

Greater Manchester Cultural Destinations

Research Summary Report



Supported using public funding by
**ARTS COUNCIL
ENGLAND**

Marketing
Manchester®

® Proud to be part of
The Growth Company



 the audience agency

Understand who your audiences are.
Discover who they could be.

Introduction

Marketing Manchester, on behalf of a Greater Manchester Cultural Steering Group, successfully applied for Cultural Destinations funding from Arts Council England in 2016 and received funding from April 2017 to develop audiences and increase footfall from international markets.

Project activity includes developing tours and excursions, improving digital information and access to booking systems and improving perceptions of Greater Manchester (GM) as a cultural destination through marketing campaigns and Press & PR activity.

The starting point for the project was to commission research to provide some baseline data on what we know about the cultural tourist in Greater Manchester, perceptions of the national and international travel trade and US consumers and a look at international cities that have culture at the heart of their tourism offer.

This document summarises the key findings of all this research and what the findings mean to help us deliver the project ambitions. The work was undertaken by The Audience Agency between July 2017 and January 2018.



Baseline research: Cultural Tourism in Greater Manchester

Based on box office and audience survey data from
Greater Manchester's cultural organisations, and
existing tourism data sources

Headlines: Visitors from the UK outside Greater Manchester attending Greater Manchester cultural organisations, 2015-17



Around **a quarter** of visitors to cultural organisations came from the UK outside Greater Manchester (GM).



For ticketed events, bookings from UK visitors from outside GM accounted for **18%** bookings and **24%** income. Their av. ticket yield was **£26.70** (higher than local bookers at £20.98).



The av. group size for box office bookings was **2.51**. Around **three fifths** of survey respondents visited with other adults only and around a **fifth** visited alone. **16%** in 15/16 had children in their group and **24%** in 16/17.



Av. booker frequency was **1.94** times across 2 years. Around **half** of survey respondents were first time visitors to the venue or organisation.



A third of bookers from the UK outside GM booked over 90 days in advance.

UK cultural tourists visiting Greater Manchester

Core Audience Spectrum segments amongst UK cultural visitors to Greater Manchester showing potential for growth are:



Commuterland Culturebuffs

Affluent and professional consumers of culture, includes empty nesters and families with older children at home. Large proportions visiting culture in Greater Manchester in particular from both the 45-90 minute drive time, as well as from the 90+ minute drive time.



Dormitory Dependables

Suburban and small towns, interest in heritage activities and mainstream arts, includes both families and more mature people. Large proportions visiting culture in Greater Manchester from both the 45-90 and 90+ minute drive times.



Trips & Treats

Mainstream arts and popular culture, influenced by children, family and friends. Prominent in Greater Manchester from the 45-90 minute drive time area.



Home & Heritage

Rural areas and small towns, daytime activities, historical events and classical music. Potential to develop in the 45-90 minute drive time area.



Metroculturals

Prosperous and well-educated, liberal, confident urbanites interested in a very wide cultural spectrum. Potential to develop in London.

www.theaudienceagency.org/audience-spectrum

Segment	Engagement level with culture	Key opp in local cultural visitors from under 45 min drive time?	Key opp in cultural visitors from 45-90 min drive time?	Key opp in cultural visitors from 90+ min drive time?	Key opp in cultural visitors from London?
Metroculturals	High				✓
Commuterland Culturebuffs	High	✓	✓	✓	
Experience Seekers	High	✓			
Dormitory Dependables	Medium	✓	✓	✓	
Trips & Treats	Medium	✓	✓		
Home & Heritage	Medium		✓		

UK cultural tourism in Greater Manchester

There is potential to further develop day trip and closer-by overnight markets.

- A high proportion of cultural visitors are from 20-50 miles away, showing potential to build both day and overnight visits from the North West.
- Greater Manchester's cultural offer is particularly attractive to visitors from Yorkshire and Humber - visitors from this region make up a higher proportion of cultural visitors than visitors to GM overall.

At county level, cultural visitor hotspots around Greater Manchester and in the South East are apparent.

- Unsurprisingly cultural organisations have highest penetration into the population in counties bordering Greater Manchester.
- Beyond this Derbyshire, Merseyside, the Wirral, and counties in North Wales close to the English border (Flintshire, Denbighshire and Wrexham) are significant sources of cultural visitors.
- The pull of Greater Manchester for people in Cumbria to visit culture is clear. Key Audience Spectrum segments visiting from Cumbria are Commuterland Culturebuffs, Dormitory Dependables and Trips & Treats.
- Penetration is higher into the populations in Oxfordshire from which a third of visitors are Commuterland Culturebuffs; Inner and Outer London where over half of visitors are Metroculturals; and in Brighton than other areas of the South of England.



Headlines: **International** visitors to culture in Greater Manchester, 2015-17



Between 2015-17, **international** visitors made **2796** bookings at GM performing arts events (0.18% of bookings overall), and bought **5943** tickets (0.14%). International bookers brought in **£136,598** income (0.18%). True figures are likely higher, due to bookings via UK based tour operators and friends/relatives. International bookers had an av. ticket yield of **£22.98**.



International visitors accounted for **1%** of survey respondents for performing arts and multi art form centres. They made up **11%** (15/16) and **13%** (16/17) of visitors to museums and galleries.



The av. group size for box office bookings was **2.2**. However **37%** booked just one ticket and around **a third** of international survey respondents visited alone. Just **12%** (15/16) and **13%** (16/17) visited with children.



Av. international booker frequency was **1.94** times across 2 years. **82%** (15/16) and **75%** (16/17) of survey respondents were first time visitors to the organisation.



International bookers booked on av. **51.5** days before a performance, however booking lead times vary greatly signifying a need for information and bookable activities well in advance, through to information via key channels during visits. **80%** booked online.

International visitors to culture in Greater Manchester

The USA is the most prominent international market for Culture in Greater Manchester

- Outside Europe, Australia and Canada are prominent, along with China, however few Chinese audiences are making direct bookings via box offices.
- Within Europe, Ireland, Germany, Spain, France the Netherlands and Belgium are prominent.



Characteristics, motivations and behaviour of **international** visitors

International cultural visitors to Greater Manchester are younger than UK visitors.

- Around half are under 35, reflecting the younger profile of international visitors to Greater Manchester overall.
- International visitors are more likely to visit culture alone and less likely to visit with children than UK visitors.

International cultural visitors are more discerning but less price sensitive than UK visitors.

- All groups - local, UK and international visitors - have the same main motivations for visiting culture: 'to be entertained,' 'to spend time with friends/family' and '[artform] is an important part of who I am.'
- Additionally, international visitors are more likely to be motivated 'to learn something' and 'to be intellectually stimulated' than UK visitors.

The peak for international leisure trips to Greater Manchester is in the summer months.

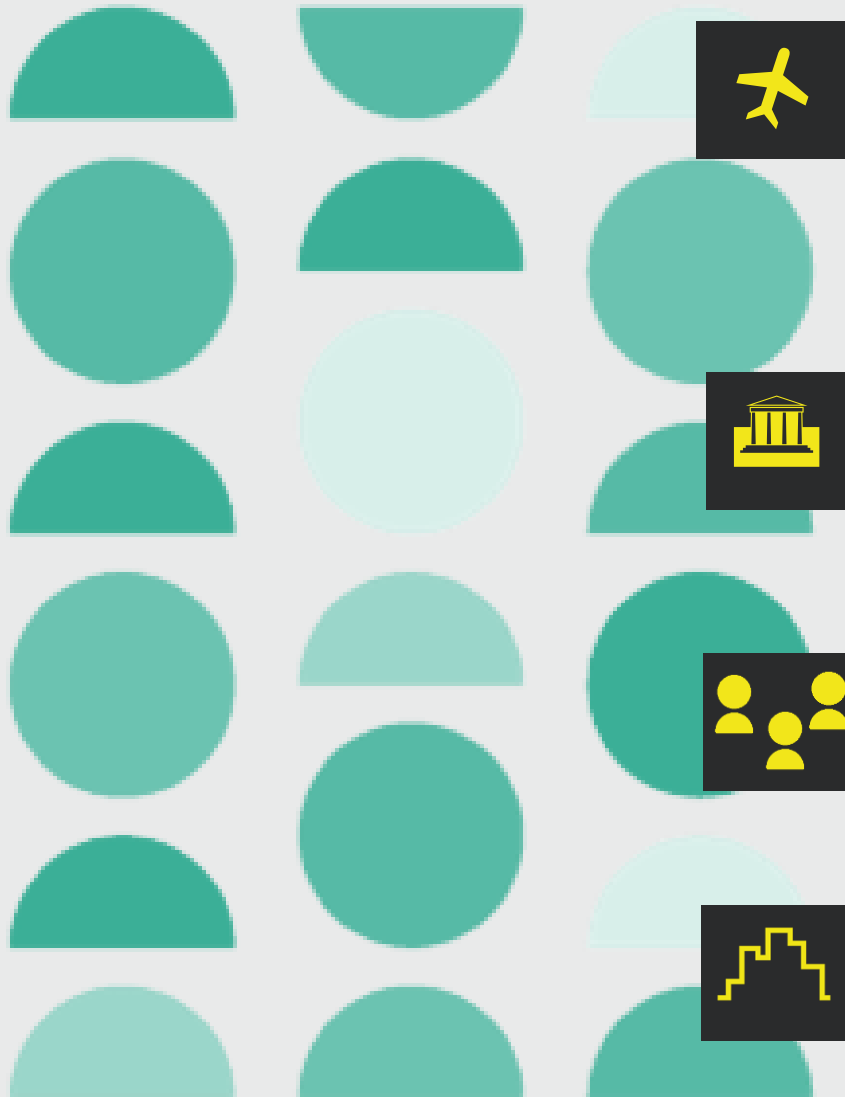
- Around two thirds visit April - September and two fifths July - September. This presents challenges for the cultural sector in reduced performing arts programming during the summer.
- The peak for international business visitors to Greater Manchester is September - November, providing opportunities during a busy time in Greater Manchester's cultural calendar.



Understanding the US consumer market for cultural visits to Greater Manchester

Key findings from a panel survey with US residents who had visited the UK in the last 7 years

Headlines: US survey respondents who visited UK in previous 7 years



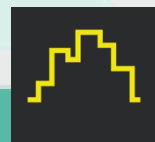
Manchester is clearly on the radar of many US leisure visitors. On their last UK leisure trip, a **third** of respondents visited Manchester. **59%** had visited Manchester for leisure at some point in their lives and **17%** for business. On their last UK trip, almost all (88%) visited London, a quarter visited Edinburgh and a quarter Liverpool.



Respondents were primarily attracted to the UK by its **culture, history** and **wanting to visit London**. **Family connections, natural environment/countryside** and **wanting to visit another UK city/town** were also important motivators.



The majority (**64%**) made their last UK leisure visit with a partner or spouse. A **quarter** visited with friends and a **quarter** with adult family members. A **fifth** visited with children. **15%** visited alone.



On their last UK visit, respondents went to an average of **3** cities/towns/areas.

US visitor movement around the UK

Notable crossovers can be seen between US visitors to Manchester and visits to London, Birmingham and Liverpool.

- Exploring the combination of areas visited on a trip gives an insight into how Manchester fits into the itineraries of US visitors to the UK.
- Almost all (88%) of survey respondents who visited Manchester on their last UK trip visited London too. A third of those surveyed who visited London on their last trip also visited Manchester.
- The majority of those who visited Birmingham (79%) and Liverpool (61%) also visited Manchester. On the whole, aside from London, crossover tended to be more significant between Manchester and cities on the west side of the UK.
- These findings suggest opportunities to position Greater Manchester's cultural offer in the context of a wider North West and UK cultural offer for US visitors.
- Considering how this can be connected to transport links may be beneficial, in particular Manchester Airport, and west coast and London trains.



US perceptions of Manchester

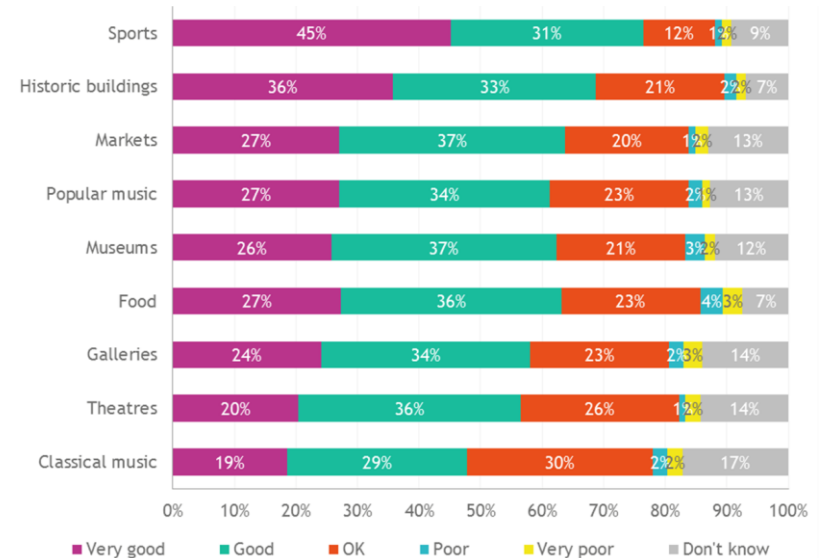
The top 5 words used to describe perceptions of Manchester by US survey respondents were Soccer, Good, Fun, Football and Industrial.



US perceptions of Manchester

Perceptions of various elements of Manchester's cultural offer were positive overall.

- Sports and historic buildings received the highest proportions of 'very good' and 'good' ratings.
- Classical music received the lowest, although almost half rated the offer as 'good' or 'very good.'
- There are positive perceptions here on which to build in raising awareness of Greater Manchester's cultural offer with US visitors, however results suggest that awareness raising will be particularly important for galleries, theatres and classical music.



Of those who went to Manchester on their last UK leisure trip, around a quarter said it was their favourite city visited on the trip.

- Culture, sport, lifestyle and people were cited as the main reasons.

I get to see lot of football and little less crowd.
Male, 25 - 34, Virginia

I thought it really embodied the culture of the United Kingdom. Most people go to visit London, but Manchester is the real gem of the country.
Female, 20 - 24, Michigan



US visitor cultural preferences

When presented with a range of Greater Manchester's cultural offers, the majority of US respondents found them to be appealing.

- Offers presented were packaged as: Live Theatre in Extraordinary Places, Museums with Global Stories to Tell, Explore the Quays, Art Galleries with Attitude, Manchester's Classical Music and Elizabeth Gaskell House.
- Packages appeal to existing interests in the art forms and topics covered.
- The diversity of city wide offers, such as the variety of galleries and their collections, is attractive.
- Free admission to museums and galleries is appealing and unique, as these are generally paid for experiences in the US.

Historic elements of the cultural offer hold particular appeal.

- Although many are attracted to contemporary offers, historic elements hold particular appeal. These include visiting historic buildings (e.g. older theatres) to experience culture, the opportunity to find out more about history including the history of the Manchester area and the opportunity to see historic collections.

Detailed information is sought both about specifics of the cultural offer and how it fits into a wider tourist offer.

- This includes information about specific performances and exhibitions. Some find famous names, e.g. artists, appealing.
- There is a need to position the cultural offer alongside other elements of a visit, such as food and drink, shopping and other things to do, to enable US visitors to understand what a trip to Greater Manchester could offer and how culture fits into the bigger picture.



Key findings from interviews with national and international travel trade

Summary of key findings from interviews with **travel trade**

Within the travel trade there is a knowledge deficit for Greater Manchester and what it stands for.

- Operators respond to requests from travel agents and others - they often have little influence.

The breadth of knowledge about Greater Manchester and its attractions is limited amongst travel trade.

- The area's plus points are acknowledged: hotels, good restaurants, shopping, youthful vibe, excellent connectivity. However there is negativity around its perceived limited visitor appeal.
- Greater Manchester's appeal tends to be defined by football, shopping, nightlife, Christmas markets and the Ship Canal.

Liverpool is cited as offering a superior tourism product.

- The Beatles story dominates, but there is recognition that its tourism assets have diversified into a broader offering. There is a strong sense that the Liverpool brand and its associations are better defined than Manchester's.

The UK's metropolitan cities aren't viewed as suitable touring hubs for many operators.

- Greater Manchester is no exception to this and few touring groups appear to stay in the city, preferring outer locations that provide convenient access to locations such as Liverpool, Chester and the Lake District.
- From an operator's perspective, there may be insufficient standout attractions in Greater Manchester to justify the time/cost/inconvenience to get into the city and out again.



Summary of key findings from interviews with **travel trade**

Booking cycles, number restrictions and lack of regular availability can work to the disadvantage of attractions.

- Many operators are working two years ahead. Those operating in the FIT (Fully Independent Travel) market need information up to a year in advance.
- Maximum number restrictions and lack of regular availability are a concern. For operators running large tour groups, these limitations may potentially make some of Greater Manchester's cultural attractions unsuitable.

Appropriate information and clarity about booking procedures is important.

- Essential elements are: availability, rates, payment terms, discounts, cancellation policy, deposits policy, credit availability, group requirements and points of contact.
- Clear and appropriate information about the offer is required. This includes brief descriptions and compelling imagery, and marketing collateral that appeals to the end user as well as intermediaries.

There is no one size fits all requirement for bundled products.

- For some operators bundled projects are essential in terms of saleability and operational convenience. For others this is of no great concern.
- A wide range of potential Greater Manchester cultural packages were presented to travel trade contacts during the interviews. Several of these were viewed as having appeal for FIT and special interest groups rather than large scheduled tours.

European markets are a more viable target than long haul for Greater Manchester's cultural offer.

- The North American market is not viewed as very culturally inclined, beyond interest in the main populist attractions. The GCC and China markets appear to offer limited scope.



International cities research

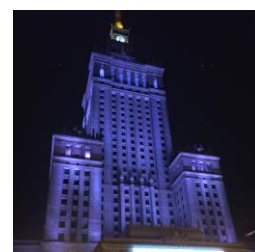
The cities

The research focused on Bilbao, Gottenburg, Chicago, Frankfurt, Melbourne, Rotterdam, Shanghai, Turin, Vancouver, Warsaw

These cities are very different in their offer, experiences and size but are:

- Successful at attracting tourists, including international tourists
- Have arts and culture as a key part of the mix

What is it that makes them successful?



5 success factors in **cities** attracting international cultural tourists

1. Places that people ‘want to inhabit’

The most intangible and difficult to implement is one of the most influential, especially for the international independent traveller.

These destinations are good at being seen as desirable places to be. This is linked to arts and culture which is seen as part of the fabric and life of these cities, making them creative contemporary places with surroundings that are distinctive and innovative. This is achieved in different ways, such as in Rotterdam with an emphasis on their regular festivals of different types that take place in a city of modern architecture or in Vancouver with its youthful feel linked to live music and going out. Vancouver, Melbourne and Frankfurt all frequently top charts as liveable cities.

With visuals and PR schemes that encourage independent travellers and recommendation sites to comment on the journeys and show the physical landscapes, they also often show the walkability between places.

In the case of itineraries, attention is also focused on what is ‘in between’ as well as the cultural nodes themselves. This also means locating cultural attractions closer together as they are in Shanghai near to the Expo site or in Rotterdam in which a children’s theatre is located on the harbour site.



5 success factors in cities attracting international cultural tourists

2. International cities with cultural connections

These cities position themselves as international cities, emphasising or making new direct cultural connections with key target markets. Many are ports and have long histories of being linked with other places in the world.

In terms of the strategies deployed, this is sometimes about exploiting existing connections such as in Warsaw, with its Jewish connections to Israel or in Vancouver, which has recent Chinese immigration (from Hong Kong). Shanghai also draws European visitors' attention to the old colonial quarters such as the 'French Concession'.

On the other hand, some cities are making direct links with international markets they are targeting, for example with Finnish artists in Melbourne, Middle Eastern museums in Turin or a Chinese dance performance in Frankfurt. These do not, by themselves, bring international tourists into the cities but they act as a focus of attention, generate attention in the countries of origin and help to develop cultural partnerships.

These links are also related to an idea of helping people to feel at home. It is a cultural tourism paradox to some extent, in that people want to discover something different and unique to that place but on the other hand many will be looking for some re-assurance that they are not in a totally alien place. Chicago's brand line 'Welcome Home' is indicative of this idea.

There is a collaborative campaign between Nordic countries and cities (including Gothenburg) called 'Chinavia' which aims specifically 'toward making Scandinavia more appealing and welcoming to Chinese travellers'. Its components include making the area 'China ready' by helping cultural organisations, hotels and other organisations to understand what Chinese tourists need and provide for them accordingly.

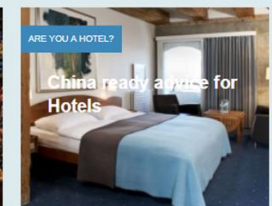
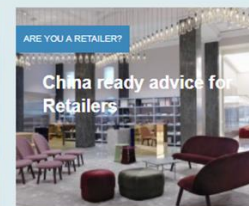


RESEARCH
Reports and Surveys

MARKET COMMUNICATION
Marketing channels and tools

CHINA KIT
Training, tools and good advice

ABOUT CHINAVIA
Who are we? and What do we do?



5 success factors in cities attracting international cultural tourists

3. Guidance is provided for different types of visitor

The cultural tourist is provided with guidance that is on their terms, with the better examples using segmentation that is based on the visitor needs and wants rather than being especially product led.

A particularly good example can be seen in the way that Chicago provides its itineraries which give people the opportunity to develop their own (www.choosechicago.com/plan-yourtrip/trip-ideas-and-itineraries/) alongside some set ones. The itineraries take in a variety of elements that mix culture with other attractions and the need for subsistence. There are undoubtedly underlying itineraries to which people are led more than others but they are based on the elements of a visit rather than purely telling people what is available.

Absolutely fundamental to the success of all these city marketing schemes are the technically well-functioning sites that enable visitors to find what it is they need with clear accurate navigation, rather than anything that is necessarily technically very complicated for the user.



5 success factors in **cities** attracting international cultural tourists

4. Connections to the wider area

An increasingly important way in which these cities are working, which is of especial relevance to Manchester, is the way in which they work as gateways to the wider region, often using arts and culture as a way of delivering the wider tourism strategy.

Bilbao is an example of a city that works in the wider region with satellite towns such as San Sebastian (which was the European Capital of Culture in 2016) with the airport in Bilbao playing a key role as a gateway to the region. In Bilbao/Basque Country, similarly with Melbourne/Victoria and Gothenburg/West Sweden, there is a regional strategy linked to government and the Destination Management Organisation with organisations working together to deliver this.

In Turin, this is currently being addressed as a specific issue, as it has struggled to persuade people to go into the wider Piedmont region until recently. Arts and culture has been used as a driver to do this, as it provides a focus around which other visit strategies can be developed. The Collisioni Festival (in Barolo) though not created to bring tourists to the area is an example of the way this is being achieved.

The image shows a screenshot of the website for 'COLLISIONI Il Festival AgriRock'. The main header features the festival's name in a bold, blue, sans-serif font. Below the header, there are navigation links for 'PROGRAMMA', 'PARTNER', 'MAPPA', 'CONTATTI', 'PHOTOGALLERY', 'PRESS', and 'CERCA'. A search icon is also present. The main content area is dominated by a large promotional image for the band Depeche Mode. The image shows three members of the band wearing sunglasses and leather jackets, standing in front of a red wall. Text on the image includes 'DEPECHE MODE', 'GLOBAL SPIRIT TOUR', 'COLLISIONI Il Festival AgriRock', '2 LUGLIO BAROLO', and '48°C 2018 30/16'. To the right of the main image, there are two smaller images: one showing a large crowd of people at night, and another showing two men, one in a white chef's uniform and one in a dark polo shirt, standing together. At the bottom of the page, there is a footer with contact information: 'PER INFO SCRIVERE A INFO@COLLISIONI.IT OPPURE CHIAMARE IL +39 329.80.49.634, pre vendita su ticketone, claieticket e nei punti vendita di Collisioni' and the Ticketmaster logo.

5 success factors in **cities** attracting international cultural tourists

5. Cultural tourism - layered and connected

Many of the cities have managed to provide an attractive tourist offer with very little tangible heritage. They generate a successful image of the modern contemporary city that is creative and forward looking. This is connected to several aspects acknowledging that even the most committed cultural tourist may want to do other things whilst there.

The activities of co-ordinating bodies like Destination Management Organisations varies a great deal but all of the cities have a successful city strategy for visitors. They are characterised by strong proactive strategies with long term aims and ways of implementing plans.

There are different views of the success of particular strategies around tourist saving schemes such as City Cards. The good ones work by being genuinely integrated across culture, transport, subsistence and other attractions and offer savings that actually make a difference. The Frankfurt City Card is a central part of the way they lead people in and is a good example of one that is well thought through, priced at a sensible rate, promoted well and offering incentives to combine different activities.

It also of course provides a good way of collecting further data from visitors and to use them as a basis for further communication and promotional initiatives.



Key opportunities

Key opportunities

- In the **UK visitor market**, building further on areas from which larger numbers of people already visit culture is likely to be successful. Areas closer to Greater Manchester offer opportunities for development of culturally-focused day trips and shorter overnight stays, in particular the North West, including Cumbria for which the pull of Greater Manchester is strong, North Wales and Yorkshire & the Humber.
- Core Audience Spectrum groups to consider and build upon in strategies to attract more UK cultural tourists are: **Comunterland Culturebuffs**, **Dormitory Dependables** and **Trips & Treats**. Their differing needs should be considered and broadly span high quality cultural offers for adults, mainstream cultural offers and family friendly offers. The **Home & Heritage** segment also provides opportunities for trips focused on daytime heritage offers, e.g. elements of the museums offer, and classical music.
- Findings demonstrate potential for further development in **Greater London**, building on the wealthy and highly engaged but discerning **Metroculturals** already visiting culture in Greater Manchester, who attend a wide cultural spectrum. Other cultural visitor hotspots in the South of England are Oxfordshire and Brighton.
- Differences in **international cultural visitors** compared to UK cultural visitors are notable and should be considered in international strategies. International visitors are younger, less likely to visit with children and more likely to visit alone. They are more discerning and less price sensitive.
- A consideration of the ways in which culture can make the most of the **peak in international visitors during the summer months** will be important. This may focus on existing and ongoing offers such as museums and galleries, as well as new developments. There may be opportunities via existing performing arts taking place each side of the summer e.g. June, early July and September.
- Internationally, there are clear opportunities for development within the **US independent traveller market**, building on a significant existing level of familiarity with Greater Manchester. Emphasising the variety of the cultural offer and different experiences, historic elements, free entry to museums and galleries, and placing culture within the context of wider itineraries are likely to be successful in the US market, as well as in other international markets.



Key opportunities

- The appeal of Greater Manchester as ‘real’ Britain came out in the US research and connects to initiatives employed by other cities in positioning them as **places people ‘want to inhabit.’** There are opportunities both in positioning Greater Manchester’s varied cultural offer as an integral part of local lifestyle which meets needs across the many different types of people in the area, and through which visitors can explore the rich social and industrial history on which the area is built.
- The movement of US visitors around UK cities points to potential opportunities in a **‘connections to the wider area’** approach, positioning the Greater Manchester cultural offer within a wider North of England offer and making connections at national level, particularly focused on the west of the country and London.
- Other international markets ripe for development outside Europe include **Australia and Canada.** There appear to be opportunities within the **Chinese** market for museums and galleries, building on current attendance, but at present the picture for performing arts is unclear, with Chinese audiences making very few direct bookings.
- Initiatives such as the South Asia Gallery at Manchester Museum offer opportunities for Greater Manchester to develop **international cultural connections.** As well as making direct cultural links for visitors to Greater Manchester, cultural connections can be used to great effect in generating PR in relevant countries. Whilst these may not directly prompt visits to Greater Manchester, they will contribute to an overall longer term process of awareness raising in countries of interest.
- The importance of **catering for different lead times for both UK and international visitors** is clear through the research, providing information and product to enable visitors to plan itineraries and book a number of months in advance, through to easily accessible cultural information for visitors during their visit to Greater Manchester.
- Focusing on developing opportunities and promotion aimed at **business travellers** may be beneficial, in particular during the peak in business visits to Greater Manchester between September and November, a busy time in the cultural calendar. This is likely to include corporate opportunities and local promotion of culture for business visitors with spare time.



Key opportunities

- Current perceptions of Greater Manchester within the **travel trade** present significant challenges. These, combined with the fact that the overwhelming majority of international visits to Greater Manchester are independent, point clearly towards the main opportunities for culture at the moment being with **independent travellers**. Where opportunities for cultural organisations to work with travel trade do exist, these are likely to be with those operating in the European FIT and special interest markets.
- Making headway with the travel trade will need to be undertaken as part of an **overall Greater Manchester wide, longer term strategy**. Focus will be on a slow building of awareness, aimed at a gradual shift in perceptions over time. The travel trade interviews identified **recent familiarisation events** run by Marketing Manchester as successful in raising awareness and these should continue with culture as a strong component.
- Over time, **actively positioning key cultural organisations and events** with the travel trade as being nationally significant, tailored to the specific markets of each travel trade operator, will help to reposition Greater Manchester's cultural offer at national level.
- In the longer term, successfully engaging a wide range of travel trade with culture, including those working with more 'mainstream' markets, will depend to a large extent on the **ability to develop offers which are genuinely suitable and sustainable**, e.g. appeal to target markets, year round availability, appropriately long lead times, suitable pricing and flexible on group size.
- In the context of these findings, there are activities specific to the current **Greater Manchester Cultural Destinations** project that might be considered. These include: **refocusing activity** of the project in particular on the **independent** travel market in the **UK** and from the **US, Australia, Canada** and key **European countries** as areas showing likelihood of the best ROI; **refining itineraries** being developed as part of the project to appeal more specifically to potential markets; **A/B testing** of itineraries and promotional plans to increase understanding of approaches most likely to be successful.
- Cultural **itineraries involving movement around Greater Manchester** may be most successfully focused on staying visitors, who are more likely than day visitors to move around the Greater Manchester area.



This research was commissioned by Marketing Manchester, the Destination Management Organisation and Tourist Board for Greater Manchester as part of the Arts Council England funded Cultural Destinations project.

For further information on research available from Marketing Manchester contact research@visitmanchester.com