

International Perceptions Evaluation 2008

EXECUTIVE SUMMARY

PROJECT DETAILS

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

Methodology

Sample size: 1800 (600 per country)
Special conditions: Passport holders and expressed an interest in international travel (USA only)
Research method: Combined approach of online survey and telephone interviews
Date: May & June 2008

Overview

At the start of the Greater Manchester Tourism Strategy 2003-2008 perceptions research was undertaken in three markets to ascertain the image that potential visitors from these markets had of Manchester, in general and across a number of themes. The USA, Spain & Germany were identified as key international markets for visitors to Manchester and where Marketing Manchester would be undertaking activity. At the end of the strategy period an evaluation took place to understand if activity in these markets had generated any changes in perceptions and to gain up-to-date feedback to inform further activity in these markets.

KEY FINDINGS

Awareness of Manchester

- Manchester continues to receive very high scores for prompted awareness (97% in Spain, 95% in Germany and 91% in the USA)
- Manchester's awareness level was virtually equal to that of Liverpool but considerably ahead of Edinburgh. Please note that the timing of the research was during Liverpool's 'Capital of Culture 08'.

Previous visits to Manchester

- Those in the sample who had travelled overseas were asked if they had ever visited Manchester and the results per country were :
Spain : 14% (compared to 5% in 2004)

Germany : 10% (compared to 7% in 2004)

U.S. : 20% (compared to 8% in 2004)

- The majority of the previous Manchester visits were for leisure purposes only. This was particularly the case for Spanish visitors followed by German respondents and the American market was the market most likely to combine a business visit with leisure.
- The largest increase in leisure visits could be noticed amongst the Spanish visitors to Manchester (up from 53% in 2004 to 76% in 2008).

Associations with Manchester

- When asked for the initial perceptions of Manchester, football related words dominated the results, particularly amongst the European respondents, with 7 out of 10 Spaniards referring to it (70%) and two thirds of all Germans referencing it (66%).
- The second most frequent references were industry related, particularly with Germans (13%) and Americans (7%); Spaniards less so (5%). Industry related comments included primarily references to the textile industry.
- The respondents were then given prompted 'themes' and were asked how much they associate each one with Manchester on a scale of 5 = greatly and 1 = not at all :
U.S. : soccer (3.62), countryside (3.46) and culture (3.45), and of the prompted themes technology was least associated in the US with Manchester.
Spain : football (4.45) industry (3.30) universities (3.29). The countryside received the least recognition.
Germany : football (4.52), industry (3.66), universities (3.35). Creativity received the least recognition.
- When the results from 2008 are compared to the 2004 results for these prompted 'associations' the following is evident :
Spain : In 2008 more people associate Manchester more closely with industry, culture, universities, music, major events, innovation, creativity. The Spanish sample now associate Manchester less with technology and slightly less with football.
Germany : In 2008 more people associate Manchester more closely with all themes than in 2004.
U.S. : In 2008 more people associate Manchester more closely with all themes than in 2004.

Important elements of a city break destination

- Respondents were asked to rate the importance of a range of destination features (on a 1 to 10 scale with 1 being low and 10 being high). In line with the 2004 result, low crime/good personal safety continues to be the most important aspect for all three nationalities.
- The second most important aspect was accessibility (7.89 for Spain, 7.88 for the US and 7.20 for Germany). This was closely followed by history and heritage and quality hotels.
- Spanish respondents placed more emphasis on internationally known museums and galleries (7.35), contemporary architecture (5.89) and watching professional sport (5.22) than the other two nationalities.

Manchester's Performance

- The US scored Manchester higher in 2008 for its contemporary architecture, unique events and festivals, watching professional sport and accessibility.
- Both the Spanish & German markets scored Manchester more favourably in 2008 for watching professional sport and vibrant nightlife and Germans also scored Manchester higher for unique



events and festivals. The research showed the need for continued awareness raising on other aspects of the Manchester offer.

- Americans saw Manchester as a slightly nearer fit with their ideal international city destination than the Germans and Spanish when considering the themes (e.g. contemporary architecture, unique events and festivals, accessibility etc and how important they are to them).

Manchester Airport as a gateway to the UK and Europe

- The 2008 results show an increase by 12% points to 94% amongst American respondents who would use Manchester Airport as a gateway to the UK, an increase by 9% points to 90% amongst Spanish respondents, whereas the German results show a slight decrease by 5% points in 2008 to 80%.

Potential future visits to Manchester

- The Spanish and Americans who had visited the UK previously, were more likely than non-UK visitors to visit Manchester in the future.
- Likelihood of future city break to Manchester:
U.S. 54% yes in 2004 and 66% yes in 2008
Spain : 45% yes in 2004 and 56% yes in 2008
Germany : 66% yes in 2004 and 72% yes in 2008

