

**THE GREATER MANCHESTER
STRATEGY FOR THE VISITOR
ECONOMY 2014 - 2020**

INTRODUCTION

This strategy sets out the strategic direction for the visitor economy from 2014 through to 2020 and is the strategic framework for the whole of the Greater Manchester city-region: Bolton, Bury, Manchester, Oldham, Rochdale, Salford, Stockport, Tameside, Trafford, and Wigan. The strategy has been developed through consultation with members and stakeholders of Marketing Manchester, in particular with input from the Manchester Visitor Economy Forum who will be responsible for monitoring delivery of the identified action areas and progress against the targets set.



Albert Square, Manchester

POLICY CONTEXT



The strategic direction of tourism in Greater Manchester is informed by the following national and sub-regional documents:

- Britain Tourism Strategy. Delivering a Golden Legacy: a growth strategy for inbound tourism 2012 - 2020 (VisitBritain)
- England: A Strategic Framework for Tourism 2010 - 2020 (VisitEngland)
- Greater Manchester Strategy 2013 - 2020 Stronger Together

In April 2013 the Secretary of State for Culture, Media and Sport launched VisitBritain's long term tourism growth strategy for Britain. This ambitious strategy - **Delivering a Golden Legacy: a growth strategy for inbound tourism 2012 - 2020** - aims to attract 40 million international visitors a year, spending £31.3 billion, by 2020.

There are four main parts to the strategy:

- Enhance Britain's image
- Ensure that Britain is packaged and sold
- Broaden Britain's strong product offering
- Make visiting Britain easier (air routes and visas)

The ten year **Strategic Framework for Tourism in England**, published in March 2010, aims to maximise tourism's contribution to the economy, employment and quality of life in England. It sets out the ways in which the industry can work together to realise the framework's growth ambition of 5% year on year in the value of tourism, creating an additional 225,000 jobs and £50 billion of expenditure by 2020.

Four interdependent objectives have been identified to address the opportunities and challenges for England's visitor economy:

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

Visit Manchester is a key strategic tourism partner supporting the delivery of both the Britain and England frameworks.

The Greater Manchester Strategy vision is that 'By 2020 the Manchester city-region will have pioneered a new model for sustainable economic growth based around a more connected, talented and greener city region where all our residents are able to contribute to and benefit from sustained prosperity.'

This strategy for the visitor economy will help to deliver those aspirations for sustainable growth, by helping to create a distinctive sense of place, by maintaining and increasing our competitive advantage, by creating employment opportunities and by raising the global profile of Manchester as a place to live, invest and visit.



Sir Kenneth Branagh in Macbeth, MIF 2013



Rochdale Pioneers Museum



Noble Prize Winners Professor Andre Geim and Professor Konstantin Novoselov



The Manchester 'M', designed by Peter Saville

Original Modern

It is also essential that this strategy embodies the brand values of Manchester and stays true to their ambition. Original Modern is a summation of Manchester's identity, of the essence of the place. It reflects the best of what we are and outlines the way in which we say and do things, as much as what we say. Manchester is the brand, and its values remain the same as they were when the industrial revolution changed the world; when the ship canal was built and the world's first ever art exhibition held; when the atom was split and the suffragette movement formed; when graphene was isolated and the Manchester International Festival created. Manchester is not original and modern because we've told it to be – original modern makes sense because that's what Manchester is.

In 2008 Manchester set out what it meant to be original modern: to make a contribution to the city and to challenge convention; to introduce a new idea or to be significantly progressive; to think global or to be truly ambitious within our own backyard. These criteria still hold true and have been applied to the development of this strategy. We believe that Manchester has the power to change people, over the course of a day, a week or a lifetime. But this relationship is transactional, and our visitors will also change us - for the better. We will encourage people to interact with Manchester, as many people as possible, drawing them off their sofas, onto trams, trains, buses and bikes, into cars and through the airport in their droves. We need to fill this place with people, day in day out, and leave an imprint of Manchester on every one of them.

TOURISM AND GREATER MANCHESTER

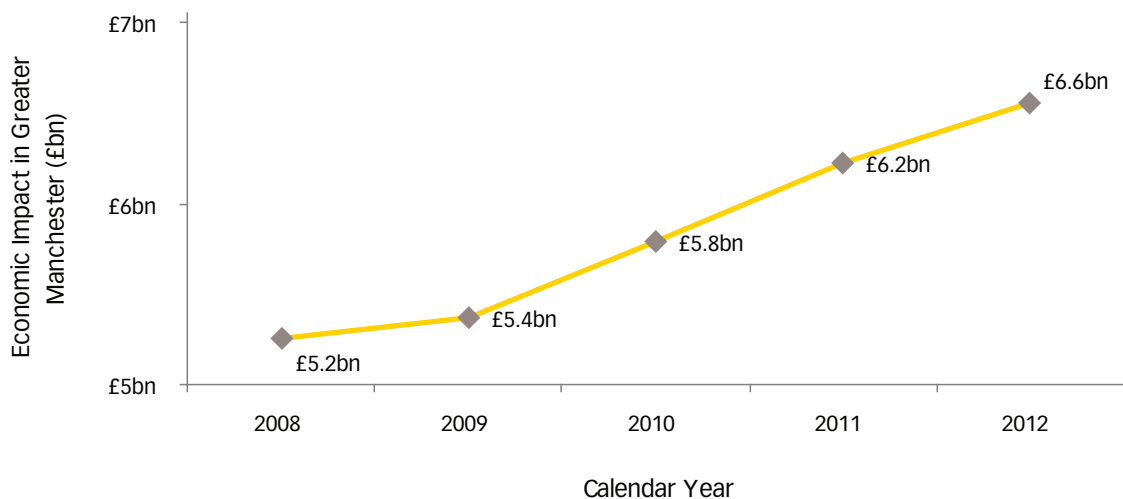
Domestic and inbound visitors spent over £84 billion in England in 2012, with tourism industries accounting for 2.7 million jobs, or in other words 10% of the total job market. National tourism growth since 2010 has averaged 8.7% against VisitEngland’s predicted target of 5%*. And this is at a time when tourism has not been without challenges including periods of exceptionally poor weather, a fragile economic recovery and shifting patterns of demand.

This growth compares well with other sectors and has enormous potential to provide continued economic growth and employment for both England and Greater Manchester’s economy.

The charts below show the growth in the value of tourism in Greater Manchester since 2008 and the growth in domestic staying and international visits to Greater Manchester and England since 2010.

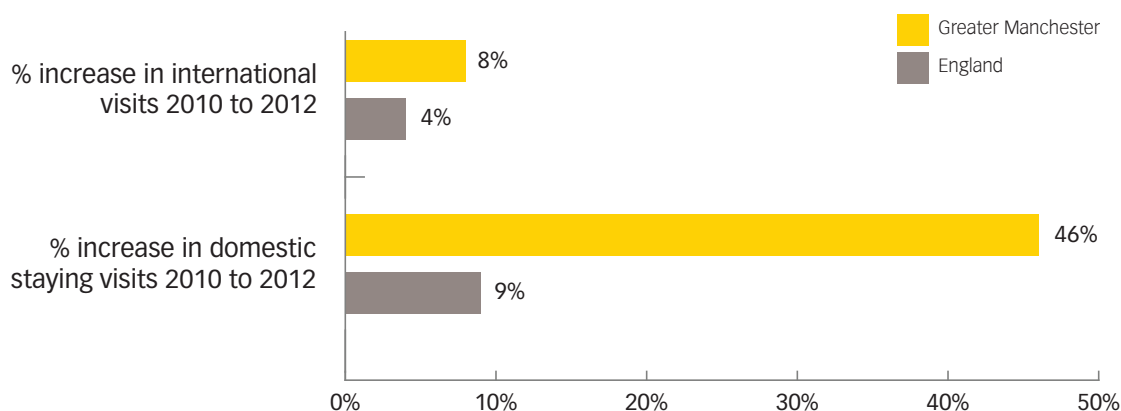
*VisitEngland Annual Progress Report 2013

Economic Impact of Tourism 2008 - 2012



Source: Greater Manchester STEAM Report. STEAM = Scarborough Tourism Economic & Activity Monitor. Visit Manchester with Global Tourism Solutions.

Growth in Domestic and International Visits 2010 - 2012



Source for international data: International Passenger Survey (IPS), Office for National Statistics & VisitBritain. England: 25.7 million (2010) to 26.8 million (2012). Greater Manchester: 1.02 million (2010) to 1.09 million (2012).

Source for domestic data: Great Britain Tourism Survey (GBTS), VisitEngland. England: 95.5 million (2010) to 104.5 million (2012). Greater Manchester: 2.1 million (2010) to 3.1 million (2012).



Stockport Air Raid Shelters



Manchester Art Gallery

A lot has changed in Greater Manchester since the previous strategy was launched in 2008 and significant progress has been made in developing the infrastructure and improving the quality of the product and of the visitor experience.

These improvements include the completion of an £80 million redevelopment of Manchester Airport, expansion of the city's Metrolink network, the opening of MediaCityUK (home to the BBC and ITV) and the establishment of the Manchester International Festival on the global cultural stage.

Development of the city-region's business tourism industry has been a constant. Estimates valued it at £573 million in 2009* and this had risen to £822 million by 2011*. Crucial to this growth was the continued investment in the conference product, including the £30 million investment in Manchester Central and the £45 million transformation of Emirates Old Trafford, the home of Lancashire County Cricket Club.

A number of new attractions have opened in the last few years, improving the leisure offer, including the National Football Museum, Legoland and the Sea Life Centre in Trafford. Other attractions including MOSI, the People's History Museum and Bury Transport Museum have received significant investment.

Testament to the impact of these developments is the growth in the city's hotel bed stock. There are now more than 11,000 rooms in Manchester (over 7,000 in the city centre) with over 2,000 more in the pipeline.

The investment is paying off. In Greater Manchester tourism now generates £6.6 billion a year for the local economy and supports nearly 84,000 FTE jobs.**

This strategy outlines how Manchester will seek to secure its share of the global tourism industry, not just with mature markets but also in the emerging markets of Brazil, Russia, India and China. It also looks at the importance of domestic tourism, particularly short breaks, which are an important target market for cities such as Manchester, but dependent on the product, infrastructure and promotion being correctly developed.

Tourism can help Greater Manchester achieve its priorities for sustainable economic growth and secure its place as one of Europe's premier city regions. A strong visitor economy can play a key role in improving the quality of life, strengthening the global distinctiveness and world ranking of Manchester as a place to live, invest and visit and help address issues such as youth unemployment and worklessness. One in twelve jobs in the UK is currently either directly or indirectly supported by tourism. 44% of people employed in tourism are under 30, compared with an average for the wider economy of 24%.***

Manchester has significant strengths to build on in attracting more domestic and international visitors.

Manchester Airport currently handles 20 million passengers a year and has aspirations to grow the capacity to handle over 24 million passengers by 2018 to help meet anticipated demand.

Business tourism makes a considerable contribution to the prosperity of Manchester. The attraction of national and international conferences not only contributes directly to the local economy, but also supports wider city objectives of attracting talent and investment in key industry and academic sectors.

* Visit Manchester Conference Value and Volume 2010 and 2012. ** STEAM 2012 data. ***ONS 2012.

Since hosting the Commonwealth Games in 2002, the city-region has continued to strengthen its identity through sport, most recently hosting Olympic football matches in 2012. The continued success and profile of Manchester United and Manchester City in the Premier and Champions leagues; the opening of the National Football Museum in 2012; the Ashes returning to Emirates Old Trafford in 2013; and a regular programme of high profile sporting events such as NBA Basketball and the Great City Games all serve to reinforce the city's profile as a major city for hosting national and international sporting events. Facilities such as the National Cycling Centre at Manchester Velodrome, the Manchester Aquatics Centre and regional gymnastics and tennis centres all attract visitors to Manchester.

The city-region has a thriving creative, new media and digital sector with the new hub at MediaCityUK, as well as a strong programme of cultural events, concerts and exhibitions. Major venues such as the Phones4u Arena, The Lowry, the Palace Theatre and The Bridgewater Hall are regularly attracting large audiences and helping to boost occupancy levels.

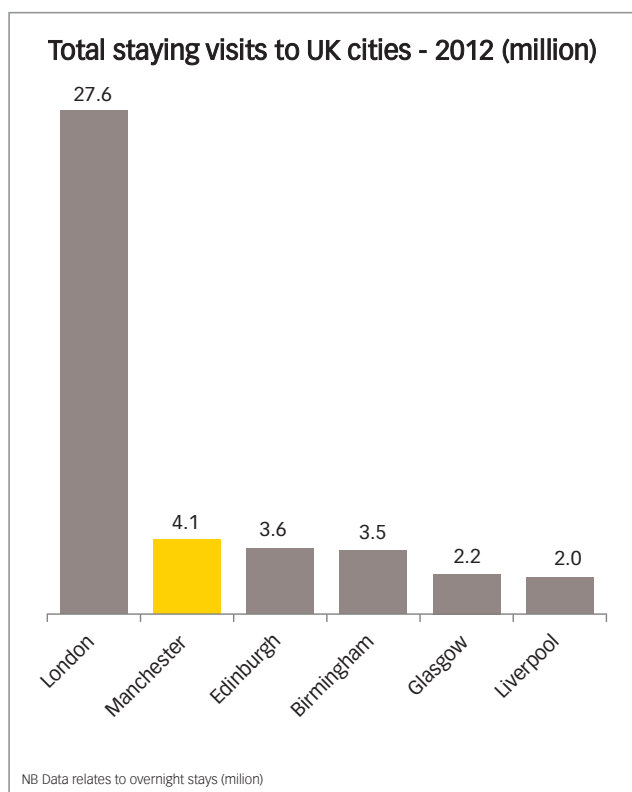
Manchester has a strong city centre retail offer that includes Manchester Arndale, the UK's largest inner city shopping mall, with key retail attractions in the city-region such as the award-winning Trafford Centre and Bury and Bolton markets. A city centre BID (Business Improvement District) was launched in early 2013 to increase footfall through events and improved marketing activity.

There have however been some set backs since 2008. There is uncertainty about the extent of the potential for growth and there are constraints on new investment, particularly by the public sector at the moment. Private sector investment has also been constrained although will hopefully be more positive within the strategy period. Consequently, the ambitions for the next six years will be more focused, concentrating on those opportunities where we can achieve the highest impact and return on investment.

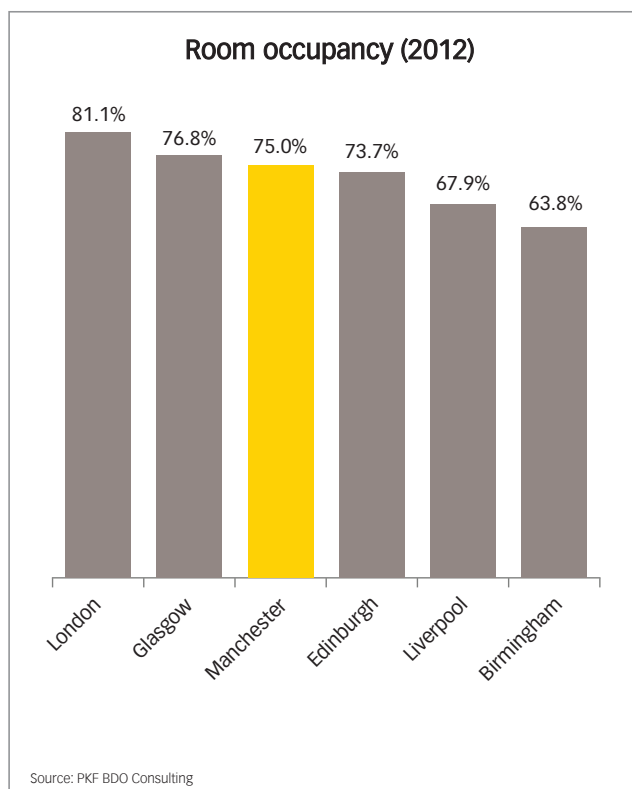


MANCHESTER'S COMPETITIVE POSITION

Manchester is the **UK's second most visited city destination**. After London and Edinburgh it is the UK city destination most visited by international visitors – 23% of Manchester's staying visitors are international.

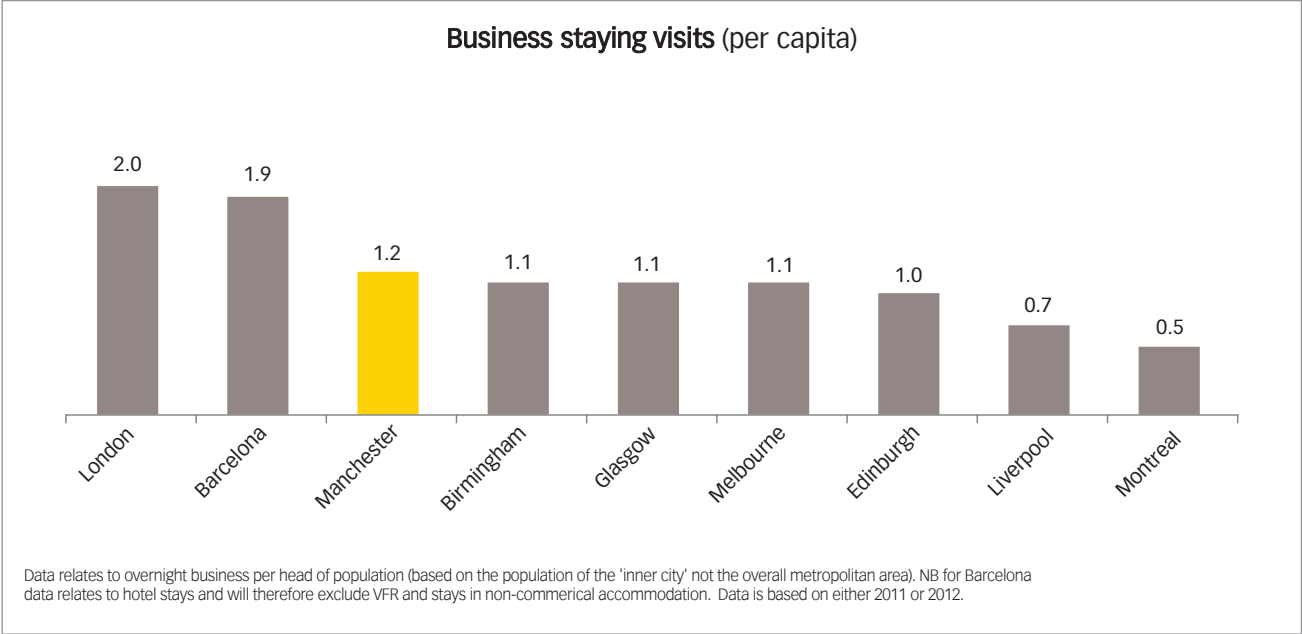


Annual **hotel occupancy in Manchester is robust** and comparable to its UK comparators as shown in the chart here. However, it does demonstrate a degree of seasonality. Compared to other UK cities, Manchester's August occupancy is relatively low – 70% compared to an average of 76% elsewhere¹.



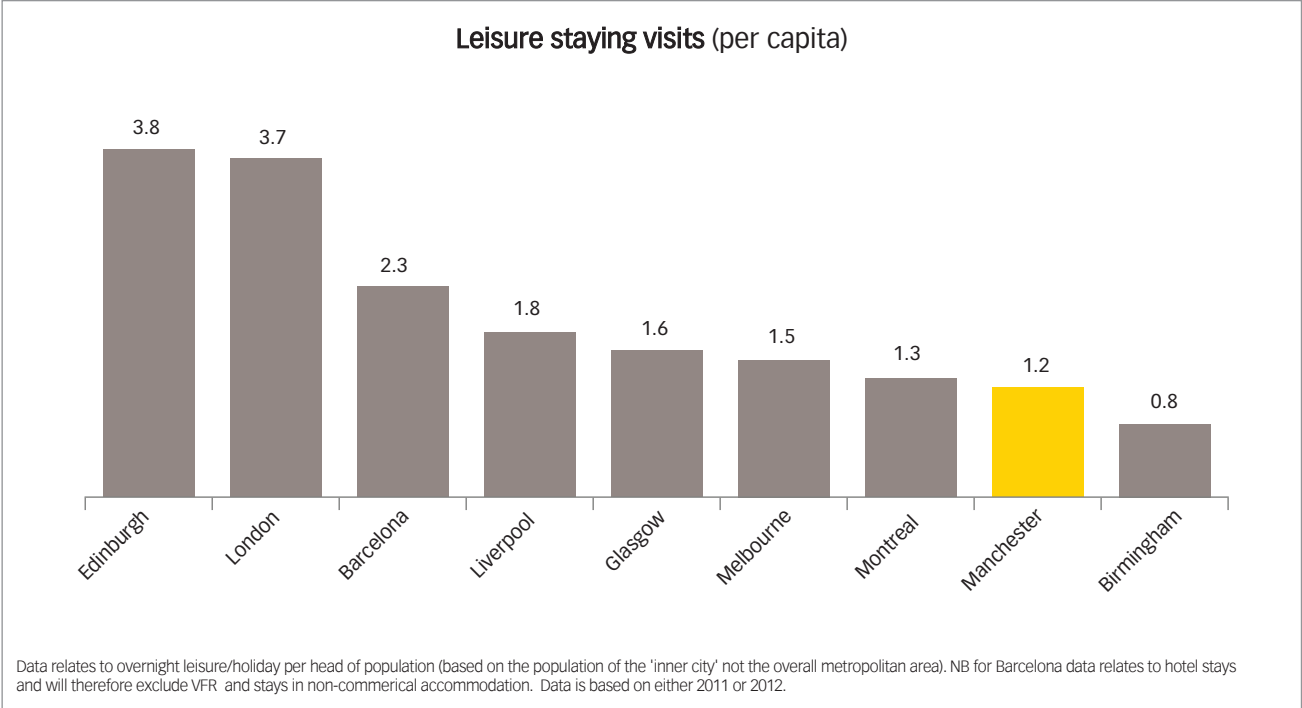
¹Based on an average of occupancies for London, Edinburgh, Glasgow, Birmingham, and Liverpool.

Manchester is **strong as a business travel destination**. The following chart shows the number of trips per head of population for Manchester and a number of UK and international comparators². Only London and Barcelona have a higher ratio among the comparators.

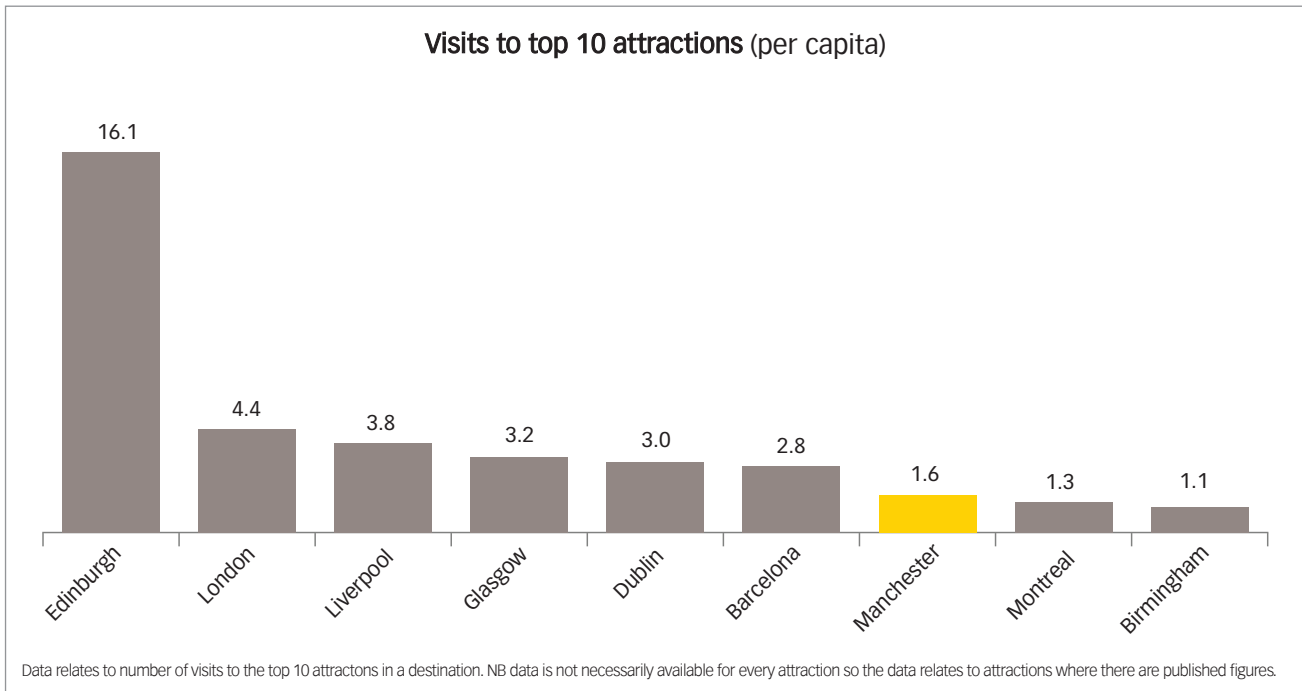


²We have used trips per head of population here (and later in this section) to make comparisons between different sized cities more meaningful. So, for example, in absolute terms Manchester is never going to compare with London, but on a per capita basis the comparison is on a more like for like basis.

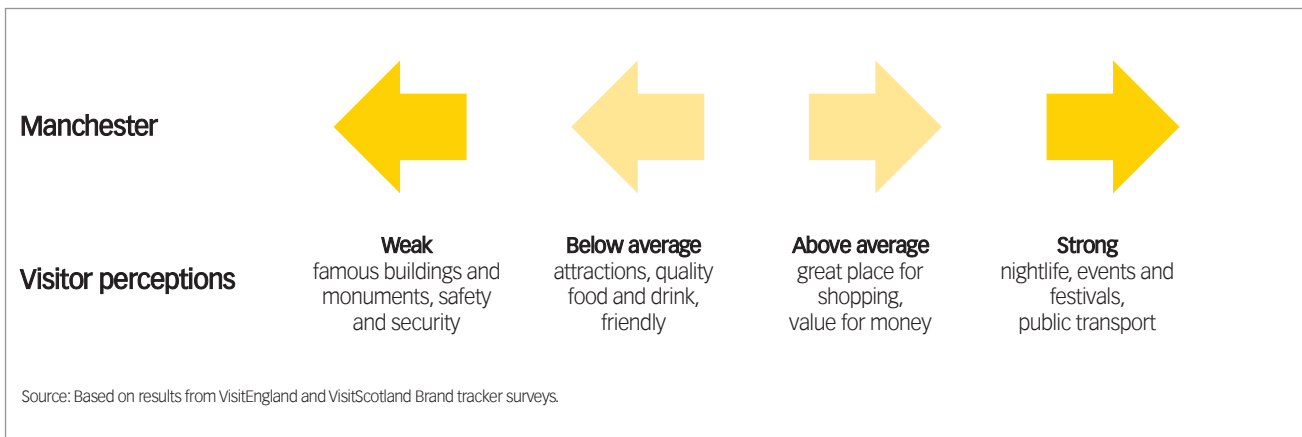
However, **the leisure market is not as strongly developed**. Among the comparators, only Birmingham has a lower ratio.



While Manchester has a number of good attractions, the relative strength of its leisure market is also reflected in data related to the attractions sector. Total visits to the top ten attractions in Manchester (relative to population) are lower than a number of comparator cites (half of Glasgow, for example).



The diagram below illustrates visitor perceptions of Manchester in terms of its perceived strengths (nightlife, events and transport) and weaknesses (safety and security, famous buildings).



CHALLENGES AND OPPORTUNITIES

We know that some of the challenges identified in the last strategy remain and there are a number of areas where we need to focus going forward.

The skills of our workforce are paramount in order to improve our visitor welcome, raise productivity and improve the visitor experience and we must continue to invest and develop in this area. We must enhance our sustainability credentials and seek to reduce the environmental impact of the visitor economy. We must continue to improve the public realm. We must build on our strengths and leverage opportunities to promote Manchester as an events destination. We must continue to innovate in our promotion of the destination and ensure that we better articulate and communicate the story of our city in order to shift global perceptions.

Staying ahead of the competition and maintaining a strong appeal with our target markets is increasingly important as other cities continue to develop their own product offer.

There are several ongoing issues at a national level that will continue to impact on tourism in Manchester such as high levels of Air Passenger Duty (APD), the high cost and complex application processes of UK visas and higher levels of VAT than other European countries. In the long term we need to be alert to opportunities that HS2 may bring for the visitor economy.

We need to think smarter about the relationship between the city centre and the other districts in tourism terms and seek to improve partnership working across Greater Manchester.

The emerging town centres work will help districts to identify and develop their unique sense of place within Greater Manchester. We need to connect the Quays/MediaCityUK better to the city centre in terms of the physical connection i.e. pedestrian, cycle and water bus routes but also in terms of how the Quays is positioned in promotional campaigns.

Our attractions are good and have great content but in global terms they are not strong enough (apart from the global brand profile of Manchester United). We need to strengthen the profile of our cultural attractions and the role culture plays in driving visits to the city-region.

In order to achieve all this, Manchester must continue to rise to the challenges presented by changes in governance, structure and funding. We must continue to forge new partnerships with our tourism partners locally, nationally and internationally, including with VisitEngland and VisitBritain. We must continue to invest in our tourism product to create a world-class destination. We must continue to increase our connectivity with the world by strengthening the city's relationship with airlines so that they will choose Manchester to operate new routes.

Manchester's aspirations and determinations are therefore clear. However, they must be tempered by the constraints of the current economic climate.

The SWOT analysis on the following page summarises the main strengths, weaknesses, opportunities and threats.



SWOT analysis

Strengths

- Manchester Airport
- Football/sport and the brand of Manchester United FC
- Home to BBC North and ITV/MediaCityUK
- Major venues including the Phones4u Arena and Manchester Central
- Size, profile and reputation of the universities
- Significant business tourism product
- Strong events programme with a national and international profile
- Ability to host major international events
- The city product – retail and nightlife

Weaknesses

- Visitor welcome (including the welcome for international visitors)
- Insufficient high end/destination restaurants
- A lack of iconic architecture and attractions
- National and international profile as a cultural tourism destination
- Some seasonality of demand

Opportunities

- The further growth of Manchester Airport as a gateway and the development of Airport City
- Hosting of more major international events
- Metrolink extensions better connecting Greater Manchester
- BBC North being based in Manchester - its role as a broadcaster and as a generator of leisure and business tourism
- Digital tourism initiatives
- A significant student population and the opportunity for increased VFR
- The increasing profile of Manchester City FC especially in key markets such as the UAE and the USA
- External funding opportunities, including European Regional Development Fund (ERDF), Heritage Lottery Fund (HLF), Regional Growth Fund (RGF) and Arts Council for England (ACE)

Threats

- Lack of public sector funding and limited external funding opportunities (as above)
- National and International competition for major events and business tourism
- National issues such as the cost of Air Passenger Duty, the cost and ease of obtaining UK visas, the level of VAT



HOW DO WE MOVE FORWARD?

This strategy is focused on how we can maximise growth, but also generate greater benefit. The overall ambition and strategic aims are set out below:



For each strategic aim, there are a number of key action areas as follows:

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

It is essential that we are clear which markets we are competing for and against whom we are competing. We must prioritise our visitor markets by those which deliver the most benefit and those that have the greatest potential for growth. We must benchmark ourselves against those destinations with which we aspire to compete. We may not be in the league of Paris, London and New York, but we should aim to position ourselves alongside cities like Barcelona, Munich, Gothenburg, Chicago, Montreal and Melbourne in the eyes of our target markets.

Key Action Areas

Markets – we must prioritise our efforts by focusing on the target markets where we can realise the growth in value. Domestic visitors remain a priority and we will continue to focus on shifting the demographic of visitors and the nature and length of their stay. Internationally we will focus on Europe (Germany, Scandinavia, Ireland and Spain), China, India, the USA and the UAE.

Promotion – we will continue to develop multi-channel promotional campaigns that drive key messages to identified target audiences. We will maintain a strong focus on media engagement, enabling the world's travel and lifestyle media to tell our story on our behalf. We will maximise the impact of all activity by working in partnership and by seeking match

funding for available resources wherever possible, from both the public and private sector.

Evaluation – we will closely track the impact of the promotional activities undertaken, in order to ensure they each deliver maximum return on investment for both Manchester as a visitor destination and for the funding partners involved. We must also continue to invest in perception surveys to understand if, and how, we are shifting perceptions across our priority markets.



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

Manchester is a place where people come to do things, whether that's attending a business meeting, speaking at a conference, or going to a concert or a festival. There is no doubt that Manchester is well equipped to meet the requirements that come with staging major events, but with increasing international competition it is critical that we maintain and grow our position.

Key Action Areas

Business Events – with such events already worth £822 million to the Greater Manchester economy, we must continue to focus on increasing the volume and value of business events coming to the conurbation. We need to ensure there is an even more collaborative approach to bidding for conferences and events, and focus on attracting international events (including ICCA ranked events) which deliver greatest economic benefit.

Culture and Sport – 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. We need to continue to grow and attract events that support Manchester's

image and profile and that will bring millions of people and maximum economic benefit to the city-region.

Values – we must 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.

Support – we must build collaborative networks across Greater Manchester that support the development and delivery of major events wherever they are to be held. We must work with the industry to improve the quality and competitiveness of our offer, and to leverage external support for investment opportunities. We need to improve our combined bidding for international events.

Evaluation – we will continue to monitor the value and volume of our conference business including the number of ICCA ranked events held in Manchester, We will also monitor our success at hosting major cultural and sporting events.

Source: *The Music Industry in Manchester 2013. ** Analysing the value of football to Greater Manchester 2013.



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

Manchester is providing the UK with its second most visited destination and third most attractive destination for international visitors. Whilst Manchester’s product is very strong in some areas, there is always room for improvement. This strategic aim is underpinned by the philosophy that making the conurbation better for all visitors means making it better for the people of Manchester as well.

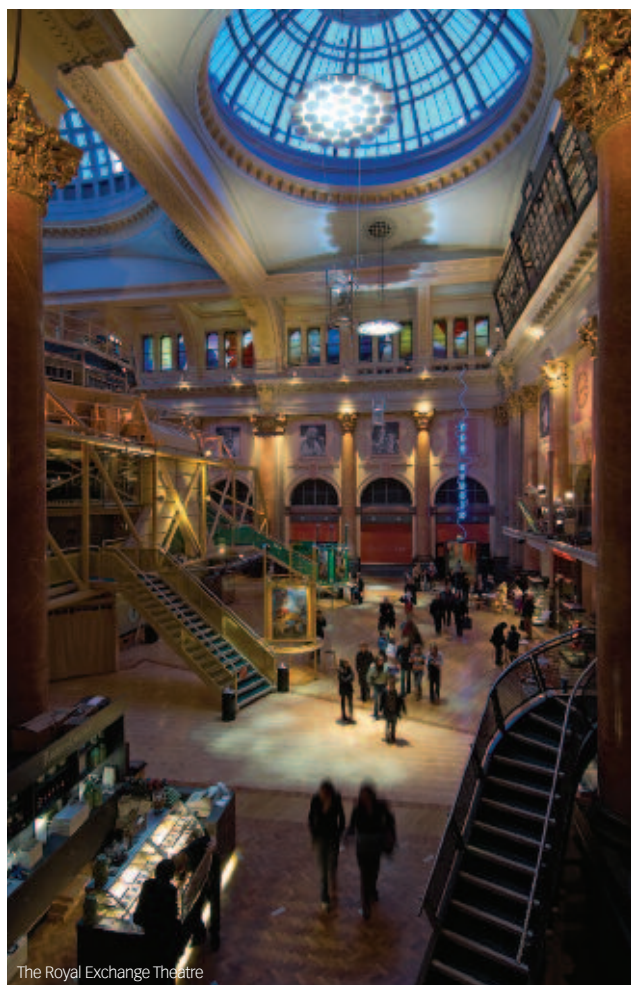
Key Action Areas

Visitor Experience – we must ensure that the basics are right, at all levels, recognising that the level of expectation of visitors today is much higher than it was even five years ago. Cleanliness, safety and security and the ease of getting around are all still important, but the need is also for improved digital services for visitors, higher quality of amenities and environment and more. The quality and warmth of our welcome to all visitors including conference delegates and international visitors must also be seen as a basic essential. We will aim to continue to improve visitor satisfaction levels and continue to invest in the skills of our workforce.

Connectivity – we must maximise the expansion of Metrolink and the opportunities that smart ticketing will provide to help encourage dispersal around the conurbation. We must also support the digital infrastructure developments already taking place and take advantage of their ability to greatly improve the visitor experience.

Distinctiveness – Manchester does not have a Great Wall or a Grand Canyon – an icon that acts as our primary draw. However, we must champion our most distinctive attributes, our sporting and cultural strengths as well as our independent retailers and restaurants, and we must encourage initiatives that will help us to create a stronger sense of place. Genuine manifestations of our Original Modern brand values, such as the Manchester International Festival, embody what we mean by championing our distinctiveness. However, the approach is applicable across the board, and the creation of distinctive town centres will play a significant role in developing a sense of place across Greater Manchester.

Evaluation – we will monitor visitor satisfaction levels through visitor surveys and benchmark the quality of our product with other cities.



Strategic Aim 4 – To maximise the capacity for growth

In order to achieve growth we must maximise capacity, not only increasing available product (more routes, more beds, new attractions) but also use existing capacity better.

Key Action Areas

Advocacy – we must do more to demonstrate the value of the visitor economy, nationally and locally, to ensure that the industry is well supported politically and financially and to maximise investment from the private sector. We must ensure that major infrastructure projects take account of the needs of visitors, and that we clearly identify priorities for tourism related investment.

Collaboration – arguably Manchester’s greatest strength - we must continue to work in partnership across the industry to maximise the use of available capacity across all months of the year and across the whole conurbation through aligned development strategies, and to support Manchester Airport’s aspirations for growth.

Skills Development – we must support the industry’s SMEs and entrepreneurs to recognise growth potential and develop their capacity to realise this potential by highlighting access to financial support and training.

Building Product Capacity – we need to support opportunities to develop the volume and range of products and services for visitors, including major new attractions and conference facilities. We need to capitalise on the major new cultural facilities opening in 2014 and 2015. We need to create demand to fill the anticipated growth in the accommodation sector - hotel developments in the pipeline across Greater Manchester could lead to an additional 3,000 plus hotel rooms in the next few years. We need to continue to lobby for, and secure, external funding, notably the European Regional Development Fund (ERDF), Heritage Lottery Funds (HLF), Arts Council England (ACE) funding and Regional Growth Fund (RGF).

Evaluation – we will track potential capital investments and monitor the performance of our attractions and accommodation. We will review our partnerships and networks and facilitate and monitor support for SMEs.



The Avenue, Spinningfields



Radisson Blu Edwardian Free Trade Hall



Worsley, Salford

OBJECTIVES AND TARGETS

The objectives and individual targets for growth and increased benefit are listed below.

The overall objective is to achieve a 5% year on year growth in the value of tourism to fit with the target set within the national growth plan, 'England; a Strategic Framework for Tourism 2010 - 2020'. This is felt to be a challenging but realistic target based on the difficult environment of the last few years and

what may happen in the years to come. Between 2008 and 2011 the numbers of staying and overseas visitors were less than 2007 levels but improved growth has been seen in the last two years. The value of tourism increased by 7.7% between 2010 and 2011, and by 5.3% between 2011 and 2012. This strategy has been designed to ensure that this level of growth is maintained or increased.

Objectives	2007 baseline for previous GM Tourism Strategy	2012 baseline position (latest data)	Target for 2020 (based on 2018 forecasts)
To increase staying visitor numbers from 10.3m to 13.7m	9.6m	10.3m	13.7m
To increase the number of day visitors from 95.2m to 127m	85m	95.2m	127m
To increase the number of overseas visitors from 1.09m to 1.27m	1.19m	1.09m	1.27m
To increase the value of tourism from £6.6bn to £8.8bn	£5.4bn	£6.6bn	£8.8bn
To increase the number of jobs supported by tourism from 83,934 to 112,447 (FTE) jobs	73,540	83,934	112,477
To improve the economic impact of business events in GM from £822m (2011 baseline) to £1.2bn	£573m (2009)	£822m (2011)	£1.2bn
To increase the number of ICCA ranked events from 30 to 45	21	30	45
To improve visitor satisfaction levels from 4.5/5 to 4.7/5	4.2	4.5 (2010)	4.7

DESTINATION MANAGEMENT PLAN

This tourism strategy will be delivered by Marketing Manchester in partnership with the local authorities and other key stakeholders through a new three year Destination Management Plan (DMP) 2014 - 2017. Progress will be monitored by the Manchester Visitor Economy Forum. The DMP will be reviewed and updated for 2017 - 2020.

Useful References

Britain Tourism Strategy. Delivering a Golden Legacy: a growth strategy for inbound tourism 2012 - 2020 (VisitBritain)
[CLICK HERE](#)

England; A Strategic Framework for Tourism 2010 - 2020 (VisitEngland)
[CLICK HERE](#)

Greater Manchester Strategy 2013 - 2020
 Stronger Together
[CLICK HERE](#)

Original Modern e-book
[CLICK HERE](#)

Marketing Manchester
marketingmanchester.com