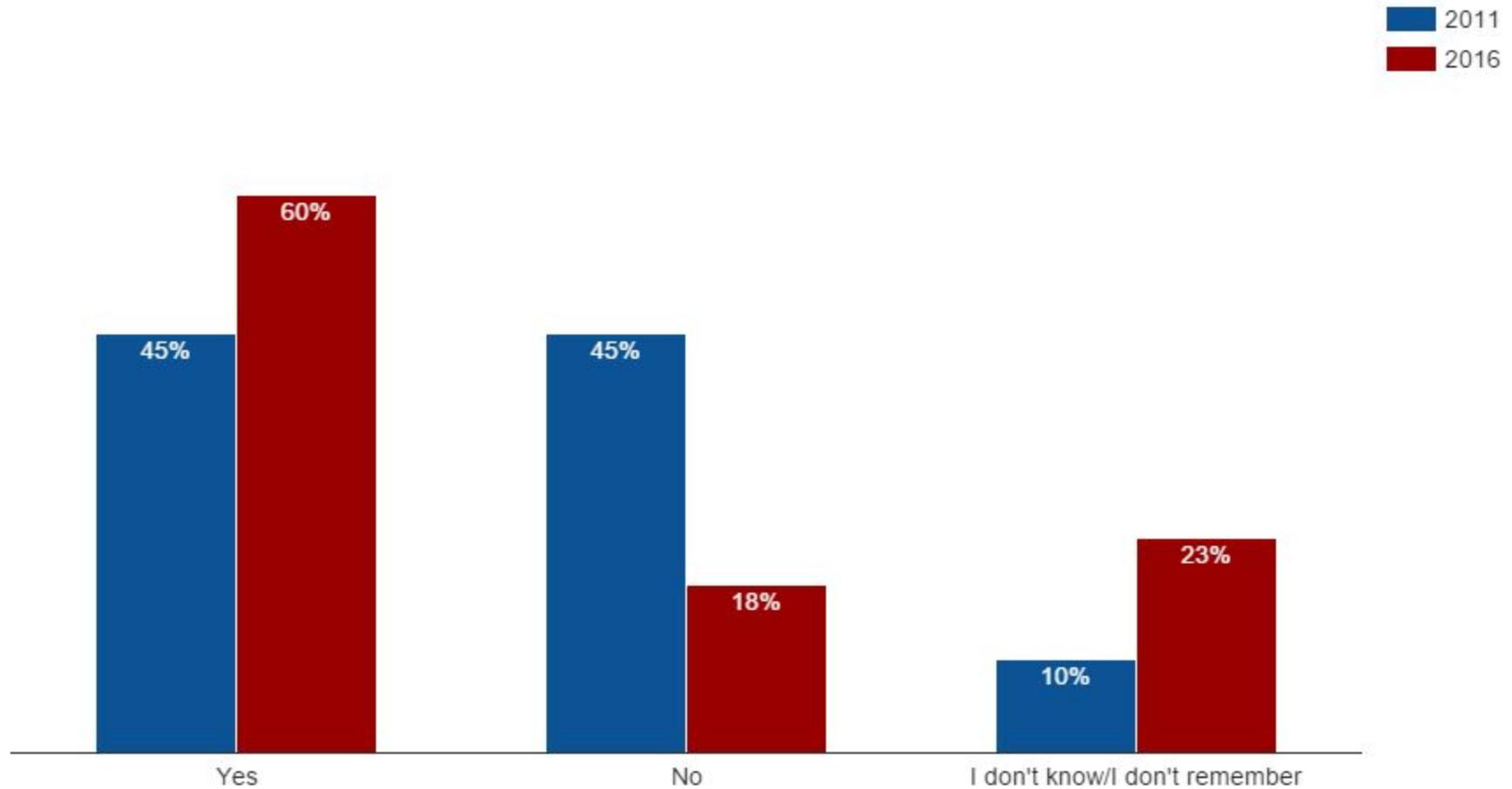
# Advertising

In the past 12 months, do you recall seeing or hearing any advertisements for Dublin, OH?



# Advertising

Were you influenced at all by an advertisement and/or the information you received in your decision to visit Dublin?



# Findings Summary

## Key Takeaways

# Key Takeaways

## Overnight Stays

▲ 7%

Improvement in overnight stays within Dublin, OH for your visitors as opposed to nearby competitors (Columbus, OH) as compared to 2011.



# Key Takeaways

Conversion Rate

▼ 18%

Decline in conversion rate from inquiry database based on the question “In the past two years have you been to or visited Dublin?” as compared to 2011.



# Key Takeaways

Advertising Recall

▲ 12%

Improvement in advertising recall as compared to 2011.



# Key Takeaways

Advertising Influence

▲ 15%

Improvement in advertising influence as compared to 2011.



# Key Takeaways

Trustworthy Source of Information

30%-32%

Your visitors and non-visitors stated that they trusted online sources as their leading source of information. This is unique, most studies both from North Star and other research firms have found that consumers trust peers as their leading source of information. In the follow-up question, those same respondents highlighted the DCVB Website as their most-used online/website source.



# Key Takeaways

Advocacy

▲ .03

Improvement in likeliness to recommend travel to Dublin to a friend, family, or a colleague to 9.08. In addition, Dublin's average is significantly higher than the 2016 United States average of 7.58.



# Key Takeaways

Top Descriptor

▲ 12%

Improvement in top descriptor of “Irish-Inspired” from 2011.



# Dublin Visitor Study

March 2016

[www.northstarideas.com](http://www.northstarideas.com) | 615.232.2103

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