LIVERPOOL CITY REGION VISITOR ECONOMY STRATEGY TO 2020

VisitLiverpool

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The Mersey Partnership
THE OFFICIAL TOURIST BOARD FOR THE LIVERPOOL CITY REGION

L&R consulting

The independent economic model used for estimating the impact of the visitor economy changed in 2009 due to better information derived about Northwest day visitor spend and numbers. All figures used in this version of the report have been recalibrated to the new 2009 baseline. Other statistics have been updated where available. Minor adjustments to forecasts based on latest economic trends have also been included. All other information is unchanged.

VISION: A SUMMARY

It is **2020** and the Visitor Economy is now central to the regeneration of the Liverpool City Region. The Visitor Economy supports **55,000 jobs** (up from 41,000 in 2009) and an **annual visitor spend of £4.2 billion** (up from £2.8 billion).

Liverpool is now well established as one of Europe's top twenty favourite cities to visit (39th in 2008). What's more, following the success of its year as European Capital of Culture, the city continued to invest in its culture and heritage and destination marketing; its decision to use the Visitor Economy as a vehicle to address wider economic and social issues has paid dividends. Liverpool is not only one of the top five UK cities for short breaks, for conferences and for shopping and cultural visits but also one of the most popular areas in the UK in which to study, live, relocate and invest.

Annual occupancy in the city's 50 hotels is always above 70%. Large branded 4 star and budget hotels are complemented by an eclectic mix of stylish, individually designed 5 star boutique hotels, aparthotels and serviced apartments, as well as hostels catering for the international backpacker. Liverpool City Region boasts more gold and silver rated places to stay than any other comparable UK destination.

Liverpool is frequently voted one of the best places to visit in the UK due to the quality and breadth of its visitor offer.

The city is now renowned for its diverse and distinctive culture, for its iconic waterfront and World Heritage Site, and for its festival spirit. It is particularly famous for its great sporting and music events and has a reputation for being a stylish and vibrant 24 hour city; popular with couples and singles of all ages. Good food, shopping and public transport underpin that offer and the City Region is famous for its friendliness, visitor welcome, its care for the environment and its distinctive visitor quarters, built around cultural hubs. Visitors travel out to attractions and destinations in other parts of the City Region and this has extended the length of the short break and therefore increased the value and reach of tourism in the City Region.

A focus on Liverpool city centre was the key to achieving this success but other parts of the City Region have also invested in their visitor offer and extended their appeal to particular target groups. Southport, for instance, has built on its reputation as a classic resort, successfully attracting national association conferences that are looking for a resort location. It also attracts the short break market and golfers, for whom, along with the Wirral Peninsula, it provides a base to explore England's Golf Coast, the finest stretch of championship links golf in the world. Day visitors from across the Northwest and beyond enjoy the improved access and visitor facilities on the coast, particularly in Sefton and Wirral, as well as the City Region's industrial heritage product. A particularly strong draw for visitors is the renowned collection of public artworks that has developed across the City Region, epitomised by St.Helens.

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1. AIMS AND OBJECTIVES

1.1
The Northwest Regional Development Agency is tasked by the government with providing the strategic lead for tourism in the Northwest and is supported by five sub-regional Tourist Boards to which it provides core funding for both destination marketing and destination leadership and development activities. Additionally, in the Liverpool City Region, EU funding has been sourced via the NWDA to support these activities. The Agency's Tourism Strategy[1] sets out the following aims:

- Enhanced communication with the region's visitors
- Higher levels of productivity and performance from the businesses operating in the Visitor Economy
- Improved products and higher quality experiences for all of the visitors to the region
- For the people who work in the Visitor Economy to have, and to be using, improved levels of skill
- An improved infrastructure for the Visitor Economy
- For all activity related to tourism and the Visitor Economy to be based on the principles of sustainable development

1.2
The objectives of this strategy are aligned with these aims:

- To provide high quality experiences for all visitors to the City Region by investing in our public realm, transport, visitor information, interpretation and destination welcome
- To invest public and private funds to improve the range and quality of places to stay, places to eat and places to visit, continuing to improve our conference, exhibition and cultural venues and attracting major events to the City Region
- To encourage higher productivity and improved sector performance by working with clusters of businesses to improve the quality of their operations and sharing best practice
- To promote the Visitor Economy as a first choice career and to address skills gaps in the hospitality workforce including management and leadership, customer service and chefing
- To develop the Visitor Economy in a sustainable and responsible way to minimise potential negative impacts and maximise benefits for local businesses and residents
- To promote the City Region through a clear understanding of our destination brands, lead themes and target markets

2. ABOUT THIS STRATEGY

2.1
This is a Visitor Economy strategy for the Liverpool City Region to 2020 and follows on from the previous 'Vision 2015' strategy, The Liverpool City Region: Winning Tourism for England's North West. It provides a framework to help achieve our vision. It will help all stakeholders with a responsibility or interest in tourism and the Visitor Economy to prioritise activity and as a result work together effectively to optimise the performance of tourism as a key economic sector for the City Region.

2.2
The City Region produces an annual Destination Management Plan (DMP) that sets out a rolling three year programme of tourism priorities and actions. This strategy provides a framework for that activity. It creates a longer term view and offers a wider perspective that can help prioritise more immediate action.

2.3
Local District tourism plans are produced by Liverpool City Council (in preparation) and the local authorities of Sefton, St.Helens, Wirral and Halton (in preparation). These provide more detailed action plans for those specific Districts and complement this overarching strategy.

[1] The Strategy for Tourism in England's Northwest 2003-2010
Northwest Regional Development Agency – Revised 2007

2.4
Liverpool First (Liverpool's Local Strategic Partnership) has recently published its own vision for Liverpool 2024: A thriving international city, outlining the city's ambition's over the next 15 years and providing a context for driving forward culture and the Visitor Economy.

2.5
The strategy takes its lead from the phenomenal success of Liverpool as the European Capital of Culture 2008. There were an estimated 15 million visits to cultural events and attractions during 2008[2] with nearly a quarter of all visitors to the city making their first ever visit to Liverpool. Total economic impact is estimated at £800 million. Staying visitor nights to Liverpool from elsewhere in the UK increased by 28%[3] during the year (against a backdrop of a small decline in nights in the UK as a whole) and Liverpool is now ranked at 86th in the world for convention business, up from 150th[4] the previous year. It leaves no doubt that Liverpool is a premier European destination. Liverpool is the lead brand for the City Region with the capability of growing the size of the overall visitor market in the Northwest. It is the destination where the greatest economic added value to the City Region can be achieved.

2.6
Liverpool's renaissance illustrates the role that culture can play alongside other investment as a driver for regeneration. In the five years to 2008, the City Region has made substantial progress in improving both the quality of the destination offer and its reputation. This is particularly true of Liverpool city centre but also true of many other parts of the sub region. Most flagship investments have been delivered or are on track for delivery. Many other developments have helped to establish real critical mass and quality in the offer of the city and more widely.

2.7
The challenge for the future is to sustain and build on this success and recognise that, notwithstanding progress to date, there remains much to do. Liverpool particularly needs to improve its performance as a short break destination for UK visitors. It is currently 10th[5] amongst English cities in attracting UK visitors in contrast to its position as 6th[6] amongst UK cities in attracting overseas visitors. The European Capital of Culture 2008 award has played an important role in turning around out-dated images of the city and it will be important to carry through the opportunities this presents. There is a need for further investment in the visitor experience – the quality of the public realm, the range and choice of things to see and do and places to stay, and the quality of the events and connectivity across all of the City Region to enable both Liverpool and surrounding destinations and attractions to work effectively together.

2.8
The strategy recognises the importance of the people who work within the sector and the role they play in providing a quality experience for the visitor. Nationally[7], skills priorities are identified as management and leadership, customer service and chefing and these, along with destination awareness and language skills, remain the focus for Liverpool City Region for the foreseeable future. At the same time, the Visitor Economy's image and role as an employer and employment generator is still underplayed. The new industry focused diplomas[8] for young people offer the opportunity for tourism and hospitality businesses to present themselves in a new light to their future workforce.

2.9
The Visitor Economy is now recognised as a driver for regeneration within the City Region and so has an important role to play in delivering the quality of life agenda and realising inward investment. The recently signed Multi Area Agreement[9] covering all the Boroughs that make up the Liverpool City Region sets out a series of unique proposals to support the delivery of improvements in the economic and social prospects of communities, residents and businesses. A focus on Culture and the Visitor Economy is one of four transformational actions that will deliver a step change in the economy of

[2] Liverpool Culture Company [3] United Kingdom Tourism Survey, VisitBritain June 2009 [4] ICCA rankings – Apr2009 [5] United Kingdom Tourism Survey – Top Towns 2006-2008 [6] International Passenger Survey 2005-2007 [7] National Skills Strategy for the Hospitality, Leisure, Travel and Tourism Sector in England – People 1st 2007 [8] Review of National Qualifications Framework and the Introduction of 14-19 Diplomas - 2009 [9] Liverpool City Region Multi Area Agreement – June 2009

the Liverpool City Region. The Visitor Economy is about creating and managing distinctive places that are good locations to live, work, invest and visit. Tourism is a key to unlocking potential. It has a vital role to play in place making and is therefore particularly important for those parts of the City Region undergoing significant regeneration. There needs to be close working between tourism and infrastructure investment at a City Region level to make this happen.

2.10
The City Region is not homogenous and contains a wide variety of experiences with different target markets. There is a need to make sense of this from a consumer perspective and deliver fewer but clearer messages to different markets at the right point in the customer journey.

2.11
The success of this strategy is reliant on the City Region ensuring there are effective stakeholder partnerships in place to deliver development, management and marketing activity and to support businesses to help them achieve their potential. Importantly, stakeholders need to work together in clusters at a strategic and delivery level to ensure a joined up response to delivering an excellent visitor experience across the whole of the City Region. This is crucial given that public funding, which has underpinned much investment in the Visitor Economy to date, is diminishing and new funding models are required to continue progress made to date.

3. THE IMPORTANCE OF THE VISITOR ECONOMY

3.1
The Visitor Economy makes a significant direct contribution to the economy of the City Region through visitor spend. This spend creates demand for new and additional services that lead to the creation and growth of small businesses. It also helps support employment in the City Region across a wide range of sectors that deliver services to visitors and also to tourism businesses.

3.2
The tourism industry in the Liverpool City Region is estimated to be worth £2.8 billion in visitor spend[10]. Liverpool and Southport[11] account for the lion's share of that, together representing an estimated 78% of the tourism spend and a similar percentage share of overnight stays. A recent separate study undertaken for the Northwest estimates that leisure short breaks alone are worth £420m to the City Region[12]. Some 5m trips are made for business purposes each year[13].

3.3
Tourism spend supports 41,000[14] jobs. Recent extensive investments in the retail experience in Liverpool, the opening of new hotels and visitor attractions together with the planned expansion of Liverpool John Lennon Airport with a projected increase to 12.3 million passengers over the next 20 years, suggest that these figures will grow further in the immediate future. The City Region is on track to create an additional 14,000 jobs by 2020.

3.4
The Visitor Economy also helps sustain demand for cultural, sports and leisure facilities that improve the quality of life for people living in the region. It can support the care and management of historic and natural environments. At a local level, tourism can be used as a focus for regeneration and can help sustain the viability and vitality of local services such as shops, cafes, pubs, local museums and leisure facilities.

3.5
By focusing on the Visitor Economy and its ability to create exceptional places within the City Region, this strategy maintains that many of the wider social, environmental and economic goals of the City Region can also be achieved. The emerging new Regional Strategy for the Northwest which brings together for the first time spatial and economic planning, provides a platform to spell out this wider significance of the Visitor Economy in areas such as:

- Innovation and entrepreneurship – the Visitor Economy offers a broad range of business start up opportunities for a wide variety of people
- A wide body of knowledge and expertise exists within the sector – through the private and public sectors, Tourist Boards, Regional Development Agency
- Business Link and the Higher Educational Institutions - this helps maximise the contribution of the Visitor Economy to the broader economy
- Sustainable economic growth is founded on the longevity of the core culture and heritage assets of the region
- Connectivity and transport linkages
- The spin–off benefits to other sectors and inward investment of further raising the profile of the region
- Improvements to health, wellbeing and sense of civic pride through participation and volunteering in culture, sporting and heritage activities
- Entry level employment opportunities provided by the Visitor Economy for disadvantaged communities
- Supply chain benefits through a concentration on local sourcing

4. KEY DRIVERS AND TRENDS

This is a strategy to 2020. It is helpful to look at what trends tell us about how the future might look to help inform long term planning.

4.1
The trend in visitors taking short-breaks is predicted to continue, driven to a large extent by city and cultural breaks and influenced by the experience economy which, in turn, is driven by the desire for the real, the distinctive and the personal.

4.2
Competition will remain fierce between UK destinations to get their slice of this market, particularly the higher spending sections of it. European destinations that are considered easy to get to, safe to visit and which have regular budget flights from London and regional airports will remain key competitors for city breaks. Britain as an established destination will continue to appeal to the US and European markets and will attract its share of visitors for the emerging BRIC[15] markets as well.

4.3
Future scenarios suggest that the knowledge economy and the creative industries will be important drivers for successful economies. Indeed investment in these sectors is already recognised and underway. These drivers will be underlined by the quest for an improved quality of life and for personal fulfilment. A focus on the local and on re-energising communities will seek to counter a corporate world and the global economy.

4.4
Festivals, events and spectator sports have an important role to play in satisfying these needs and provide an opportunity for visitors to become part of a community and join the 'tribe'; sharing an experience with like minded people. It will be important for the Liverpool City Region to capitalise on its strong festivals and spectator sports offer and to develop that further.

4.5
Trends also point towards an increasingly demanding consumer. This means ensuring the visitor experience meets and exceeds expectations, provides opportunities to explore, learn and, importantly, the potential to personalise a visit; to experience a unique moment. Some visitors are increasingly aware of their environmental footprint and may demand services that are procured in an environmentally responsible manner. Good customer service and well maintained destinations and facilities are expected; they are a baseline, not a selling point.

4.6
Destinations have to respond to all these demands in equal measure to meet and exceed visitor expectations. That is a hard balance to achieve with ever increasing expectations of service and facilities set within a well designed and well managed environment and frequently against a back drop of diminishing resources.

[10] STEAM 2009 [11] Includes all of Sefton Borough in which Southport is the main destination with a concentration of visitor accommodation [12] England's Northwest Staying Visitor Survey, 2007-8, Northwest Development Agency
[13] Business Tourism to the Northwest, 2008, Northwest Development Agency [14] STEAM 2009

[15] Brazil, Russia, India, China

4.7
The growth in booking short breaks and planning holidays online provides opportunities and challenges for the industry to respond creatively and quickly to the potential of digital communication. Marketing must speak to the individual and in a noisy, competitive marketplace achieving the distinctive is increasingly challenging.

4.8
This strategy responds to these trends by clearly identifying the main destinations, markets and themes that communicate the key experiences the City Region offers. This should help prioritise investment for the stakeholders working within it.

4.9
At the same time the strategy recognises the need to accommodate the opportunities for visitors to personalise their trip, to explore and become part of the community. It provides for this by highlighting the need to identify and invest in distinctive quarters, festivals and activities.

5. ACCESS, PLACE MAKING AND PLACE MANAGEMENT

5.1
Access to a destination is a crucial element of the visitor experience and Liverpool City Region is well served by a variety of road, rail, water and air-based access points. As a City Region we need to continue to invest in improving access to and movement around our region. Specifically, the completion of the Edge Lane corridor core arterial route into the city centre and the Mersey Gateway in Halton are priorities for the Visitor Economy. Liverpool's improved rail connections with London have received an additional boost with the potential for a West Coast high speed rail link significantly reducing the future journey time from London. This could enhance opportunities for attracting longer haul markets to Liverpool who currently just visit the capital. Improved rail connections to Southport from the North would also enhance the resort's business and leisure market opportunities.

Growth in European short breaks to Liverpool has mirrored the growth in low-cost airline routes to Liverpool John Lennon Airport. Future growth of the Visitor Economy will benefit from the Airport's continued physical expansion (to accommodate a potential 12.3 million passengers by 2030) and its success in attracting new long haul routes especially from the US as well as strengthening links with established routes into Manchester International Airport.

Liverpool is generally well served by internal public transport links but visitors would undoubtedly benefit from improved circulation resulting from major schemes such as Mersey tram.

5.2
The role of access points as gateways to the destination cannot be underestimated as very often they form the visitor's first impression. Icons such as the Runcorn-Widnes Bridge to the South and Jaume Plensa's *Dream* alongside the M62, combined with the increasingly popular canal network - linking directly into Albert Dock from the North, provide just a few examples of how high quality public realm at gateway arrival and access points can enhance the visitor experience and present a sense of 'arrival'.

5.3
Great destinations are about places that are designed and managed to reflect the shared aspirations and values of all their stakeholders and which present a very clear proposition to visitors and deliver a consistent experience. These principles are evident in the quality of design of buildings and public spaces, in the visible commitment to supporting culture and creativity and in the commitment to promoting excellence of welcome, service and customer relationships including guides and Tourist Information Centres.

5.4
Equally, these principles can be applied to the creation and good management of distinctive quarters with a strong sense of identity. This requires careful development and management of all the underpinning aspects of the destinations in the City Region that are essential to achieving an excellent visitor experience.

These include the retail offer, the food and drink experience and festivals and events. It also includes the hygiene factors; the details that complete the experience and which are part of good visitor management and include the management of public spaces, toilets and car parking, clear and consistent signage, and good public transport both to and within the destination.

5.5
The City Region will create a mosaic of distinctive quarters, prioritising investment in them to help drive new and additional visitors. This requires a holistic approach to recognising that it is the combination of investment in the public realm, in providing businesses with the environment and support to excel, the delivery of good information and a vibrant environment to a consistent quality that meets and exceeds expectations that is the recipe for success. Not only should the quality match expectations but investment needs to take place in a way that underlines the sense of place; responses should be creative not corporate. There is a significant role for local authorities, as guardians of the planning and development process, to assist in the implementation of this and to work closely with the Visitor Economy to foster this approach within development proposals.

5.6
Within Liverpool the key early areas for focus are Liverpool Waterfront, the World Heritage Site, Hope Street, The Ropewalks and the Cavern Quarter; each quarter is reaching a point in its destination life cycle where there are opportunities to refresh, re-brand and reinvest to attract visitors. These areas are using a product/market matrix to help inform thinking on investment priorities. This model may be of value to others. In due course other areas will be added including the Baltic Quarter and Chinatown.

5.7
In Southport key areas for focus will be Lord Street (experience retail & emerging cultural offer, including the Cultural Centre); the seafront offer (Kings Gardens and Marine Park); West Street (diversifying and uplifting the evening economy); Market Street and Market Hall (nurturing creative industries).

5.8
Elsewhere in the City Region initial priorities for investment in the quality of the visitor experience and in presentation and management will be the coastline of the Wirral Peninsula and Sefton, West Kirby, Port Sunlight, Prescot and St.Helens town centre, building on the cultural hub of George Street.

5.9
Stakeholders will use master plans and key regeneration plans for sites and areas as routes to deliver leisure investment and help ensure specific visitor needs are clearly articulated and taken on board. This approach will help embed tourism more strongly within the economy and within place making and regeneration.

5.10
Integral to a place shaping and placement approach is ensuring that every stage of the visitor journey meets and exceeds expectations.

This will require ongoing analysis of gaps in both the quality and range of the visitor offer in comparison to competitor destinations.

5.11
Hotel investment is a good barometer of the success of the Visitor Economy. The City Region's hotel offer has grown exponentially with the number of hotel rooms virtually doubling in the last decade. In the city centre the number of rooms has increased from 1500 in 1998 to over 4,000 at the end of 2009. The pipeline of hotel developer intent remains strong and the City Region will seek to attract those brands and accommodation styles that complement its conference, culture and heritage offer.

Preliminary research commissioned by TMP[16] indicates continuing strong demand for 3 star and budget accommodation in Liverpool over the next decade, scope for further innovation and boutique brands (including 5 star) and, post 2012, further 4 star hotel potential. The actual number of rooms required will depend on the rate of economic growth the City Region experiences. Outside of Liverpool there are also opportunities for 3 star and budget accommodation and in selected locations opportunities for 4 star, possibly 5 star (e.g. Wirral Waters) and boutique operations (e.g. West Kirby and Southport).

There is also huge untapped demand for at least one high quality Caravan Club touring caravan site close to Liverpool.

The strategy is to continue to develop the City Region's accommodation offer in line with growing demand so that a minimum annual occupancy of 70% for all businesses is achieved, room yield continues to grow thus enabling re-investment and continuous quality improvement. Recognition of the quality of places to stay will be evidenced by a growing number of businesses achieving gold and silver awards and other regional, national and international recognition (see Appendix C for hotel growth projection).

6. THE RATIONALE

6.1
What is distinctive about the Liverpool City Region is the concentration of culture and heritage within Liverpool which extends to other parts of the City Region. Liverpool has the highest concentration of cultural and heritage venues in a UK city outside of London. Traditionally, Liverpool's culture was perceived to be about its association with The Beatles, football and its maritime heritage – these remain important icons for the city but its reputation as a European Cultural Capital now complements and broadens that appeal. This provides huge potential for the city as a destination but also creates an opportunity for cultural and heritage attractions elsewhere in the City Region to punch above their weight.

6.2
Culture is recognised as a critical component of the continued economic and social renaissance of the Northwest region and a critical mass and excellence in culture are essential prerequisites for a competitive region. The Liverpool City Region has an important contribution to make to that agenda recognising that investment in culture is investment in the economy, in GVA, in jobs and in the community.

6.3
Investment in public art, in cultural, music, food and drink, and heritage festivals, and in sporting events as well as in cultural institutions and sports facilities, means that culture and heritage is embedded in the experience; it is what defines the sense of place in Liverpool City Region. It is the tourism DNA of the City Region.

6.4
This investment needs to be continued but importantly backed up by ensuring that all aspects of the visitor experience meet the same challenging levels of quality and creativity and contribute to creating distinctive places that reinforce these cultural and heritage credentials and meet the needs of future market priorities.

6.5
Much of what makes the City Region visually distinctive is its waterfront or seafront location. Of course, only a strip of the City Region is actually on a waterfront or by the sea but it is frequently these locations that present strong differentiated destinations with associated visitor development opportunities. The iconic waterfront of Liverpool with its changing skyline is recognised the world over; the £4.5bn transformation of Wirral's waterfront through the Wirral Waters project will create a world-class destination on the opposite bank of the river. The classic resort of Southport and the rural coast of the Wirral Peninsula and Sefton offer a contrasting but equally high quality waterfront offer. Landmarks such as the River Mersey, the Royal Liver Building, Mersey Ferries and the Gormley sculptures reinforce the iconic status of the City Region's waterfront.

[16] Hotel Futures 2009

6.6
It makes economic and promotional good sense to play to these strengths. Therefore the strategy focuses on developing these two assets – Liverpool and the City Region's coast and waterfront - to realise the potential of the Visitor Economy of Liverpool City Region.

6.7
These assets will be complemented by placing a strong focus on the conference sector which offers significant international and national top tier opportunities for Liverpool and also nationally for Southport, capitalising on recent investment in world class facilities. Together these are the assets that have the strongest potential to grow the overall size of the market in the Northwest.

6.8
Market intelligence for short breaks in the Northwest[17] demonstrates that most destinations are in competition with each other to become the visitor's destination of choice. Therefore it is important to continue to lead with the strong destination brand of Liverpool, to support this by capitalising on specific opportunities for the resort of Southport and to strengthen dispersal activity to ensure the whole of the City Region optimises the economic opportunities of the Visitor Economy.

6.9
The profile of staying visitors in Liverpool is younger and more cosmopolitan than traditional city destinations such as London and Edinburgh. At the same time the concentration of cultural assets means it performs well in the markets looking for high quality museums and cultural attractions. Liverpool is therefore well placed to target the three high spend markets - Cosmopolitans, Style Hounds and Traditionals[18].

6.10
Cosmopolitan and Traditional markets are independent minded and that provides the Liverpool City Region with a particular opportunity to increase the proportion of shortbreak visitors to Liverpool exploring the City Region more widely during their stay. Cosmopolitans in particular are early adopters and willing to try out new experiences. However they are also sophisticated well-travelled markets with corresponding expectations of quality.

6.11
The Northwest is a large region stretching to the borders of Scotland in the north, to Wales in the west and to the West Midlands to the east. People living in the Northwest are an important source of day visits and people also travel within the region for an overnight stay. These shorter regional overnight stays are important for all destinations but especially those that are looking to raise and grow their profile as places to visit, work and invest. Like all visits the quality and type of experience must meet the needs of target audiences to succeed and ensure visitors are delighted by their experience.

6.12
Conversely, Liverpool in particular, is in a strong position to act as an international gateway to other areas of the Northwest, potentially performing the role of a touring centre for onward journeys to the Lake District and other areas of the Northwest and beyond. The Wirral Peninsula sits between the two attack brands of Liverpool and Chester and draws on visitors to both cities whilst St.Helens, Knowsley and Halton sit at the heart of the Northwest motorway network with locational advantages that can pull in leisure and business travellers to both Manchester and Liverpool.

6.13
There is a need to recognise the important role of day visitors in generating spend in the region and therefore providing year round support for the vitality of tourism businesses and the wider Visitor Economy[19]. Day visitors have the choice to travel outside the region for their leisure days out. The range and quality of the visitor attractions, leisure, retail and eating out experiences in the Liverpool City Region must aim to encourage more day visits to take place in the Northwest. Families are important markets for day visitors and there needs to be further investment in family friendly facilities across the City Region if we are to extend our market reach.

[17] England's Northwest Visitor Survey, 2007-08 [18] See Appendix B for definitions and more information on these market segments
[19] Over half of all jobs supported by tourism in the Northwest are dependent upon spending by day visitors - Draft report: Understanding Tourism's Economic Impact – Regeneris Consulting - Apr 09

6.14
The City Region performs strongly in the day visitor market and needs to strengthen that position. The recent Day Visitor Survey for the Northwest shows that a day visitor to the Liverpool City Region has travelled further and stays marginally longer than a day visitor to other parts of the region. They are attracted principally by the range and quality of the museums, galleries and other attractions and for spectator sports. This reinforces the importance of culture as a key driver across all markets. Day visits driven by cultural activities such as a visit to the theatre or to a visitor attraction are higher spend visits too. The City Region's coastal and rural offer also adds a further significant attraction for day visitors seeking a less urban-based experience.

6.15
Shopping is an activity undertaken across all visitor markets, across all ages and for most types of visit. For day visits it can be a key driver, main activity and principal area of spend. The significant investment in the shopping experience at Liverpool ONE has ensured the city is placed to compete with the best in the region. Further investment in distinctive city quarters such as Ropewalks will complement the mainstream with the unusual and unique to deliver the quality and choice of shopping 21st century visitors expect from a major international city. Shopping will continue to be a driver for regional day visitors to the city and also to Southport, particularly the specialist shopping in and around Lord Street.

6.16
The success of a market-led approach is reliant on each part of the City Region being clear about which of its cultural assets best meets the quality and experience needs of different target markets and then undertaking appropriate investment in destinations to enable them to fully participate in relevant City Region marketing activity. Each area will invest in improving their product and experiences to maximise the opportunities drawing on the good regional market intelligence about the needs of target market segments to inform this process.

7. THE MARKETING APPROACH

LIVERPOOL+
=
CULTURE+

7.1
There is one lead destination brand for the Liverpool City Region and that is

- Liverpool

7.2
Two further destination brands have considerably smaller but nonetheless significant resonance with the out of region consumer

- Southport
- England's Golf Coast

7.3
The City Region will optimise its impacts from the Visitor Economy by focusing its investment and particularly marketing effort to support those three destination brands in proportion to their potential impact.

7.4
Thematically, investment and marketing will be optimised by focusing on the two key themes of

- Culture and heritage
- Conference tourism

7.5
The thematic approach will be evident in destination marketing activity led by the Tourist Board. It will lead with the key theme assets such as the leading cultural institutions in Liverpool, the World Heritage Site, ACCLiverpool, Southport Theatre and Convention Centre but will connect with the wider City Region offer through marketing collateral and visitor information.

7.6
This strategy is clearly recommending an approach that:

Focuses on activity that will expand the size of the overall visitor market in the Northwest - and not just recycle existing visitors or increase market share at the expense of other Northwest destinations - in this way the greatest economic added value will be achieved.

Leads with Liverpool – recognising that recent investment in the city's Visitor Economy has consolidated its position as a major European cultural destination.

Recognises the distinct and specific destination opportunities of Southport and capitalises on the investment that has taken place in the resort. Where it makes good market sense links with Liverpool will be strengthened.

Maximises the potential of the events and product in the rest of the City Region in areas where there are specific acknowledged strengths.

7.7
At the same time the strategy

Values the role of the day visitor in delivering and sustaining visitor destinations, in creating year round demand for interesting and varied products and retaining visitor spend in the Northwest. Key locations with more to offer the day visitor market include the coastline of Sefton and the Wirral Peninsula – particularly New Brighton and West Kirby, Port Sunlight, St.Helens and specific individual attractions throughout the City Region, including attractions in both Knowsley and Halton. In addition, both Liverpool's retail offer and the cruise liner terminal add to the city's appeal to attract day visitors.

Recommends investment in the total visitor experience and in raising the quality across all of the City Region to enable key destinations to achieve their tourism potential. It acknowledges the role that locations outside of the City Centre can play in developing a sense of arrival through interesting gateway features such as Jaume Plensa's *Dream* at Sutton Manor by the M62 in St.Helens, but also recognises that consistently high quality public realm throughout the destination is essential to the visitor experience.

Proposes to streamline marketing activity that puts out fewer but stronger messages to target markets – to deliver an improved return on investment, following through marketing and promotional activity and making effective use of limited resources.

Values and invests in market intelligence that is robust and consistent to inform decision-making, measure progress and evaluate success.

7.8
The priorities and actions for the strategy are designed to be market-led and customer facing. That means stakeholders putting the customer at the heart of decision-making and prioritising action.

8. THE LEISURE MARKET

8.1
Liverpool City Region will deliver the strategy through a destination and theme approach. It will lead with and focus resources on the premier brand of Liverpool and with the inter-related theme of culture and heritage. It will also capitalise on the particular opportunities presented by the Classic Resort of Southport and England's Golf Coast.

8.2
It is important to understand the real drivers behind new additional leisure visits to the region. There are just a handful of destinations or attractions and events in the City Region that in their own right are powerful enough to drive new leisure business to the area, as illustrated on the following page:

DRIVERS OF SIGNIFICANT[20] NEW LEISURE VISITORS TO LIVERPOOL CITY REGION				
	INTERNATIONAL	UK OVERNIGHT	REGIONAL DAY	LOCAL DAY
Liverpool	Yes	Yes	Yes	Yes
Southport	No	Yes	Yes	Yes
England's Golf coast	Yes	Yes	Yes	Yes
Port Sunlight and West Kirby	No	Yes	Yes	Yes
Wirral and Sefton coast	No	Potentially	Yes	Yes
New Brighton, Crosby, George Street, St.Helens	No	Potentially	Yes	Yes
Selected attractions and events	A small number of Beatles, sport and cultural events and attractions	A small number of sport and cultural attractions	Yes	Yes
Other attractions and events	No	No	Yes	Yes

8.3
Visitors often have multiple motivations for visiting a destination and clearly it is the total experience of an area that makes it really attractive to the first time visitor. The above table does illustrate however the need to focus on those brands and themes that will attract new, additional overnight visitors to the area in marketing communications. Other attractions and places tend to deepen and broaden the visitor experience and overall appeal to target markets, playing an important role in the Visitor Economy as well as generating visitors primarily from the Northwest region.

8.4 LEAD WITH LIVERPOOL

Liverpool will continue to capitalise on its culture targeting the international and national city break markets. The objectives are:

To strengthen the city's position as a short break destination with higher value UK markets – Liverpool will use its culture and heritage to continue to change perceptions of the city. The appeal of Liverpool to younger people and the powerful draw of the City Region's culture and heritage means it is well placed to target the three high spend markets, Cosmopolitans, Style Hounds and Traditionals. It will target younger singles and couples of all ages in London and the South East, where there is a concentration of these markets. The needs and expectations of these markets will inform destination investment priorities.

Furthermore, there are opportunities to convert business tourists attending conferences in the city to extend their stay for leisure purposes; similarly cruise passengers once Liverpool has secured its turnaround cruise port status.

To become a primary short break destination for international visitors and secure its position in the top five UK towns and cities visited by visitors from overseas – Liverpool holds a strong position in the league table for international visits but it needs to work hard to sustain that in the face of stiff competition that is investing strongly in new product and in leisure marketing. We will target the European markets arriving at gateways to the UK, taking particular advantage of the expansion of destinations served by the North West's airports. Initial focus will be on Ireland, Spain and the Netherlands but most European countries with direct air links to the Northwest have potential. It will also target the long haul markets of US and Japan. In the longer term, it will investigate the potential of emerging long haul markets such as Brazil, Russia China and India.

To use Liverpool to drive additional visitors to other parts of the City Region - The City Region will undertake marketing that responds to the independence of spirit of the Cosmopolitan and Traditional markets and in a way that encourages these visitors to explore the City Region further during their stay and targeting experiences that can meet market expectation. This will help increase dispersal of visitors from Liverpool to other parts of the sub region.

[20] 'Significant' means tens of thousands of general leisure visitors attracted by the destination in its own right and does not include visitors attracted by specific events or sporting opportunities

To deliver an excellent destination experience that exceeds expectations to strengthen the competitive positioning of Liverpool in the marketplace – Liverpool will invest in its arrival points and gateways and will continue to drive up standards of customer service and destination management to ensure that they consistently reach and exceed expectations for a premier league city. The Liverpool Waterfront and the World Heritage Site are critically important in this respect and world class standards need to be set and maintained. Investment in creating a mosaic of distinctive zones that are well-designed and maintained, with coherent and consistent signage connecting them, will help deliver a legible city that visitors can find their way around easily and safely; clear about the personality and experience to be found in the different quarters.

8.5 CULTURE AND HERITAGE

The total cultural and heritage offer of the City Region will be presented to target international and UK short break markets in a way that takes a powerful message in the marketplace and has impact. Marketing will recognise and use the distinctive strands of culture in the Liverpool City Region effectively but understand that the real power of the cultural and heritage offer and its point of differentiation is the collective impact of all the strands.

The culture of the City Region is very wide ranging. It embraces visual and performing arts; classical and contemporary culture. It is manifest in the architecture (historic and modern), music, maritime and industrial heritage, World Heritage Site status of the city, national galleries, specialist museums and arts centres, sporting venues and associations, public art installations and events and festivals. Arguably no other City Region outside of London can compete with the cultural offer of Liverpool City Region.

Within that culture and heritage mix there are a strong set of icons that range across The Beatles and Cream to the Tate, National Museums Liverpool, Royal Liverpool Philharmonic Orchestra, Liverpool cathedrals and Port Sunlight. The City Region will use its icons as shorthand to convey messages about the range and quality of its culture and heritage.

The key objectives are:

To place cultural experiences and events as central themes for short break marketing – responding to regional market intelligence that says these are key drivers for visits to Liverpool from UK audiences. Heritage also remains one of the top two drivers of visits to Britain from overseas markets and is important for the emerging BRIC[21] markets too. Therefore, the culture and heritage of Liverpool will be used as the destination sell for international marketing.

To develop creative programming around annual themes to provide coherence to the offer – strengthening the proposition for audiences, providing reasons to visit, stay longer and come back again. To facilitate this approach the City Region Visitor Economy stakeholders will build effective relationships with cultural organisations to help them secure investment to develop our prime cultural assets and stage blockbuster exhibitions (such as NML's Titanic and Tate's Picasso) and performances. Also to drive a co-ordinated approach to programming that makes best use of resources and adds value to the investment of individual establishments and venues. Liverpool City Council will take the lead on developing the thematic story each year building on relevant anniversaries and ensuring connectivity with cultural partners. There will be opportunities to extend the thematic across the City Region.

To optimise the opportunities of the very strong cluster of high profile spectator sport venues – by developing added value packages and special experiences at venues outside of the main sports season when there is capacity to do so. These packages will target leisure and corporate visitors and help to diversify the sport cultural offer, playing to the strength of key brands and events including Liverpool Football Club, Everton Football Club, the Echo Arena, Aintree, Haydock Park and both St.Helens Saints and Widnes Vikings rugby league clubs, in order to maximise the capacity of the venues and their facilities throughout the year.

[21] Brazil, Russia, India, China

3 BEAT RECORDS · 20 FORTHLIN ROAD · 3345 PARR STREET · A FOUNDATION · ADELPHI HOTEL · ADRIAN HENRI · AFRICA OYÉ · AINTREE RACECOURSE · ALAN BLEASDALE · ALBERT DOCK · ANFIELD · ANOTHER PLACE BY ANTONY GORMLEY · THE ATHENAEUM · ATKINSON ART GALLERY · BALTIC QUARTER · **THE BEATLES** · BEATLES STORY · BERYL BAINBRIDGE · BIDSTON HILL WINDMILL · BILL KENRIGHT · BILL SHANKLY · BILLY FURY · BIRKENHEAD PARK · BIRKENHEAD PRIORY · BLACKBURNE HOUSE · THE BLACKIE · THE BLUECOAT · BOTANIC GARDENS MUSEUM · THE BRIDGEWATER CANAL · BRIMSTAGE HALL COURTYARD · THE BRINDLEY · BRITISH LAWNMOWER MUSEUM · BROMBOROUGH GOLF CLUB · BROUHAHA · CALDERSTONES PARK · CALDY GOLF CLUB · CARLA LANE · CASBAH COFFEE CLUB · CAST · CATALYST SCIENCE AND DISCOVERY CENTRE · CAVERN CLUB · CAVERN QUARTER · CERI HAND GALLERY · CHAMPIONS LEAGUE · CHAPTER & VERSE LITERATURE FESTIVAL · CHINATOWN · CHINESE NEW YEAR FESTIVAL · CHURCHTOWN · THE CITADEL · THE CORAL · CORNERSTONE · CREAM · CREAMFIELDS · CROXTETH HALL · THE CULTURAL QUARTER · CUNARD BUILDING · DADAFEST · DAN DARE · DARESBURY VILLAGE · DAVID MORRISSEY · DIXIE DEAN · DOT ART · DREAM BY JAUME PLENSA · ECHO AND THE BUNNYMEN · **ECHO ARENA** · EVERTON FC · ELVIS COSTELLO · ERIC'S · **EVERYMAN THEATRE** · EUROPEAN CAPITAL OF CULTURE · FAB 4D · FACT · FIELD FOR THE BRITISH ISLES BY ANTONY GORMLEY · FLORAL PAVILION · FOR YOU BY TRACEY EMIN · FORMBY GOLF CLUB · FORT PERCH ROCK · FOUR CORNERS · FRANKIE GOES TO HOLLYWOOD · GARLANDS · GEORGIAN QUARTER · GEORGE HARRISON · GEORGE STREET QUARTER · GOSTINS GALLERY · GERRY AND THE PACEMAKERS · THE GRAPES · GUSTAF ADOLF SWEDISH CHURCH · HAMILTON SQUARE · HARD DAYS NIGHT GALLERY · HAYDOCK PARK RACECOURSE · HERITAGE OPEN DAYS · HESKETH GOLF CLUB · HILBRE ISLANDS · HILLSIDE GOLF CLUB · HOMOTOPIA · HOPE STREET · HUB FESTIVAL · INDIA BUILDINGS · INTERNATIONAL BEATLES WEEK · INTERNATIONAL SLAVERY MUSEUM · ISLA GLADSTONE CONSERVATORY · JACARANDA · JIMMY MCGOVERN · JOHN LENNON · JOHN SMITH'S GRAND NATIONAL · KNOWSLEY HALL · LADY LEVER ART GALLERY · LEASOWE LIGHTHOUSE · LEEDS-LIVERPOOL CANAL · LEVEL ONE ART GALLERY · LEWIS CARROLL · LIME STREET STATION · LION TAVERN · LIPA · LIVER BUILDING · LIVERPOOL ACADEMY OF ARTS · LIVERPOOL ARABIC FESTIVAL · LIVERPOOL BIENNIAL · **LIVERPOOL CATHEDRAL** · LIVERPOOL COMEDY FESTIVAL · LIVERPOOL ECHO · LIVERPOOL EMPIRE THEATRE · LIVERPOOL FOOD AND DRINK FESTIVAL · **LIVERPOOL FC** · LIVERPOOL INTERNATIONAL TENNIS TOURNAMENT · LIVERPOOL IRISH FESTIVAL · LIVERPOOL LIGHTHOUSE · LIVERPOOL LITERARY FESTIVAL · **LIVERPOOL METROPOLITAN CATHEDRAL** · LIVERPOOL MUSIC WEEK · LIVERPOOL TOWN HALL · **LIVERPOOL WATERFRONT** · LORD STREET · MAGICAL MYSTERY TOUR · MALCOLM LOWRY · MATHEW STREET FESTIVAL · MATHEW STREET FRINGE · THE MCGANNS · MENDIPS · MEOLS HALL · MERSEY FERRIES · MERSEY TUNNEL TOURS · MERSEYSIDE MARITIME MUSEUM · MR HARDMAN'S PHOTOGRAPHIC STUDIO · MUSEUM OF LIVERPOOL · NATIONAL CONSERVATION CENTRE · **NATIONAL MUSEUMS LIVERPOOL** · NATIONAL WILDFLOWER CENTRE · NEPTUNE THEATRE · NESS BOTANIC GARDENS · NORTHWEST RACING MASTERS · NORTH WEST ROAD TRANSPORT MUSEUM · NORTH WEST VINTAGE RALLY · NORTON PRIORY · NOVAS CONTEMPORARY URBAN CENTRE · OPEN EYE GALLERY · PACIFIC ROAD ARTS CENTRE · PAUL MCCARTNEY · PENELOPE BY JORGE PARDO · PENNY LANE · PHIL REDMOND · PHILHARMONIC HALL · THE PHILHARMONIC PUB · THE PIER HEAD · PLAYHOUSE THEATRE · PORT OF LIVERPOOL BUILDING · PORT SUNLIGHT VILLAGE · PRESCOT MUSEUM · PRINCES ROAD SYNAGOGUE · RADIO CITY TOWER · RAINHILL TRIALS · RED RUM · REDWIRE · RINGO STARR · RIVER MERSEY · ROGER MCGOUGH · ROMAN STANDARD BY TRACEY EMIN · ROPEWALKS · ROYAL BIRKDALE · ROYAL COURT THEATRE · ROYAL LIVERPOOL GOLF CLUB · **ROYAL LIVERPOOL PHILHARMONIC ORCHESTRA** · RUNCORN WIDNES BRIDGE · SANKEY VIADUCT · SEFTON PARK PALM HOUSE · SIR SIMON RATTLE · SOUTHPORT AIRSHOW · SOUTHPORT AND AINSDALE GOLF CLUB · SOUTHPORT ARTS CENTRE · SOUTHPORT COMEDY FESTIVAL · SOUTHPORT FOOD AND DRINK FESTIVAL · SOUTHPORT FLOWER SHOW · SOUTHPORT JAZZ FESTIVAL · SOUTHPORT PIER · SOUTHPORT THEATRE · SPACEPORT · SPEKE HALL · ST. GEORGE'S HALL · ST.HELENS RFC · ST.HELENS CAMRA BEER, CIDER AND PIE FESTIVAL · ST.HELENS COMEDY WEEK · ST.HELENS MUSIC FESTIVAL · STANLEY DOCK · STANLEY PARK · STEVEN GERRARD · SUDLEY HOUSE · SUMMER CLASSICS – MUSIC IN THE PARK · SUMMER POPS FESTIVAL · SUPER LAMB BANANA BY TARO CHIEZO · **TATE LIVERPOOL** · TERENCE DAVIES · SIR THOMAS BEECHAM · THREE GRACES · TRANMERE ROVERS · TURNING THE PLACE OVER BY RICHARD WILSON · U-BOAT STORY · **UNESCO WORLD HERITAGE SITE** · UNITY THEATRE · VASILY PETRENKO · VICTORIA GALLERY AND MUSEUM · VIEW TWO GALLERY · WALLASEY GOLF CLUB · WALKER ART GALLERY · WAVERTREE LOCK UP · WAYFARERS ARCADE · WEST LANCASHIRE GOLF CLUB · WESTERN APPROACHES MUSEUM · THE WHITE STAR · WIDNES VIKINGS RFC · WILLIAM BROWN STREET · WILLIAMSON ART GALLERY · WILLIAMSON TUNNELS HERITAGE CENTRE · WILLY RUSSELL · WIRRAL COUNTRY PARK · WIRRAL FOLK FESTIVAL · WIRRAL FOOD AND DRINK FESTIVAL · WIRRAL HISTORIC VEHICLE RALLY · WIRRAL INTERNATIONAL GUITAR FESTIVAL · WIRRAL TRAMWAY AND TRANSPORT MUSEUM · WORLD MUSEUM LIVERPOOL · WORLD OF GLASS · WRITING ON THE WALL · YOU'LL NEVER WALK ALONE · Z CARS

To use the natural and industrial heritage of the region, in particular the rural stretches of the coast, to provide a supporting and additional strand to the culture and heritage of the City Region - they present opportunities to target day visitors and regional overnight stays, recognising that the natural and industrial heritage of the City Region's coast and countryside offers an interesting contrast and complementary offer to the urban experience and is part of the wider positioning of the City Region as a place to live, visit and invest. The opportunities to develop a strong cultural product in these areas through public art installations have already been demonstrated through Antony Gormley's 'Another Place' in Crosby and Jaume Plensa's *Dream* at Sutton Manor in St.Helens. Trails can extend beyond the Liverpool City Region into the wider Northwest region.

8.6 SOUTHPORT

Southport will continue to invest, deliver and capitalise on its classic resort position for regional leisure visitors (day and overnight stays), for niche markets and, over time, for UK short-breaks. It will also strive to further enhance its positioning as a national resort offer for business visitors targeting high value destination conferences and exploiting the exhibitions market.

Key objectives are:

To strengthen and consolidate the visitor offer for regional Cosmopolitans visitors – the initial focus will be Lord Street. This will include working with businesses to deliver a distinctive specialist retail area to a consistent quality that helps strengthen the Classic Resort and Lord Street brand. To back this up in the longer term, the resort will capitalise on Lord Street's unique sense of place by creating opportunities for high quality cultural experiences that will add breadth and diversity to the product offer whilst enabling it to compete more effectively with other Northwest visitor destinations such as Chester.

To make more of the nightlife offer of Southport – targeting regional Style Hounds through better targeted marketing and promotion, in conjunction with related product development within the night time economy.

To realise a new family leisure entertainment centre on the seafront – to help retain existing markets and attract new ones by presenting a facility that responds to the quality and experience needs of the 21st century family visitor. The facility will also act as the catalyst for the ongoing development of the seafront. This will build on the distinctive heritage of Southport and create seamless linkages to the town centre.

To capitalise on Southport's major events programme – the Southport Flower Show and Southport Air Show are key attractors of day and short break visitor markets to the City Region. Southport will prioritise developing the potential of these and other events, such as the Southport International Jazz Festival and the Southport Food & Drink Festival to help realise the ambition of England's Classic Resort by ensuring these events are truly of regional significance.

8.7 ENGLAND'S GOLF COAST

The City Region will continue to prioritise attracting international golfing events and visitors and promoting England's Golf Coast for golfing holidays and short breaks, particularly building on the world class links golf available. By building on success to date and capitalising on the international profile opportunities that golfing tournaments present to put the City Region on the world's media map including using the championship courses of the Royal Birkdale and Royal Liverpool as standard bearers for the quality of the offer. The potential for the development of a major golf resort at Hoylake is also acknowledged.

England's Golf Coast is a specific and strong theme within international and national markets. It has a specialist and spatial identity. It requires dedicated specialist marketing but also needs to be included where and as appropriate within mainstream marketing.

The City Region will use the positive quality of life associations of golf to underpin regeneration and inward investment messages and set standards for management of the public realm to ensure a high quality visitor experience that also delivers a quality environment for people living and working along the coast.

8.8 DAY VISITORS

The City Region will focus marketing activity on the higher spend target markets of Cosmopolitans, Style Hounds and Traditionals because this reinforces messages within these target audiences. However, individual destinations may want to extend their promotional activity to other markets reflecting particular opportunities. This approach recognises the diversity of the City Region, is an appropriate and cost effective approach for day trip activity and provides opportunities for parts of the City Region to work together on specific campaigns where it is cost effective to do so.

The City Region will ensure it continues to performs strongly in the day visitor market and improve visitor spend by:

Broadening the day visitor catchment for major events and festivals – currently City Region festivals do not draw strongly on day visits from outside the local catchment[22]. The European Capital of Culture 2008 began to change that trend and future promotion will ensure a regional as well as a national marketing reach for major festivals and events.

Packaging and presenting the visitor experience to day visitors in a way that helps drive up spend - overall day visitor spend per trip lags behind some other parts of the Northwest[23]. A key push will be to increase the number of day trips and their associated spend using targeted marketing activity, particularly to coach operators and plugging gaps in the visitor experience where they occur. The approach is to present a package of activities for a day out to target markets that bring together different products and experiences, whilst seeking to drive up secondary spend via, for example, retail and catering opportunities. The main international cruise operators will also be targeted to capitalise on the city's investment in cruise facilities and cruise tourism success to date.

9. FESTIVALS AND EVENTS

The City Region will focus on major events and festivals that build on the success of 2008 and on major sporting and cultural opportunities.

9.1
Bidding for events (PR and image led) – winning major international and national events and conferences that bring significant and powerful PR opportunities to Liverpool City Region and which reinforce the positioning of the City Region as a cultural, heritage, waterfront and sports region. There will be a focus on major international events but also events that reinforce the diversity of the cultural offer, including music, the visual and performing arts, classical and contemporary culture etc.

9.2
Cultural and Sporting Events (drivers for visitors) – the City Region will focus on those events, exhibitions and festivals with the potential to draw on international and national markets and where there is capacity (creative and physical) to develop them further. This will be delivered through innovative programming in the City Region and will support the major cultural institutions to deliver this. The City of Liverpool will also capitalise on the opportunities to host and facilitate major festivals including the development of a limited number of blockbuster festivals that will create landmarks along the City Region timeline to 2020 including the Titanic Centenary in 2012 and music festivals.

9.3
Better packaging and cross-selling of events and festivals is also required. In particular there are opportunities to encourage extended stays by promoting the events and festivals programme to different markets such as conference delegates.

9.4
England's Golf Coast has contributed towards the continued success of Royal Birkdale and Royal Liverpool in attracting international golfing championships and will continue to target those major events in the golfing calendar. The 2013 Rugby League World Cup and the 2015 Rugby Union World Cup also offer opportunities for the City Region. In the immediate term the London 2012 Olympics offers opportunities for the City Region to develop overseas linkages through the hosting of training camps, whilst in the longer-term benefitting from the opportunities for global exposure offered by the Olympics themselves and access to London by rail in particular.

9.5
Stakeholders will work together to ensure that strategic and operational structures are in place to bid, manage and market festivals and events effectively through a Major Events Group that brings together the key partners to ensure a streamlined approach. This will require the development of a focused Events Strategy setting out research parameters, the bidding process and with an overall vision aligned to this Visitor Economy strategy.

10. THE CONFERENCE MARKET

The Liverpool City Region will present the market with its two strong conference destination offers in Liverpool and Southport. Both will build on their investment in venue facilities, accommodation and infrastructure to grow their profile in the marketplace and achieve significant growth in events and delegate visitors.

10.1 LIVERPOOL CONFERENCE VISION

In just two years, Liverpool has become a serious player in the convention market with the opening of ACCLiverpool attracting conferences such as the TUC in 2009, the Lib Dems in 2010 and the Labour Party in 2011. The challenge now is to establish Liverpool as a global conference destination building on established international brands to deliver a world-class visitor experience with business tourism contributing to economic success. Liverpool will become an ICCA top 50 international destination and be recognised in the UK industry as a top five destination which delivers a compelling experience for meetings and events. The key asset of the BT Convention Centre will be communicated strongly, but the city's strength in depth in terms of its sheer diversity of secondary and complementary venues, which in themselves can help to secure an event, will also be demonstrated.

That success will include Liverpool being recognised as a leading UK event destination for a broad cross section of conferences; from a small scale meeting to an international association conference attracting thousands of delegates.

There is potential for Liverpool to attract a larger share of the exhibitions market with an extension to exhibition space currently offered at ACCLiverpool. The City Region will actively target conferences and trade events of 2-3 days duration that need delegate accommodation because these events deliver greater economic benefits. Liverpool will target the following three categories of event and conference to the City:

Political and governmental events – party conferences, Intergovernmental conferences

High profile events – media/branded large scale events, e.g. sports events, MTV awards

Large conferences which offer strategic connections and opportunities – both corporate and association:

- Corporate – e.g. AGMs, sales conferences
- Public sector – e.g. health, local government conferences
- Association – across all sectors and professions working closely with the universities to identify the sectors and professions offering the strongest synergies with the city and which support the knowledge economy

10.2 SOUTHPORT CONFERENCE VISION

To develop a sustainable market proposition using England's Classic Resort appeal to market a conference destination experience that attracts national association, trade union and public sector agency conferences. The key asset of Southport Theatre and Convention Centre will form the lead message in marketing communications.

The aim will be to build on the Southport conference product by retaining primary target markets including destination conferences but also introduce additional markets to the destination over time that will sustain and complement the improved facilities and hotel accommodation. This improved product will also enable Southport to expand the range of activities that it is able to attract to include new exhibitions and festivals.

[22] Northwest Day Visitor Survey, Final Results, Northwest Development Agency, September 2008
[23] though it is acknowledged that free entry to many of Liverpool's attractions plays a role in this.

10.3
Overall, the objectives across the City Region for conference tourism are:

To invest in building Liverpool as a conference city for the benefit of the whole of the City Region - using the city's cultural and waterfront collateral to differentiate the city in the conference marketplace recognising Liverpool as the hub for the City Region. The whole of the City Region will benefit from this approach through the ripple effect it has on hotel occupancy and the opportunities it offers the whole of the City Region for ancillary activity, secondary venues, corporate entertainment, delegate trips and partner programmes. To be successful the primary focus of marketing activity will be on Liverpool and its outstanding conference offer.

To target conferences that are related to industries and sectors that are strong in the City Region and which are linked to sub-regional investment priorities - including conferences and exhibitions related to culture and heritage. This approach will help grow the value of business tourism and increase its GVA contribution to the economy of the Liverpool City Region. It will contribute to raising the profile of the City Region for inward investment and as a place to do business.

To raise the profile of Liverpool and Southport in the conference market to increase the City Region's share of this sector in the UK - this approach will directly benefit venues outside of Liverpool and Southport by introducing them to more and new potential markets that would not otherwise be available to them. A differentiated approach to the marketing of the Southport offer as a conference destination is acknowledged as the way forward. This cannot be effectively achieved as an 'add-on' to the Liverpool message.

To explore new ways of driving business to other venues across the Liverpool City Region - recognising that there are a significant number of venues within the City Region capable of attracting business through their own unique attributes, be it for example, a location close to a motorway e.g. Haydock Park, or the heritage or aesthetic appeal of the venue itself e.g. Knowsley Hall or New Brighton Floral Pavilion. For these venues most such business will be regionally sourced.

To ensure a world-class comprehensive conference service through the Liverpool Convention Bureau - that is capable of optimising opportunity and selling all of the offer. This will focus not only on attracting conferences to the area but also ensuring that destination welcome services ensure a seamless and enjoyable experience both for the conference organiser and the delegate.

11. DELIVERING THE STRATEGY

11.1
This strategy is deliberately high level and does not detail the who, how and when of delivery. This will be detailed in local tourism strategies and action plans produced by local authority partners plus the annual Destination Management Plan (DMP) which sets out a 3 year rolling programme of activity which underpins the delivery of the strategy. It will also report on progress to date. The Mersey Partnership (TMP) and its partners in the Visitor Economy will also work with Government to produce an action plan based on the strategy as part of the Multi Area Agreement.

No single agency can be responsible for delivery. It will require concerted effort by all public and private stakeholders to address the issues and opportunities outlined.

11.2
TMP, as the Tourist Board for Liverpool City Region will monitor progress on the strategy and report to stakeholders through the new governance arrangements that are being put into place.

11.3
The Visitor Economy Panel and Committee will take responsibility for developing an Action Plan to drive forward the sector in the short to medium term. This will also address funding issues at a time when there will be diminishing public funding to support the sector. The private sector, local authorities, Merseytravel, North West Regional Development Agency, cultural institutions plus many more partners will pool resources, where appropriate, to effectively drive forward the Visitor Economy to achieve the vision for 2020.

APPENDIX A:
A FUTURE SCENARIO FOR THE LIVERPOOL CITY REGION

It is 2020 and the Visitor Economy is now central to the regeneration of the Liverpool City Region. The Visitor Economy supports 55,000 jobs (up from 41,000) and an annual visitor spend of £4.2 billion (up from £2.8 billion).

Liverpool is now well established as one of Europe's top 20 favourite cities to visit. It is also one of the top five UK cities for short breaks, for conferences and for retail and cultural visits.

Occupancy in the city's 50 hotels outstrips the competition and the city is frequently in the top three of some of the most prestigious consumer awards like Condé Nast Traveller.

Liverpool is now renowned for its diverse and distinctive culture, for its waterfront, for its heritage and for its festival spirit. It has a reputation for being a stylish and vibrant 24 hour city; popular with couples and singles of all ages. Good food and good shopping underpin that offer and the City Region is famous for its friendliness and visitor welcome.

Liverpool is deservedly known as having one of the world's most stunning and recognisable waterfronts, successfully blending iconic contemporary buildings such as the Museum of Liverpool and further exhibition extensions to the BT Convention Centre with historic dockland buildings that now have new leisure and commercial uses. A digital led approach to the animation of the waterfront means visitors have a personalised interactive experience with the past, present and future. A number of new 4 and 5 star hotels on both sides of the river are evidence of the commitment to quality of place and design. A commitment that is shared by all waterfront stakeholders. The physical transformation of the waterfront continues apace with construction now on-site at Wirral Waters and Liverpool Waters with an exciting mixed use of commercial, leisure and residential developments.

Liverpool's success as a cruise port of call is now complemented by a healthy turnaround cruise business with thousands of visitors starting and finishing their cruises in the City.

The cultural offer of Liverpool City Region has always been one of its strengths but it was the European Capital of Culture that kick started a new way of developing, managing and promoting culture. This means that the City Region's cultural offer is now the pride of the region, a significant contributor to regional GVA and, of course, a driver of visitors from the rest of the UK and all over the world. Liverpool has become the definitive European cultural capital.

That new way of making the most of the City Region's cultural assets is all about recognising that while culture has many strands, it is the collective impact of the sheer volume of quality venues, iconic buildings, national museums, distinctive historic quarters, sporting and musical events and associations and spectacular festivals that creates the wow factor. That wow factor is Liverpool City Region.

Key stakeholders have developed a strong culture-focused response to delivering a lasting legacy from The European Capital of Culture 2008 tackling head on the opportunity and challenge of making culture really work for them. This is all about using culture as a theme to connect different venues and locations within the city and across the City Region; to bring diverse stakeholders together to deliver a shared agenda; to illustrate how best practice in one area benefits another; to help visitors make a connection with places that leaves a lasting and positive impression and to join up the creativity of businesses. The result is one of the most creative and culturally rich city regions in Europe that has been particularly successful in attracting creative businesses, in part through a very strong support of entrepreneurship. The City Region is now a byword for excellence in cultural regeneration attracting thousands of business and academic visits every year from all over the world keen to learn how to do things 'the Liverpool Way'.

Visitors from Brazil, China, India and Russia now form an important part of the city's international market and the city conference market has benefited too, attracting some exciting conferences and exhibitions that are creating new inward investment opportunities. The growth of international arrivals at Liverpool John Lennon Airport has been an important part of accessing this market, while at the same time consolidating European markets through improved services.

Liverpool is now a mosaic of special places each with its own distinctive character and appeal. Hope Street is home to a completely new Everyman Theatre which retains the ambience and reputation of its predecessor but with a contemporary offer. The Philharmonic has extended its footprint and now offers additional performance space for a wide range of performing arts. Boutique hotels and award winning restaurants extend from Hope Street through a rejuvenated Chinatown down Duke Street to join Liverpool One. The Ropewalks is a lively bustling quarter characterised by independent retail, restaurants and markets that also extend the Chinatown experience. This complements and adds choice to the main shopping experience of the city, which underpins the destination sell and is popular with trend conscious visitor markets.

Liverpool has become shorthand for the urban culture, heritage and waterfronts of the City Region. Visitors are attracted to the City of Liverpool but also travel out to take trips to other attractions and venues during their stay. This positioning has been achieved by all the stakeholders getting behind and supporting the Visitor Economy and by investing in quality attractions, facilities and locations across the City Region that add to the choice of things to see and do on a short break. This has then been followed through by undertaking effective and targeted marketing to position the wider offer with key markets. This approach is underpinned by the creation of distinctive localities each with their own sense of place.

Improved transport connections in the City Region have been a key enabler of that approach. There is now a modern, innovative and high quality integrated public transport system across the City Region that links up the key destinations with the key transport infrastructure, and which utilises both the water- and land-based assets available.

Southport has become firmly established as England's premier classic resort, presenting an excellent resort experience tuned into the expectations of the 21st century UK visitor looking for a weekend away by the sea. Visitors enjoy the range of family friendly activities and attractions on the seafront, while others spend time browsing the well-preserved Lord St shopping area packed with interesting and unusual independent shops and cafés. They can also hire a bike and take a ride out along the seafront to explore the Sefton coast. Southport has also become one of the UK's most successful conference resort destinations. Excellent conference facilities, new boutique and 3-4 star hotels backed up by efficient personalised service and a beautiful resort are a hard act to beat.

The City Region has played to its international and national brands, using them as PR to retain and grow profile on the international stage and add value to the visitor experience. Festivals and events are playing a key part in that approach. The highlights so far have included the Titanic centenary in 2012, which captured the imagination of people the world over. The City's annual arts festival combined with the regular summer blockbuster exhibitions from the city's cultural institutions, starting with Tate Liverpool's hugely successful Picasso in 2010, continue to delight and surprise visitors.

High profile festivals and events across the City Region continue to play a key role in maintaining the profile of the City Region and underline the quality values it represents. Sport, music, maritime heritage and the visual arts lead the way.

England's Golf Coast is established in Europe's top five golf destinations alongside Spain, Portugal, Ireland and Scotland. Royal Birkdale and Hoylake - boasting both Royal Liverpool and Hoylake Golf Resort -

are now synonymous with the best of golf offers, and Southport and Wirral provide excellent bases from which to explore and enjoy England's Golf Coast. This is also presenting opportunities to link golf and conferences to create some great work and play packages that link in to the post-recession emphasis on work-life blend.

This approach has been a key part of the phenomenal success of the conference incentive sector in Liverpool and Southport. Both conference destinations have not only outrun their competitors on facilities and service but also defined how you combine sport, culture and conference. This 'business extender' approach whereby conference and event attendees are encouraged to stay on or return as leisure visitors was a winning approach leading up to 2012 with sport at the forefront of culture. This has grown apace, providing new business opportunities for Haydock Park, Aintree, Liverpool and Everton Football Stadiums, Widnes Vikings' Halton Stadium and St.Helens' new Saints Rugby stadium.

The City Region has also recognised that a key ingredient to successful destinations is to create places that people aspire to live because of the quality of life, sense of place and community pride. The City Region has invested in its public spaces and their maintenance, its infrastructure and making the most of its coast and countryside to attract inward investment and reinforce sense of place. That has strengthened the City Region's reputation as a leisure destination for people living in the Northwest and looking for a day out or a short break close to home.

It has also invested in its gateways to ensure that visitors receive an excellent first impression of the City Region, which sets the tone of the visit. Incremental investment in the public realm now means that wherever you go in the City Region visitors are greeted with distinctive public art and well maintained local streetscapes and landscapes.

This ranges from Antony Gormley's 'Another Place, - the stunning men on Crosby Beach, the continued international acclaim of the Liverpool Biennial, the Superlambananas that have become a fun dimension to the legacy of Liverpool 08', to Jaume Plensa's 'Dream'– a nationally significant gateway artwork to rival the 'Angel of the North' that has catalysed a spectacular programme of varied artworks across St.Helens adding a new attractor and dimension to the cultural identity of the City Region.

Part of the success of the Liverpool City Region has been investing in getting right the visitor experience; in particular the welcome and customer service that underpin sense of place. There has been a focus on the key arrival points – John Lennon International Airport, the cruise terminal, Lime Street Station and on Liverpool and Southport as the leading destinations. Attention to detail – animation of public spaces, public art, creating distinctive quarters and spaces for shopping and eating out, visitor management – means that the experience delivers the marketing promise.

What has been especially important is that investment in place shaping has not only focused on Liverpool and Southport but is evident everywhere you visit in the City Region. It is embedded in the experience and the vision for the Wirral Waterfront, in the experience of Port Sunlight and is clearly at the heart of regeneration plans for St.Helens. Huge commitment and investment has been made in getting that right. Each part of the City Region is daring to be different because it recognises that the trend for 'the desire for the real' is where the future lies. Distinctive places sit at the heart of that.

APPENDIX B:
ARKLEISURE
MARKET SEGMENTS

The information below sets out the key characteristics of the targeted ArkLeisure market segments. Understanding these characteristics will help channel investment in development and marketing for individual products, themes and destinations in the Liverpool City Region.

The target market segments for the City Region are set out below. These are Cosmopolitans, Style Hounds and Traditionals.

COSMOPOLITAN
OUTLOOK

Early adopters but this is generally based on their personal interest in new products and opportunities rather than on fashion trends. Strong, active and confident. Do what they want rather than follow any particular fashion, but they do want to look good.

Stylish people but it is individuality rather than fashion that is important to them.

Comfortable trying new things that are out of the ordinary.

Happy to adopt traditional values when appropriate.

High-spending market and find it easy to justify buying expensive alternatives.

Cosmopolitans will pay for service, by which they mean the things that enable them to do what they want with the minimum of fuss

Are risk takers and this is reflected in their purchases and their desire for things that are new and different. They like new challenges, both physical and intellectual.

Have an appreciation of art and culture.

Life for this group is full and active, yet peace and relaxation is still valued in the right circumstances as a break. They are therefore a key health and well being market.

INTERESTS & ACTIVITIES

Personal interests – Cosmopolitans like shopping, new products, cooking and arts and culture.

Days out and attractions – Cosmopolitans have a slight bias towards heritage and arts or cultural attractions. Their active nature is also reflected in the fact that they have a strong appeal towards days out in the 'great outdoors' – this could be visits to a National Park, a walk in the countryside or a day at the beach. The atmosphere that they are looking for in a day out is something that is different, educational and perhaps a challenge.

Shopping – Cosmopolitans spend a lot of money on clothes and up market fashion chains (e.g. GAP) are where they are likely to be found. They also like places to shop that have a strong independent sector (e.g. antique shops or specialist shops).

Eating & drinking – Cosmopolitans are the segment to eat out most often and are drawn to new, self found, or non-chain restaurants. Wine bars are popular for drinking

Nights out – Cosmopolitans have a range of nights out that appeal and these include comedy, cabaret, theatre and ballet.

Media – Into films, news and comedy. Less time spent viewing TV than other segments.

Holidays – Take the most holidays of any group 83% took a UK holiday in 2007. They contribute; 25% of all UK short breaks (1-4 nights) and 23% of all longer holidays. They are by far the most active group for both kinds of trip in both absolute and relative terms.

Most likely segment to use the long haul and more independent operators (e.g. Kuoni, Expedia, Trailfinders or cruise operators).

A good short break for a Cosmopolitan allows them to maximise the use of the time they have to achieve what they want to do, whether this is just to relax or do a bit of extreme adventure they want to maximise their return from the holiday. Their definition of good service is the invisible delivery of this 'no hitch' enjoyment anticipating their needs.

DEMOGRAPHIC PROFILE

19% of the GB population

Even breakdown of ages. 34% under 35; 29% over 55

69% have internet access

33% have children at home

27% single; 51% married/living as married

57% ABC1, 21% retired

STYLE HOUNDS
OUTLOOK

Style Hounds are very fashion conscious, and keen not to be seen as old fashioned. They like to be part of the latest trends and therefore quite strongly influenced by others, though they have a spending power to do what they want.

They are very brand focused; they see fashion as being stylish.

They are early adopters, and will go for things out of the ordinary, probably believing that they are setting fashions.

Limited responsibility means that if they have money they are prepared to spend it. They find it easy to justify buying expensive alternatives and will pay for better service. Style Hounds are risk takers who like to try new and different things and they live a full and active life, but active does not mean serious sports.

Peace and relaxation in the traditional sense is not sought out; fun and excitement is what defines a good time.

They haven't much interest in more 'sophisticated' arts, or cerebral activities

INTERESTS & ACTIVITIES

Personal Interests – Gossip and Celebrity news, fashion, pop culture and shopping.

Shopping – They are a high spending segment when it comes to clothes shopping. They will shop at the main high street outlets (Next, Warehouse, etc) but are very keen on their brand names. They are the Fashion Tribe referred to by many clothes retailers keen to buy what is in (once it is in) – i.e. they are told what the fashion is they don't create it.

Days out and attractions – they are seeking attractions that are fun, entertaining and thrilling. Alton Towers is a perfect day out. A good night out for this segment would be clubbing, live music or a visit to the cinema.

Eating and drinking – Style Hounds go to places they consider fashionable and stylish – the sort of place they can show off their fashion brands. Their judgement is based mostly on media and celeb opinions. An example of this would be 'trendy' bars and night clubs.

Holidays – they are the group most averse to taking UK holidays; even so 74% took a UK break in 2007. 11% of UK short breaks (1-4 nights) and 9% of UK longer holidays. This makes them the group least likely to take a UK long holiday.

This segment is likely to use the main stream package tour operators for their overseas holiday. They are likely to book holidays via the Internet and book them last minute.

They want lots to do – by which they mean experience – nothing too cerebral but lots of fun. Good shopping and eating, casual 'sport', swimming pools, partying all night and meeting new people defines a good short break with friends for this segment. In the UK this trend tends to mean weekend breaks in big cities, where they can enjoy the nightlife and take in some shopping.

Media – This segment has the highest proportion of Sun readers. They are into the male and female lifestyle magazines as well as celebrity gossip magazines. For TV viewing, they enjoy reality TV, music TV and soap operas.

DEMOGRAPHIC PROFILE

10% of the GB population

A young group; 60% under 34; 35% single

Very high internet access; 79%

58% have no children at home

60% ABC1

55% working full time

TRADITONALS
OUTLOOK

As the name suggests this is a group more likely to hold traditional values. Their members are relatively self reliant and internally referenced with a tendency towards being sustainers (i.e. uncomfortable with change).

Functionality is far more important than fashion. Brand is not a key purchase driver for this segment, but this does not mean that they are brand averse. They are not looking for media driven fashion but 'quality' and established 'brands of substance'.

Traditionals are quite a main stream market though they will be slow to adopt new products or ideas. They are also often modest spenders, slow to choose expensive alternatives.

They value good service, by which they mean personal recognition and attention. They value 'form' and a personal interaction with the restaurant, shop or hotel.

They live life at a relaxed pace and enjoy intellectual challenges, arts and culture.

INTERESTS & ACTIVITIES

Days out and attractions – Traditionals are looking for days out that are peaceful & relaxing, nostalgic and educational. Offers that are geared towards heritage and exploration will appeal to Traditionals. This includes National Trust attractions, churches and cathedrals and botanical gardens. They are also happy just exploring the countryside or a market town.

Personal interests – include gardening and arts and culture.

Eating & drinking – For Traditionals, the traditional pub is the type of place that holds the greatest appeal.

A good night out – would be going for a drink or a meal out with family or friends.

Holidays – 81% took a UK holiday in 2007. They are second only to Cosmopolitans in their readiness to holiday in the UK, contributing 11% of short breaks (1-4 nights) and 11% of longer holidays in the UK, they take more holidays in the UK than overseas and love the UK countryside.

Being an active older segment, they are big group for the service Saga offers, but also domestic niche operators (e.g. English Country Cottages). However they also like to use independent hotels and other serviced accommodation where there is a personal touch and interaction with the staff.

They are likely to use the telephone for booking – they want to speak to someone.

A good short break for Traditionals would give them the chance to explore, escape, slow down and do their own thing. They are quite interested in art and other cultural attractions as well as England's heritage; buildings and gardens.

DEMOGRAPHIC PROFILE

10% of the GB population

Older profile; 73% over 45; 53% over 55

57% with internet access

21% with children at home

51% married or living as married; 28% widowed, separated or divorced

43% C1C2; 36% DE

58% taken an overseas holiday in past 3 years.

41% retired; 31% working full time

Photography by Ian Hughes

APPENDIX C :
VOLUME AND VALUE OF TOURISM TO THE LIVERPOOL CITY REGION

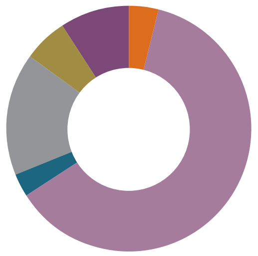
1. OVERALL VALUE AND VOLUME OF TOURISM

GROWTH IN VOLUME AND VALUE OF TOURISM IN LIVERPOOL CITY REGION

	2006	2007	2008	2009
Tourist Numbers (m)	47.61	48.81	60.03	52.44
Tourist Days (m)	54.00	55.32	66.76	58.81
Economic Impact (£m)	£2,514.07	£2,581.20	£3,126.95	£2,757.55

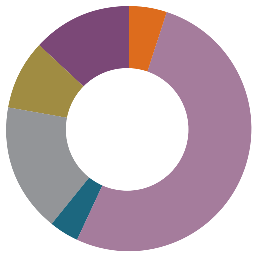
Source: STEAM Economic Impact Model 2009

VOLUME AND VALUE OF TOURISM BY DISTRICT



Value of Tourism by District in Liverpool City Region (£m)

	VALUE OF TOURISM	(£m)
Halton	4%	£113
Liverpool	62%	£1,703
Knowsley	3%	£83
Sefton	16%	£443
St.Helens	6%	£164
Wirral	9%	£252

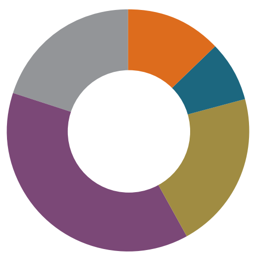


Volume of Tourism by District in Liverpool City Region (000s)

	VOLUME OF TOURISM	(000s)
Halton	5%	2,677
Liverpool	52%	27,625
Knowsley	4%	2,030
Sefton	17%	8,973
St.Helens	9%	4,484
Wirral	13%	6,646

VOLUME AND VALUE OF TOURISM IN ENGLAND'S NORTHWEST

Note: The Northwest STEAM figures use a different spend co-efficient, so in absolute value terms are not directly comparable to the Merseyside figures, above.



Value of Tourism in England's Northwest (£bn)

	VALUE OF TOURISM	(£bn)
Cheshire	13%	£1.8
Cumbria	8%	£1.2
Lancashire	21%	£3
Greater Manchester	38%	£5.5
Liverpool City Region	20%	£2.8

Volume of Tourism in England's Northwest (Tourist numbers - m)

	VOLUME OF TOURISM	(m)
Cheshire	14%	42
Cumbria	5%	15
Lancashire	20%	60
Greater Manchester	35%	102
Liverpool City Region	26%	75

2. STAYING VISITORS

INTERNATIONAL STAYING VISITS[24]: TOP TOWNS RANKINGS FROM THE INTERNATIONAL PASSENGER SURVEY 2007 - 2009

2007			2008			2009		
RANK	TOWN/CITY	VISITS (000s)	RANK	TOWN/CITY	VISITS (000s)	RANK	TOWN/CITY	VISITS (000s)
1	London	15,340	1	London	14,753	1	London	14,211
2	Edinburgh	1,338	2	Edinburgh	1,191	2	Edinburgh	1,324
3	Manchester	971	3	Manchester	889	3	Manchester	800
4	Glasgow	755	4	Birmingham	763	4	Birmingham	709
5	Birmingham	700	5	Glasgow	629	5	Glasgow	623
6	Liverpool	544	6	Liverpool	553	6	Liverpool	458
7	Bristol	470	7	Bristol	492	7	Bristol	421
8	Oxford	460	8	Oxford	437	8	Oxford	416
9	Cambridge	376	9	Cambridge	382	9	Cambridge	400
10	Brighton / Hove	325	10	Cardiff	342	10	Brighton / Hove	330
11	Cardiff	304	11	Brighton / Hove	331	11	Cardiff	313
12	Leeds	301	12	Leeds	326	12	Inverness	248
13	Newcastle-upon-Tyne	278	13	Nottingham	290	13	Nottingham	244
14	Bath	278	14	Bath	254	14	Leeds	231
15	Nottingham	275	15	York	249	15	Aberdeen	216
16	Inverness	238	16	Newcastle-upon-Tyne	244	16	York	215
17	York	210	17	Reading	210	17	Newcastle-upon-Tyne	213
18	Reading	182	18	Inverness	197	18	Bath	212
19	Windsor	167	19	Windsor	188	19	Canterbury	197
20	Canterbury	156	20	Canterbury	164	20	Reading	187

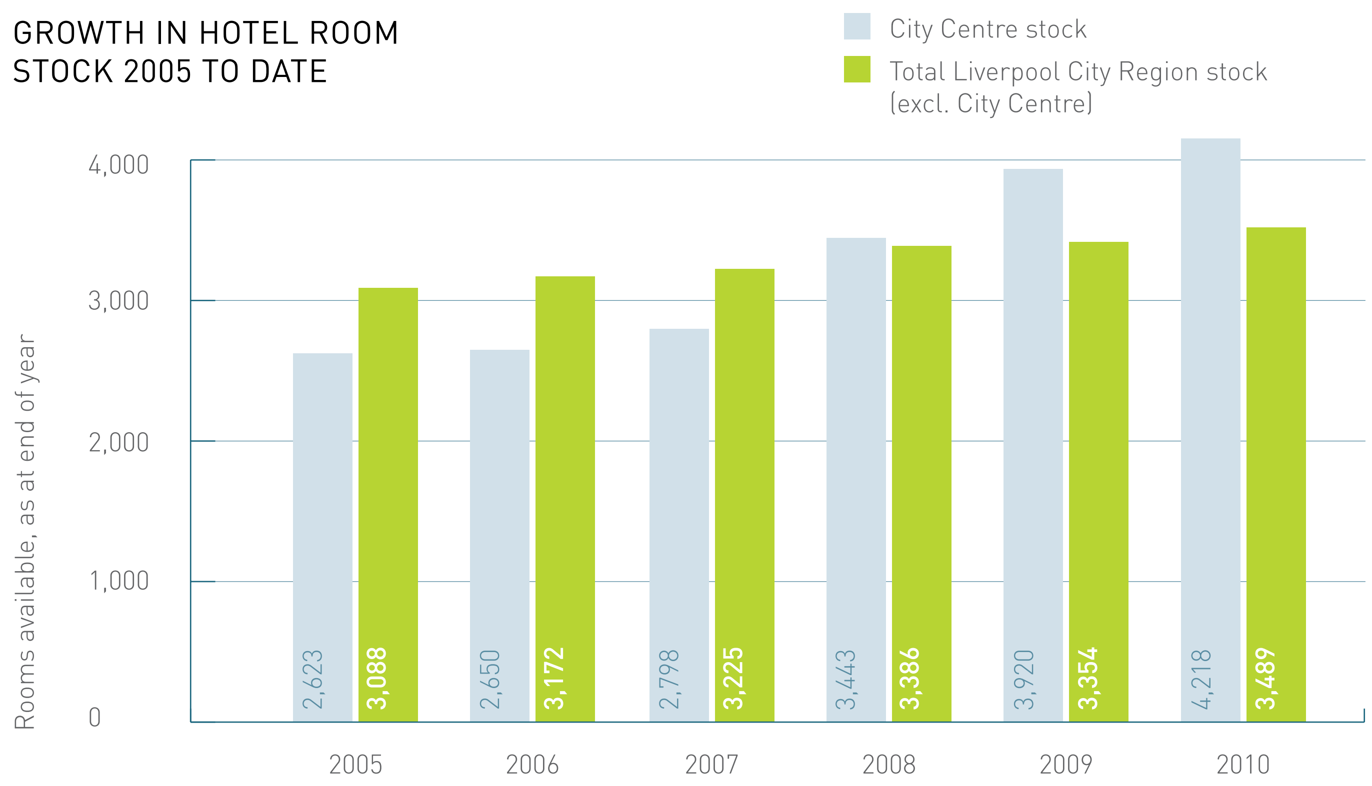
[24] all visits including business tourism

DOMESTIC STAYING VISITS: ENGLISH TOP TOWNS RANKINGS FROM THE UNITED KINGDOM TOURISM SURVEY 2007 - 2009								
2007			2008			2009		
RANK	TOWN/CITY	VISITS (000s)	RANK	TOWN/CITY	VISITS (000s)	RANK	TOWN/CITY	VISITS (000s)
1	London	10,144	1	London	11,315	1	London	10,795
2	Manchester	2,330	2	Manchester	2,501	2	Manchester	2,743
3	Birmingham	2,293	3	Birmingham	2,374	3	Birmingham	2,358
4	Blackpool	1,873	4	Bristol	1,469	4	Scarborough	1,765
5	Bristol	1,553	5	Leeds	1,464	5	Bristol	1,761
6	Scarborough	1,488	6	Blackpool	1,382	6	Blackpool	1,504
7	Leeds	1,403	7	York	1,344	7	York	1,418
8	York	1,191	8	Scarborough	1,341	8	Leeds	1,378
9	Sheffield	1,137	9	Newcastle-upon-Tyne	1,336	9	Newcastle-upon-Tyne	1,351
10	Newcastle-upon-Tyne	1,094	10	Liverpool	1,088	10	Brighton and Hove	1,302
11	Bournemouth	1,059	11	Brighton and Hove	1,014	11	Isle of Wight	1,218
12	Isle of Wight	1,052	12	Bournemouth	959	12	Liverpool	1,204
13	Brighton and Hove	975	13	Sheffield	944	13	Nottingham	1,047
14	Southampton	871	14	Isle of Wight	884	14	Sheffield	1,042
15	Nottingham	858	15	Nottingham	827	15	Skegness	1,035
16	Liverpool	851	16	Norwich	816	16	Bournemouth	922
17	Torquay	841	17	Skegness	808	17	Southampton	892
18	Norwich	830	18	Newquay	749	18	Great Yarmouth	826
19	Skegness	800	19	Southampton	740	19	Oxford	811
20	Plymouth	763	20	Exeter	695	20	Plymouth	724

Statistical Health Warning: Visit Britain, who source both of these tables, advise that caution should be used as sample sizes can be low. For this reason we tend to place higher reliability in locally gathered data, such as hotel occupancy figures.

HOTEL OCCUPANCY 2005 TO DATE - LIVERPOOL CITY REGION						
	2005	2006	2007	2008	2009	2010
Room occupancy	73.6%	73.1%	71.3%	75.8%	69.2%	69.5%
City Centre rooms sold	704,564	694,311	724,783	909,889	896,824	1,045,593

GROWTH IN HOTEL ROOM STOCK 2005 TO DATE



PROJECTED HOTEL GROWTH 2009 -2011 – LIVERPOOL CITY REGION						
	END 2009		END 2010		END 2011	
LOCATION	HOTELS	ROOMS	HOTELS	ROOMS	HOTELS	ROOMS
Liverpool City Centre	34	3920	37	4218	41	4706
Liverpool suburbs	12	702	13	803	13	803
Total Liverpool	**46**	**4622**	**50**	**5021**	**54**	**5509**
Knowsley	6	352	6	352	6	352
Halton	9	628	9	628	9	628
Wirral	25	629	26	692	29	853
Sefton	61	1040	62	1027	62	1027
St Helens	13	705	14	790	15	854
Total rest of Merseyside	**114**	**3354**	**117**	**3489**	**121**	**3714**
Total Liverpool City Region	**160**	**7976**	**167**	**8510**	**175**	**9223**

3. INTERNATIONAL COMPARISONS

EUROMONITOR 2007: SHOWING TOP 5 DESTINATIONS RANKED ABOVE AND BELOW LIVERPOOL

CITY	RANK	000's TOURISTS ARRIVALS
Mumbai	86	672
Dalian	87	666
San Diego	88	650
Bruges	89	641
Antwerp	90	636
Liverpool (GB)	91	625
New Delhi	92	612
Valencia	93	611
Kunming	94	607
Granada	95	606
Wuxi	96	594

Data drawn from national data sources; in the case of the UK, this uses the IPS data (as displayed above)

4. BUSINESS TOURISM

ICCA INTERNATIONAL CONGRESS AND CONVENTION ASSOCIATION RANKINGS

	2006	2007	2008	2009
Liverpool	245th	130th	86th	139th

RANKING OF UK CITIES, 2008

CITY	RANK
London	19th
Edinburgh	28th
Glasgow	42nd
Manchester	68th
Liverpool	86th
Belfast	120th
Oxford	164th
Southampton	164th
Cambridge	181st
Newcastle	181st
Birmingham	234th
Cardiff	265th

Cities in similar rank: Adelaide, Brisbane, Graz, Marseille, Orlando, Riga, San Francisco

Note: To achieve ICCA rankings, the events that are taken into consideration are:
- a minimum of 50 delegates
- regular event (not ad hoc)
- an event that rotates between at least three countries

5. KEY ATTRACTIONS AND EVENTS

TOP 10 FREE ATTRACTIONS 2009

	ATTRACTION	DISTRICT	ATTENDANCE
1	Merseyside Maritime Museum	Liverpool	945,254
2	World Museum Liverpool	Liverpool	605,601
3	Tate Liverpool	Liverpool	541,638
4	Liverpool Cathedral	Liverpool	465,455
5	FACT	Liverpool	360,361
6	International Slavery Museum	Liverpool	354,579
7	National Trust, Formby	Sefton	343,034
8	Liverpool Metropolitan Cathedral	Liverpool	318,499
9	Southport Pier	Sefton	314,215
10	Walker Art Gallery	Liverpool	213,890

TOP 10 PAID ATTRACTIONS 2009

	ATTRACTION	DISTRICT	ATTENDANCE
1	Mersey Ferries	Liverpool / Wirral	706,752
2	Knowsley Safari Park	Knowsley	530,691
3	Liverpool Philharmonic	Liverpool	242,980
4	Beatles Story	Liverpool	199,064
5	Royal Court Theatre*	Liverpool	143,905
6	Liverpool Football Club Museum & Tour**	Liverpool	143,122
7	New Palace Family Amusement Centre**	Wirral	140,000
8	The Brindley*	Halton	124,499
9	Croxteth Hall & Country Park	Liverpool	117,361
10	Ness Botanic Gardens	Wirral	101,701

TOP 10 FREE EVENTS 2010

	ATTRACTION	DISTRICT	ATTENDANCE
1	Mathew Street Festival	Liverpool	320,000
2	On the Waterfront	Liverpool	65,000
3	Halton Fireworks	Halton	55,000
4	Vintage Organ & Steam Rally	Halton	50,000
5	Africa Oye	Liverpool	50,000
6	Southport Food & Drink Festival	Sefton	40,000
7	Brouhaha Carnival	Liverpool	35,000
8	Lord Street Christmas Festival	Sefton	34,000
9	Hoylake RNLI Open Day	Wirral	30,000
10	Liverpool Pride	Liverpool	21,000

TOP 10 PAID EVENTS 2010

	ATTRACTION	DISTRICT	ATTENDANCE
1	Grand National	Liverpool	150,213
2	Southport Flower Show	Sefton	80,000
3	Creamfields	Halton	40,000
4	Southport Airshow	Sefton	35,000
5	Liverpool Food & Drink Festival	Liverpool	27,872
6	Wirral Food & Drink Festival	Wirral	24,000
7	North West Masters Racing (Aintree & Haydock)	Liverpool & St.Helens	17,218
8	Liverpool International Tennis Tournament	Liverpool & St.Helens	17,000
9	Southport Jazz Festival	Sefton	16,000
10	Premier League Darts***	Liverpool	8,000

* 2007 figures ** 2008 figures *** 2009 figures

6. FUTURE TOURISM GROWTH PROSPECTS FOR LIVERPOOL CITY REGION

Data Shown below comes from the latest Destination Management Plan, with figures and trends updated to show latest STEAM.

Figures in **bold** represent actual data. All £ values at current values

	2006	2007	2008	2009	2010	2011	2012	2013
CORE MEASURES								
No. of staying nights (m) City Region	**10.7**	**11.0**	**11.3**	**10.6**	10.8	11.1	11.4	11.8
No. of staying nights (m) Liverpool	**3.7**	**3.8**	**4.4**	**4.1**	4.2	4.3	4.4	4.6
No. of overseas visitors nights (m)	**4.5**	**3.9**	**4.7**	**4.3**	4.4	4.6	4.8	5.2
Total staying tourism spend (m)	**£767**	**£801**	**£854**	**£814**	£827	£841	£855	£913
Tourism related employment*	**36,700**	**38,600**	**46,300**	**40,600**	41,300	42,000	42,600	45,500
Average spend per staying night	**£71.68**	**£72.82**	**£75.58**	**£76.80**	£76.45	£75.89	£75.21	£77.05
Index of attractions (indexed to 2004)	**99**	**116**	**155**	**124**	132	134	138	142
Room occupancy - Liverpool	**73%**	**71%**	**76%**	**69%**	**70%**	71%	72%	72%
Bed-spaces**	**27,000**	**28,000**	**31,000**	**33,000**	**34,000**	35,000	36,000	38,000
ADDITIONAL INDICATORS								
No. of day visits (m)	**43.3**	**44.4**	**55.4**	**48.2**	51.3	52.1	53.6	55.1
Total day visit spend (m)	**£1,747**	**£1,781**	**£2,273**	**£1,943**	£2,212	£2,244	£2,310	£2,398
Nights spent in serviced accommodation (m)	**3.4**	**3.6**	**3.9**	**3.4**	3.5	3.6	3.8	4.1
Total room nights sold in Liverpool (000)	**694**	**725**	**910**	**897**	**1,045**	1,086	1,131	1,208
PERFORMANCE MEASURES								
Passenger traffic via LJL Airport (m)	**5.0**	**5.5**	**5.4**	**4.9**	**5.0**	5.4	5.7	6.1

	2006	2014	2015	2016	2017	2018	2019	2020
CORE MEASURES								
No. of staying nights (m) City Region	**10.7**	12.1	12.2	12.7	12.9	13.2	13.5	13.5
No. of staying nights (m) Liverpool	**3.7**	4.7	4.7	4.9	5.0	5.1	5.2	5.2
No. of overseas visitors nights (m)	**4.5**	5.3	5.5	5.8	6.0	6.2	6.4	6.4
Total staying tourism spend (m)	**£767**	£938	£960	£1,017	£1,039	£1,076	£1,113	£1,113
Tourism related employment*	**36,700**	46,700	47,900	50,700	51,800	53,600	55,500	55,500
Average spend per staying night	**£71.68**	£77.79	£78.41	£79.97	£80.55	£81.45	£82.33	£82.33
Index of attractions (indexed to 2003)	**99**	147	150	155	159	164	169	173
Room occupancy - Liverpool	**73%**	73%	73%	74%	74%	75%	76%	76%
Bed-spaces**	**27,000**	39,000	39,000	41,000	42,000	43,000	44,000	44,000
ADDITIONAL INDICATORS								
No. of day visits (m)	**43.3**	57.0	58.5	60.4	61.9	63.8	65.6	67.2
Total day visit spend (m)	**£1,747**	£2,505	£2,597	£2,708	£2,803	£2,918	£3,034	£3,135
Nights spent in serviced accommodation (m)	**3.4**	4.2	4.3	4.5	4.6	4.8	4.9	4.9
Total room nights sold in Liverpool (000)	**694**	1,241	1,270	1,346	1,375	1,423	1,472	1,472
PERFORMANCE MEASURES								
Passenger traffic via LJL Airport (m)	**5.0**	6.4	6.9	7.1	7.3	7.5	7.8	8.1

* Rounded to nearest 100 ** Rounded to nearest 1,000

APPENDIX D : USEFUL REFERENCES AND WEBSITES

WEBSITES

Merseyside Online Support for Tourism (MOST) Tourism industry site
www.merseyside.org.uk/MOST

The Mersey Partnership
www.merseyside.org.uk

Liverpool City Region consumer site
www.visitliverpool.com

Halton BC
www.visithalton.com

Knowsley MBC
www.visitknowsley.com

St.Helens MBC
www.visitsthelens.com

Sefton MBC
www.visitsouthport.com

Wirral MBC
www.visitwirral.com

Northwest Regional Development Agency (NWDA)
www.nwda.co.uk

VisitEngland
www.visitengland.com

VisitBritain
www.visitbritain.com

ICCA (International Congress and Convention Association)
www.iccaworld.com

People 1st
www.people1st.co.uk

PUBLICATIONS

The Strategy for Tourism in England's Northwest (Revised 2007)
http://www.nwda.co.uk/publications/quality-of-life/the-strategy-for-tourism-in.aspx

United Kingdom Tourism Survey 2010
http://www.tourismtrade.org.uk/MarketIntelligenceResearch/DomesticTourismStatistics/UKTS/UKTS.asp

International Passenger Survey
http://www.statistics.gov.uk/ssd/surveys/international_passenger_survey.asp

National Skills Strategy for the Hospitality, Leisure and Tourism Sector in England
http://www.people1st.co.uk/webfiles/NSS/NSS.pdf

England's North West Staying Visitor Survey
http://www.nwriu.co.uk/tourism/documents/NWDA_Staying_Visitors_Report-FINAL.pdf

Business Tourism to the Northwest
http://www.nwriu.co.uk/tourism/documents/NWDA_Business_Tourism_Final_Report.pdf

Northwest Day Visitor Survey
http://nwriu.co.uk/tourism/documents/NW_Day_Visitor_Survey07.pdf

Destination Management Plan - Liverpool City Region Visitor Economy 3 year Action Plan
www.merseyside.org.uk/most - research

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For tourist information - VisitLiverpool.com
For sector information - Merseyside.org.uk/MOST

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