

Greater Manchester Destination Management Plan:

The visitor economy action plan 2009-12

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1 Introduction

The Destination Management Plan is an action plan for the visitor economy for Greater Manchester. A three year plan is updated each year to capture what is happening in tourism, past and present, and to set our priorities for the future. The activity includes not only the plans of the Tourist Board, Visit Manchester, but also those of other partners such as the 10 local authorities of Greater Manchester, training providers, other agencies and of course the bedrock of tourism, the tourism businesses themselves.

The Destination Management Plan (DMP) is co-ordinated and written by Visit Manchester but is developed through consultation with all the appropriate stakeholders. The activity of the DMP is monitored through the Visit Manchester Management Board, which meets quarterly, and comprises representatives from various organisations or groups involved in tourism.

The document has a number of supporting documents which give additional detail, or context to what can be found here. These include:-

- 1) Visit Manchester Management Board members
- 2) Destination Performance Indicators
- 3) Key visitor economy developments
- 4) Local Authority tourism activity
- 5) List of stakeholders consulted in the development of the DMP

Some significant changes are currently taking place which will affect our visitor economy, and give rise to a number of new opportunities. These include the **British Tourism Framework Review**¹, looking at how Britain can fulfil its potential as a Visitor Economy; the **New Regional Strategy for the North West**², currently under development; the **Multi Area Agreement**³ for Greater Manchester, allowing the sub-region to decide on its priorities and the public sector to work in better partnership; and the new **Greater Manchester Economic Strategy**, which will follow the **Manchester Independent Economic Review**⁴.

The DMP however continues to be influenced by the appropriate regional tourism strategies (The Strategy for Tourism in England's Northwest⁵, the Northwest Business Tourism Strategy, the Northwest Visitor Information Framework⁶ and the Northwest Strategic Marketing Framework⁷), and of course our own Tourism Strategy for Greater Manchester 2008-2013⁸. Our sub-regional tourism strategy is very clear in its aspirations challenging all relevant stakeholders to create a city which delivers a better quality of life for the people who live and work here – this in turn will lead to a destination that attracts visitors from around the globe.

¹ www.visitbritain.com/en/campaigns/tourism-review/index.aspx

² www.nwregionalstrategy.com

³ www.manchester-enterprises.com/documents/Manchester_MAA.pdf

⁴ www.manchester-review.org.uk

⁵ www.nwda.co.uk/publications/quality-of-life/the-strategy-for-tourism-in.aspx

⁶ www.nwtourism.net/index.php/About-Us/Visitor-Information-Framework.html

⁷ www.nwda.co.uk/pdf/Strategic%20Marketing%2004.pdf

⁸ www.themanchestertouristboard.com/xsdbimngs/Tourism%20Strategy.pdf

2 Manchester Now

Manchester continues to thrive as a visitor destination. Year on year, from 1999 to 2007 the number of visitors has increased (currently over 100 million⁹), and at a quicker rate than other UK destinations. The start of the economic downturn in 2008 seemed to have a limited effect – average hotel occupancy figures¹⁰ showed a 3% drop from 2007 (this despite an increase in the number of rooms that became available), whilst visitor attractions and the restaurant and retail sector reported mixed news. The nature of Manchester's visitor economy, its appeal to leisure and conference/business visitors, to international and national visitors, to staying and day visitors, its significant student population, puts it in a good position to weather the storm, though this of course will depend on the duration of the recession and our ability to react quickly to changes in the market.

2.1 Our key offer

Much of Manchester's ongoing success is due to the variety and diversity of its offer for visitors, and the fact that there is something to attract them all year round. A recent visitor survey¹¹ identified that 48% of leisure visitors came to Manchester to visit specific places or attractions, and 37% came because of a special event or show.

Some of the key events raising Manchester's profile and attracting leisure visitors during 2008 included:

- The **UEFA Cup Final** played at the City of Manchester Stadium in May, with Zenit St Petersburg beating Glasgow Rangers 2-0
- **Manchester Pride**, an annual lesbian, gay, bisexual and transgender festival, held over the August Bank Holiday weekend.
- **The Manchester Food & Drink Festival**, the 11th annual festival took place in October 2008, with a strong events programme in all 10 districts of Greater Manchester.
- **Futuresonic 2008** featured 5 days and nights of live music, art premieres, exhibitions, club nights and events with a world-class programme of over 350 artists attended by 50,000 people across the city centre
- **24-7 Theatre Festival** was an award-winning annual showcase of new one-hour plays by local writers, performed by some of the best regional acting talent in non-theatre venues and took place July 2008.

Other events worthy of note included the UCI Track Cycling World Championships, 9th FINA World Swimming Championships (25m), BUPA Great Manchester Run, Hi-Tec World Squash Championships Manchester 2008, Paralympic World Cup, Queer Up North, Jazz Festival, Literature Festival, The Media Festival, Urban Moves outdoor dance festival and Viva Spanish and Latin American film festival.

Our art galleries, museums and theatres are also an integral part of the Manchester experience, and are increasingly focussing their exhibitions and programmes to be of wider appeal. In late 2008 Manchester Art Gallery hosted '**Holman Hunt and the Pre-Raphaelite Vision**'. This major exhibition brought together for the first time all three versions of Hunt's most famous painting, *The Light of the World* and featured original work that had not been on public display before. **The Hallé** (cited by The Times as the No. 1 British orchestra) celebrated its 150th anniversary in 2008 with a series of high-profile events and a retrospective of premieres. **Body Worlds 4** was the latest work of anatomist and physician Gunther von Hagen. Hosted at MOSI (Museum of Science and Industry) from February to June 2008, the exhibition achieved record visitor numbers and was extended until August.

Manchester is also a thriving conference and business destination, competing with cities around the world for international conferences, and UK cities such as London, Edinburgh and Birmingham for national conferences. During 2008 some significant conferences were held in Manchester including:

⁹ STEAM Reports 2007 commissioned by Visit Manchester

¹⁰ LJ Forecaster commissioned by Visit Manchester

¹¹ Visitor Survey 2007 undertaken by Visit Manchester

- Labour Annual Party Conference, September 2008, 11,000 delegates
- Discovery 08, October 2008, 80 delegates
- European Regions Airline, October 2008, 500 delegates
- National Union of Teachers, March 2008, 1200 delegates
- European Facilities Management Conference, June 2008, 500 delegates
- UNISON Healthcare Conference, April 2008, 1200 delegates
- Catenians, May 2008, 2000 delegates
- European Parliament, November 2008, 300 delegates
- EPHAR Conference, July 2008, 2000 delegates

2.2 Development Plans

Investment in tourism projects continues across Greater Manchester despite the current economic situation (see Appendix 3 for full details of these developments).

Much of the development in Greater Manchester is led by the private sector, with some public sector funding to support key projects. Developments requiring any public sector funding must follow a process that involves the local Tourist Board from an early stage, who are then instrumental in guiding, prioritising and where successful, supporting developments in their quest for funding.

Across Greater Manchester it is anticipated that around 700 additional hotel rooms will be available during 2009, of which 500 will be in the city centre. Up to another 3,000 are currently in the pipeline for 2010 to 2012¹².

A number of visitor attractions will re-open during 2009 including the People's History Museum, Royal Lancashire Fusiliers Museum, East Lancashire Railway Bury Transport Museum and the Band on the Wall. Over the next few years there will be further investment to existing attractions, as well as some new attractions opening, including:-

- Stockport Plaza restoration (2010)
- Chethams School of Music expansion (2010)
- MOSI (Museum of Science and Industry) redevelopment (2011)
- Ordsall Hall (2011)
- Lancashire County Cricket Club redevelopment (2012)
- Oldham Coliseum Theatre relocation (2012)
- Palace Theatre redevelopment to house Royal Opera (2013)

Significant investment is being made in Manchester's conference facilities

- Manchester Central redevelopment (2011)

Some key infrastructure projects will also be taking place, or will be finalised, having an impact on the visitor economy. These include:-

- Irwell City Park (2010)
- Bolton Innovation Zone (2010)
- Salford Reds 20,000 seater stadium (2010)
- BMX Centre, East Manchester (2011)
- MediaCity: UK (2011)
- Victoria Station redevelopment (2011)
- The Corridor (Oxford Road) (2011)
- Metrolink expansion (2012)
- East Lancashire Railway Development (2020)
- Manchester Airport expansion (2030)

¹² Source: Visit Manchester

3 Manchester of the Future

3.1 Introduction

Already planned to take place during 2009 are some key events, conferences and exhibitions to draw in international and national visitors, or raise Manchester's profile. These include the BT Paralympic World Cup (May), the Manchester International Festival (July), Conservative Party Conference (Sept), Angels of Anarchy at Manchester Art Gallery (Sept 09-Jan 10) and The Darwin Festival at The Manchester Museum (Oct 09-Aug 10).

3.2 Vision

Our vision is to build a city region fit for the people of Manchester, which will attract people from all over the world, particularly those with a thirst for discovery.

3.3 Targets

Targets for Greater Manchester are set in line with the tourism strategy which runs from 2008 to 2013, therefore targets for 2013 are:

- To increase staying visitor nights to 10.6million
- To bring in 995,000 overseas visitors
- To increase staying visitor spend to £1.4billion
- To support 81,000 (FTE) jobs

A number of other destination performance indicators have been identified to measure the performance of Manchester's visitor economy. These can be found in Appendix 2.

3.4 Objectives

- To improve the visitor experience
- To enhance communication with visitors
- To develop the infrastructure
- To create iconic events, developments, initiatives and opportunities
- To ensure a better quality of life for residents
- To increase the productivity and performance of the tourism businesses
- To improve the skills level of people working in the visitor economy
- To improve community benefits:- accessibility, diversity and an inclusive night-time economy

3.5 Target Markets

Target markets are identified by vigorous research¹³, matching what we have to offer with the needs of particular markets, also taking into consideration predicted growth and decline of the markets. Countries can be so large however, that we then narrow down even further who we are going to target – this can be geographic and demographic – to get the best match and ensure that the marketing money spent is as effective as possible.

Our destination three year marketing plans are reviewed annually and marketing campaigns put together with key partners such as Manchester Airport, train operating companies, airlines, other destination such as Liverpool and the Lake District, and also the tourism businesses as appropriate.

Increasingly there is a move to marketing through electronic means – internet and email. This both ties in with our aspirations to become a more “green” destination through reducing the amount of print that is generated, but also because customers are increasingly using methods other than brochures to research and select their destinations.

¹³ Research into international markets is conducted by partners such as Visit Britain who are able to examine individual markets in depth, looking at trends and opportunities.

During 2009/10, Visit Manchester will be running campaigns (for the leisure visitor) in the following countries:-

Market	Segment	Product / Interest
Primary markets		
USA (North America & Canada)	Baby Boomers	"Hidden Britain", Industrial heritage, Value for money, experiential travel, arts & culture, Gateway message
	Gay and Lesbian Travellers	Value for money, arts & culture, nightlife, shopping, gateway message
	GRUPS (18-44)	Value for money, arts & culture, music, nightlife, shopping
India	DINKS ¹⁴ (25-44), VFR ¹⁵ (45+), Families	Industrial Heritage, arts & culture, Gateway/Touring
Ireland	DINKS (26-35), ABC1 C2 ¹⁶ SINKS ¹⁷ (26-35), ABC1 C2	Value for money, shopping, sport, nightlife, arts & culture
Germany	Young Urban Professionals (25-35)	Value for money, nightlife, arts & culture
	DINKS (35-55)	Value for money, Industrial Heritage, Gateway/Touring
Nordic Region	DINKS (20-39)	Value for money, Sport, Shopping, Nightlife, Music
Spain	Young Urban Professionals (25-35)	Value for money, music, fashion, nightlife, arts & culture
Secondary markets		
Italy	DINKS/SINKS (25-44)	Value for money, arts & culture, shopping, touring
Netherlands	Independent Wanderers (18-35)	Value for money, arts & culture, shopping, touring
Emerging markets		
China	The ADS tourist (broad age range)	Value for money, shopping, industrial heritage,
	Independent travellers(30-45)	Value for money, shopping, arts & culture, food & drink, industrial heritage,
Asia Pacific (Hong Kong, Singapore, Malaysia)	DINKS, SINKS (25-35)	Value for money, shopping, nightlife, touring
Middle East UAE, Qatar linked with direct air routes).	Families	Value for money, shopping, food & drink, entertainment, family friendly

In terms of business and conference tourism, a regional resource, based at Visit Manchester identifies, contacts and prepares bids for international and national conferences. In addition to this, an Ambassador programme run in Manchester works with academics involved in specialist Associations, to help bring their conference to Manchester. The strong medical research and educational base has meant that the Ambassador work is currently very focussed in this area and will continue to be so over the coming years.

¹⁴ DINKS = Double income no kids

¹⁵ VRF = Visiting Friends and Relatives

¹⁶ ABC1 C2 = Medium to High Income

¹⁷ SINKS = Single income no kids

4 Challenges

The current challenges we face, or gaps in our product or offer, as defined by stakeholders (see Appendix 5) are:

Miscellaneous

- The global downturn – fewer people taking breaks
- Other destinations improving their image and performance at a faster rate
- Continued perception issues¹⁸ including those around safety, its industrial background and low awareness of the cultural offer

Facilities

- Limited quality venues for large-scale dinners (500 people plus)
- Poor information provision across the city centre, around Greater Manchester, and at the airport
- Limited green spaces/public areas in the city centre
- Few internationally recognised restaurants (eg. Michelin starred restaurants)
- Poor signage in the city centre and in other town centres and at points of entry
- Limited venues for large conferences (800 people plus)
- Limited family friendly activities
- Disabled access across all types of facility

Transport

- Ease of moving around Greater Manchester (it is not easy for visitors to understand the different forms of public transport, the providers and how to use them)

Service

- Consistently high levels of customer service offered across all sectors within the visitor economy
- Product knowledge of Manchester of front line staff

5 Opportunities

Whilst the current economic crisis may dominate the news, the global downturn also brings along some opportunities:

- Low value of sterling makes the UK an attractive holiday destination for Euro currency countries and the USA
- Potential increase in British people taking breaks within the UK
- Strong cultural assets, and continued investment in improving these
- Varied and appealing events programme - cultural, music and sports

¹⁸ International Perceptions Survey 2007 undertaken by Visit Manchester

6 Priorities

Outlined below are Manchester's priorities for the next 3 years in no particular order. These remain unchanged from 2008.

1. Enhancing the image
2. Promoting Manchester to national and international visitors
3. Creating a leading conference and business destination
4. Improving the provision of information to visitors
5. Developing and enhancing the product
6. Improving the infrastructure

6.1 Enhancing the Image

Despite past and recent promotional work, there remains a perception in some markets of Manchester as a grey, industrial city. The image has been further tarnished over the past few years with widespread media coverage of crime¹⁹ (gun and knife related), which remains, regardless of the work done to combat this and the significant progress made.

Manchester's original modern brand vision is the foundation for our image. Working together (public and private sectors) reinforces and adds credence to the brand, and cross-sector working enables economies of scale to combat these negative perceptions.

Objectives:-

- To change perceptions of Manchester around the world, through targeted press coverage and marketing campaigns.
- To inspire potential visitors into coming to Manchester, using the brand image to create desire
- To guide tourism stakeholders in the use and application of the brand
- To educate residents on local tourism assets and encourage civic pride through local media

6.2 Promoting Manchester to National and International Visitors

Manchester is a key UK destination for both national and international visitors, who come here for both leisure and business purposes. In 2007 Manchester was again the third most visited city in the UK by international visitors²⁰. Targeted marketing campaigns have been delivered in key markets for a number of years, and despite the global economic climate, it is important that investment in marketing continues to ensure continued market share when the recovery starts.

Manchester is England's second city and boasts a major international airport. It has both an urban and rural offering within its city-region boundaries for leisure visitors, and a conference quarter based right in the city centre. Manchester's location enables visitors to come from and / or go to many parts of northern, central and eastern England, and north Wales within an easy drive or train ride. Manchester's airport serves around 200 destinations worldwide and connects to 16 airports in the United Kingdom, making it easy to get to, but also a gateway to other destinations.

Objectives:-

- Increase the number of visitors to Manchester, encourage them to stay longer and spend more money in the local economy
- Ensure the survival of existing key air routes
- Attract leisure visitors from new / developing markets

6.3 Creating a Leading Conference and Business Destination

Manchester has significant potential as a major European business tourism destination and with Manchester Central's plans for future expansion in addition to the new facilities at the University of Manchester, the city is perfectly placed to maximise its potential for large scale conferences. With the access provided by Manchester Airport, the city offers a genuine alternative to London as a place to

¹⁹ International Perceptions Survey 2007 undertaken by Visit Manchester

²⁰ International Passenger Survey 2007, undertaken by the Office for National Statistics

hold major conferences and conventions. The city has a proven track record and a reputation as one of the most dynamic conference destinations in Europe.

The business tourism offer continues to be enhanced through the construction of new high-quality conference hotels and facilities, increased budget bed-stock and ongoing programmes of refurbishment which will further position the City as a destination of choice.

Objectives:-

- Increase the number of conference delegates and business visitors to Manchester with a particular focus on the association sector
- Attract major exhibitions and business events to Manchester
- Promote Manchester as a meeting room for the world
- Improve the level of service offered to conference buyers
- Improve the quality of the conference facilities

6.4 Improving the Provision of Information to Visitors

Information to visitors can be separated into two distinct areas:- providing visitors with succinct, easy to find information to assist them in researching and planning their trip, and supporting them when they arrive through different contact points across the destination. Wherever possible we aim to maximise the economic contribution of visitors – encouraging them to stay longer, do more and spend more money.

Objectives:-

- To increase visitor dispersal, motivating longer stays and repeat visits.
- To 'make it easy' for the visitor to find out about Manchester, to book their journey and the services they require during the stay
- To improve Manchester's welcome to improve and add value to the visitor experience.
- To provide the "right" information to visitors through the channel most relevant and appropriate for their needs
- Support and encourage the quality and breadth of the visitor offer and visitor experience.

6.5 Developing and Enhancing the Product

This priority area covers all aspects of the tourism product, primarily focussing on the businesses themselves and their employees, but also including the product in terms of dispersal strategies and what visitors do when they come to Manchester. It also covers reasons to encourage visitors to come, such as events and festivals.

The visitor's experience is influenced by a number of areas, not least the quality of the accommodation, the visitor attractions, the restaurants, and the service that is received during the stay. High quality and consistency is particularly important to a destination attracting so many international and business visitors. We need to raise our game to ensure that we do deliver a world class service.

Objectives:-

- To ensure that Manchester's offer meets expectations and delivers quality on all levels
- To support tourism businesses through recession whilst still improving productivity and profitability
- To ensure that skills gaps are met and improve the key skills required by businesses to deliver a quality service
- To support signature projects, filling gaps in the offer, and offering a rounded experience to visitors
- To improve access to tourism businesses where possible, and improve information on access
- To promote sustainable tourism and encourage businesses to become more environmentally aware
- To improve the quality and reputation of the food offering

6.6 Improving the Infrastructure

Manchester has a built environment with a pronounced historical significance from the amazing industrial buildings, the modern city centre and the waterways to the smaller towns and easily accessible countryside that appeals to a range of visitors. However the quality of the public spaces is not always of a high standard and through our vision to create a destination that is inspiring for its residents, we will be creating a better quality environment for our visitors. In addition to this, we need to ensure that visitors are able to travel around the city-region easily, reaching parts of the destination that appeal to them and we must put into place strategies to ensure the city is a 24 hour city, and one that has appeal to families.

Objectives

- To improve the quality of the public realm in key destinations across Greater Manchester, particularly encouraging green space wherever possible
- To develop strategies to open up the city and towns during evenings and nights to a wider audience
- To support the development of “icons” increasing the attractiveness of the tourism offer
- To improve transport links for visitors, and provide better information and easier ticketing options