

The logo consists of the words "BLUE SAIL" in a light blue sans-serif font, followed by a dark blue right-pointing arrowhead.

## GLASGOW'S TOURISM POSITIONING

### COMPARATOR CITY REVIEW – WORKING PAPER

This paper provides the detail of our review of comparator cities for the Glasgow Tourism Positioning project. Summary and conclusions are contained in the final reports.

The cities looked at were:

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In addition we undertook a thematic comparator on **music** and reviewed how 12 cities famous for their music offer have used it ... p33

## Berlin

Overview of conclusions:

- ▶ City is very large, is a capital and a reunited one at that, so need to take that into account when drawing comparisons with Glasgow
- ▶ Berlin is a world-class city that's affordable – a good aspiration for Glasgow
- ▶ “Poor but sexy” is how its hipster Berlin mayor, Klaus Wowereit, proudly describes his city – very clear positioning
- ▶ Berlin has experienced a massive growth in tourism triggered by Berlin Wall coming down. In the recession tourism was the one sector that continued to grow. International visitors represent 41% of visitors
- ▶ Berlin is a particularly attractive conference city because not expensive, has the venues and people want to visit Berlin because of its iconic history
- ▶ Top 4 reasons for a leisure visit are sights, history, atmosphere/flair and arts & culture.
- ▶ Iconic history and wider culture is a huge draw – heritage, music and events.
- ▶ The city celebrates its edgy alternative underground culture and being different but offers the ‘mainstream’ visitor experience too.
- ▶ There is an interesting inter-relationship between conference tourism (drives investment in hotels) with cultural tourism (more hotels pushes down Revpar and supports more growth in leisure visits) – Glasgow does not appear to have experienced this
- ▶ Gets over its size by making a virtue of it – explore different areas/characters of the city and plays up different modes of transport to get around. Berlin Brandenburg Airport is important leap as it will create a single very large airport serving the city and hinterland.

Area	Findings	Learning for Glasgow
Culture - built heritage, museums and gallery collections,	Ironic recent history – internationally known  WHS – use the 3 areas to provide a focus for visitors – it's the opening page	Festival of Light would be great idea for Glasgow especially if they included the river

contemporary culture esp	<p>of the VisitBerlin website.</p> <p>Is UNESCO City of Design but low profile of that status</p> <p>The Gemaldegalerie is on list of Top Museums to Visit at least once in One's life. <a href="http://www.europeanbestdestinations.com/top/best-museums-in-europe/">http://www.europeanbestdestinations.com/top/best-museums-in-europe/</a></p> <p>1 in 3 domestic visitors (outside of region) go to a cultural institution during their stay and 26% of all international visitors. Interestingly going to orchestral performance strong. Contemporary music seems less dominant as a trip motivator/activity, despite young age range of visitors.</p> <p>History and culture offer ranges mainstream to edgy underground scene. Huge numbers of galleries + big on graffiti.</p> <p>This year v.moving commemorative year looking at lost cultural diversity during Nazi rule. Wide range of institutions involved and strong focus on individual lives of people associated with the arts in that period.</p> <p>Annual Festival of Light illuminates all the landmark buildings, dresses them in light art and also giant screen of faces of people who want to represent/associate themselves with Berlin. It appears that people applied to be part of this but not entirely clear.</p>	
Sport	<p>The VisitBerlin website says 'Berlin is the place to be for sports' and research reports talk about regular large scale sports events. Nothing that jumps out as outstanding or different and doesn't come across as strongly as Glasgow on this front. Only 6% of visitors do something connected with</p>	<p>Aquatic Sports Festival - A 3-days-programme at the historic regatta course in Berlin-Grünau: classic boats, regattas, boat ballet, live music, taster sailing, rowing and canoeing, boat show,</p>

	sports during their stay (compared with 53% going to a museum or an exhibition).	used boat market etc. good use of water. River events for Glasgow?
Business tourism - in particular where it has worked well with leisure	<p>Convention tourism accounts for 1 in 4 bednights and EIA work has established the conference tourism supports growth in hotels but the massive growth in hotel/beds in the city has impacted on Revpar. Ironically that has made the city inexpensive for cultural tourism and younger visitors.</p> <p>Has been in top 5 ICCA conference capitals for 8 years and hosts nearly 150 association congresses a year.</p> <p>Growth from 72,400-115,700 events (2003-2011) and from 4.2 to 9.7 million congress visitors.</p>	Glasgow seems not to have experienced that growth, so would need to up its game on leisure front to potentially achieve that boost in investment
Positioning - city narrative - and how they deal with not having iconic attraction	<p>Edgy underground culture v. big architecture and iconic history – Berlin Wall, etc. Is UNESCO City of Design. Very confident now about their recent history and exploring and sharing it</p> <p>Themes seem strong – graffiti, light, food &amp; drink, modern art – used to help you explore city and give strong sense of huge offer available.</p> <p>City quarters are strong too – a sense you go to particular areas for particular types of experiences.</p>	City quarters and how they give/have evolved identities.
Industrial heritage and post-industrial image challenges	Part of their WHS is modern housing estates 1919-1934 built to house workers of the city in better lighter places. They seem happy to present this on their tourism website. A number of factories seem to house art galleries etc. A big push in 2012 to achieve WHS status in connection with hidden industrial heritage related to electricity and sense that Berlin is 'electric'	

	city'.	
Target markets	Appears to be international visitors plus younger/arty/edgy. Stats show 42% of overnight visitors under 40. Biggest international market is GB plus Netherlands, USA and Italy. Spain big growth market. Get US + other long haul too. Consistently in Top 10 European destinations.	
Use of Waterfronts	Lots of imagery of major buildings/urban walks along river. Backdrop rather than lead apart from their Aquatic Festival	
Gateway or hub role for hinterland esp positioning	City is v.big so this doesn't really feature. Positioned as multiple centres, different districts. Note edgy artcafes exploring and defining new areas as city culture spreads out. You get sense that if you leave the centre you'll find the interesting stuff. Also walking tours of the various neighbourhoods positioned as the way to find the 'real' Berlin.  Can be a 45 min walk between places in the city, so play up flat city for walking and cycling.  Comprehensive Berlin Travel card means you get a travel pass/discounts and a map. There are also trails graded according to whether you are a new or experienced visitor so the latter takes you further out. You can buy and plan all this online.	
Delivery & partnerships	Nothing comes out particularly.	

### Some background and context information

The tourism sector is one of **the most important economic sectors** in Berlin. The number of overnight stays has been on the rise for years, growing more than almost any other metropolis. In 2013 it grew to nearly 27 million – a record. Berlin comes in third after London and Paris and is, as Germany's largest

cultural metropolis, the most popular urban travel destination in Germany. This is made possible through the comparatively low price level: Berlin is a world-class city that's affordable.

In 2013:

- ▶ The total number of overnight stays was roughly 27 million, an increase of 8.2 % over the previous year.
- ▶ The share of foreign overnight stays amounted to 11.6 million, which is up 9.2%.
- ▶ The number of overall visitors to Berlin rose by 4.4 % to 11.32 million; also, the proportion of foreign guests rose by 5.1 % over the previous year to reach a total of 4.3 million.
- ▶ Most of Berlin's foreign visitors came from Great Britain, Italy, USA, Holland and France; the share of guests visiting from the Arab Gulf states rose by 33.6 %, from China by 21.6 % and from Russia by 21.5 % in 2013.
- ▶ In a nationwide comparison, tourism in Berlin grew twice as much and is therefore the growth engine of Germany's outbound tourism.

(Source: Berlin-Brandenburg Statistics Office (*Amt für Statistik Berlin-Brandenburg*), 2014)

Germany's 2014 earnings from business travel in 2014 add up to €10.4 billion which presents 7.5% growth compared to the gains achieved in the same period in 2013. The report expects the country's business travel to grow at 10.8% in 2015. For comparison UK had 2nd highest level of spending on business travel in Western Europe in 2013. The country took €32.9 billion, expected to go up by 6 – 8% in 2014 and 2015 respectively.

Although this is about nations, given Berlin's strong conference sector it is indicative of its strength. (Source: *GBTA BIT Outlook – Western Europe*)

Berlin Brandenburg Airport is the new international airport under construction and due to open next year, located adjacent to the current Berlin Schönefeld Airport and intended to replace both Schönefeld and Berlin Tegel Airport, to become the single commercial airport serving Berlin and the surrounding state of Brandenburg, an area with a combined 6 million inhabitants. With a projected annual passenger number of around 27 million Berlin Brandenburg Airport would become the third busiest airport in Germany, superseding Düsseldorf Airport, and one of the fifteen busiest in Europe. Air Berlin, Germanwings and EasyJet are expected to become the leading carriers, having announced the intent to relocate and keep their hub / base operations.

## Copenhagen

Overview of conclusions:

- ▶ Collaboration on market development and marketing to get a bigger reach and impact
- ▶ Brand focus on distinctiveness of Cuisine from a zero reputation to world leader – use of a Kitchen Manifesto
- ▶ Lessons on sustainability which feels embedded and meaningful and supports distinctiveness
- ▶ Public space, public life and impact of Gehl – a case study worth visiting
- ▶ Interesting Tax ideas (more for Scotland) including Brownfield land tax
- ▶ Tivoli experience and Festive celebrations
- ▶ Airline Route Development approach

Area	Findings	Learning for Glasgow
Culture - built heritage, museums and gallery collections, contemporary culture esp	<p>Copenhagen provides a full range of cultural experiences and attractions including Theatre, Opera, Music, Dance and Film. It also has wonderful open spaces including the Tivoli Gardens with its Festive production.</p> <p>Some interesting focus on film festivals including Documentary Film Festival <a href="http://cphdox.dk/en">http://cphdox.dk/en</a> in November and a feature film festival in April</p> <p>Architecture, neighbourhoods, walking/cycling all given equal prominence to attractions, shopping, nightlife, family etc.</p> <p>Use of 'The Killing' to direct tourists to film locations.</p>	<p>The quality and distinctive of their Christmas celebrations built around the Tivoli are exceptional.</p>

	<p>Viking heritage also celebrated as unique experience</p> <p>Wondercool Events Festival during Feb to drive demand off peak. Multi venue, multi discipline arts festival.</p>	
Sport	<p>Football, ice hockey and basketball are among the most popular sports in Copenhagen. Though never hosted an Olympics, Copenhagen is exploring a bid for 2024.</p> <p>In 2013 alone, Copenhagen won the World Championship in handball in 2019, World Masters Rowing 2016, and World Curling Congress. In 2013, Wonderful Copenhagen was also involved in the Canoe and Kayak Marathon World Championship at Bagsværd Sø, European Championship finals and semi-finals in Volleyball in Parken, broadcast to 160 countries, and contributed to the creation of a new, annual prestige event - Copenhagen Polo Open.</p> <p>In 2013 Copenhagen was appointed the world's seventh best sport city.</p> <p>The well-reputed research firm Sportcal is behind the list, and the good position of Copenhagen is based on the hosting of a large number of sport events from small sports to the large World Championship in road cycling race in 2011. During 2013, bids have been made for several major sport events which will be decided later. Sport events which will, in addition to turnover for the city's hotels, attractions, restaurants and retail sector, fill Copenhagen's future Super Arena, which will open in 2016.</p>	
Business tourism - in particular where it has worked well with leisure	<p>Highlights indices in innovation and sustainability where Copenhagen comes top as key selling proposition.</p> <p>Sustainability seems much more embedded and the amount of materials given over to supporting sustainable events is impressive including a specific campaign to support honey bees. <a href="http://www.copenhagenvb.com/copenhagen/how-support-bees">http://www.copenhagenvb.com/copenhagen/how-support-bees</a></p> <p>Also Denmark has developed a unique proposition regarding meeting design</p>	<p>Focus on sustainability is among the best in the world. Shows a level of commitment unmatched by any UK destination.</p> <p>Interesting focus on design also – images of well designed furniture in venues and rooms play up the Danish reputation for good design.</p>

	<p>called 'Meetovation' <a href="http://www.visitdenmark.com/denmark/meetovation-meeting-designs">http://www.visitdenmark.com/denmark/meetovation-meeting-designs</a></p> <p>Bella Center is already one of the largest purpose built facilities and has recently expanded and upgraded its offer and expanded on site accommodation. Located about 5km from the center of Copenhagen it has had a shopping center developed nearby which has increased traffic to the area. Served by a metro.</p>	
Positioning - city narrative - and how they deal with not having iconic attraction	<p>Design &amp; Architecture, Food (noma and the manifesto for the new Nordic Kitchen), Sustainability, Fairy Tales (Vikings, Little Mermaid and Royalty), LGBT.</p> <p><i>Danes are said to be the happiest people in the world, and Copenhagen the world's most liveable city. Why? Because every bit of Copenhagen is designed for life, from the buildings and architecture, the food and the water, the many bikes and the intelligent infrastructure to free education, free health care, and a society firmly focused on the life balance between work and play.</i></p> <p><i>This is Copenhagen - a city for life.</i></p>	What would a manifesto for the new Glasgow Kitchen be? How would you narrate the ambition for the city's food offer? And could it be used to generate a new interest and buzz in connecting the place to its food?
Industrial heritage and post-industrial image challenges	<p>Fishing, Shipping, Brewing and Science and Technology define most of the industrial development through the 19<sup>th</sup> and 20<sup>th</sup> century.</p> <p>As a capital city Copenhagen is also home to Government, the Civil service and the Royal Family.</p> <p>As design is so critical to the Danes, post industrial sites have been actively re-developed for commerce and housing with architecture that is both sustainable and contemporary.</p>	Mainly centred on the waterfront (see below)
Target markets	<p>Consumers from European and BRIC markets</p> <p>Press and media</p> <p>Major sporting events</p> <p>Association Conferences</p> <p>All broadly very similar to other large destinations such as Glasgow.</p>	

	Interesting focus in 2013 review on opportunities to reach new European audiences via Eurovision Song Contest.	
Use of Waterfronts	<p>Very thoughtful article that sums up the changes to Copenhagen's waterfront and the importance attached to making it a public amenity with development to generate waterfront demand.</p> <p><a href="http://www.travelandleisure.com/articles/copenhagens-waterfront-development">http://www.travelandleisure.com/articles/copenhagens-waterfront-development</a></p> <p>Yet again emphasises the importance of spaces and places at a human scale rather than dominated by cars and highlights the impact of Gehl.</p> <p>Further technical briefings on development of spaces and places for bathing</p> <p><a href="http://www.stadsbyggnad.lth.se/fileadmin/stadsbyggnad/images/student_work/Landscape_and_gardens/Kevin_Vickery.pdf">http://www.stadsbyggnad.lth.se/fileadmin/stadsbyggnad/images/student_work/Landscape_and_gardens/Kevin_Vickery.pdf</a></p>	Combination of development and regeneration, culture, human scale and landscape
Gateway or hub role for hinterland esp positioning	Relationship with Malmö and development of Öresund links have made both places more successful and created a larger economic powerhouse that competes more effectively on an international stage.	Growth through collaboration
Delivery & partnerships	<p>Partnerships for route development via 'Global Connected'</p> <p>Partnership for development of new markets such as China 'Chinavia' with Swedish and Danish destinations.</p> <p>City Break Network for partners (approx. 40) who come together to invest in developing campaigns targeting city break takers in European and long haul markets.</p>	Model for route development with a tangible marketing support offer
Other...	<p>Copenhagen uses a land value tax based system that taxes land based on their values rather than whether there is a building on the site thus resulting in speedy development of brownfield sites and an absence of vacant lots.</p> <p>37% of all local trips are by bike. Council invest 10-20m euros per annum in parking and has gradually reduced the availability of parking spaces rather than restrict car access.</p>	Get Gehl involved first hand. His influence and reputation is used by world cities.

	<p>Stroget is one of the most successful shopping streets in Europe. Designed as 'playful 'human centred' streets. Jan Gehl example.</p> <p>Excellent Urbed briefing on planning and development implications and opportunities</p> <p><a href="http://www.urbed.com/sites/default/files/Learning%20from%20Copenhagen%20and%20Malmo.pdf">http://www.urbed.com/sites/default/files/Learning%20from%20Copenhagen%20and%20Malmo.pdf</a></p> <p>Scheme 'Global Connected' established in 2010 to underpin and support route development with proactive destination marketing tools in new source markets.</p> <p><a href="http://www.visitcopenhagen.com/copenhagen/global-connected">http://www.visitcopenhagen.com/copenhagen/global-connected</a></p> <p>Review of Copenhagen <a href="http://wonderfulcopenhagenannual.dk/uk.html">http://wonderfulcopenhagenannual.dk/uk.html</a></p>	
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## DUBLIN

Overview of conclusions:

- ▶ 4m international visitors in 2013 (compares to Glasgow 2.133M staying visitors). Declined 2007-2012. Increased 2013 and in 2014 numbers are up by 9% (for Ireland). 1.3m domestic.
- ▶ Glasgow beats Dublin on the range and depth of its cultural offer, and the value for money of accommodation, and eating out
- ▶ Dublin beats Glasgow on its reputation and profile
- ▶ Areas which are interesting and may offer opportunities are:
  - The single-minded focus on two narrowly-defined segments – this guides all marketing and product development – priority given to Social Energisers and then to Culturally Curious
  - Bringing the environs of the city to be an integral part of the offer to the segments to help in repositioning and increasing appeal
  - Use of UNESCO city of literature status to promote the cultural credentials of the city – and indeed the place as – ‘city of words’ –story-telling, creativity
  - The Dubline trail as an example of visitor-focused development - linking up key sites, exposing the ‘hidden gems’ , story-telling, business involvement and securing specific interventions to improve the visitor experience
  - Focus on developing experiences to take to market
  - Saltmarket as Glasgow’s Temple Bar – independent, buzzy, drinking, eating, contemporary culture, shopping
  - Level of trade engagement including giving the trade detailed information, resources and tools on markets, products, marketing, channels etc to focus and align efforts

Area	Findings	Learning for Glasgow
Culture - built heritage, museums and gallery collections, contemporary culture esp	<p>Dublin's cultural offer is less than Glasgow's. Although a capital city and only slightly smaller than Glasgow in terms of population its infrastructure is much less in terms of architectural heritage, museums and galleries.</p> <p>Scale of the buildings, width of the streets, grandeur of the streetscapes, squares, public buildings &amp; architecture is all less in Dublin than in Glasgow.</p> <p>Contemporary culture focused on UNESCO city of literature, music and festivals.</p> <p>Make a lot of UNESCO city of literature. It has its own website <a href="http://www.dublincityofliterature.ie/">http://www.dublincityofliterature.ie/</a> as well as profile and 25+ sites highlighted on the visit Dublin site.</p> <p><i>"No other city in the world boasts such an all-pervading sense of literary heritage and creative impetus"</i></p> <p><b>Temple Bar</b> - developed as a cultural quarter in the 1980s via the TB Cultural Trust. The cultural 'offer' is now dominated by publicly supported cultural institutions, rather than the informal bohemian businesses that colonised the area nearly 30 years ago. This reflects the nature of successful regeneration but these institutions are inward facing, so visitors don't get a sense of the cultural life of the place. The other uses are bars and hotels. The</p>	<p>The scale and quality of Glasgow's built heritage – and therefore the environment of the city is a surprise to those who don't know the city. An opportunity.</p> <p>Glasgow already doing this with <a href="http://www.glasgowcityofmusic.com/">http://www.glasgowcityofmusic.com/</a> - could do more</p> <p>Similarity of Temple Bar to the Saltmarket area of Glasgow – mix of cultural venues, pubs, independent quirky retail. Could Saltmarket become Glasgow's Temple Bar with that sort of iconic status?</p>

	<p>area has developed a poor reputation for its rowdy nightlife. Over focus on a building rather than 'people and place together' approach has resulted in achieving occupied buildings but little sense of place and conflicts between different users. From a visitor perspective it lacks what you expect from a cultural quarter.</p>	
Sport	Not significant for Dublin	
Business tourism - in particular where it has worked well with leisure	<p>Business tourism is a focus for Dublin but no particular evidence of working well together – other than our assertion that a strong leisure profile will support conference tourism.</p>	
Positioning - city narrative - and how they deal with not having iconic attraction	<p>Attraction based on being capital city and the Irish reputation for warmth and charm.</p> <p>However has suffered more recently from its reputation as a 'party city' and the quality of environment in the once iconic (?) Temple Bar. Currently rebranding.</p> <p>Dublin is one of only 3 destination brands that FI is focusing on.</p> <p>Current narrative based on the city of words and stories (and nice link to chattiness of the people and literature), exciting days and happening nights, and city plus bay &amp; mountains. The focus on Social Energisers (see below) gives marketing comms a very young, hip feel.</p>	<p>Glasgow obviously going big on its people too. But what does that mean for a visitor? Friendliness, welcome, hospitality. Also need to differentiate from Irish. Sense of humour, banter, quirky?</p>
Industrial heritage and post-industrial image challenges	<p>Dublin has less industrial heritage and post-industrial challenges. It does have areas that are quite grim and more recently the impact of the recession.</p>	

Target markets	<p>Interesting work done on target markets and segments. Major research programme by Fáilte Ireland and Tourism Ireland starting in GB market to reverse the decline.</p> <p>Focus on 3 market segments, two of which are relevant to Dublin Social Energisers – young groups of friends looking for an action packed time.</p> <p>Culturally Curious – 35+ couples looking for cultural depth</p> <p>Social Energisers are main target segment for Dublin.</p> <p>Totally focused on geographic markets GB, USA, France and Germany. These are where the numbers are.</p>	<p>Research driven segmentation (but nb at national level) – and then the confidence to focus on one or two.</p>
Use of Waterfronts	The Liffey not particularly creatively used but the Bay is increasingly used to extend the offer. Dun Laoghaire positioned as Dublin's Waterfront with water based activities and the villages as destinations for good food (esp seafood) and independent retail.	
Gateway or hub role for hinterland esp positioning	<p>Bringing the hinterland to the city offer is interesting. This means Dublin is not a gateway to somewhere else but bay &amp; mountains extends the city break offer but it is focused on activities for Social Energisers so very specific and very market driven.</p> <p><i>"City's metropolitan heart beats a buzzing hipster rhythm, part of its soul is found in the natural treasures that frame the metropolis".</i></p> <p><i>"Urban pleasures with outdoor adventure"</i></p>	<p>Glasgow needs to decide whether it is a city break destination – for UK and near Europe. Or one stop on a longer visit from Europe and long haul.</p> <p>What are the target markets for each? And what is the proposition if including hinterland? Golf or a trip to Loch Lomond is not going to appeal to the Social Energiser types – or indeed the Culturally Curious.</p>
Delivery & partnerships	Visit Dublin – the promotional agency – taken into Fáilte Ireland in 2012.	Engagement with industry on leisure tourism. Private sector leadership on strategy.

	<p>Focus from FI and City Council on facilitating the industry to lead in doing things and respond to their ideas and initiatives.</p> <p>Dublin Tourism Alliance set up by FI and City Council around same time to engage with the industry in producing a tourism strategy. This has morphed into the Grow Dublin Tourism Alliance launched Nov 2014 with responsibility to deliver the strategy and an initial remit to produce a new brand for Dublin region.</p> <p>Dublin Now project developed to further that engagement and develop new experiences for Social Energisers – so have set up collaboration with hip restaurants, clubs, bloggers and media influencers, Google (who are based in Dublin) to access and set up new networks and activity.</p>	
Other	Findings	Learning for Glasgow
Experiences	Huge focus on developing 'experiences' – driven by Fáilte Ireland – very evident from the VisitDublin website with insider tips, personal recommendations, top 5s etc. And evident in their engagement with the industry programmes.	Feels like Glasgow is more about things than experiences.
The Dubline <a href="http://dubline.failteireland.ie/">http://dubline.failteireland.ie/</a>	€4 million programme. Brings together a comprehensive approach to planning, orientation, trails, public realm, interpretation, promotion and experience development. Essentially a walking heritage trail that links main attractions via interesting routes and hidden places off the beaten track. Has identified sites, hubs and paths and what intervention is required at each – public realm improvements, traffic management, interpretation etc. Various themes have been identified and these will be used in each of the planned 6 routes. 4 are being launched autumn 2014. Digital is important vehicle – apps, podcasts, video, personal views, stories, images and a 'storymap' <a href="http://dubline.storymap.ie/">http://dubline.storymap.ie/</a> all available.	Interesting approach to holistic development and marketing. Could work to link up within and between Glasgow's 'neighbourhoods' .

Trade website and resources	Very robust and extensive – reflects the priority given to major engagement programme with the trade. Lots of detailed, practical info on markets and the new segments, distribution channels etc. Digital profiles of market segments and Digital Consumer Journeys developed with Google.	Engagement and practical tools helps align messages and targeting as well as new product development.
Food	FI is running a food tourism initiative – network of ambassadors, toolkit of marketing comms resources (copy, images etc) and practical guidance on things like setting up food trails, events etc. Dublin has similar range and quality of restaurants as most cities, but it is significantly more expensive than Glasgow.	Quality and value of eating out offer is key part of visitor experience. Opportunities to make much more of this particularly with cool young chefs, owners.

### More on the Dubline

*"The Dubline will be the best way to trace the timeline of the City from its origins to the present day. Simply following the Dubline will also be the easiest way for the visitor to ensure they see the City's most popular attractions while also helping them discover many of the hidden gems along the way. It will present the story of the city in a manner which is coherent, informative and entertaining for the visitor."*

Project initiated by Fáilte Ireland in 2011 is based on premise that visitors were not getting the whole Dublin experience as they were focused solely on specific well-known sites. It is an east to west cultural axis thro the city telling the story of Dublin.

In parallel the Heritage Office at Dublin City Council had plotted, and researched the history, of an ancient highway, from Trinity College to Kilmainham Gaol which took in key locations and stopping points. The route runs south of and parallel to the River Liffey for 3.5km and takes in Dublin Castle, Guinness Storehouse and Christchurch Cathedral on the way. It has historic dimensions as well as geographic telling the story of Dublin from Viking, thro early Christian, medieval, Norman and Anglo-Irish.

A project was then articulate and outsourced to develop the idea and produce a strategy (in effect a masterplan) to develop the route. The aim was to get visitors walking around discovering the place, how it is now and its history. The strategy had to identify what wasn't working to enable this or what could

be done better. A multi-disciplinary team won the contract involving tourism specialists, architects, transport planners and engineers. The intention is also to market it as an immersive experience of Dublin.

Project managed by FI, DCC and Office for Public Works.

The team undertook widespread consultation with local interests – historians from Trinity College, academics, business people, council departments etc.

The route was plotted, with diversions from the main route to see points of interest and a series of interventions identified including traffic management, traffic calming, working with businesses/organisations to improved frontages, the experience at attractions along the route, giving access into buildings and other initiatives like food, menus, provenance etc. Also included using digital channels and platforms – apps, dynamic signage, wifi enabled etc.

FI provided a development fund for capital grant (up to 80%; and up to €200,000) for private, public and voluntary orgs along the Dubline.

Work is still in progress but a lot has been completed:

- Traffic management, speed restrictions etc
- New visitor meeting point (architectural commission)
- Extending the public bike scheme along the route
- Influencing the way marking scheme that DCC was introducing
- Public realm improvements
- B2B engagement via FI
- New interpretation and visitor management at Dublin Castle (via OPW)
- Key person in DCC is coordinating all the interventions

But still a lot to do eg signposting on the ground, produce the app etc.

New routes across the river are being planned.

## Milan

Overview of conclusions:

- ▶ Culture, industry and conferences are considered inter-related and presented together. Milan is the main Italian city for cultural business & conferences and a big financial centre.
- ▶ Historically the city was not on the tourist trail as a leisure destination but known for its conference and business tourism. That has changed over last decade and now the split is c. 60% (leisure): 40% (conference/business). They have pushed hard on the leisure side.
- ▶ Very chic, cultured, rich image – ornate large churches and baroque architecture, top designer fashion and furniture, thoroughbred horse breeding, Grand Prix – strong appeal to Arab countries as well as Russia (big push for this market)
- ▶ Milan is 2015 World Expo City
- ▶ Milan is a 1<sup>st</sup> not a 2<sup>nd</sup> city.

Area	Findings	Learning for Glasgow
Culture - built heritage, museums and gallery collections, contemporary culture esp	<p>Heritage (especially medieval and baroque churches) and art very strong and big scale. Big traditional institution museums. GAM is main large art gallery.</p> <p>Invested (post 2010) in 2 modern art galleries Museo del Novecento and Gallerie d'Italia (free and bank-owned).</p> <p>Shopping is huge (arguably not culture) but defines Milan. They have a fashion district, Monte Napoleone is one of the 15 most lux and expensive streets in the world, Corso Buenos Aires is 1.2m long with 350 shops. Also have streets/mini-quarters renown for particular types of shopping, e.g. alternative/vintage/ethnic, pop-up shops, low cost etc</p>	<p>Leading with cultural offer.</p> <p>Mini-quarters of independent shops as a complement to The Style Mile</p>

Sport	V. strong – 2 championship football teams. Big on horse racing and also horse riding, thoroughbred breeding etc. artificial lake hosts watersports, velodrome and also hold large athletic events. Monza (15 km outside Milan) is best known for its Grand Prix motor racing circuit and hosts the Formula One Italian Grand Prix.	
Business tourism - in particular where it has worked well with leisure	<p>Largest conference centre in Europe at the new CityLife district – mix of very large and smaller spaces. Milan fair is 560,000 sq m. Plus 13,000 sq m at the Expo park Around 70 big events a year held in expo spaces brings in 4m visitors and 4 billion euro.</p> <p>At international level, city famed for pharmaceutical, furniture fairs and fashion week. The latter 2 link well with cultural positioning and visitor experience, e.g. Salone del Mobile (Furniture Fair) is biggest annual event in Milan – 350,000 visitors from 160 countries, 1,270 exhibitors (open to public at weekends, 100s of exhibitions, cocktail evenings and parties (mostly free and open to all).</p> <p>Milan is hosting the World Expo in May-Oct 2015, theme 'Feeding the Planet; Energy for Life' – expecting 20m visitors from 130 countries. The Expo site (1m sq metres) is next to the Milan Trade Fair. The halls will be themed including cultural and food traditions through to food science. The site is under construction and will include botanical gardens, lakes, educational areas, meeting rooms etc.</p>	<p>Started off as successful conference destination and used as platform to develop leisure tourism</p> <p>Maximising opportunities for consumer elements to big exhibitions – B2C as well as B2B.</p>
Positioning - city narrative - and how they deal with not having iconic attraction	<p>'In Milan – out of the ordinary'</p> <p>Architecture and monuments, history and art, contemporary art.</p> <p>Chic, cultured and luxury (from their history and art through to their</p>	<p>Be clear about positioning and target markets.</p> <p>Focus</p>

	shopping).	
Industrial heritage and post-industrial image challenges	Milan is still industrial but at the high-end - furniture and fashion. They have a 'Furnishing route' because many of the furniture designer-makers have shops where you can order/buy but also contain displays of their company designs from previous era – so contemporary mini-museums.	
Target markets	'Old' Europe – Germany, France, Spain plus Russia and Gulf countries (for lux shopping and sport) and China.	Focus
Use of Waterfronts	Milan was once a navigable city like Venice. The canals are part of the bohemian part of the city, so in the top things for visitors to do and in a quieter part of city.	Use of the river
Gateway or hub role for hinterland esp positioning	They promote 'Outside Milan' (Bassa Milanese) and give bus routes to reach key destinations including Monza where there is the famous racing circuit. Generally the offer is more history – including rural industry. Seen as a day trip out.  Simple ticket system for public transport (urban and extra-urban tickets). Also have bike and car sharing schemes.	Glasgow + experiences tailored to markets
Delivery & partnerships	The Italian National Tourist Board has agreement with Russia on promoting Italy as a destination in Russia. Milan a key offer within that. Fiera Milano is the public limited company in charge of the management of the two trade fair centres in the city.	

## Vancouver

Overview of conclusions:

- ▶ Opportunities to animate and enhance public realm through sculpture and public art.
- ▶ Significance of various city indices and rankings.
- ▶ Food Festival with a difference – taking visitors to the restaurants rather than more traditional food festival.
- ▶ Collaboration with competitors where market growth makes sense. Opportunities for BRIC market?
- ▶ Bed Tax to fund growth ambitions.

Area	Findings	Learning for Glasgow
Culture - built heritage, museums and gallery collections, contemporary culture esp	<p>2008-2018 Cultural Strategy recognises key role in attracting visitors alongside liveability for residents. Themes: innovation, connecting, learning, neighbourhoods, value (economic).</p> <p>Exceptionally strong and striking public art programme that commissions and installs contemporary public art throughout the city <a href="http://vancouver.ca/parks-recreation-culture/explore-the-public-art-registries.aspx">http://vancouver.ca/parks-recreation-culture/explore-the-public-art-registries.aspx</a></p>	<p>Public Art – connects visitors to the neighbourhoods and districts of the city</p> <p>Strategy – Prominence of Culture to deliver visitors and support economy</p>
Sport	<p>Though host to the 2010 Winter Olympics, Vancouver does not show sports as a key thread of its tourism ambitions, receiving minor references in strategy and other plans.</p> <p>\$600m CAD economic benefit from hosting Winter Olympics  <a href="http://www.olympic.org/news/vancouver-2010-legacy-lives-on/167164">http://www.olympic.org/news/vancouver-2010-legacy-lives-on/167164</a></p> <p>Sell city as a sporting venue alongside their conference sales section of the website  <a href="http://www.tourismvancouver.com/includes/content/images/media/docs/Vancouver-Sport-Tourism-Brochure.pdf">http://www.tourismvancouver.com/includes/content/images/media/docs/Vancouver-Sport-Tourism-Brochure.pdf</a></p>	

Business tourism - in particular where it has worked well with leisure	Dedicated waterfront convention facility. Highly sustainable and award winning. Annual mowing of the roof. <a href="http://www.vancouverconventioncentre.com/wp-content/uploads/2013/03/QuickFacts_2013.pdf">http://www.vancouverconventioncentre.com/wp-content/uploads/2013/03/QuickFacts_2013.pdf</a> Tourism Vancouver Be A Host (Ambassador scheme) targets 350 new Ambassador leads p.a.	
Positioning - city narrative - and how they deal with not having iconic attraction	<a href="http://www.tourismvancouver.com/includes/content/images/media/docs/Be-VANCOUVER.pdf">http://www.tourismvancouver.com/includes/content/images/media/docs/Be-VANCOUVER.pdf</a> Brand Toolkit developed – strong on importance of imagery and personal interaction. Key messages: Location, Climate, Character, Lifestyle, Sport & Recreation, Cuisine, Neighbourhoods, Multicultural, Arts & Culture, VFM, Attractions, Green, Accessible. Feels as though ticking every box 'Vancouver. Spectacular by nature'.	Don't follow this example – ticking every box leads to a lack of distinctiveness. But 'spectacular by nature' hints at proximity of city to great outdoors.
Industrial heritage and post-industrial image challenges	Mainly Lumber and Port functions. Heritage and historic buildings recognised in Register and a number of civic societies support interpretation and promotion of heritage.	
Target markets	<a href="http://ticketstonight.ca/includes/content/images/media/docs/FINAL-2013-Sales-Mktg-Plan-20-Dec-12-low-res.pdf">http://ticketstonight.ca/includes/content/images/media/docs/FINAL-2013-Sales-Mktg-Plan-20-Dec-12-low-res.pdf</a> Spends \$10m p.a. on sales and marketing 12 source markets and in each a combination of consumer, trade, media and conference activity Some niche activity around Cruise Market, Association Ambassadors, Culture and Cuisine	Active in BRIC markets but mainly via Trade and Press BRIC Language options on website Interesting 17 day winter food festival <a href="http://www.dineoutvancouver.com/">http://www.dineoutvancouver.com/</a> which operates fixed price taster menus at 250 restaurants over 17 days and explicitly drives towards staying visitor generation. Established and supported by Tourism Vancouver.
Use of Waterfronts	Cruise Terminal, Conference Centre, Parks and other attractions all front the water. The City has numerous parks and gardens that line the waterfront.	
Gateway or hub role for hinterland esp	Plans do not reflect the gateway role very strongly. Ty Speer: 'better to have a bit of something than all of nothing'	Look on collaboration as opportunity to grow markets rather than divide up

positioning		current market.
Delivery & partnerships	<p>Tourism Vancouver has a number of high-level sponsors that are more engaged in high-level strategic marketing and include American Express, BC Hydro, EasyPark, Metropolitan Fine Printers, MNP Consulting, The Vancouver Sun &amp; The Province, UNIGLOBE Vision Travel Group.</p> <p>Additionally it has many hundreds of annual members with fees starting at \$578 p.a.</p>	<p>Two tier member arrangements with 'sponsor level' committed to multi-year support and investment</p>
Other...	<p>2013 Tourism Masterplan  <a href="http://www.tourismvancouver.com/includes/content/images/media/docs/TMP-Final-doc1.pdf">http://www.tourismvancouver.com/includes/content/images/media/docs/TMP-Final-doc1.pdf</a></p> <p>Highlighted rate pressure in accommodation as a barrier to accommodation growth, need to improve occupancy and yield and impact of seasonal imbalance. Also instability of funding for investment and promotion.</p> <p>Aspiration to bid for David Cup and FIFA Womens World Cup.</p> <p>Receives \$10m to fund Tourism Vancouver from 2% hotel sales tax and total budget of \$15m p.a.</p> <p>It may have moved from 1<sup>st</sup> to 3<sup>rd</sup> in the EIU Liveability Index but the ranking is still laudible with perfect scores for Culture.</p>	<p>Events to grow 1<sup>st</sup> and 4<sup>th</sup> quarter growth          Promote diversity of neighbourhoods to lengthen stay and increase repeat visits.          Use Public Art to support.</p> <p>Direct taxation opportunities</p> <p>Review the city indices and focus on areas where performance is lower.</p>

## Liverpool

Overview of conclusions:

- ▶ Turned around perception and experience from a 'basket case of a city' which was rundown and depressed into an exciting cultural city
- ▶ Music, culture, heritage, sport and waterfront are the dominant elements and European Capital of Culture 2008 was huge boost in terms of positioning, performance and confidence which the city did not let slip – the growth is unrelenting and they have ever rising ambition. Everything is benchmarked against 2008.
- ▶ 25+ years in huge capital investment – museums/galleries, shopping, roads (including sorting the physical disconnect between the city and the waterfront) and regeneration of theatres and quarters e.g. Hope St, Ropewalks, Baltic Triangle. They don't have the word 'enough'.
- ▶ Used culture very strongly both big/iconic and grassroots to project strong identity. People and local pride is a strong.

Area	Findings	Learning for Glasgow
Culture - built heritage, museums and gallery collections, contemporary culture esp	<p>Very large volume of big high profile culture backed up by grassroots arts activity. Liverpool Biennal for Contemporary Art is now well established as edgy cultural event <a href="http://www.biennial.com/">http://www.biennial.com/</a></p> <p>Iconic buildings (3 Graces) and music associations (Beatles and Cream) + Mathew St Festival (though more local following). WHS status but difficulty in making it part of visitor offer, given bigger more obvious attractions and icons</p> <p>Achieving Tate Liverpool was 1<sup>st</sup> big surprise cultural win in Liverpool and which along with transforming Albert Docks into a mini destination was Liverpool's first step in turning round the city's image (1984) but Albert Dock struggled for many years because severed from city centre by busy 6</p>	<p>Think long term. Think big. Be confident and stick with it and keep asking for money!</p> <p>Make sure you achieve blockbusters that are high profile and 'only here'.</p>

	<p>lane road.</p> <p>Outside London, Liverpool is city with highest number of National Museums &amp; Galleries – 7 (between them attracted 3m visitors in 2013) – all free. Includes National Maritime Museum and International Slavery Museum (both have strong industry stories). Tate Liverpool gets big name exhibitions (which do not go on or come from London, e.g. Picasso, Andy Warhol)</p> <p>2 main theatres (Everyman just completed total refurbishment in 2014 and redesign and already award winning). Everyman frontage has windows have outlines of local people who auditioned to have their profile in a window. Home to Liverpool Philharmonic. Lots of comedy and associations with contemporary playwrights. LIPPA (Liverpool Institute of Performing Arts). 2 cathedrals (one modern; the other used as an events venue as well as a place of worship).</p> <p>Liverpool ONE has significantly boosted the local economy and is the largest open air shopping centre in UK and the 10<sup>th</sup> largest overall. (c.25m visitors per annum) - not necessarily better than Glasgow probably on a par but a different type of experience.</p> <p>Lively evening economy – no better than Glasgow, probably less good on restaurants.</p>	<p>Interesting use of local people in the redesign of the Everyman. Liverpool very strong on its people – their friendliness, humour etc.</p>
Sport	<p>Football is v. important part of national/international brand (though not as strong as Manchester) When Liverpool plays at home the city hotels are full. Horse racing Grand National at Aintree and Haydock Park (neither in Liverpool but in city region). Also Golf (international championship courses</p>	

	on Wirral). C 3m attendances to main sports venues per annum – though of course not all visitors. Offers corporate entertaining opportunity	
Business tourism - in particular where it has worked well with leisure	Recent investment in Arena and BT Convention Centre has put Liverpool on big conference map. Works well with smaller facilities in Southport. Some rivalry but largely complementary offers and target markets/events. Not as strong as Glasgow but Liverpool is playing catch up with glossy subsidised new venue which benefits from being right beside the city centre and on the waterfront but also easily accessible by car. It works well for leisure events and business conferences and makes it easy to knit together conference and leisure activity.	
Positioning - city narrative - and how they deal with not having iconic attraction	Culture, music, heritage and sport.  They do have several iconic associations and images, so this isn't really relevant per se.	
Industrial heritage and post-industrial image challenges	A problem with UK but not international markets. Perceptions beginning to change in UK post European Capital of Culture 2008.  Industrial heritage is maritime, etc so part of core offer. Some creative use of old industrial buildings (lots of Urban Splash conversions for offices/housing – investments made in 2000s boomtime) plus some quirky use of old industrial spaces <a href="http://www.campandfurnace.com/about/">http://www.campandfurnace.com/about/</a>	
Target markets	Pushing hard on business front as traditionally a leisure destination and have mid-week capacity. Growing short UK breaks. Opening up new BRIC markets.	
Use of Waterfronts	Integral to Liverpool offer (where many of the museums and art galleries	Use River Clyde

	are located, 3 Graces, many hotels and the exhibition and convention centre). Liverpool waterfront one of top 4 most recognised waterfronts in world. Cruise tourism growing steadily, large liners can now moor in city.	
Gateway or hub role for hinterland esp positioning	Liverpool is main brand but Liverpool City Region embraces 7 neighbouring boroughs and some of their offers are badged Liverpool. Areas beyond the City Region are keen to make links where it is valuable e.g. Chester	
Delivery & partnerships	A dedicated tourism team in place for c. 30 years that covers the City Region but based in Liverpool. Partnerships have struggled to work. Lots of in-fighting and often in public.	
Hotel stock	74% growth in hotel stock in last decade – have 4,557 rooms in the city. It nearly doubles if you add the city region. Growth has largely been in the city not in the hinterland	Glasgow needs to ask why it has not achieved the same level of investment in hotels.

## Manchester

Overview of conclusions:

- ▶ Glasgow performance is stronger and better thought through in many areas.
- ▶ Salford Quays development is a successful model that may have lessons for Clydeside and Urban Splash are a thoughtful partner in urban regeneration
- ▶ Mass participation sporting events – programme them to generate bed nights. Glasgow Marathon.
- ▶ Ambitious growth targets creates a narrative for success.
- ▶ Strong political leadership sets the agenda for Westminster in relation to Cities not the other way around.

Area	Findings	Learning for Glasgow
Culture - built heritage, museums and gallery collections, contemporary culture esp	<p>Seen as lacking iconic architecture.</p> <p>Sport and Culture seen as iconic strengths.</p> <p>Development of Manchester International Festival and Museum of Football cited as examples of intent to keep improving.</p> <p>Attractions and quality of food and drink are seen as weaknesses in the current product mix with little international recognition or appeal.</p> <p>Welcome is highlighted as an ongoing area for further work with workforce skills and general approach to welcome in need of continuing work.</p>	Very little – International Festival has grown rapidly but shares some similar weaknesses with limited plans for overcoming them.
Sport	<p>Resonance of the two premier league clubs especially in long haul markets such as UAE and</p> <p>NBA Basketball and City Games also cited as examples of continued growth and innovation</p> <p>Following the Commonwealth Games in 2002, Manchester developed a major</p>	Mass participation sports have grown in strength and significance. Opportunity for further expansion in Glasgow – The Glasgow Marathon, Half, 10 mile, 10k, Tri etc.

	<p>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</p>	
Business tourism - in particular where it has worked well with leisure	<p>Currently valued at £882m to local economy it remains a key driver for future success.</p> <p>Investment in the product has improved competitiveness however the product mix does continue to present some challenges to clients in terms of exhibition, plenary and break out mix at Manchester Central.</p> <p>Up to 11000 bedrooms – want 3000 more</p>	Little learning for Glasgow
Positioning - city narrative - and how they deal with not having iconic attraction	<p>Original Modern  <a href="http://issuu.com/manchestermagazine/docs/original_modern?e=1285196/2678594">http://issuu.com/manchestermagazine/docs/original_modern?e=1285196/2678594</a></p> <p>Supposedly is about the essence of the City. But I think remains a little opaque to most. It centres on innovations, challenging convention, ambition and making a contribution and relates well to Manchester's industrial heritage and innovation. Yet its application for tourism is a little more challenging.</p>	More about ambition – clear targets for growth across a wide range of PIs
Industrial heritage and post-industrial image challenges	<p>The whole of the North West has used ERDF funding to underpin activity relating to industrial heritage <a href="http://www.modernhistory.co.uk/">http://www.modernhistory.co.uk/</a></p> <p>It remains a portal that actually just directs to generic Visitmanchester content and so with the end of the funding it appears that the theme of industrial heritage has again been relegated.</p> <p>Architecture is synonymous with industrial heritage and while there is</p>	

	contemporary architecture particularly around Salford, the city remains with distinctive and iconic architectural features.	
Target markets	<p>Europe (Germany, Scandinavia, Ireland, Spain), China, India, USA and UAE (Strategic Plan)</p> <p>Business Events, Culture and Sport (importance of external funding sources highlighted Inc. ERDF) and partnership approach to bidding</p> <p>Domestic seasonal and thematic campaigns</p> <p>Global Ambassador Project to extend reach and amplification of the Manchester message overseas</p>	Global Ambassador Programme – amplifying reach overseas as well as at home
Use of Waterfronts	<p>The Salford Quays Development has taken 40 years and continues to be developed. Early improvements to infrastructure followed by mixed use development schemes that then added cultural attractions such as the Lowry and IWM have seen employment grow from less than a thousand in the mid-80s to almost 29000 today. The next phases are largely about increasing activity and leisure uses in and around the area with more water sport, an ITU Triathlon and other cultural activity.</p> <p><a href="http://www.salford.gov.uk/d/milestones_v2.pdf">http://www.salford.gov.uk/d/milestones_v2.pdf</a></p>	Salford Quays model for Clyde. Time taken to fill in the brownfield gaps. Increasing development of leisure and sport as a way of enlivening these quieter regenerated spaces.
Gateway or hub role for hinterland esp positioning	Key role is in relation to the Greater Manchester City Region and recognition in strategy that not currently aiding dispersal as well as is needed. Some of the issues are ease of access, awareness and product development.	
Delivery & partnerships	<p>Manchester has a partnership with business and around 400 partners from across the tourism industry.</p> <p>The Board is made up of public and private sector members including those from the airport, festival, PWC, Police and ITV.</p> <p>The Global Ambassador Network is the main vehicle for developing individual relationships with Manchester advocates who can support growth in key sectors and markets.</p>	Determined political leadership with influence over Westminster. Big and strong enough to get what they want.

	Manchester has a track record of authorities working together to pool resources and effort and share strategy including around City deal.	
Other...	<p>Contemporary urban regeneration most notably undertaken through companies such as Urban Splash a Manchester company with a reputation for conversion of former industrial sites into thriving neighbourhoods and communities.</p> <p>Very nice short article that highlights the power of pop and sport to help raise awareness of places.</p> <p><a href="http://www.economist.com/blogs/blighty/2013/09/manchester">http://www.economist.com/blogs/blighty/2013/09/manchester</a></p>	Urban Splash another great urban design company with a strong reputation. A potential partner in looking at opportunities and challenges for the riverside.

## Music

For a destination to achieve stand out in music it needs 3 things:

- ▶ A strong genre/band/musician that can define what music means to the destination
- ▶ Activity that combines spectator +participation activities
- ▶ Something tangible around which to grow an experience – that could be a festival, a performance venue, an iconic musician, band, orchestra etc.

Music is a bit like sport. People are fans of a particular musician/band/genre of music just like they are a follower of a particular sport. Fans may be participants as well as spectators. Music is frequently a group activity just like sport – it is about sharing a live event that binds you with others and creates shared memories. Music is creative and requires competence, practice and talent, just like sport. Fan bases can be huge or niche but draw in other people with a passing interest as well.

If you want to breakdown music tourism experiences into different ‘things’, you can divide them into the following:

- ▶ Venues & festivals – prolific, what’s different about yours?
- ▶ Attractions, e.g. The Beatles Story, Motown Museum, Mozart’s Birthplace Museum
- ▶ Temporary exhibitions, e.g., David Bowie at the V&A
- ▶ Iconic locations and public tributes , e.g., Abbey Road, plaques and statues
- ▶ Related businesses e.g. Hard Rock Café, recording studios
- ▶ Related sectors – links to conferences by offering entertainment packages, education e.g. supporting new talent.

Overview of conclusions:

- ▶ To be a really successful in developing music as part of your visitor economy allow a lot of time – at least a decade, there are no quick fixes and you need to commit long term and get others to understand the need to do that
- ▶ Success means public agencies and institutions must work with musicians and others in the creative industries who can bring credibility, creativity, contacts and frequently a commercial perspective. All of the big music destination success stories have been achieved by collaborations between public agencies and the creative industries. If the lead musicians in a genre don't support the initiative, it will only go so far. Conversely if they do support it, they can be a powerful force for achieving something big
- ▶ If you are going for a venue or festival-led approach you also need sponsors to make a meaningful impact – sponsorship tends to come overtime when credibility is proven which is another reason for getting musicians and others from the creative sectors involved early on to help with contacts and credibility
- ▶ Build connections with education – a lot of successful music destinations have foundations that are supporting new talent and showcasing that - brings credibility and audiences and builds in longevity and sustainability.
- ▶ No destination is successful because of music generally (Ghent is possible exception); success is always specific to a type of music or an individual or band. Generic music attractions - Sheffield National Centre of Popular Music and The British Music Experience, 02 - have both shut, for example. However once you've established your music credentials around one genre you can 'top it up'/expand into other genres.
- ▶ Only Ghent seems to have done much with their title as UNESCO City of Music – perhaps because the UNESCO title is generic. It's good to have but doesn't deliver anything in itself – could be used as a hook to attract support and a reason to focus on music and make it mean something to the city
- ▶ Keep it real – grassroots venues need to grow and evolve organically to remain 'edgy' and authentic
- ▶ A small performance venue based approach works best where the venues are clustered in a street or a quarter - people know where to find the music, can move from one venue to another and it attracts other aspects of the music industry to open music shops, recording studios, production companies etc
- ▶ Take music into the city – people need to hear music happening around them if you want the city to be associated with music, e.g. Liverpool's white grand piano in the streets for the public to play
- ▶ Monetise your website once you're established – music offers lots of opportunities

Area	Findings	Learning for Glasgow
<b>Nashville, Tennessee</b>	<p>Nashville – aka Music City – lives up to its name, with record stores that host gigs, old music joints with history, and hip new venues all giving room to new and established acts <a href="http://www.theguardian.com/travel/2013/aug/17/top-10-music-venues-museums-nashville">http://www.theguardian.com/travel/2013/aug/17/top-10-music-venues-museums-nashville</a></p> <p>Music City's Hollywood-style star system has long been a magnet for aspiring performers and songwriters. But Nashville's music identity is rooted deeper, in its distinctive institutions like the Ryman Auditorium, in its Southern Baptist churches, and in downtown bars associated with the honky-tonk of Hank Williams and Kitty Wells belong.</p> <p>The music associations started in 1820s when the city got into publishing hymnals. Music Row (now several streets) is a concentration of production companies and recording studios that attracts talent because of the facilities available. The city is now home to the Country Music Association.</p> <p>The city's music associations are very strong around musicians, producers, broadcasters and rare archive of the country legends, e.g. Dolly Parton, Johnny Cash, Charley Pride, Kris Kristofferson and several hit-making contemporary stars - Kacey Musgraves, Brad Paisley</p> <p>Big annual CMA Country folk festival billed as the ultimate Folk Music Fan Festival includes the CMT Awards that honour the stars. Musicians perform for free and all profit goes to a music charity. 71,000 fans from all 50 states and 24 countries to Nashville to see 450 artists perform for more than 200 hours of concerts (2012).</p>	<p>How to connect music production and performance to attract both a business and a leisure visitor but based around a long tradition of music production from singing, bands to printing hymnals – hard to create from scratch</p>
<b>Austin, Texas – Keep Austin Weird (bumper stickers available)</b>	<p>Its music culture was built around a reputation as a place for struggling musicians to launch their careers. The city has strong punk rock associations (The Skunks, Violators) and became a tour stop off for bands such as Police and Blondie.</p>	

<p>Keep Austin Weird: A Guide to the Odd Side of Town  <a href="http://www.waterstones.com/waterstonesweb/products/red+wassenich/keep+austin+weird/5721973/">http://www.waterstones.com/waterstonesweb/products/red+wassenich/keep+austin+weird/5721973/</a></p>	<p>The Austin Music Foundation is one of several Austin groups that help independent artists further their music careers. Assisting musicians with medical needs are the Simms Foundation and Health Alliance for Austin Musicians (HAAM). Promotion, preservation and education is the mission of the Austin Blues Society, formed in 2006 by Kaz Kazanoff and other blues community notables.</p> <p>Music industry estimated to be worth \$1 billion in the city and promoted by the Austin Music Office. A department of the Austin Convention &amp; Visitors Bureau, the Austin Music Office offers creative, personalised assistance in booking live music, discounted Austin Compilation CDs and mini-guides to the city's live music scene, assistance with utilisation of live music venues for off-site events, and guidance with local music attractions and creation of music tours</p>	<p>Breadth of role and engagement of Convention &amp; Visitor Bureau provides opportunities for Glasgow.</p>
<p><b>Salzburg</b></p>	<p>Mozart's Birthplace and The Sound of Music in the hills outside the city.  Mozart's Birthplace Museum has recently added 3 new exhibitions – traditional experience around instruments, 'day in the Life of Child Prodigy' etc.  6 week Salzburg Festival is opera, drama and concert  <a href="http://www.salzburgerfestspiele.at/summer">http://www.salzburgerfestspiele.at/summer</a>  BUT 70% of 300,000 visitors to the city come because of Sound of Music – cult has built around the film. There are tours – 24 hour round clock playing of film in some hotels etc.</p>	<p>Very touristy and commercialised – not a model to copy but interesting to observe. It appears to attract lower value coach parties</p>
<p><b>Liverpool</b></p>	<p>Liverpool is a leading centre for music heritage tourism. It is estimated that The Beatles generate £70 million per year for Liverpool's economy. Beatles attractions in the city include The Beatles Story, the Cavern Club, the childhood homes of Lennon and McCartney, and Magical Mystery Tours. The strong association between The Beatles and Liverpool has spurned various music themed hotels including the Yellow Submarine Hotel and Hard Days Night hotel. In 2011, Liverpool linked up with Memphis to become 'rock and soul mates', with various attractions twinned informally. For example The Beatles</p>	<p>Interesting example of how iconic band has spurned commercial attractions and themed hotels. Demonstrates the wider economic potential   Also music twinning idea – could</p>

	<p>Story twinned with Graceland and hosted and jointly curated a temporary exhibition, Elvis &amp; Us. Non Beatles music festivals and in particular Mathew St Festival (has been criticised for having too local a focus and audience but making tourism claims for it) has grown over the last decade. The city also has the Liverpool Philharmonic but that aligned with the more mainstream cultural offer of art galleries, theatre and museums.</p>	offer potential for Glasgow?
<b>UNESCO Cities of Music – part of Creative Cities Network</b>	<p><b>Ghent, Belgium</b> (one of the early designations [2009]– as was Glasgow) – led with lots of festivals and given the status public profile around heritage of city of Ghent as being a place people passed through so that nurtured culture and creativity (arguably similar for Glasgow as port city). Refer to its ‘creative City of Music’.</p> <p>Festival of Flanders Ghent, one of the top festivals in Europe for classical music. Ghent Jazz festival, repertoire of international musicians but which also serves as a platform for young, up-and-coming talent. The International Film Festival of Flanders Ghent, which is also the only film festival worldwide which pays special attention to film music. Ghent also serves as the headquarters of the European Festival Association and the association of music festivals in Flanders. - <a href="http://www.visitgent.be/en/unesco-0?from_category=3929&amp;context=tourist#sthash.Fr0EtHA0.dpuf">http://www.visitgent.be/en/unesco-0?from_category=3929&amp;context=tourist#sthash.Fr0EtHA0.dpuf</a></p> <p><b>Seville, Spain</b> – little evidence of much going on other than flamenco, which they’ve always had of course</p> <p><b>Bologna, Italy</b> – focused more on the education/family side. Though charmingly show music venues on a map with a red quaver instead of a red dot – lovely touch.</p> <p><b>Brazzaville, Congo</b> – only achieved UNESCO accolade last year and though listed in Lonely Planet there are of course issues of safety travelling in Congo and government advice about safe areas etc, so not relevant to us</p> <p><b>Bogota, Columbia</b> – promotes its UNESCO status and the most famous Rock Festival of the continent and the most important theatre festival in the world, the Iberoamerican Theater Festival but no more strongly than the other lists of things.</p>	Only example of where a city took music as a theme and seems to have successfully developed multiple genres around a series of festivals

<b>Lorient Interceltique Festival, Brittany</b>	<p>700,000 visitors a year. Make a virtue of repeating the same format annually. Very much about and for Celtic countries.</p> <p>2002 Wales was the 'Featured Nation' and had a Pavilion designed and constructed in a square just off the main central route, in Place Paul Bert. It was very successful in attracting visitors to enquire about tourism, food and drink and Welsh culture generally. It had an outside stage where a programme of Welsh folk musicians played throughout the day. As far as the Festival was concerned it had "raised the bar for National Pavilions" and was seen as the standard for all future Pavilions in the Festival. Wales doesn't seem to have repeated that.</p>	
<b>Hamburg, rock music</b>	<p>Heyday and underground scene during 1960s. Entertainment area is in red light district in port area. Strong links with rock scene in US and GB during 50s/60s. Always quite commercial in approach. Now more mainstream and touristy. Lots of venues – doesn't seem to offer Glasgow any learning in terms of offer. Not listed in top things to do in Hamburg on Lonely Planet, though featured on things to do with some recommended venues. <a href="http://www.hamburgrocks.de/">http://www.hamburgrocks.de/</a> provides a list of every concert on. The website has equivalents for Belfast, Manchester, Barcelona, Dublin, London, Madrid (none for Glasgow). The Hamburg tourism site has listings of all the pubs, live and dance clubs and music venues with a little more about them and cost £ or ££. <a href="http://www.hamburg-travel.com/experience/nightlife/all-bars-clubs-etc./">http://www.hamburg-travel.com/experience/nightlife/all-bars-clubs-etc./</a>.</p>	<p>Is Glasgow appearing in the right places online to get out its message? Other cities seem to be selected for gig planning sites</p> <p>Is it profiling its music gig nightlife strongly and clearly?</p>
<b>Montreux, jazz</b>  The future of jazz is bright and starts in Montreux	<p>In 1967 the city of Montreux staged a music festival as part of revitalizing the city. Over the last 40 years this small music festival has become one of the most prestigious cultural events of Switzerland and ranks among the top three Jazz festivals of the world and now attracts big sponsor companies including Nestle/Nescafe (Swiss leading brands and reflects festival seen as part of Switzerland cultural identity).</p>	<p>Gold standard of how to take a music genre and make it your own and create a whole culture and industry round it.</p>

	<p>100k facebook likes/26,500 visits (at 0212140) and 54k twitter followers. Note facebook page and videos all in French</p> <p>Montreux Academy – 12 young talents from all over the world develop jazz toolkits + public events including jamming sessions, lectures, performances etc. Also jazz musician competitions. This is run by the Montreux Jazz foundation 2 which is about supporting and showcasing new jazz talent.</p> <p>Daily Chronicle (magazine with back issues available online covering detailed interviews etc). Website feels like signing up to an online community – flashbacks, great image library, jazz shop (though in French even on English version of site) + booking, information on venues, tickets etc. Festival app – you name it, they've thought of it and are doing it!</p> <p>Corporate packages available  <a href="http://www.montreuxjazzfestival.com/en/tickets/corporate-packages">http://www.montreuxjazzfestival.com/en/tickets/corporate-packages</a></p> <p>Issues around multiple venues/traffic management etc. As of 2007, the Convention Centre hosts two main stages, Auditorium Stravinski (capacity 3,500) and Miles Davis Hall (capacity 1,800), as well as the smaller Montreux Jazz Cafe, and several smaller open-air stages around the Centre. Additional themed shows (Bahia, Blues, etc.) are held on boats cruising the lake and train cars traveling the region, and various workshops and competitions are held at the nearby Montreux Palais and Le Petit Palais.</p>	
<b>Detroit, Motown</b>	Don't really make much of the Motown connections. Motown Museum (says it mostly attracts US visitors) – seems to be all there is (6th thing on a list of 10 to see in Detroit). Have an annual Jazz Festival.	
<b>Greenwich Village, NY -</b>	Greenwich Village may not be as bohemian as it was in its beatnik heyday, but it's still	

<b>jazz and hiphop</b>	home to some of the city's best old-time jazz clubs, pubs, bars, restaurants and delis. (The Guardian's view). Also good jazz venues in other parts of the city that appear on various websites. Some have feel of Irish pubs with live music. Some reference to NY jazz venues having become touristy. Little other than listings of venues for hip hop.	
<b>Paris - Festival D'Automne A Paris</b>	Since its launch in 1972, the Autumn Festival has set the standard for art-related events in Paris. With more than 50 events and over 100,000 visitors each year, the festival is an excellent opportunity for emerging artists to showcase their talent. The festival celebrates contemporary art and embraces all forms of artistic expression. Events take place from September until the end of December, and differ just as the art forms themselves; theatre, dance, sculpture and music all take part in this pursuit of experimentation and innovation. Though the programme changes every year, events always take place in some of the most iconic buildings and museums of the city, from the Orsay Museum to the Theatre des Champs Élysées. Poor and difficult to find online presence unless youa re searching specifically for the festival. For example only 6'265 likes on facebook and only 120 visits. Website no better than many similar, poor use of scoial media.	Use of iconic buildings for cultural activity.  Music + other arts – does Glasgow want to develop the arts or to develop music specifically and separately? The latter creates a stronger story to tell to sponsors, partners and audiences.
<b>Milan, opera</b>	The experience centres around one venue - La Scala (abbreviation in Italian language for the official name Teatro alla Scala) Milan's world-renowned opera house (opened 1778). The theatre is recognised as one of the leading opera and ballet theatres in the world and is home to the La Scala Theatre Chorus, La Scala Theatre Ballet and La Scala Theatre Orchestra. The theatre also has an associate school, known as the La Scala Theatre Academy, which offers professional training in music, dance, stage craft and stage management Teatre alla Scala is a foundation which has comemrcial and artistic dimensions.	Venue-led approach. Has Glasgow got a venue it can use as a springboard for developing its musical credentials?