

Liverpool City Region Visitor Economy

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West Lancashire Council

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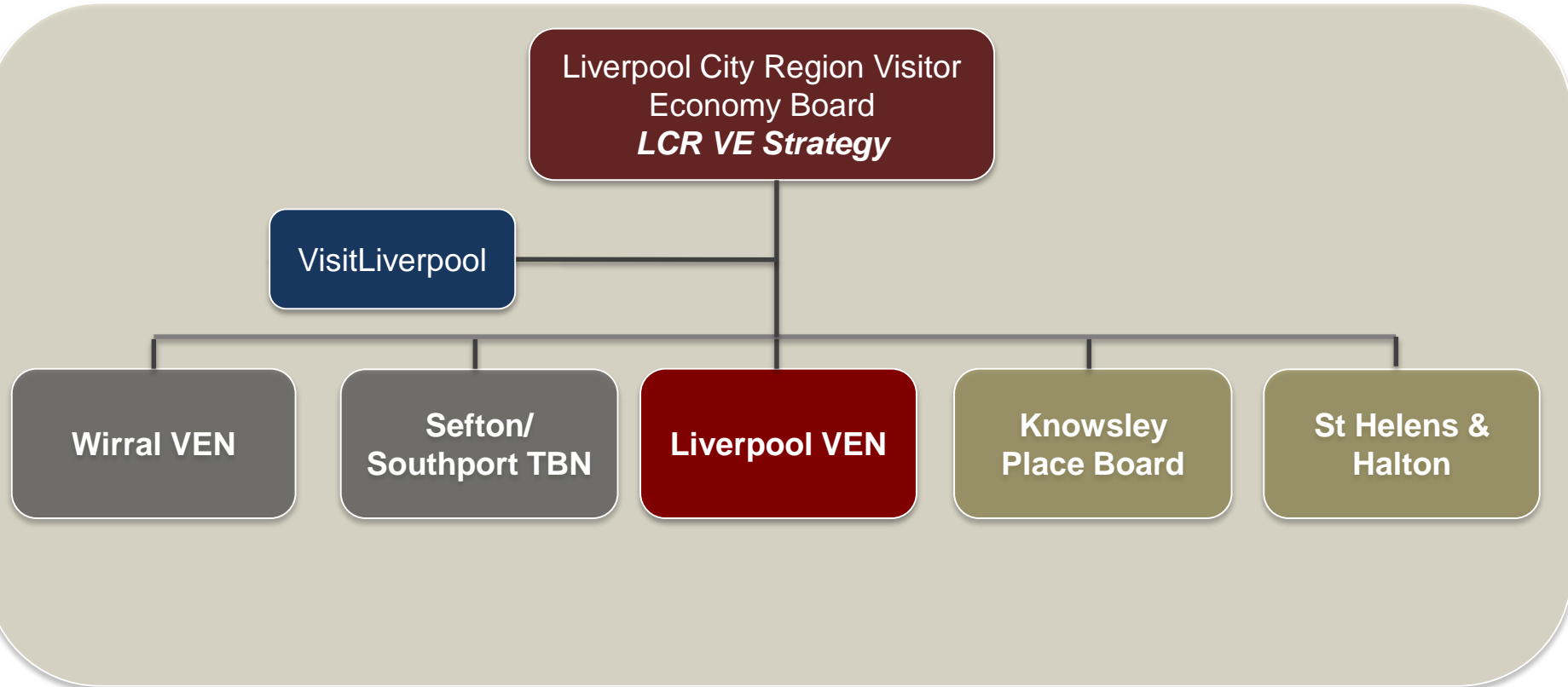
The role of the LEP

- **A Destination Management Organisation** for the LCR and its stakeholders – **Commissioned by the LCR CA**
- **Destination Marketing** - ‘Far’ domestic & International Leisure & Business Tourism Markets
- **Quality & Accreditation** – Welcome, Skills, Visit England accreditation
- **Integration** – LCR & cross boundary
- **Supports sector development** – DCMS, Visit England, strategy, funding & business support

Destination Management



City Region Structures



Current worth of the Visitor Economy to the Liverpool City Region

- **Economic Contribution** – £4.1bn in spend & 7% of LCR GVA (£1.25bn) – Nationally the sector contributes 5%
- **Job Creation** – 50K (38.6K direct, 11.4K indirect), increase by 23K in the next 9 years
- **Dependencies** – Liverpool 34.1m visitors/£2.7b income. Sefton & Southport 8.6m visitors/£498 m income
- **Liverpool** in 2015 was the 6th most popular destination for international visitors – 6.5 million staying visitor nights (STEAM)

but

- 90% of inbound visitors stay in Liverpool and don't explore the wider city region

Where Visitors Come From (2015)

Top overseas markets:

Ireland 4%
USA 3%
Spain 3%
Germany 2%
Australia 3%
France 3%

Top domestic markets:

London & Southeast 26%
Yorkshire 18%
Northeast 8%
Wales 7%
Cheshire 6%
Scotland 6%

Source: Liverpool Destination Survey 2015

Supporting the LCR Growth Plan



Strategy to 2025:

- International Conference Markets & Exhibitions.
- Staycations – Culture & Heritage Visitors.
- International Leisure Visitors.
- Digital Connectivity.
- Transport Connectivity.
- Welcome & Skills.
- Brand Distinctiveness.

Targets for 2025:

- Additional **£652 million/12K FTE jobs** by 2020.
- Additional **£1.2 billion in spend and 22K FTE jobs** by 2025.

The importance of Liverpool...

- **An international brand** – Legacy of '08 international heritage and cultural offer.
- **Increases reach** - Rated 3 on Rough Guide's Top 10 Cities in the world for 2014 – the only English city on the list.
- **Infrastructure investment** over the last 10 years – Liverpool 1, Culture, hotels, conference/exhibition facilities
- **Day and staying visitors - valued at £2.7bn/34.1 million. 77.2% occupancy**



Visitor Spread - Attract & Disperse



The attract brands are well - known destinations and icons that consumers in our domestic & international markets recognise.

They serve as starting point in marketing activity to raise interest in discovering the hidden gems.

Dispersal can be geographic or thematic.

Playing to our strengths

- **VisitBritain Research**

Low recognition of NW among holiday visitors for rural/coastal locations, activities & attractions, heritage & cultural attractions.

- **A market opportunity for the City Region's other gems.....?**

- England's Golf Coast
- Regional Meetings, Functions & Conference offer
- Heritage & Attractions
- Rural, Coast & Countryside



Market Trends

- **Demographics** – Aging population, protecting & prioritising expenditure on leisure, tourism & recreation
- **More discerning customers** – ‘cash-tight, time-poor’
- **Pre trip research** – 150 million trip adviser users each month, 115 new reviews every minute!
- **Inbound Volume** – 620K visitor to LCR per annum, 90% staying in Liverpool
- **Inbound motivations** – built heritage, cultural heritage, contemporary culture, sport & shopping
- **Domestic** – Staycation market is thriving, city & urban destinations are driving growth, short breaks are getting shorter

Opportunities for West Lancashire?

- **Invest in key assets/themes** – Ormskirk town centre, proximity to Martin Mere, Leeds & Liverpool Canal, Rufford Old Hall, strength of rural recreational offer
- **Customer focus** - Joint packaging and itineraries with other attractions – geographic/thematic
- **Visibility & familiarisation** – thematic marketing, press and PR, visitliverpool & visitsouthport
- **Ease of access** – transport connectivity, journey planning, booking etc
- **Place** – Welcome and Upsell
- **Intelligence & Research** – Value of tourism for West Lancs – is it a key component of place?

Potential Areas for Engagement

- **LCR Single Investment Fund** = £1m to business tourism with specific focus on Southport
- **Southport** growing as a visitor destination – new membership scheme & destination marketing strategy
- **Thematic linkages** – Heritage, Wildlife, Local Produce
- **Discover England Fund** - focused on international visitors to Northern Coastal Resorts
- **Cruise Liner Terminal** - £60 million investment increasing opportunity for excursions
- **Intelligence** – Volume, Value, Visitor Profiles & Satisfaction
- **Marketing Liverpool** – Working at LCR level to reach domestic and international markets

Useful Websites

For more information visit:

- www.liverpoollep.org
- www.visitliverpool.com
- www.visitsouthport.com





Any Questions?