

Groups Research 2009

EXECUTIVE SUMMARY

PROJECT DETAILS

Funded by: Northwest Regional Development Agency (NWDA)
Commissioned to: QA Research Ltd

Overview

The study's primary aim was to evaluate the effectiveness of the various methods of communication used by Visit Manchester to target the groups market and also to gain feedback on the success of Greater Manchester as a groups destination (both perceptions and actual experience).

Methodology

Sample size: 429 quantitative surveys (on-line and telephone surveys combined) + 18 in-depth qualitative interviews (these findings detail the quantitative study only)
Database: Visit Manchester's Groups database supplemented by Great Days Out Fair registration contacts, reader reply database and familiarisation contacts
Dates: May & June 2008

KEY FINDINGS

Profile of Sample

- 75% Group Travel Organiser, 14% coach operators, 13% tour operators, 6% others.
- 59% of participants catered for 55 years and above and 14% catered for 16-24 year olds.
- 70% of respondents who had visited on a day trip were from the North West. Yorkshire and the Humber (8%), East Midlands (7%) & West Midlands (6%) also generated a significant proportion of day trips.
- 32% of overnight visits were from the Northwest followed by London (14%), Yorkshire & the Humber (11%) and East Midlands (11%).
- 72% of participants increasingly source information using the internet.

Previous Visits

- 63% had operated day visits to Manchester in the previous 3 years compared to 22% overnight.
- 51% had operated day visits and 15% overnight in the previous 12 months.
- When asked what prompted them to visit Manchester in the previous 12 months the most popular reasons were 'to attend special event/show' (50%), 'visit particular visitor attraction' (37%), 'shopping' (31%), 'a previous visit' (14%).

- Those who hadn't visited Manchester in the last 12 months were asked why. The most popular options selected were 'Been in recent years and the group would like to explore alternative destinations' (38%) and 'lack of interest from clients' (28%). The groups offer in terms of attractions and accommodation suitable for a group was seen as a reason by a low minority.
- The key reasons for those who hadn't visited in the last 3 years were 'lack of interest from clients' (27%) 'we are based too near to Manchester for it to be an attractive destination' (17%), 'Been in recent years and the group would like to explore alternative destinations' (13%) and 'We are based too far away' (13%). This could suggest that although a proportion could be too far away for their groups maximum travelling time there could be a proportion who are not seeing Manchester as an overnight destination and this could be an opportunity.

Manchester's Performance as a Groups Destination

- The three aspects of a group trip that are most important to GTOs and coach operators are 'accessibility', 'high quality visitor attractions' and 'historic houses & cultural heritage'.
- The three aspects that Manchester scored most highly on for a group destination were 'visiting theatre shows/concerts', 'world-class shopping experience' and 'accessibility'.
- When comparing the importance and performance scores Manchester is seen as underperforming in high quality visitor attractions and historic houses & cultural heritage, two of the most important elements to those organising group trips. However when looking at those who had actually visited in the last 3 years 81% rated Manchester as having either good or excellent visitor attractions compared to 56% who had not visited in the previous 3 years. This suggests that further awareness-raising is required of what is on offer and the high standard it is.
- 31% graded Greater Manchester as 'excellent' as a groups destination, 46% 'good', 13% 'satisfactory', 2% 'poor', 0% 'very poor', and 7% 'don't know' as they didn't feel they had the knowledge or experience to rate. Previous visitors in the last 3 years were significantly more likely to rate Manchester as excellent (38%) compared to those who hadn't visited in the last 3 years (15%).

Trip Characteristics

- Groups spend £7.39 more on a day trip to Manchester in the 2009 findings compared to the 2006 study and £6.36 more on overnight trips (inflation has already been deducted).
- The average day trip spend was £43.26 and £124.34 for overnight.
- The average length of stay for overnight visits was 1.94 and the most popular response was two nights.

Methods of communication

- 82% of participants were aware of the Great Days Out Fair, 60% the Groups Travel Guide, 44% of participants the Visit Manchester groups website and 28% the group travel e-bulletins.
- Overall 72% of organisations had been influenced when planning a day trip by one of Visit Manchester's group travel communication methods. This suggests that the marketing material or event was successful in converting potential day visits to actual day visits.
- 52% of overnight visitors agreed their visit was influenced (fully or partially) by Visit Manchester's groups marketing.
- Participants suggested that cheaper accommodation (14%) and impressive evening entertainment (13%) were key factors in influencing the conversion from a day visit into an overnight stay.

Future planned trips

- 30% were planning at least one day trip and 11% planning overnight trips.



- 28% had arranged and booked a future day trip compared to 8% who had made at least one booking for an overnight stay.
- Participants reported that 'group admission discounts' (58%), 'free admittance to attractions' (49%) and 'good access to coach parking' (40%) would be influential incentives when planning a day trip.
- 'Special offers on accommodation' (51%), 'group admission discounts' (34%), 'free admittance to attractions' (29%) and 'good access to coach parking' (29%) were the factors most likely to influence an overnight stay.
- The 2009 research identified that a larger proportion was interested in group admission discounts than in 2006, highlighting the importance of this during economically difficult times and ensuring that Manchester effectively promotes its strong offer of attractions with free admission as part of its groups offering.