Greater Manchester Destination Management Plan

THE VISITOR ECONOMY ACTION PLAN 2014 -17
1.0 INTRODUCTION

The Destination Management Plan (DMP) is an action plan for the visitor economy for Greater Manchester that sits below the recently launched tourism strategy, ‘The Greater Manchester Strategy for the Visitor Economy 2014 - 2020’. The plan is for a three year period and captures what has been achieved in the last strategy period, where we are now and what needs to be done to achieve our growth targets. The activity includes not only the plans of the Tourist Board, Visit Manchester, but also those of other stakeholders and partners such as the ten local authorities of Greater Manchester (Bolton, Bury, Manchester, Oldham, Rochdale, Salford, Stockport, Tameside, Trafford, Wigan), Manchester Airport, other agencies and the tourism businesses themselves.

The DMP is a partnership document which is co-ordinated and written by Marketing Manchester but which is developed through consultation with all the appropriate stakeholders through the Manchester Visitor Economy Forum. The Forum meets quarterly, and comprises senior representatives from various visitor economy stakeholders. The Forum is responsible for developing and agreeing the DMP and monitoring delivery of the actions by all relevant stakeholders.

In summary the DMP will:

- Specify where we are now and what we want to achieve over the next three years
- Review and set priorities, actions and targets
- Identify roles and responsibilities for all stakeholders
- Act as a key tool for consultation and engagement under the management of the Manchester Visitor Economy Forum

Members of the Manchester Visitor Economy Forum (as at April 2014)

Andrew Stokes, Chief Executive, Marketing Manchester (Chair)
Angie Robinson, Chief Executive, Manchester Central Convention Complex Ltd
Caroline McElaney, Director of Venue Sales and Marketing, Manchester United FC
Gary McClaran, Founder and CEO, Sparklestreet
James Allen, General Manager, Phones4u Arena
Jeff Howarth, Director of Marketing, Manchester Airports Group
Julia Fawcett, Chief Executive, The Lowry
Keith Davies, Director of Development and Regeneration, Bolton Council (AGMA)
Laura Dyson, Head of Marketing, CityCo
Maria Balshaw, Director of the Whitworth and Manchester City Art Galleries
Mike Gibbons, Director of International Development, University of Manchester
Mike Mellor, Head of Commercial, TfGM (Transport for Greater Manchester)
Sara Tomkins, Assistant Chief Executive, Manchester City Council
Stephen Miles, Chair, Manchester Hoteliers Association

Cover image: Artists impression of the £15m transformation of Whitworth Art Gallery into a 21st century gallery in the park. Opens October 2014.
VisitEngland

England has had a new national tourism body since 2009, VisitEngland.

VisitEngland launched a new ‘Strategic Framework for Tourism 2010-2020’ with the aim of providing the basis for public and private sectors to continue to enhance the quality of the product on offer and for Government at all levels to encourage such investment. The headline ambition is for a 5% year on year growth over the ten year period of the strategy.

The Strategic Framework aims to achieve four interdependent objectives which are;

- To increase England’s share of global visitor markets
- To offer compelling destinations of distinction
- To champion a successful, thriving industry
- To facilitate greater engagement between the visitor and the experience

VisitEngland subsequently launched a number of action plans: nine plus the All England marketing strategy in June 2011 and three more in January 2012. Marketing Manchester is fully involved in the delivery of these action plans; Manchester was one of four Pathfinder areas for VisitEngland and is a member of the national Destinations Forum. Manchester is a campaign partner in the delivery of VisitEngland’s successful RGF bid which is delivering additional marketing activity from 2012 - 2015.

The Ambition for Greater Manchester

As stated in ‘The Greater Manchester Strategy for the Visitor Economy 2014 - 2020’, the ambition is as follows:

‘In 2020 the visitor economy will continue to be a key driver of the social, cultural and economic life of Greater Manchester, with substantially increased economic benefits for residents and businesses. This will be achieved by further developing and promoting the Greater Manchester product offer for leisure and business visitors as a year round vibrant and stimulating cultural city destination.’

Strategic Aims

The strategy has four strategic aims as listed below:

**Strategic Aim 1**
To position Manchester as a successful international destination

**Strategic Aim 2**
To further develop Manchester as a leading events destination

**Strategic Aim 3**
To improve the quality and appeal of the product offer

**Strategic Aim 4**
To maximise the capacity for growth

The Greater Manchester Destination Plan 2014 - 2017
3.0 TARGETS

The targets below are taken from The Greater Manchester Strategy for the Visitor Economy 2014 -2020. Targets through to 2020 are:

- To increase staying visitor numbers from 10.3 million to 13.7 million
- To increase the number of day visitors from 95.2 million to 127 million
- To increase the number of overseas visitors from 1.09 million to 1.27 million
- To increase the value of tourism from £6.6 billion to £8.8 billion
- To increase the number of jobs supported by tourism from 83,934 to 112,477 (FTE) jobs
- To improve the economic impact of business events in Greater Manchester from £822 million (2011 baseline) to £1.2 billion
- To increase the number of ICCA ranked events from 30 to 45
- To maintain and ideally improve visitor satisfaction levels from 4.5/5 to 4.7/5

Baseline data is from 2010/11/12 (latest data). Progress so far is shown in the table on page 12.
Achievements from 2008 - 2013
This section reviews achievements from the previous tourism strategy which ran from 2008 - 2013 and provides the context from which we need to build going forward.

Priority 1: Enhancing the Image

- Since 2008, 847 international journalists have been hosted in Manchester from target markets including USA, China, India, UAE, Germany, Scandinavia, and more recently, Brazil and Russia.
- Since 2008, leisure tourism media coverage with an AVE of more than £14.4m has been generated, with the region profiled in publications as varied as the New York Times, Hong Kong Economic Journal, Gulf News and The Times.
- Media activity has been thoroughly undertaken to improve awareness of Greater Manchester in China. A number of in market events, combined with a significant push for additional press visits from China, has resulted in over £2m of leisure coverage in the last two years alone. Furthermore, in conjunction with other key partners, Marketing Manchester has helped to launch the Manchester China Forum - a new business-led initiative aimed at increasing Greater Manchester’s commercial connectivity with China.
- A positive shift in perceptions has been tracked in the Anholt City Brands index over the last few years. Manchester was positioned 32 in the latest Anholt City Brand Index (2013) – the third UK city in the list behind London (1) and Edinburgh (30). The report, which coordinates international perceptions of Manchester against other global cities, noted particular strengths around Manchester’s pre-requisites, such as its perceived affordability, cultural diversity and quality education opportunities, but highlighted challenges still being faced to alter perceptions of Manchester’s physical appeal and its pulse - a measure of vibrancy.
- Perceptions in our priority target markets have also improved with the US, China and Brazil showing the strongest improvement between 2009 and 2011 and the UK having the most positive shift between 2007 and 2009. The latest data suggests however that Manchester must continue to face the challenge of growing its reputation particularly in the priority market of China.
- Marketing Manchester has established both an image bank and a footage bank; providing partners, stakeholders and the media with access to high quality still and moving images of the city region. Broadcast footage of Manchester has been downloaded by ESPN, Nickleodeon, MTV, The X Factor and ITV amongst others.
- The ‘I Love MCR’ campaign, developed in response to the riots in August 2011, was targeted specifically at nurturing the swell of civic pride and educating residents on the assets of the city region. In three weeks, the campaign generated 27k ‘likes’ on Facebook; 40k mentions on Twitter (trending twice in the UK) with a total digital value of more than £95k; an outdoor profile with a commercial value of over £200k and media coverage with an AVE of over £750k.
- In 2012 Manchester hosted MTV Crashes, a high profile concert headlined by Alicia Keys, at Manchester Cathedral. Marketing Manchester supported Manchester City Council in the national and international promotion of the event and the production of a destination film which was shown with the concert across the global MTV network of 640 million homes.
- Marketing Manchester coordinated the official dressing of Manchester, Salford and Trafford for the Games, as part of the London 2012 Olympic Look project. This included vibrant 2012 branding in each district, at Manchester Airport and Manchester Piccadilly Station, aimed at celebrating the UK-wide Games and welcoming visitors and teams arriving in the city.
- A new Media Pack app was created to replace the traditional press pack. The new app provides all of the facts, figures and information that journalists request as well as new features including an image and video library, Twitter feed and option to subscribe to future ‘What’s on in Manchester’ information. A changeable tab within the app allows for a specific push on headline events. Created originally for Olympic media it has since been re-branded to promote both Manchester Pride and the Labour Party Annual Conference.
- In 2013 the fourth Manchester International Festival took place attracting 246,820 visitors. Marketing Manchester worked with MIF13 to promote the Festival nationally and internationally as part of the summer campaign activity. Selected elements of the newly commissioned programme are then performed in locations around the world which helps to raise the profile of MIF and Manchester.
Priority 2: Promoting Manchester to National and International Visitors

- Our approach to domestic and international promotional activity has evolved into a seasonal, multi-faceted, multi-channel approach. A promotional strategy framework has been developed that enables key messages to be collated, prioritised and communicated in the most targeted way possible.

- In 2013 the summer and Christmas domestic campaigns delivered a collective media reach to more than 13m attracting over 1.8m visitors to the specific campaign areas of visitmanchester.com. Promotional support was given to Manchester International Festival, Dig the City, 24:7 Theatre Festival, Salford summer events and Bolton Food and Drink Festival for summer and for Christmas, Manchester Christmas Markets, Spinningfields Ice Rink and the retail offer.

- Domestic promotional activity has increasingly focused on families as well as the more traditional audience of cosmopolitan couples and discoverers; thematic campaigns such as Creative Tourist which promote the offer across Greater Manchester have continued to gain traction in key niche markets.

- In Europe, marketing activity in partnership with airlines was delivered in 2013 in Spain, France, Austria and Germany. Highlights included an increase of 74% in bookings from Barcelona to Manchester through a partnership with Jet 2.

- Long haul airline activity has included marketing campaigns in China, India and the USA targeting both consumers and travel trade. These campaigns have seen visitor numbers increase from all markets.

- Focused travel trade activity in key priority long haul markets such as China, Japan, the US and across the APMEA region has included on-territory events, workshops and direct marketing. This has led to the development of Manchester packages, i.e. contracts with Manchester partners, which in turn has increased the number of international visitors to Greater Manchester.

- Greater Manchester hosted the Rugby League World Cup in October 2013. Marketing Manchester supported the promotion of the games on behalf of the RLWC and the venues across the region with digital marketing and the production of a RLWC leaflet in partnership with TfGM, which was circulated to ticket holders before they arrived in Manchester.

- Manchester Calling, a travel trade workshop, was held in November 2013 giving local tourism partners the opportunity to engage with tour operators. The event led to the development of Manchester packages and the inclusion of Manchester in itineraries.

- Marketing Manchester produced a Guide to Tax Free Shopping in Manchester to promote the city’s luxury retail offering. The guide was produced in English, Arabic and Mandarin and distributed in international markets.

- Over the past twelve months, Marketing Manchester has continued to promote the conference offer through targeted research of key conferences and the refinement of the dedicated conference website, visitmanchester.com/conference, with specific focus on the development of the ambassador section. Additionally, a new conference guide was produced and distributed focusing on multiple event buyers in London and the South East. Furthermore, Manchester has attended international and national exhibitions such as IMEX Europe, IMEX US, The Meetings Show and Confex, as well as creating bespoke platforms to promote the offer in London and the US.
Priority 3: Creating a Leading Conference and Business Tourism Destination

• Business events continue to be a significant contributor to Manchester’s tourism offer. Our Team Manchester approach, from the initial research and identification, through the bidding and the delivery of conferences, has continued to strengthen our reputation as a world class conference and events destination.

• Manchester continues to develop its profile within the international associations sector and has, over the past year, hosted a variety of international events including: World Conference on Disaster and Emergency Medicine, International Anthropological & Ethnological Sciences and the International Conference on Urban Health. These add further value to the national conferences which Manchester continues to host such as Chartered Institute of Housing, Renewables UK and of course, the Conservative Party Annual Conference.

• International conferences hosted in Manchester have increased, including the number of ICCA ranked events from 21 in 2009 to 34 in 2013. Manchester is now ranked 68th internationally having moved up 10 places from 2012.

• The value of the conference and business events sector throughout Greater Manchester is significant. The Conference Value & Volume Study of 2012 identified the industry to be worth over £822 million to Greater Manchester’s local economy in 2011. This study has been repeated in 2013 and the results will be made available in mid 2014.

• Continual investment in our conference product has allowed Manchester to further develop its offer, with new and refurbished facilities such as the Point at Emirates Old Trafford, National Football Museum, Victoria Warehouse and MMU’s new Arts School (Benzie Building). Marketing Manchester continues to work with wider city initiatives to develop the conference offer promoting digital connectivity, sustainability, accessibility and quality.

• Manchester will continue to attract conferences which not only provide a significant economic impact, but also support the city’s academic and industry strengths. This approach not only supports the city’s ability to attract conferences in an increasingly competitive market place, but also supports our priorities to attract talent, investment and trade, whilst promoting Manchester as a place to study, work and visit.
Priority 4: Improving the Provision of Information to Visitors

• Significant progress was made with the opening of the all new Manchester Visitor Information Centre (MVIC) in 2010 in its new location. Reflecting changes in customer behaviour, MVIC was the first visitor centre in Europe to use interactive Microsoft Surface Tables, allowing people to interact directly with the information available and discover a wide range of information independently. The primary asset of the Visitor Centre remains the experienced team of staff who ‘walk’ the centre freely, welcoming an annual footfall of over 232,000. MVIC won the Gold Award for ‘Tourist Information Provider of the Year’ at the VisitEngland Enjoy England Awards in 2012.

• Visitmanchester.com has continued to increase in popularity and visibility. For 2013/14, the site received 2.3 million unique visitors (up 15% on the previous year) and had 16 million page views (up 75% on the previous year).

• The mobile version of the site is proving its worth with 45% of visits via mobile/tablet.

• The site data now powers: MVIC Surfaces; MiGuides; visitoldham.com; visittrafford.info; visitrochdale.com; visitbolton.com and will soon power: visitbury.com and the Detour Walking tour app.

• MCR, Manchester’s destination magazine, launched in 2008 and has grown to become a biannual publication that delivers high quality editorial content which showcases the best that the city region has to offer.

• Across Greater Manchester: Stockport launched a new website; Bury TIC relocated to a shared visitor services area in The Fusilier Museum in 2009 and improvements have been made to both signage and wayfinding in Bolton and Bury.

• In 2013 City Hosts were introduced into Manchester city centre, funded by the Heart of Manchester BID, and patrolling a specific area of the city they are on hand to help visitors to the city and improve the visitor welcome.

• In 2013 Manchester unveiled its world-leading network of interactive city centre digital touch screens across the city centre. MiGuide is designed to help visitors get around the city and to get the most out of their visit.
Priority 5: Developing and Enhancing the Product

A China Visitor Economy Forum has been established to focus on ensuring Manchester is ‘China-ready’ and to ultimately increase the number of visitors to Manchester from China. Members include organisations interested in, and who are currently targeting, the Chinese market including Manchester Airport, Selfridges, Manchester City Football Club, Manchester United Football Club, the Centre For Chinese Contemporary Art, hotels as well as Marketing Cheshire. The group has agreed on key areas of focus including the visa process, promoting the retail offering/tax free shopping/Union Pay, Chinese New Year going forwards and developing a north of England package.

The Football Attractions Steering Group, led by Marketing Manchester, involves Manchester United Football Club, Manchester City Football Club and the National Football Museum. The group has developed a Manchester Football Experience for international groups of 15 or more, allowing visits to all three attractions in two days.

Quality and Skills

• There have been improvements in the number of QiT* and VAQAS* accredited businesses throughout Greater Manchester since 2008.

• The tenth Manchester Tourism Awards took place in November 2013. Manchester Tourism Award winners have enjoyed good success at the national Enjoy England Awards where Manchester businesses have won eleven gold, silver and bronze awards since 2007.

• Over 1,000 people and almost 900 businesses in Greater Manchester have benefitted from NWDA**/Visit Manchester subsidised customer service, leadership and management, marketing and young chefs training and skills programmes.

*QiT and VAQAS are the national quality accreditation schemes for accommodation and visitor attractions.

**Northwest Regional Development Agency

Events

• Manchester’s rich cultural offering through its events, collections and exhibitions has been highlighted with the development of events such as; Manchester International Festival, Manchester Pride, Food & Drink Festivals in Bolton, Salford, Manchester, Tameside and Trafford, Rochdale Feel Good Festival, Ramsbottom Chocolate and Music Festivals, Stockport Festival of Light, The Manchester Weekender, AND Festival, and the Manchester Literature Festival.

• Following the Commonwealth Games in 2002, Manchester developed a major events strategy which led to the ‘Manchester World Sport 2008’ campaign resulting in Manchester being named the ‘World’s Best City for Sport’, at the Sports Business Awards in November 2008. Manchester has continued to outperform in hosting major events including; Ironman UK Triathlon – Bolton, National and European Badminton Championships, National Squash Championships, Rugby and Cricket Test Matches, International Taekwondo Open Championships, World Netball Series, Track Cycling World Cup, Para-cycling World Championships, World Championship Boxing, British National BMX Series, RFL Super League Grand Final, and the Paralympic World Cup. The Greater Manchester Marathon was re-introduced in Trafford in 2012.

• In 2010 the 1652 face-to-face interviews in the Greater Manchester Visitors Survey 2010 scored Greater Manchester as 4.6 out of 5 for ‘unique events and festivals’ compared to 4.3 from the 1777 sample in 2007.

• Over 2.7 million people attended a concert or festival in Greater Manchester in 2012 and in terms of sport, football alone contributes an estimated £330 million per season to Greater Manchester’s economy. In 2013 we continued to grow and attract key cultural and sporting events that support Manchester’s image and attract significant value including MIF13, and key world championship sports events, which included The Rugby League World Cup, World Taekwondo Championships and World Squash Championships.
Visitor Attractions
There has been significant investment into a number of attractions since 2008:

- MOSI has had a £9m investment into a new Revolution Gallery, conference and learning centre, shop and café, all of which opened in January 2011.
- The People’s History Museum re-opened in 2010 following a £12.5m redevelopment.
- Manchester Art Gallery, along with other NW museums, has received Renaissance and NWDA funding to improve exhibitions and attendance.
- In Bury a new Lancashire Fusilier Museum opened in 2009 and the redevelopment of Bury Transport Museum (£3m) was completed in 2010, Rochdale Pioneers Museum and Stockport Plaza have each received significant funding for improvements. Bolton Museum, Aquarium and Archive was extended and improved through a £500k redevelopment programme.
- Bolton Market’s Food Hall opened a cookery demonstration theatre in 2009 which led to an 80% increase in coach visits and national awards.
- Chetham’s School of Music has undertaken a £20m project to improve access and facilities at the school and open visitor facilities.
- Ordsall Hall in Salford re-opened in 2011 having undertaken a £6.5m restoration using HLF funding.
- The introduction of BBC Tours at MediaCity from 2012.
- The opening of the National Football Museum in the Urbis building in July 2012.
- The Robinsons Brewery Tour opened in Stockport in 2013.
Other Investment

- The successful development of MediaCityUK includes new hotels, retail, food and drink and leisure, as well as the launch of BBC Tours and invited show audiences.
- A £30 million, three phase redevelopment of Manchester Central Convention Complex to create additional and more flexible spaces including a new foyer area, entrance and new events space.
- A new £19m BMX Centre opened in East Manchester in 2011.
- EventCity opened near the intu Trafford Centre in 2011 providing additional event and exhibition facilities.
- The Point at Lancashire County Cricket Club, Trafford opened in 2010 following a £190m development of the site as a world-class venue fit to host international cricket, including enhanced conference and event facilities.
- The opening of Salford City Stadium in January 2012, home to Salford Red Devils RLFC and Sale Sharks RUFC.
- ‘Bolton One’, a unique leisure facility with a county competition standard swimming pool opened in 2012.
- Successful establishment of regular themed markets in Stockport including vintage, handmade and crafts, teenage and local producers.
- Investment in business tourism venues including the new MMU Business School and School of Art and New Century House at NOMA.
- Significant investment in the extension of Metrolink with the Rochdale and Ashton lines now open.
- Victoria station is being completely redeveloped and is due to be complete by early 2015.
- The Central Library & Archive re-opened in 2014 following a £48m refurbishment.

Accommodation

Greater Manchester has continued to attract hotel development since 2008, despite the difficult economic trading conditions. These include the following:

- Crowne Plaza City Centre (2008, 228 rooms)
- Premier Inn, Reebok Stadium, Bolton (2008, 126 rooms)
- Ramada Manchester Salford Quays (2009, 142 rooms)
- Ibis Budget Manchester, Salford Quays (2009, 210 rooms)
- Park Inn by Radisson (2009, 252 rooms)
- Velvet Hotel, Canal St (2009, 19 rooms)
- Holiday Inn MediaCityUK (2010, 218 rooms)
- Holiday Inn Express Oxford Road (2010, 147 rooms)
- Staycity Serviced Apartments (2010, 84 apartments)
- Holiday Inn Express Manchester Arena (2011, 192 rooms)
- Max Serviced Apartments (2011, 85 rooms)
- Premier Inn, Bury town centre (2011, 115 rooms)
- Travelodge, Manchester, Salford Quays (2011, 156 rooms)
- Travelodge, Bolton (2011, 80 rooms)
- Travelodge, Manchester, Central Arena (2011, 200 rooms)
- Travelodge, Manchester, Upper Brook St (2011, 104 rooms)
- Travelodge, Altrincham, Trafford (2012, 91 rooms)
- Premier Inn, City Centre, Piccadilly (2012, 193 rooms)
- Ibis Budget hotel, Ancoats (2012, 150 rooms)
- Le Ville, Canal St (2013, 24 rooms)
- Premier Inn, Wigan (2014, 83 rooms)
Priority 6: Improving the Infrastructure

- Manchester Airport completed its £80m investment in the redevelopment of both Terminal 1 and 2 during 2009/10, which included improved security processes, new retail spaces and improvements to arrivals and departure lounges.

- ASDF (Air Services Delivery Fund) funding has helped support the development of new and improved flights into Manchester Airport from the US. Activity resulted in American Airlines introducing a daily flight from JFK; the launch of a new service from Washington D.C. with United Airlines; increased frequency from Singapore, and additional capacity from India via the Middle East were secured.

- Emirates Airways launched the only A380 at a UK regional airport. Manchester is in the airline’s top 10 destinations in terms of passenger numbers, holding 8th position.

- MediaCityUK is now complete including a new tram stop, bus routes and taxi rank. A new footbridge has improved pedestrian flow around The Quays and provided better linkages between the Imperial War Museum North, Old Trafford and MediaCityUK and a 2,200 space car park.

- Redevelopment of Manchester’s Medieval Quarter. Pedestrianisation and signage has helped make the area more visitor friendly and has defined the area of Manchester Cathedral, Chetham’s School of Music, The Corn Exchange, and now the new National Football Museum in the former Urbis building.

- Successful bid for Arts Council funding for the Irwell Sculpture Trail.

- Further development of the Irwell River Park development, a £72m urban river park connecting Salford and Manchester.

- The Rock development opened in Bury in 2010 – a £300m development with restaurants, retail and cinema supporting the night time economy and improvements to the public realm.

- Bolton has developed Middlebrook Retail and Leisure Park since 2008 and doubled town centre car parking spaces.

- Completion of the redevelopment of the Stamford Quarter (£40million) and The Grafton’s (£10 million) in Altrincham, Trafford, plus continued land assembly to ensure delivery of Altair, a £150m redevelopment of a five acre site which will include landscaped public squares, a hotel, retail, restaurants and a permanent ice rink. The Victoria Warehouse opened in March 2012 offering a boutique hotel, club nights and a new event space.
## 5.0 REVIEW OF PROGRESS

### Overall Performance – key measures

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<th>2011</th>
<th>2012</th>
<th>2013</th>
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<td>£6.2bn</td>
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<tr>
<td>Economic Impact to Greater Manchester from Conference &amp; Business Events Market</td>
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<td>£822m</td>
<td>-</td>
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<td>Conference Value &amp; Volume</td>
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### Performance

| Hotel occupancy annual average – Greater Manchester | 71% | 74% | 73% | 76% | STR Global |
| Hotel occupancy annual average – city centre        | 72% | 75% | 74% | 77% | STR Global/LIF |
| ICCA ranking – UK cities                            | 4   | 4   | 4   | 3   | ICCA       |
| ICCA ranking – Global cities                        | 86  | 79  | 78  | 68  | ICCA       |
| Anholt ranking - overall                            | 29 out of 51 cities | 31 out of 51 cities | Anholt City Brands Index |

### Visitor Numbers

| Visitors to Greater Manchester (all) | 100.2m | 105.0m | 105.5m | STEAM |
| Staying visitors to Greater Manchester | 8.8m   | 9.5m   | 10.3m  | STEAM |
| Day visitors to Greater Manchester       | 91.4m  | 95.5m  | 95.2m  | STEAM |
| Visitors to Manchester (all)             | 48.7m  | 53.6m  | 53.9m  | STEAM |
| International visits to Greater Manchester | 1,016,000 | 1,102,000 | 1,093,000 | IPS (ONS/VB) |
| International visits to Manchester      | 811,000 | 934,000 | 932,000 | IPS (ONS/VB) |

### Visitor Experience

| Average rating for destination offer (all categories) | 4.5 / 5 | GMVS 2010 |

All economic impact figures shown are 'unindexed' and represent the value of tourism at that year in time.
Business Tourism Performance

- The Conference Value & Volume Study reporting on 2011 activity evidenced strong sector performance as indicated below:
  - £822m economic impact generated to Greater Manchester (£484m to Manchester)
  - £489m income to conference venues
  - £333m additional spend on accommodation, eating out etc
  - 5.2m delegates generating 8.2m delegate days
  - 45% of the total impact generated from delegates from outside the Northwest
  - Sectors: 59% corporate; 28% Public Sector; 11% National Associations; 3% International Associations
  - International delegates however contribute 6% of the economic impact

An update to these figures for 2013 will be available later on this year.

- In terms of international business visits, as sourced from the International Passenger Survey, Manchester remains third behind London and Birmingham, a strong position but identifying that ongoing work is required to continue to raise the profile of Manchester as a business and conference destination.

- The 2013 Great British Tourism Survey undertaken by VisitEngland also shows Manchester positioned second behind London for the number of overall visits and fourth in terms of holiday and business trips.

Leisure Tourism Performance

- In terms of growth in domestic markets, those making their first visit to Manchester in 2011 were most likely to be from the East of England (for 28% of visitors this was their first visit), East Midlands (24%), London (23%) and South West (23%) (source: UK Short Breaks Evaluation 2011).

- In 2010 Australia, Singapore and China all became new markets for Manchester with all three reaching the top ten for international leisure visits to Manchester for the first time, and therefore showing relatively fast development and consequent potential with air route development.

- However in 2011, Manchester saw significant increases in its established European markets of Sweden and Italy and also from lesser established leisure markets of Switzerland and Belgium.

- Ireland, Germany, USA, France and Australia were the countries generating the highest number of holiday visits, with Germany replacing the USA for being the second highest generator of leisure visits.

- In 2007 the average length of stay was 5.5 days but this decreased to 4.5 in 2010 so is an area that needs supporting (Greater Manchester Visitors Survey 2007 and 2010).

- Visitors were asked to rate the destination’s performance across a range of 13 consistent categories either relating to Greater Manchester’s tourism product offer or supporting infrastructure. In 2007 the average rating was 4.2 out of 5 which increased in 2010 to an average rating of 4.5 out of 5.

- In 2012, Manchester, along with London and Glasgow, were the only destinations in the top ten for leisure visits that continued to see an increase.

- 2013 International Passenger Survey results showed international visits up by 7% across Greater Manchester with BRIC countries showing significant signs of growth.
6.0 CHALLENGES AND OPPORTUNITIES

As the new visitor economy strategy outlines, there are a number of challenges where Manchester needs to focus going forward. The skills of our workforce are paramount and the quality of our visitor welcome and the visitor experience are vital to our continued success. We need to stay ahead of the competition and maintain a strong appeal with our target markets. We need to think smarter about the relationship between the city centre and the other districts of Greater Manchester and seek to improve partnership working. We need to continue to invest in our tourism product to create a world-class destination. We need to continue to increase our connectivity with the world by strengthening the city’s relationship with airlines so they will choose Manchester.

These challenges need to be addressed through the delivery of the Destination Management Plan throughout the strategy period.

There are though a number of significant opportunities outlined below;

- The continued investments in cultural facilities e.g. the Whitworth Art Gallery extension, the relocation and development of HOME and the refurbished Central Library and Archive and the success of winning Grants for the Arts funding to develop a shared narrative and grow audiences.
- The ongoing development of MediaCityUK which is now home to ITV and the Coronation Street set, as well as BBC North.
- The ongoing £1.4bn Metrolink expansion which now connects businesses and communities in Rochdale, Ashton and Oldham to the network and will include the Airport by the end of 2014. Also the introduction of a ‘Get me there’ smart ticketing system by TfGM which will encourage visitors to use the transport network to explore Greater Manchester.
- The £800m development of Airport City to serve global markets as a business and transport hub. It will create 16,000 jobs and includes a hotel, conference, retail and leisure facilities, plus an aviation infrastructure that will accommodate growing numbers of passengers and cargo.
- The Rugby Union World Cup 2015 with one England game being held at the Manchester City Stadium and team training camps in Greater Manchester.
- Manchester will host Euroscience Open Forum (ESOF) in July 2016. This multi-disciplinary science event will attract over 4,500 scientists from across Europe and beyond. It will include a careers fair, a business to business programme and a Science in the City festival. Additionally hosting ESOF 2016 means Manchester will be recognised as the ‘European City of Science 2016’.
- The continued creation of a varied and appealing cultural and sporting events programme e.g. MIF15, significantly raising the profile of the city region.
- The launch of the Coronation Street Tour for a limited period.
- The impact of the delivery of the National Hospitality Academy’s £40m ‘Hotel Future’ hospitality training hotel which will open in Oldham in 2016, offering 100 apprenticeships each year.
- The opening of Hotel Football in Trafford which will further enhance the city’s reputation as the home of football.
- The CityCo retail BID which will support improvements in events, visitor information and welcome, and help to enhance the image of the city centre.
- Oxford Road Corridor improvements – location of the largest academic and clinical academic campus in Europe plus home to iconic cultural venues and major developments.
- NOMA – an £800m project over 10 -15 years to develop a new 20 acre sustainable city centre district to the north of the city centre. One of the anchor tenants is the new Co-Op headquarters which is now complete.
- The new Virgin Atlantic Little Red service from London to Manchester which will open up domestic and international (long haul) traffic and increased capacity from the US, Canada and Europe.
- Continuing announcements of new routes into Manchester Airport including easyJet to Moscow and Cathay Pacific to Hong Kong from 2014.
- The launch of the Manchester-China Forum.
- The potential development and implementation of a TBID.
### 7.0 PRIORITIES AND ACTIONS GOING FORWARD

#### Strategic Aim 1: To Position Manchester as a Successful International Destination

**Key actions will seek to:**
- Improve perceptions of Manchester
- Increase the numbers of visitors to Greater Manchester encouraging them to stay longer and spend more
- Maintain and develop air routes
- Encourage civic pride amongst local residents

**Target markets are as follows:**
- Domestic: ABC1 families, couples, groups of friends, LGBT and groups
- International: China, India, UAE and US and for Europe: Germany, France and Spain

#### Key Actions for 2014-2017

<table>
<thead>
<tr>
<th>Action Area</th>
<th>Activity</th>
<th>Lead</th>
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<tbody>
<tr>
<td><strong>Domestic Campaigns</strong></td>
<td>In partnership with VisitEngland, deliver marketing activity funded by the Regional Growth Fund to promote short breaks to Manchester to 2015. Create seasonal and themed campaigns to generate interest and encourage bookings including spring, summer, Christmas and cultural campaigns. Investigate funding opportunities for 2015 onwards. Work in partnership with CityCo to deliver marketing activity with funding from the city centre retail BID to drive visitors to the city centre retail offer. Support the marketing and promotion of the Greater Manchester principal town centres to residents and visitors through development of the Town Centre Marketing Framework.</td>
<td>Visit Manchester/VisitEngland</td>
</tr>
<tr>
<td><strong>International Campaigns</strong></td>
<td>Promote Manchester as a unique visitor destination within international priority markets of US, UAE, Germany, China, India, France and Spain. Work with Manchester Airport, and identified airlines, to increase inbound passenger traffic and promote Manchester as a gateway. Maximise opportunities created by international events such as the Rugby Union World Cup, European City of Science 2016 and the Manchester International Festival. Continue to engage with travel trade to maximise travel trade visits to Manchester with particular focus on China, Germany, India, USA and UK based international trade. Increase in market representation in India, China and the US to enhance travel trade engagement. Promote Manchester as a leading international conference destination encouraging extended leisure stays. Launch the Manchester Global Ambassadors project to engage with a number of ambassadors who can support the development and reach of Manchester’s global connections.</td>
<td>Visit Manchester/VisitEngland/Manchester Airport/VisitBritain</td>
</tr>
<tr>
<td><strong>PR and Media Activity</strong></td>
<td>Co-ordinate media familiarisation visits from priority markets to achieve an AVE of £10m. Continue to promote and evolve the image bank and online film footage. Utilise significant cultural events by developing shared messages: the opening of the Central Library, Whitworth Art Gallery, HOME, Frieze 2014, MIF15 and their international exhibitions to position Manchester as a leading cultural destination. Generate media coverage in support of the Global Ambassadors project. Continue to develop visitmanchester.com and to attract 2.6 million visitors in 2014/15. Continue to grow the destinations social media presence as a platform for promoting the product and attracting visitors.</td>
<td>Visit Manchester</td>
</tr>
<tr>
<td><strong>Visitor Information</strong></td>
<td>Provide an excellent visitor information service across Greater Manchester maximising digital and mobile technology wherever possible.</td>
<td>Visit Manchester</td>
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</tbody>
</table>
Strategic Aim 2: To Further Develop Manchester as a Leading Events Destination

Manchester will focus on attracting those events that resonate with the brand values of Manchester, seeking out conferences that highlight and support our academic, business sector and industry strengths, and on major events that meet our aspirations to be known for internationally acclaimed sport, science and culture. We must also ensure that the events we host have a lasting, positive legacy for the conurbation.

Business events play an increasingly important role in the economic prosperity of Manchester. Not only do these events bring with them huge spend profiles from visiting delegates – driving a direct economic impact, they also attract international thought leaders, institutions, companies and academics within those industry and academic sectors in which Manchester either has a particular strength, is globally renowned, or is developing.

Business events hosted in Manchester help the internationalisation agenda by attracting talent, raising its profile to international communities, and promoting investment, trade and academic collaboration opportunities.

Additionally, some business events have the ability to directly impact on local communities, improving health and education.

We have a track record of hosting major international and national conferences. Our international connectivity, due to Manchester Airport, as well as our central location in the UK, makes it easy for delegates to get to Manchester quickly and cost effectively. With world-class conference venues, over 20,000 hotel bedrooms, and a vibrant visitor offer, Manchester has the ability to continue to attract major international and national events.

The strategic aim identified in the Greater Manchester Tourism Strategy 2014-2020 is to ‘Further Develop Manchester as a Leading Events Destination’. To support this aim, we will seek to:

- Further increase the volume and value of business events
- Increase the number of international visitors attending conferences and events
- Improve international perceptions of Manchester as a conference and events destination

Key Actions for 2014-2017

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<thead>
<tr>
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<tbody>
<tr>
<td>Business Events</td>
<td>Benchmark and improve the collaborative bidding approach for international and national conferences.</td>
<td>Visit Manchester/ Universities / Manchester Central/ MHA</td>
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<td></td>
<td>Accelerate work with our universities to investigate the potential of the key academic research strengths to attract national and international conference business.</td>
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<td></td>
<td>Further refine and strengthen a combined research and lead generation approach within key markets to target international associations.</td>
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<td></td>
<td>Further strengthen the Manchester Conference Ambassador programme working in collaboration with all the University conference Offices and Manchester Central Convention Complex.</td>
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<td></td>
<td>Continue to support the development of new conferences, with specific focus on the biomedical (incl. MAHSC), advanced materials (incl. National Graphene Institute) and Digital. Also explore conferences to support key assets such as Airport City etc.</td>
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</tr>
<tr>
<td>Culture and Sport</td>
<td>Improve combined bidding for major national and international events, including support from TfGM to improve the visitor experience</td>
<td>Visit Manchester/ GM Local Authorities/ TfGM</td>
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<tr>
<td></td>
<td>Continue to focus on events that deliver legacy and support brand values.</td>
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<td></td>
<td>Develop knowledge and awareness of the expanded conference offer at Whitworth and HOME.</td>
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<tr>
<td>Support</td>
<td>Strengthen collaborative networks within public and private sector organisations to support the attraction, development and delivery of major events.</td>
<td>Visit Manchester/ GM Local Authorities/ MVEF/TfGM</td>
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<tr>
<td></td>
<td>Leverage external support for investment opportunities to ensure our offer remains competitive internationally.</td>
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<td></td>
<td>Investigate and develop opportunities to grow Manchester’s conference and events profile in London and South East.</td>
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<td></td>
<td>Work to improve our sustainability, accessibility and quality credentials for conferences and events, including working with TfGM to improve accessibility across GM.</td>
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<td></td>
<td>Maximise the potential of the City’s world-class events programme to attract media to the city on hosted press visits.</td>
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<td></td>
<td>Extend volunteer programmes and improve visitor welcome to ensure events maximise potential and add value to local communities.</td>
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<tr>
<td>Evaluation</td>
<td>To continue to review the Conference Value and Volume survey every two years</td>
<td>Visit Manchester</td>
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<td></td>
<td>Undertake the collation and submission of ICCA ranked events to establish Manchester’s ICCA rankings globally.</td>
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<tr>
<td></td>
<td>Continue to assess the economic, profile and legacy impacts each event has on GM.</td>
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Strategic Aim 3: To Improve the Quality and Appeal of the Product Offer

Key actions will seek to;

- Ensure that Manchester’s visitor experience exceeds expectations and delivers quality at all levels
- Support projects and opportunities that will help develop a stronger sense of place
- Improve digital connectivity
- Support businesses to be more productive and profitable by facilitating skills development
- Ensure that Manchester is accessible by all visitors
- Improve the quality of the public realm, particularly greenspace and waterways
- Improve and better promote sustainable transport options
- Maximise opportunities from the expansion of Metrolink, including the ‘getmethere’ smartcard

Key Actions for 2014-2017

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<tr>
<td>Visitor Experience</td>
<td>Ensure the basics are right. Improve the visitor welcome with initiatives such as the Black Cab Working Group. Create a series of digital walking tours. Continue to build a quality visitor offer based on QIT and VAQAS accreditation and supported by annual Tourism Awards. Maximise opportunities from the ‘Hotel Future’ National Hospitality Training Academy hotel project in Oldham. Continue to invest in skills and facilitate training for tourism businesses. Ensure actions fit with MACF targets - importance of sustainable visitor economy. Roll out cultural concierge model across cultural organisations and hotels using ACE funding.</td>
<td>GM Local Authorities/ Visit Manchester/CityCo/ Manchester Airport</td>
</tr>
<tr>
<td>Connectivity</td>
<td>Improved access to Manchester Airport with the Metrolink extension by the end of 2014, the new Eastern Link Road and a fourth rail platform. Continued extension of the Metrolink lines and development of the Metrolink digital offer to enable seamless provision across Manchester’s wider digital offer; this includes new digital signage installation and a network-wide roll out of Wi-Fi on trams during 2014. Introduction of a GM wide smartcard system ‘getmethere’ is now being rolled out. It is intended the system will include the capability to deliver a smartcard product aimed at the visitor market. Integrate data from the DMS into Manchester City Council’s wayfinding initiative – Mi-Guides and other platforms. Continue to manage and develop strategic relationships with rail and coach operators.</td>
<td>TFGM</td>
</tr>
<tr>
<td>Distinctiveness</td>
<td>Continue to champion local products e.g. food and drink, independent retailers and restaurants. Use Manchester’s Countryside/Peak District to help differentiate the offer. Champion our sporting and cultural strengths e.g. football, cycling, MIF, Museums and Galleries, Creative Tourist etc. Support the growth and development of key neighbourhoods e.g. China Town, Medieval Quarter, NOMA, The Corridor, HOME and the Northern Quarter. Support the continued growth and development of The Quays through the delivery of the 2014-2017 Quays DMP. Differentiate the offer of the key town centres based on feedback from the AGMA Town Centres Report. Continued development of high quality events to increase visitors and help develop sense of place across Greater Manchester e.g. Ramsbottom Chocolate Festival, Stockport Vintage Markets, Manchester Day Parade and Saddleworth Whit Friday Band Contests.</td>
<td>Visit Manchester/ GM Local Authorities/ Quays Visitor Destination Group</td>
</tr>
<tr>
<td>Evaluation</td>
<td>Visitor surveys. Destination benchmarking.</td>
<td>Visit Manchester</td>
</tr>
</tbody>
</table>
Strategic Aim 4: To Maximise the Capacity for Growth

Key actions will seek to;

• Improve partnership working across Greater Manchester
• Align development strategies and plans to maximise opportunities
• Develop opportunities to build capacity
• Promote sustainable growth in the visitor economy

Key Actions for 2014-2017

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<tbody>
<tr>
<td>Advocacy</td>
<td>Ensure major infrastructure developments take account of the needs of visitors. Maintain political support for the visitor economy. Identify priorities for tourism investment. Promote Greater Manchester to national stakeholders e.g. VisitEngland/VisitBritain/DCMS.</td>
<td>GM Local Authorities/Visit Manchester/MVEF/Manchester Airport/Universities</td>
</tr>
<tr>
<td>Collaboration</td>
<td>Maintain and improve partnership working across GM. Support Manchester Airport’s aspirations for growth. Align development strategies to better support growth opportunities. Ensure transport provision is flexible and fit for purpose including the introduction of integrated ticketing provision.</td>
<td>Visit Manchester/GM Local Authorities/Manchester Airport/MVEF</td>
</tr>
<tr>
<td>Skills Development</td>
<td>Work with partners to improve customer service skills, digital capabilities and visitor welcome. Support SMEs to recognise growth and develop capacity.</td>
<td>Visit Manchester</td>
</tr>
<tr>
<td>Building Capacity</td>
<td>Support opportunities to develop the range and volume of visitor products and services, including new hotel developments. Lobby for and secure external funding e.g. HLF, ERDF, ACE, RGF, RDPE. Capitalise on the opening of major new cultural facilities in 2014/15 i.e. Whitworth Art Gallery, HOME, the Central Library and Archive. Delivery of the 2014/15 Grants for the Arts project to support arts businesses and grow audiences. Leverage opportunities for private sector investment.</td>
<td>Visit Manchester/GM Local Authorities/MVEF</td>
</tr>
<tr>
<td>Evaluation</td>
<td>Monitor visitor economy pipeline projects. Delivery against Manchester Airport’s growth targets. Hotel occupancy levels. Visitor numbers to attractions. STEAM Data. Volume and Value of business events Economic impact of individual conferences, sporting and cultural events</td>
<td>Visit Manchester</td>
</tr>
</tbody>
</table>

Acronyms
MVEF - Manchester Visitor Economy Forum
MHA - Manchester Hoteliers Association
TFGM - Transport for Greater Manchester
ACE - Arts Council England
GM - Greater Manchester