

UK Short Breaks 2010

EXECUTIVE SUMMARY

PROJECT DETAILS

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

Overview

The overall aim of this evaluation was to evaluate the impact of the UK Short Breaks campaign by:

- Establishing the conversion rate of enquiries for information to actual short breaks taken
- Evaluating the value of visits
- Measuring the effectiveness of each elements of the UKSB campaign i.e. seasonal e-newsletters, web presence and MCR magazine
- Measuring changes in the market when compared to the 2008 findings
- Gain feedback on future motivating factors to direct future marketing activity

Methodology

Method: On-line survey with capacity to provide Arkenford profiling
Database: c.22,000 UK Short Breaks
Sample: 1112 responses
Dates: April 2010

KEY FINDINGS

Profile of sample

- A higher reach was gained through the 2010 database, than 2008, (if the sample is representative) for London, Yorkshire, North East, South West, West Midlands, East Midlands and Wales.
- Higher representation from the older age groupings 41+ was evident in the 2010 sample.
- 43% use e-mails they receive for ideas for holidays and 46% source brochures. Both of these sources have seen increases since 2008. The proportion using a travel agent for a UK-based holiday has decreased significantly from 52% in 2008 to 13%.
- 28% 'always' look for the official tourist board website when considering a holiday destination and 62% 'sometimes' do (90%).
- The profile of the sample shows that the database is showing a wider representation of most arkleisure groups than in 2008.

Visitor Profile

- The most common methods for booking were 61% directly with the provider i.e. accommodation provider and 17% through a website. Both of these categories have seen increases since 2008.
- 10% of visitors during the two years of the campaign period were first time visitors.
- The most frequent motivation to visit reported was to attend an entertainment event e.g. concert/performance (24%). This was followed by visiting friends and family (17%), just to see Manchester (14%), shopping (10%) and to attend a sporting event (9%).
- During their visit 31% stay in a 4-5 star hotel, 31% stayed in a budget hotel, 24% in a 2-3 star hotel and 19% with friends and relatives.
- The average length of stay for short breaks to Manchester from the UK base was 2.1 nights.
- The average travelling party was 2.2 people with couples being the most common groups composition.
- The most frequently reported activities undertaken were eating out (77%), shopping (67%), going out to pubs, bars or clubs (54%), city sightseeing (44%), visiting museums and galleries (35%), attending an event or festival (29%), visiting the surrounding Greater Manchester area (29%), attending a theatre performance (23%), attending a historic site or building (19%), attending a sporting event (16%), visiting the surrounding countryside (14%), went on a stadium tour (7%) and visiting a casino (2%).
- 25% of the sample (visitors and non-visitors) reported that they 'definitely' intend to visit Manchester in the next 12 months and 60% will 'possibly' visit.

Visitor Spend

- 97% of visitors spent on food and drink, 81% on accommodation, 67% shopping for gifts and pleasure, 58% travelling around the area, 58% spent at attractions, 56% shopping for daily needs, 45% other leisure and recreation spend and 42% other expenses.
- There is a higher proportion spending in each category (compared to 2008) but the amount per head has decreased from 2008.
- The average spend in Greater Manchester was £376.93 per person per trip and £643.81 per group per trip (excluding transportation costs to Greater Manchester).

Impact of Communications

- The Spring 2010 e-mail received the highest recall at 20% which could be an indication of the shorter recall time but also that its presentation was effective to the market.
- The e-bulletins featured click-throughs to websites and those most visited was the 'Made in Manchester' (21%), 'January Sales 2010' (20%) and the Spring Microsite (20%).
- Lower recall was received from the MCR brochures but this had increased slightly between MCR3 and MCR4.
- Overall satisfaction in levels were high across all communication methods with MCR4 receiving the highest positive scoring (83% positive and 17% neutral) followed by the January sales microsite (82% positive and 17% neutral). These communications were issued towards the end of the 2008-2010 campaign period and therefore evidences the increase in effectiveness on completion of the campaign period.
- Print media received the highest ratings but has lower levels of recall.
- 23% stayed in accommodation that was listed in the communication (all types - web, e-mail and print combined) and this rose to 35% for first time visitors.
- When the data is cross-tabbed to identify the type of accommodation stayed in with those who booked accommodation listed in the communication the most frequent results were budget hotel (28%), 2-3 star hotel (27%) and 4-5 star hotel (24%).



- The communication (all types - web, e-mail and print combined) encouraged 41% to book their visit (4% 'fully' and 37% 'partly'). This rises to 54% for first-time visitors.
- 66% plan a future visit as a result of the information received (4% fully and 62% partly) rising to 74% for those who hadn't visited in the campaign period.
- The most cited reasons for not visiting Manchester during the campaign period were 'went on holiday or short break elsewhere in the UK' (45%), 'went on an overseas break' (36%) and 'lack of finance' (14%).

