The view from outside

PEOPLE MAKE GLASGOW
37 online & offline sources

21 external consultations

1000+ pages

29 questionnaires: 5 PRs, 17 Chamber of Commerce, International Club, 7 SDI offices

8 comparators
What the 5 PRs say ..... 

**Strengths**
People – humour, warmth
Culture – events, music, arts, architecture
Value for money
Loch Lomond

**Opportunities**
Music
Energy, vibrancy, youth
Entry point to Scotland
Hospitality

... younger demographic
... UNESCO city of music and vibrant nightlife

**Weaknesses**
Bad food
Dark, industrial, rough
Soft adventure

...edgy beauty, buzz and banter ...

**Threats**
Lack of awareness & knowledge
Distance & access

Visitors don't want to just visit Glasgow alone

rough, dangerous, dark, fried mars bars
What the 17 International Club say

**Strengths**
- History & tradition
- Culture – galleries & architecture
- Loch Lomond, Edinburgh, golf
- People
- Shopping
- Parks

**Opportunities**
- Reinvention
- Youth
- Mackintosh
- River Clyde
- Diaspora

**Weaknesses**
- Crime, drinking
- Shopping same as everywhere
- Lack of direct flights
- No specific proposition, well communicated
- No iconic attractions

**Threats**
- Lack of international status
- Can’t compete with premier league
- Awareness is of Scotland & Edinburgh
- Dominance of Ireland & Dublin
- Weather

Glasgow’s ‘brand’ … is barely visible

- fun atmosphere in the pubs, great food, friendly people
- no obvious reason to go there
- picture-perfectness of Edinburgh
- Glasgow is part of a bigger story

more direct flights has to be a priority
What 7 SDI offices say ...

**Strengths**
- Events
- Museums
- Architecture
- Shopping
- Nightlife
- People

**Opportunities**
- Proximity to Highlands
- Food

**Weaknesses**
- Rough
- No iconic attractions

**Threats**
- Weather
- Knowledge at sub-Scotland level
- Edinburgh & other competition

Glasgow is a 2nd or even 3rd tier choice
Leisure

Transformed... Energy ...Gritty ...Buzz ...Friendly ...Beautiful ...Stylish ...Indie... Culturally Rich ...

“...disarming blend of sophistication and earthiness...regenerated and evolved...one of Britain’s most intriguing metropolises...Victorian architectural legacy swamped with stylish bars and top-notch restaurants...pounding music scene is one of the best in Britain. Top-drawer museums and galleries abound ...Mackintosh sublime works ...River Clyde symbol of renaissance...” Lonely Planet
37 online and offline sources

Business

Culture — Museums, Architecture, Mackintosh, Music, Opera, Orchestra, Ballet

Essence — Lively, Vibrant, Friendly, Welcoming, Social

Professional — Partnership, GCMB, Venue Range & Flexibility, Value, Ambassadors
**Why go?**

You wouldn’t expect it to be so beautiful.

The best infrastructure and culture outside London.

People are its strength – passionate and friendly.

It is less cosmopolitan [than Edinburgh] but more honest and human.

Really vibrant and fun, genuine vibe – music, entertainment.

urban living, creative place, young, spontaneous, exciting.

Glasgow is good at bringing events which bring people to the city.

cool mix of urban and heritage – great culture old and new.
21 external consultations

Why not?

- Not clear why it’s different and what you get if you go
- far away, grimy, cold
- not top of mind for short break/city break ... needs to shout louder
- There are no icons – no memories – nothing to take away
- The Style Mile is not different enough
- safety and lack of sophistication

[other European cities] all appear slightly more ‘exotic’ than Glasgow
What’s lacking?

- It is a young cultural city – that seems to have fallen off the agenda
- Not clear whether Glasgow trying to be a short break destination or gateway to the rest of Scotland
- City not done much with UNESCO city of music badge
- One off big events fill beds for a week [and are not sufficient]
- International visitors think ‘Scotland’ not ‘Glasgow’
- Needs a warm, sexier brand
- Hospitality – there is little of great quality to shout about
- As a journalist get nothing from Scotland let alone Glasgow
- I want to ‘see it’ or experience it – people are part of that but not the only part
- One off big events fill beds for a week [and are not sufficient]

21 external consultations
What's the answer?

Glasgow needs to do a lot more to up the ante, it is way behind other UK cities in positioning its leisure offer.

In long haul and overseas markets it should be part of a 2-centre break...with Edinburgh.

City needs to exploit its museums and Rennie Mackintosh.

Play up its role as a gateway and entry point to Scotland.

Needs a strong confident council to continue to back the ambition with investment.

River is a missed opportunity.

Culture is where Glasgow needs to differentiate.

21 external consultations.
Comparator Cities

PEOPLE MAKE GLASGOW
Berlin

Snapshot

- Leads with iconic history and underground culture
- 'Poor but sexy' - how the City Mayor talks about the city
- Value for money city
- Identity of city quarters is used to help visitors find 'real' Berlin
- 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)
Berlin

Implications & Ideas

- Berlin is positioned as a world-class city that’s affordable – a good positioning for Glasgow
- A stand out Light Festival that celebrates architecture and people
- Repurpose old factories for art exhibitions & galleries
- Strong neighbourhood identities and reasons to visit e.g. art exhibition
Copenhagen

**Snapshot**

- Human scale of waterfront - creating spaces for the public
- Award winning airline route development programme with defined role for CVB in market development for new routes
- Sustainability embedded as part of modern city positioning and intrinsic to all activity
- From zero to world class in food and dining reputation due to Kitchen Manifesto and Noma
- Economic growth through collaboration with Malmo
- Influence of Gehl and ‘Public Space Public Life’ throughout the City
- Strong off-peak event development including Tivoli, Wondercool and Film Festivals
Implications & Ideas

- A kitchen manifesto for Glasgow to highlight ambition and intent
- Brownfield tax structures that ensure vacant plots get developed quickly
- Lessons on sustainability which are embedded and meaningful
- Public Space Public Life examples that can apply to Glasgow
- Airline route development focus which reduces risk for carriers
Dublin

**Snapshot**

- Focus on target market segments – Social Energisers (young, highly active, extrovert) and Culturally Curious (older couples, authenticity, depth)
- Focus on the big source markets – GB, USA, France, Germany
- Dublin City brand being refreshed to reposition city – led by private/public partnership
- Focus on developing and promoting ‘experiences’ tailored to target segments
- City plus experiences tailored to segments – market not politically driven
- Focus on food offer – working with entrepreneurs within city and in coastal villages
Dublin

Implications & Ideas

• Focus on target markets and segments to drive both comms and product (experience) development
• Temple Bar experience – lessons for Saltmarket as the ‘independent, creative neighbourhood’
• The Dubline – a holistic approach to city heritage trail linking key attractions, multi-layered interpretation and visitor management: opportunities along River Clyde
Milan

Snapshot

• Business destination first - then moved into leisure tourism
• Lead with culture - heritage, arts, design and sport
• Very clear market positioning – luxury that links different aspects of the city
• Strongly targeted international markets
• Bassa Milanese – outside Milan presented as part of the experience
Milan

Implications & Ideas

• Mini fashion quarters & streets that maximise one of their lead experiences
• Conferences that provide fringe events for general public as one way to link at business and leisure tourism
• Targeting & focus on specific (high-value) markets
• Clear offer for outside the city, e.g. Monza (15 km outside Milan) Grand Prix motor racing circuit.
Vancouver

**Snapshot**
- Culture a driver for success in the visitor economy and in EIU Global City Rankings which give Vancouver a perfect score for Culture
- Recognition that if it works well for residents it works well for the visitor economy
- Brand toolkit - strong on imagery & personal interaction between citizens and visitors
- Strong public art animating public realm and supporting distinctiveness of districts
- CVB collaboration with regional and competing destinations (Seattle & Portland) where there is an opportunity to grow markets
- Masterplans reflect challenge of increasing accommodation yield in order to secure further investment and bedstock growth
- Focus on developing 1st and 4th quarter events to build off-peak visitors eg imaginative Food Festival in Jan/Feb
- Highly sustainable convention facility with annual ‘mowing of the roof’
Vancouver

Implications & Ideas

• A refined public art programme to animate neighbourhoods and support distinctiveness and wayfinding

• Collaboration with competitors where it makes sense for example in long haul or emerging markets

• Develop the brand tools to promote the personal, individual and bespoke interactions that visitors will have with Glaswegians when visiting and let pictures do more of the ‘talking’

• Focus new event development around periods of weakest demand to achieve a better seasonal balance
Liverpool

Snapshot

- Music, culture, heritage, sport, waterfront
- Culture - iconic + grassroots to project strong identity
- People + local pride is strong – Liverpool ‘08 created huge confidence boost to city which they have sustained. Significantly repositioned the city to realise potential of infrastructure investments
- More is never enough - hugely ambitious
- Leisure tourism first; now invested heavily in conference and rising competitors for established conference venues
Liverpool

Implications & Ideas

• Lever value of cultural assets - and people – for the visitor economy
• Street music and street festivals makes music integral to the experience e.g. White grand piano in the street for public to play, classical music students busking with orchestral pieces
• Waterfront as backdrop - eg animation at night, animation of space
Manchester

**Snapshot**

- Ambitious growth targets and a strong city narrative mean that they set their sights high.
- Continued positioning as a sports city with a renewed focus on mass participation to drive bednights.
- Regeneration of Salford Quays + Media City over 30 years has created an area which is now seamless, well-connected and a destination in its own right.
- Manchester International Festival seen as a vehicle for developing culture and changing perceptions.
- Strong political leadership takes the city debate to Westminster.
Implications & Ideas

• Creative urban developers and urban development to re-invigorate post-industrial sites and brownfield land with a real focus on communities
• Making more of mass-participation events
• Strong public + industry tourism partnerships that ensure the city is listened to
Music

Snapshot from 12 cities

Critical Success Factors:

• A genre, a band or a musician to define what music means in your city
• Spectator and participation activity
• Something tangible to build an offer around – a venue, a festival, a band, an orchestra
• Strong partnership working between public sector and creative industries to deliver credibility, content, creativity, contacts and frequently a commercial perspective
Music

Implications & Ideas

• Lead with a music genre or iconic band
• Need focus and ongoing commitment to make impact
• And strong partnerships with creative sectors
• GCMB opportunity to coordinate sales, develop dedicated monetised websites,
• Twinning Glasgow with other music cities
• Look at developing the links across into learning
The Visitor Journey
Visitor Journey

Dreaming & looking

Remembering, reminiscing, repeating, recommending

Booking & planning

The journey home

The journey there

The destination experience
Conference

Looking & booking
High profile venues
Value for money
Strong city partnership
Bid support
Ambassador programme

Getting there
UAE great for long haul
Europe less competitive offer
Train routes are excellent - travelling first class

The experience
SECC excellent - feels far from city centre
City incentives needed
More bedsparse growth?

Remembering & repeating
Welcome strong
Limited recollection of Glasgow
Leisure

Dreaming, looking & booking
Lack of narrative
Unclear on target audiences
Good value destination - though travel less so

Getting there
Long rail journey
Good immediate arrival experience – rail and air

The experience
Very good cultural offer
Orientation needs more work
Under-developed opportunities to use the city assets
Scope for more animation

Remembering & repeating
Friendly people
Good experiences
Good social media messaging
So What?

PEOPLE MAKE GLASGOW
Strengths

✓ People – humour, warmth
✓ Culture – architecture, music, art, Mackintosh
✓ Events – conferences, exhibitions, sport, music
✓ Neighbourhoods – varied, lived in
✓ Investment in infrastructure – Hydro, Riverside, Kelvingrove, Burrell etc
Weaknesses

X Lack of awareness – sometimes negative perception
X Lack of connection to Scotland
X Lack of narrative and positioning
X Weak connection to source markets
X Orientation and connection within city
X Lack of iconic attraction
Areas of opportunity?

Positioning & Marketing

- Narrative for the city
- Identity for the neighbourhoods
- Target market focus
- Relationship with Scotland, Edinburgh & hinterland – presenting the offer
Areas of opportunity?

People & Place

- People Make Glasgow – what does it mean?
- Culture – the big one
- Mackintosh
- River Clyde
- Parks & open spaces - animation
- Food
- Events – programming, off-peak, participation
- Orientation
Areas of opportunity?

The next step change

- Leisure tourism
- Ambition
- Leadership
- Partnerships
Blue Sail Glasgow’s Tourism Positioning

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BLUE SAIL VISITORS PLACES DESTINATIONS