DIGEST OF TOURISM STATISTICS

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NorthWestResearch.org

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North West Research
This study has been produced by the in-house research team at the Liverpool City Region Local Enterprise Partnership. The team produces numerous key publications for the area, including the annual Digest of Tourism Statistics, in addition to collating key data and managing many regular research projects such as Hotel Occupancy and the Merseyside Visitor Survey.

Under the badge of North West Research (formerly known as England's Northwest Research Service) the team conducts numerous commercial research projects, with a particular specialism in the visitor economy and event evaluation. Over the last 10 years, North West Research has completed over 250 projects for both public and private sector clients.

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Introduction

Welcome to the latest edition of the *Digest of Tourism Statistics*.

The *Digest* collates a range of key tourism research sets for the Liverpool City Region and is intended for all users of tourism data; whether businesses, consultants or students. Each edition sees a presentation of key tourism statistics – which may change only once during a year – together with the latest data and any recent research that the tourist board has commissioned or sponsored. There are also links for further information.

This *Digest* presents STEAM[1] data for 2013 – that is, the estimated visitor numbers recorded by the city and wider city region. These figures show that in 2013 the number of staying visitors, both for Liverpool and the City Region, has over taken the record levels achieved in 2008, Liverpool's European Capital of Culture year. Previous year's statistics have been updated using 2013 values.

We welcome feedback on this document; if you feel there is some aspect of research it should cover, please do let us know on research@liverpoolLEP.org.

The Liverpool City Region

We describe the geography covered by the tourist board as being the "Liverpool City Region" (not to be confused with the Liverpool Local Authority area or the City Centre). Although there are a number of definitions, for our purposes this covers the six districts comprising 'Merseyside and Halton'; the same area as covered by the Liverpool City Region Local Enterprise Partnership:

[1] Scarborough Tourism Economic Activity Monitor, the primary method used by the Liverpool LEP and many tourist boards in the UK to measure the value and volume of tourism.

Key Facts about the visitor economy in the Liverpool City Region

1. In 2013 there were 58m visitors to the Liverpool City Region.
2. In 2013 the visitor economy was worth £3.6bn to the Liverpool City Region.
3. In 2013 approximately 48,607 jobs were supported by visitor spend.
4. Liverpool is in the top 10 of all UK towns or cities visited by overseas visitors (and is now placed 5th).
5. Six attractions drew in over half a million visitors in 2014; the Merseyside Maritime Museum, World Museum Liverpool, Museum of Liverpool, Tate Liverpool, Mersey Ferries and Liverpool Cathedral
6. Average hotel room occupancy in 2014 was 76%, an increase of 5% since 2013
7. Over 2.5m hotel rooms were sold in the City Region in 2014.
8. 3,981,849 passengers passed through Liverpool John Lennon Airport in 2014
9. Some 656,000 passengers arrived or departed the City Region on one of the three ferry routes in 2014
10. Liverpool One, the retail and leisure development in the City Centre, recorded a footfall of over 27m people in 2014 – this is an increase on 2013

North West Research

The *Digest* is produced by the research team at The Liverpool City Region Local Enterprise Partnership, who collate a wide range of tourism statistics for the Liverpool City Region. Surveys include Destination Benchmarking, the Airport Gateway study and a quarterly Tourism Business Performance survey.

Under the banner of the **North West Research (formerly England's North West Research Service)**, the team conducts commercial research in a range of different sectors across the North west, with a particular specialism in the tourism industry and event impact evaluation.

Amongst the research packages we can offer are:

- Customer profiling and segmentation
- Customer satisfaction studies
- Economic impact studies
- Gap analysis
- Marketing / branding evaluation and assessment
- Performance monitoring

For more information, contact anna.biagetti@liverpoollep.org.

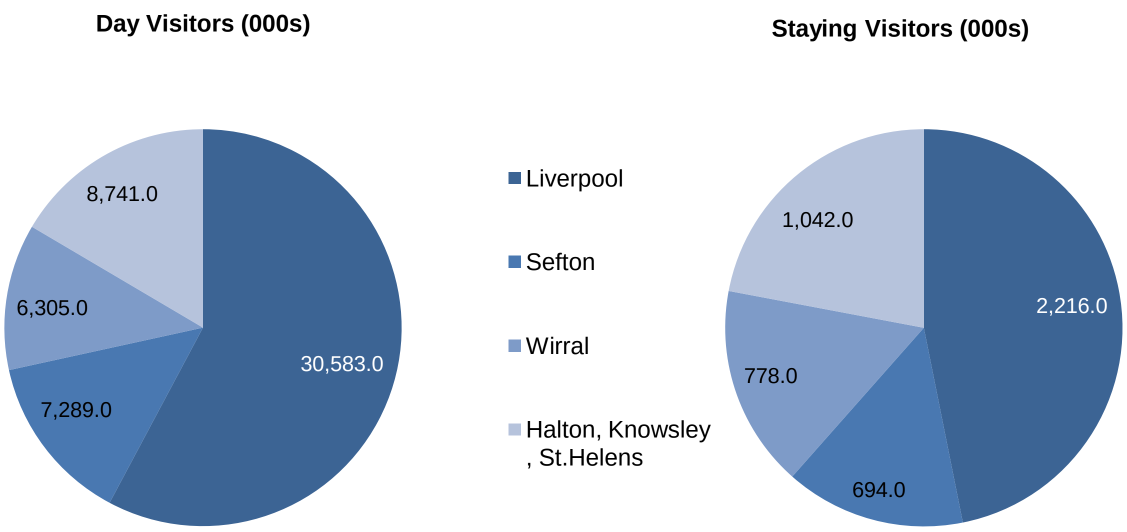
1 Overall size of the visitor economy (STEAM)

1.1 Number of visitors (Volume)

- In total there were an estimated **58m visitors** to the Liverpool City Region in 2013; this includes 53m day visitors and 5m staying visitors.
- For the city of Liverpool itself, this equated to a total of **33m visitors** (31m day visitors and 2m staying visitors).

Thousands of visitors 2013	Liverpool	Liverpool City Region
Serviced Accommodation	1,293.00	2.237.0
Non-Serviced Accommodation	162.0	261.1
Staying with Friends and Relatives	761.0	2,232.0
Day Visitors	30,583.0	**52,918.0**
TOTAL	**32,799.0**	**57,648.0**

Source: STEAM



Statistical Note:

Although in the charts above we provide data for each district, a certain amount of caution should be exercised. STEAM is very much an input-based model (see section 1.5), and whilst a good range of inputs are available for the whole city region and Liverpool itself, this is less the case at district level.

Hence, although figures for the whole area and Liverpool are statistically robust, the exact split of visitor numbers and impact amongst the other five districts has a lower level of statistical reliability.

1.2 Total spend by visitors (Value)

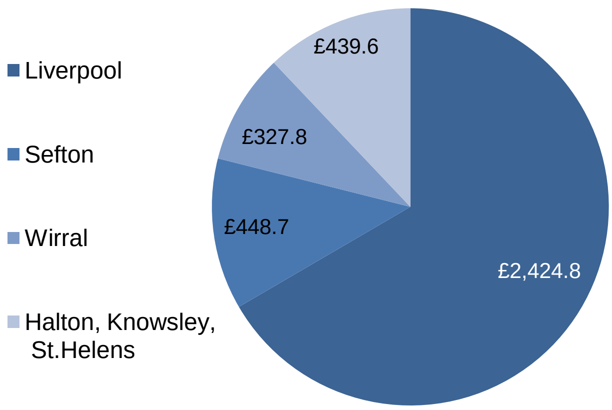
Total spend by visitors is shown in the table below. Note that this covers both the *direct* spend by visitors and the *indirect* spend resulting (for example, spend within the local economy by businesses using local goods and services).

- In 2013 the visitor economy was estimated as being worth **£3.6bn** to the Liverpool City Region - £1.1bn of this coming from staying visitors.
- The visitor economy was worth **£2.4bn** to Liverpool itself.

Economic impact of visitors 2012 (£m)	Liverpool	Liverpool City Region
Serviced Accommodation	£437.4	£669.3
Non-Serviced Accommodation	£147.2	£192.4
Staying with Friends and Relatives	£108.2	£241.1
Day Visitors	£1,731.8	£2,537.9
TOTAL	**£2,424.7**	**£3,640.9**

Source: STEAM

Economic Impact (£m)



The *sectors* where spend occurs are detailed below.

Economic impact of visitors 2012 (£m)	Liverpool	Liverpool City Region
Accommodation	£125.8	£207.9
Food and drink	£496.6	£683.6
Recreation	£156.9	£207.0
Shopping	£524.1	£863.8
Transport	£208.8	£283.6
Total Direct Revenue	**£1,512.5**	**£2,246.1**
Indirect Expenditure	£609.7	£945.5
VAT	£302.5	£449.2
TOTAL	**£2,424.7**	**£3,640.9**

Source: STEAM

1.3 Jobs supported by the visitor economy

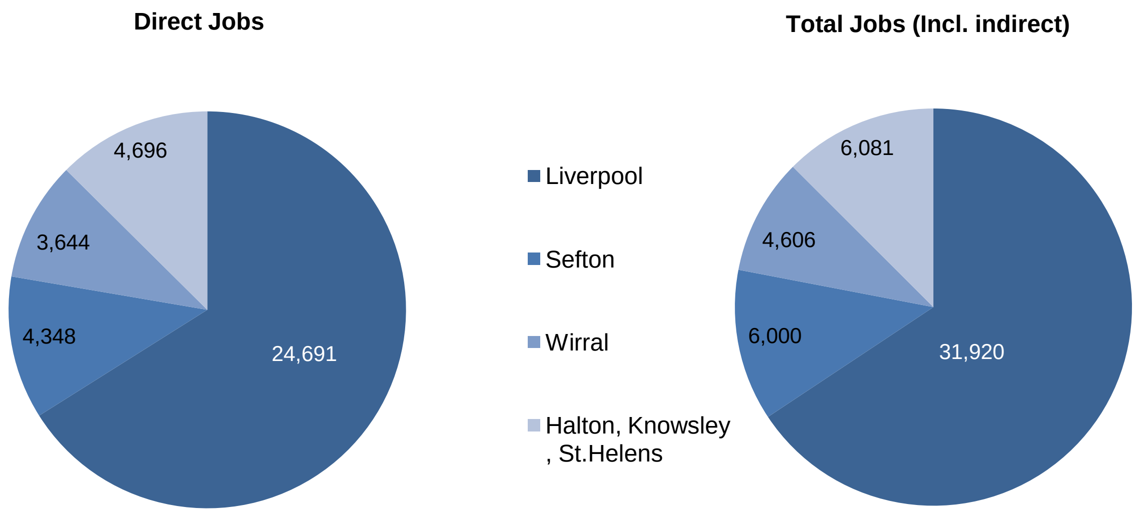
In terms of jobs in the visitor economy, there are two broad approaches to estimating this. The first is to estimate the jobs supported by visitor spend (as adopted by the STEAM model). The second is to decide which SIC[2] codes are applicable to tourism and use survey data from the Office for National Statistics (ONS) to determine 'actual' jobs. Neither method is an exact estimate, as using STEAM is clearly not counting direct jobs, whilst using ONS data does not count the jobs that may be supported by spend made with sectors outside the SIC codes – nor does this approach allow for the calculation of indirect jobs being supported.

a) Using STEAM data.

- This estimates that there were **48,607 jobs** supported by tourism expenditure throughout the Liverpool City Region – 37,397 of these were direct jobs.
- In Liverpool there were **24,691 jobs** supported by tourism spend.

Jobs supported by visitor spend (FTE) 2013	Liverpool	Liverpool City Region
Accommodation	1,601	3,465
Food and drink	9,114	12,545
Recreation	3,495	4,610
Shopping	8,768	14,451
Transport	1,712	2,326
Total Direct Revenue	**24,691**	**37,397**
Indirect Expenditure	7,229	11,210
TOTAL	**31,920**	**48,607**

Source: STEAM



Source: STEAM

[2] Standard Industrial Classification – the list of codes used by ONS to allocate all industries into specific sectors, last revised in 2007. Typically, many economic activity sectors – such as 'tourism' do not fit neatly into the codes used by ONS, but are instead assumed to involve a range of sectors and sub-sectors.

b) Using data from ONS

A selection of SIC codes have been chosen as providing the closest fit possible in terms of the visitor economy sector and these are listed in the appendix.

This suggests that there were **45,075 direct jobs** in visitor economy-related SIC codes. As indicated above though, this is likely to undervalue the jobs connected to the visitor economy; an easy example to illustrate the point is that this data does not cover jobs in the retail sector, when STEAM suggest that over a third of visitor spend was made on 'shopping', thus supporting jobs in this sector.

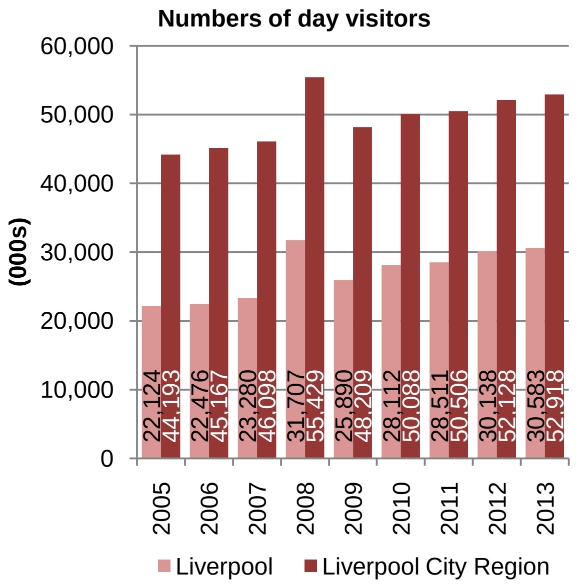
Jobs in the visitor economy, Liverpool City Region	**All Employment[3]** 2011	**All Employment[4]** 2012
Accommodation	6,687	5,422
Food and drink	30,177	31,873
Transport & travel	1,963	3,205
Culture, attractions, entertainment, other	4,745	4,575
TOTAL	**43,572**	**45,075**

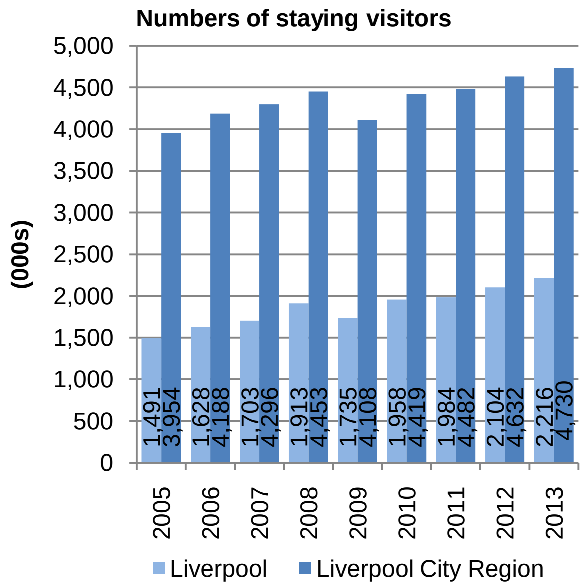
Source: Business Register & Employment Survey 2012, ONS.

[3] *"All employment" includes both employees and self employed such as sole traders.*
[4] *"All employment" includes both employees and self employed such as sole traders.*

1.4 Change over time

Although the headline figures produced by STEAM are useful, it is perhaps even more helpful in illustrating growth or decline in the visitor economy. In the series of charts below, data is tracked back to 2005[5].

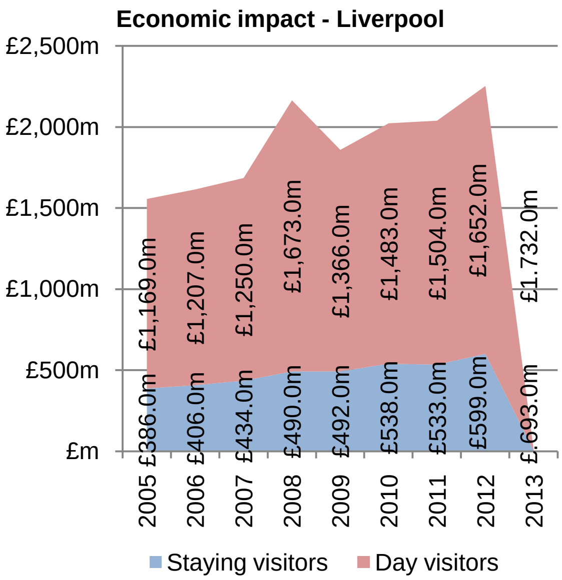


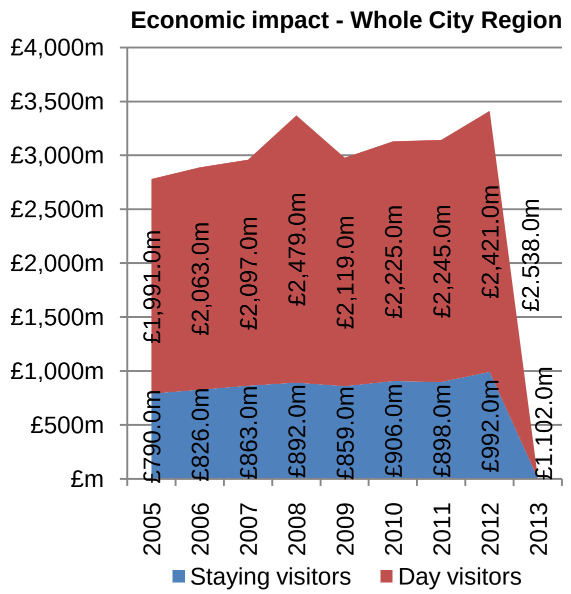


Source: STEAM

Both day and staying visitor numbers show an increase from last year; day visitors are at their highest ever level excluding Capital of Culture year, whilst **staying visits across the whole city region reached a new record level.**

In terms of the economic impact of the sector, 2012 figures overtook the record set in the 2008 Capital of Culture year.





Source: STEAM

[5] *Note: where economic data is traced back to 2005, all figures shown are "at 2012 values".*

1.5 STEAM Methodology

To estimate the volume and value of tourism, the Liverpool City Region uses the STEAM[6] model – this model is widely (though not universally) used across the UK, including other tourist boards in North West England. STEAM is owned and operated by Global Tourism Solutions (UK) Ltd.

STEAM relies on local-level data to drive the estimates, principally[7]:

- Accommodation stock
- Local occupancy surveys
- Visits to attractions / events
- Visits to Tourist Information Centres
- Hotel Occupancy in the City Region

A key component of the way in which STEAM works is its definition of 'day visitors'; this is defined as a person travelling to a district other than that in which they live, for a non-routine purpose, with a stay of over 3 hours. Thus, someone making a trip to Southport Pier from Liverpool could be classed as a day visitor, but not someone making a similar trip who lived in Formby. The important note to make here is that the number of the day visits recorded by STEAM for the Liverpool City Region will contain a certain amount of intra-city region tourism.

Local data for the preceding year is gathered by the research team in January-March each year. This data is passed to Global Tourism Solutions, with reports typically available by mid-year. Currently the most recently available data is that for 2013.

Note:

GTS-UK has utilised research conducted on behalf of the Northwest Regional Development Agency (NWDA) in 2007/2009 to update the initial baseline estimates which the model has used – much of this information having not previously been available. This change has resulted in significant alterations to data and this affects not just the Liverpool City Region but also the whole of the Northwest. Therefore, the figures used within this Digest replace completely any STEAM figures from 2009 or before.

For more guidance on this change (if required), please contact the research team: research@liverpoolLEP.org.

[6] *Scarborough Tourism Economic Activity Monitor – so-called because Scarborough was the first UK location where the model was applied.*
[7] *Notice that STEAM uses a further range of inputs, although the components which have the biggest influence on the model are listed here.*

2 Local data from the Visitor Economy

2.1 Hotel occupancy

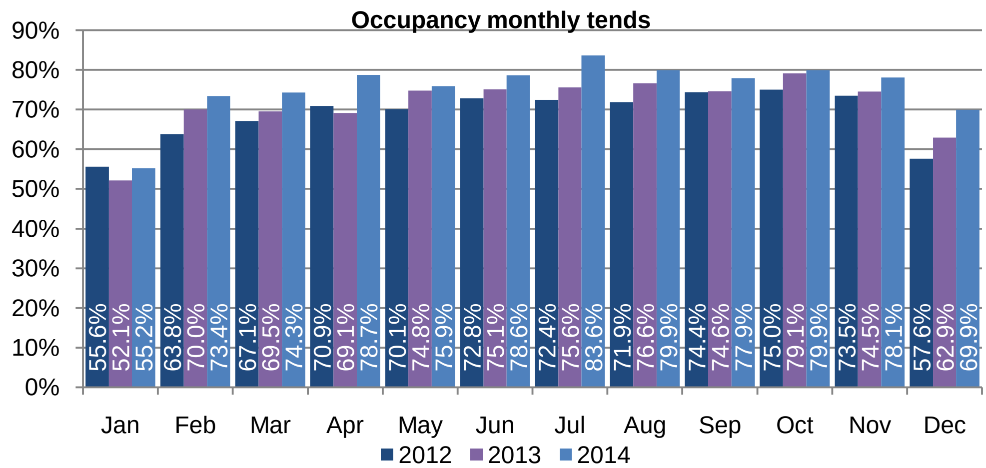
Hotel occupancy data is drawn from the STR Global®[8]. it includes a number of establishments based in the districts.

Room occupancy, Liverpool City Region	2012	2013	2014
Weekday average (Mo-Th)	68.9%	69.9%	73.1%
Weekend average (Fr-Sa)	84.9%	83.6%	85.6%
Sunday	51.9%	53.6%	58.2%
Total average	**68.8%**	**71.2%**	**75.5%**

SOURCE: STR GLOBAL, LTD. REPUBLICATION OR OTHER RE-USE OF THIS DATA WITHOUT THE EXPRESS WRITTEN PERMISSION OF STR GLOBAL IS STRICTLY PROHIBITED

- In 2013 room occupancy in the city region averaged **76%**, an increase of 5% since 2013.

Below, the latest occupancy data is compared with earlier years.



SOURCE: STR GLOBAL, LTD. REPUBLICATION OR OTHER RE-USE OF THIS DATA WITHOUT THE EXPRESS WRITTEN PERMISSION OF STR GLOBAL IS STRICTLY PROHIBITED

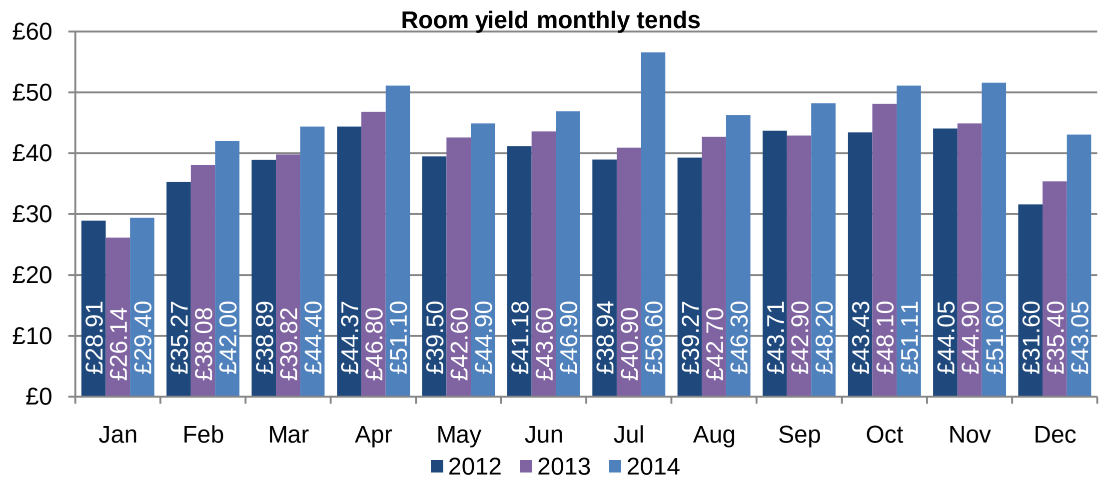
[8] *STR Global is a tool run by Smith Travel Research Global that allows hotel and tourism managers to see an up-to-date picture of room occupancy and availability in their city. Please note change over from LJ forecaster to STR Global occurred in April 2013*

Most establishments also complete a section of the STR Global dealing with revenue analysis. This gives the Average Daily Rate (ADR) and Revenue Per Available Rooms (RevPAR) – the latter tending to be the preferred measure in terms of economic performance.

Room revenue, Liverpool City Region	**2012**	**2013**	**2014**
ADR weekday average (Mo-Th)	£52.54	£53.02	£55.23
ADR weekend average (Fr-Sa)	£66.56	£66.17	£73.55
ADR average	**£56.66**	**£57.09**	**£61.13**
REVPAR weekday average (Mo-Th)	£36.24	£35.29	£41.70
REVPAR weekend average (Fr-Sa)	£57.17	£55.09	£61.90
REVPAR average	**£39.09**	**£41.00**	**£46.30**

SOURCE: STR GLOBAL, LTD. REPUBLICATION OR OTHER RE-USE OF THIS DATA WITHOUT THE EXPRESS WRITTEN PERMISSION OF STR GLOBAL IS STRICTLY PROHIBITED

- The average room yield (RevPAR) in the city region in 2014 was £46.30, an increase since 2013



SOURCE: STR GLOBAL, LTD. REPUBLICATION OR OTHER RE-USE OF THIS DATA WITHOUT THE EXPRESS WRITTEN PERMISSION OF STR GLOBAL IS STRICTLY PROHIBITED

All hotel performance – both in terms of occupancy levels and yield – needs to be viewed in the light of the hotel room stock in the city (*see section 2.2*).

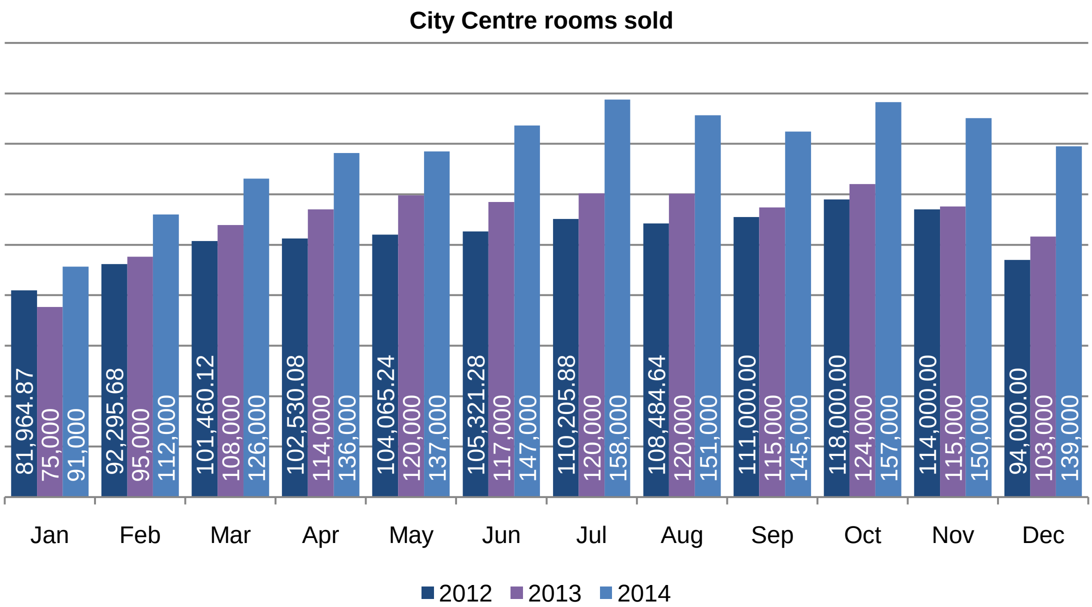
In the table below, known city centre hotel stock is overlaid by the occupancy levels shown in the STR Global to produce an estimate of the actual number of hotel rooms that have been sold:

Hotel rooms sold[9]	Liverpool City Centre
2004	720,000
2005	705,000
2006	694,000
2007	725,000
2008	910,000
2009	897,000
2010	1,046,000
2012	1,244,000
2013	1,326,936
2014	1,649,634

Source: Tourist board room stock data

This indicates a growth in the numbers of visitors staying in hotels in the city and **in 2014 1 million 649 thousand rooms were sold in the city centre**. This is higher than in any previous year (including Capital of Culture year) and shows Liverpool's ongoing growth as a destination.

Importantly, besides the attractiveness of the destination, this is also a product of increasing stock levels; below we see the monthly results, with each month indicating record numbers of rooms being sold on the year before.

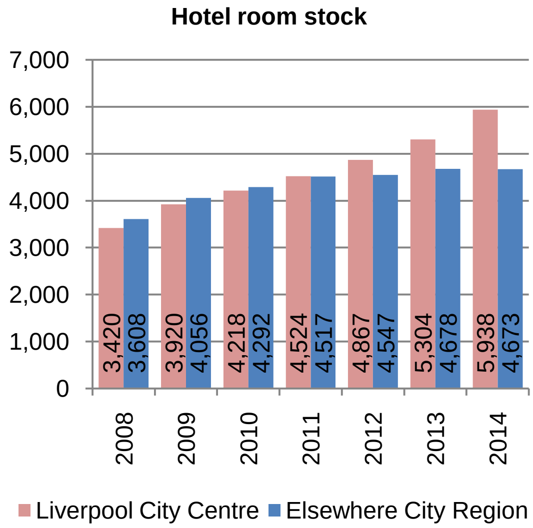


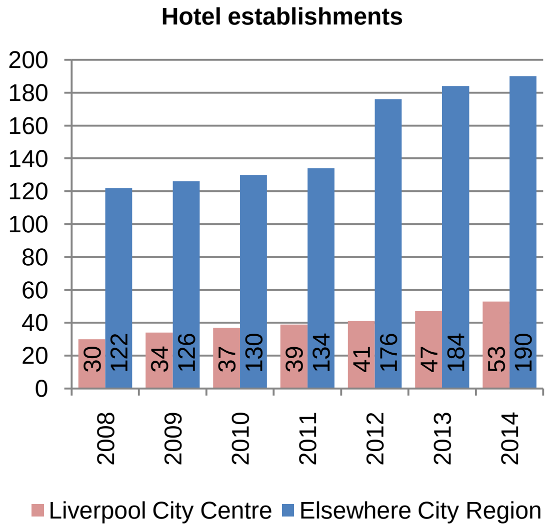
Source: STR Global / Tourist board room stock data

[9] *Figures rounded to the nearest 000.*

2.2 Hotel stock

Hotel room stock is (as seen in 2.1) an important component behind performance; in the charts below we show growth both in the room stock and the number of establishments. Note that in order to simplify this visually, we present the data split between Liverpool City Centre and elsewhere in the city region (including the Liverpool suburbs).





Source: Tourist board room stock data

- Figures for the City Centre include the most recent openings:
    - The 153 room Titanic Hotel on Stanley Dock (opened May 2014)
    - The 116 room Aloft on North John Street (opened mid 2014)
    - The 67 room Signature, Albion House (April 2014)
    - The 87 room Doubletree by Hilton, Sir Thomas Street (March 2014)

- 2013 data will include:
    - The 125 room Travelodge on Exchange St East (opened March 2013)
    - The 122 room Ibis Styles on Dale Street (opened October 2013)
    - The 129 room Adagio at Lewis' Building (opened April 2013)
    - The 51 room The Richmond, Hatton Garden (opened April 2013)
    - The 12 room (sleeps111) Signature Hotel (opened April 2013)
    - The 35 room Hoax Liverpool, Stanley Street (opened July 2013)
    - The 92 room Z Hotel (opened May 2013)
    - The 14 room Epic aparthotel (sleeps 50+)

  and outside the city centre:
    - The 25 room Lorne Hotel, Wirral
    - The 101 room Travelodge, Southport

2.3 Visits to Attractions

In the table below, we show the top attractions in the Liverpool City Region in 2014; this shows the diverse range of attractions, both free and paid, that the city region offers. It should be noted that this excludes some major attractions in the area where it is not possible to obtain accurate counts, such as the Albert Dock, Wirral Coastal Park and Another Place.

Note that we can only show those attractions who respond to our annual attractions survey and who permit us to show their data.

Top "free" attractions

	Attraction	Type	District	Attendance 2014
1	Bluecoat	Museum / gallery	Liverpool	743,814
2	Museum of Liverpool	Museum / gallery	Liverpool	707,405
3	Merseyside Maritime Museum	Museum / gallery	Liverpool	631,711
4	World Museum Liverpool	Museum / gallery	Liverpool	610,785
5	Tate Liverpool	Museum / gallery	Liverpool	540,885
6	Liverpool Cathedral	Place of worship	Liverpool	527,741
7	International Slavery Museum	Museum / gallery	Liverpool	372,316
8	Liverpool Metropolitan Cathedral	Place of worship	Liverpool	318,347
9	National Trust, Formby	Nature / wildlife / zoo	Sefton	267,375&
10	Walker Art Gallery	Museum / gallery	Liverpool	252,042
11	Lady Lever Art Gallery	Museum / gallery	Wirral	221,663
12	Sudley House	Historic Property	Liverpool	55,010
13	Williamson Art Gallery & Museum	Museum / gallery	Wirral	36,144
14	Marshside RSPB	Wildlife	Sefton	20,365
15	Knowsley Hall	Historic Property	Knowsley	15,020

Source: Tourist board annual Visitor Attractions Survey

Top "paid" attractions

	Attraction	Type	District	Attendance 2014
1	Mersey Ferries	Other	Liverpool &Wirral	611,028
2	Echo Arena Liverpool	Entertainment	Liverpool	521,234
3	Knowsley Safari Park	Nature / wildlife / zoo	Knowsley	503,678
4	Beatles Story	Museum / gallery	Liverpool	249,734
5	Aintree Racecourse	Sporting venue	Liverpool	203,042
6	Liverpool Football Club Museum & Tour	Museum	Liverpool	185,466
7	Liverpool Philharmonic	Entertainment	Liverpool	178,715
8	Floral Pavilion	Entertainment	Wirral	177,500
9	Haydock Park Racecourse	Sporting venue	St Helens	170,717
10	Ness Botanic Gardens	Gardens	Wirral	101,701$
11	World of Glass	Visitor Centre	St Helens	60.891
12	Spaceport	Other	Wirral	48,910
13	Norton Priory	Historic Property	Halton	34,242!
14	Port Sunlight Museum	Museum / gallery	Wirral	32,980!
15	U-Boat Story	Museum	Wirral	25,916

Source: Tourist board annual Visitor Attractions Survey

! 2013 figures
& 2012 figures
** 2010 figures*
@ 2009 figures
 # 2008 figures

2.4 Sport

As well as visitor attractions, ‘sport’ is a key driver behind visits to the city region; the following are the attendance figures recorded at key venues for the most recent sporting year[10].

	Venue	District	Attendance
1	Liverpool FC	Liverpool	849,513
2	Everton FC	Liverpool	803,413
3	St.Helens Saints RLFC	St.Helens	190,914
4	Aintree Racecourse	Liverpool	169,362
5	Haydock Park Racecourse	St.Helens	177,575
6	Tranmere Rovers FC	Wirral	131,541
7	Widnes Vikings RLFC	Halton	74,751

Source: Media / publicity

[10] *For racecourses this is a calendar year; for others this relates to the 2013/14 sport season.*

2.5 Events

In addition to the list of top attractions we also record the top 10 free and paid events. Where local authorities or event organisers have published a figure we use this; other than that, use is made of figures quoted in the press.

A higher degree of reliability is associated with visitor numbers at paid events, as the ticketed data provides a robust measure. Again, as with attractions, we can only show those events where organisers respond to our request for figures and permit us to publish their data.

Top "free" events 2014

	Event	District	Attendance
1	Giants spectacular	Liverpool	1.0m
2	Biennial	Liverpool	677,000
3	Battle of Atlantic	Liverpool	300,000!
4	Mersey River Festival	Liverpool	200,000
5	International Music Festival[11]	Liverpool	100,000
6	Brazilica	Liverpool	100,000
7	Africa Oye	Liverpool	75,000
8	Southport Food & Drink	Sefton	28,000!
9	Hoylake RNLI Open Day	Wirral	8,000
10	Tour of Britain – Start	Knowsley	2,500

Source: Media / publicity

Top "paid" events 2014

	Event	District	Attendance
1	Open Golf Championship	Wirral	203,000
2	Grand National	Liverpool	139,000
3	Southport Flower Show	Sefton	90,000
4	Southport Air Show	Sefton	67,500
5	Creamfields	Halton	60,000
6	Brouhaha	Liverpool	50,000
7	Liverpool Food and Drink Festival	Liverpool	45,000
8	Liverpool International Tennis Tournament	Liverpool	20,000
9	Port Sunlight Festival	Wirral	18,000
10	Rock N Roll Marathon	Liverpool	7,000[12]

Source: Media / publicity

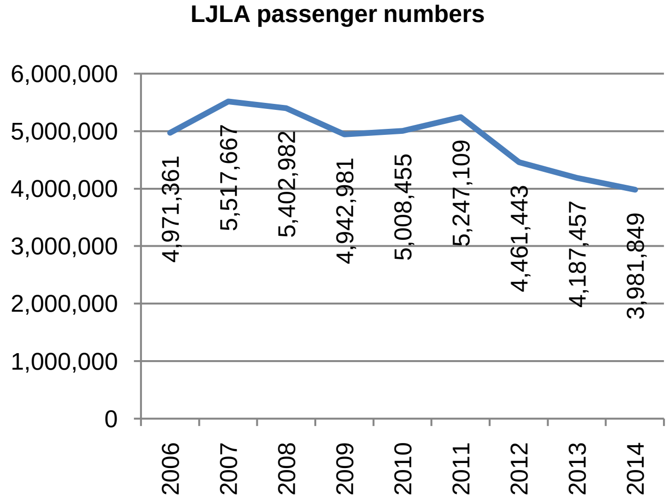
! *2013 figures*

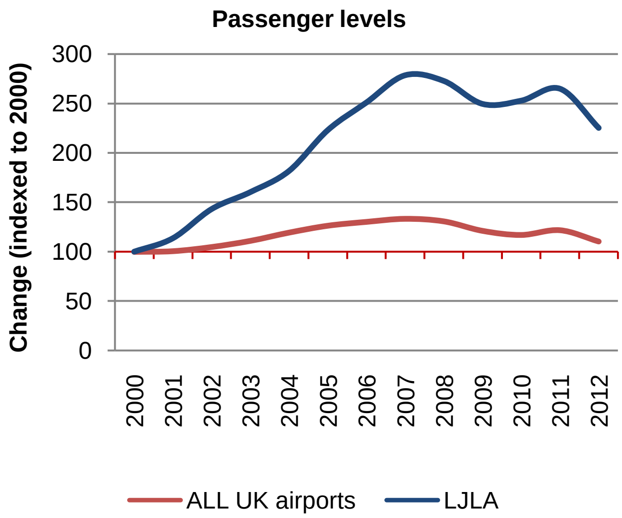
[11] This replaces the Mathew Street Festival
[12] Number of runners

2.6 Transport data

a) Passenger levels LJLA

A range of airlines provide routes out of Liverpool John Lennon Airport (LJLA) including the scheduled operators EasyJet, FlyBE, Ryanair and Wizz Air.





Source: CAA Airport Statistics

During 2014 4.0m passengers travelled through LJLA; this is a slight downturn on figures recorded during the previous 2 years. However, there are a number of considerations to be taken into account here:

- The above data represents both inbound[13] and outbound[14] travellers; there being no contiguous source disaggregating changing tourism levels from (potentially lower) domestic outbound travellers.

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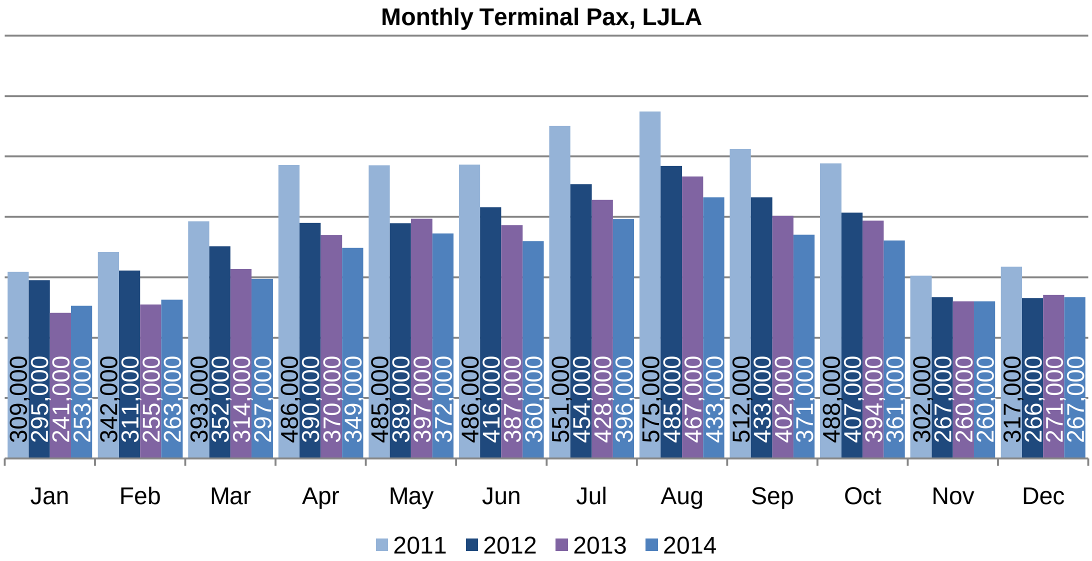
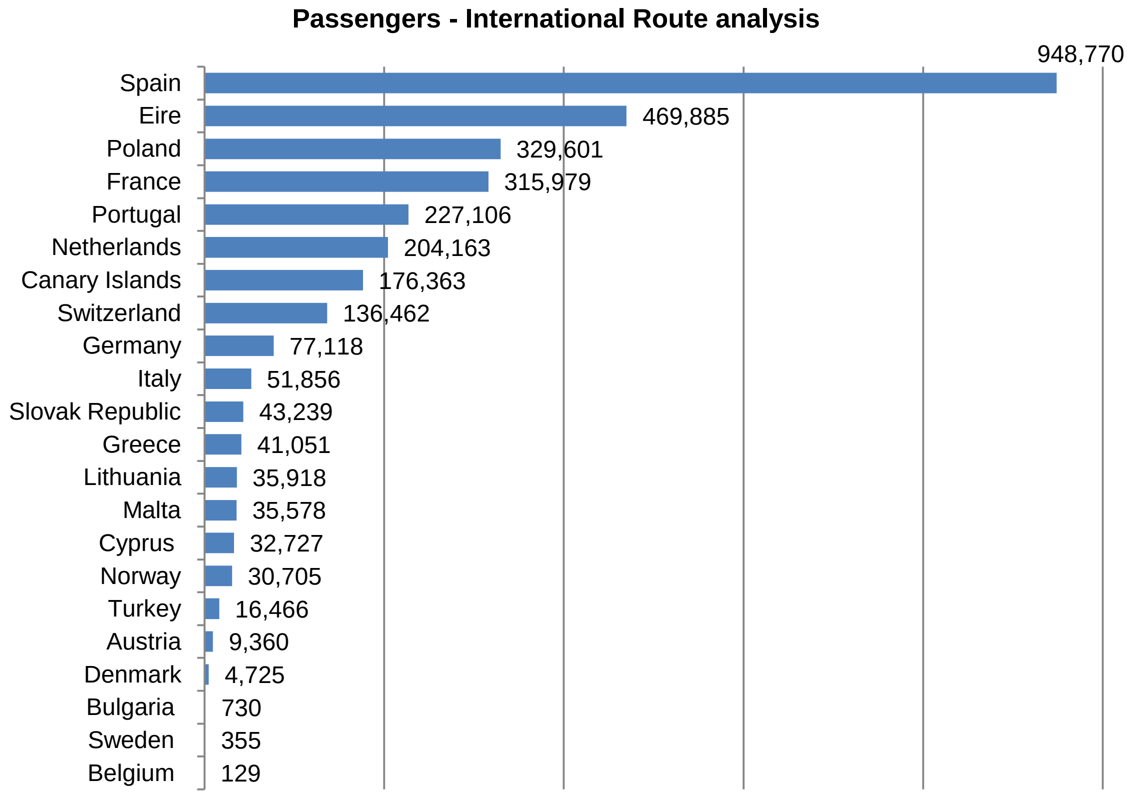
[13] "Inbound" = Overseas visitors to the UK.
[14] "Outbound" = UK nationals travelling overseas.



Source: CAA Airport Statistics

The change on a monthly basis can be seen above; whilst below we show in the year to date the number of passengers by route of destination/origin. Again do bear in mind that this covers both inbound and outbound travellers, and is not necessarily an indication of the strength of different visitor markets.



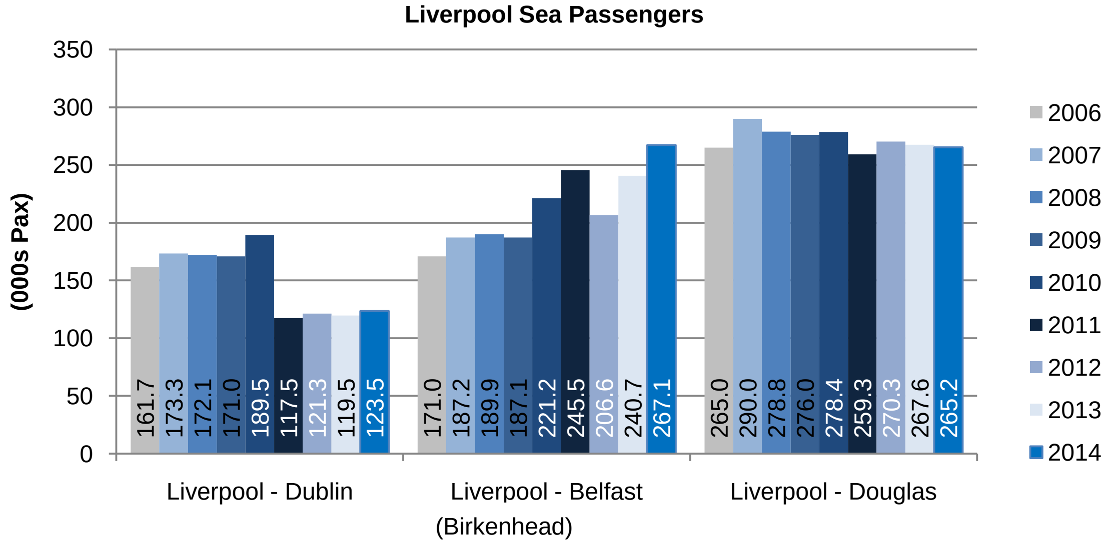
Source: CAA Airport Statistics

b) Irish Sea Ferry passengers

Until recently, four passenger routes were operated from the Liverpool City Region:

- Liverpool – Isle of Man (Steam Packet)
- Liverpool – Dublin (P&O)
- Birkenhead – Dublin (Norfolkline ➢ DFDS)
- Birkenhead – Belfast (Norfolkline ➢ DFDS ➢ Stena)

In 2010, DFDS acquired Norfolkline; unfortunately, despite strong market potential DFDS disposed of the Irish Sea part of the Norfolkline group within a year – this decision may particularly have been influenced by the condition of the Irish economy. The Belfast link was sold to Stena and the Dublin link closed as at January 2012. Stena have since undertaken significant refurbishment of the ships on their 'new' Belfast link, with strong marketing promotion.



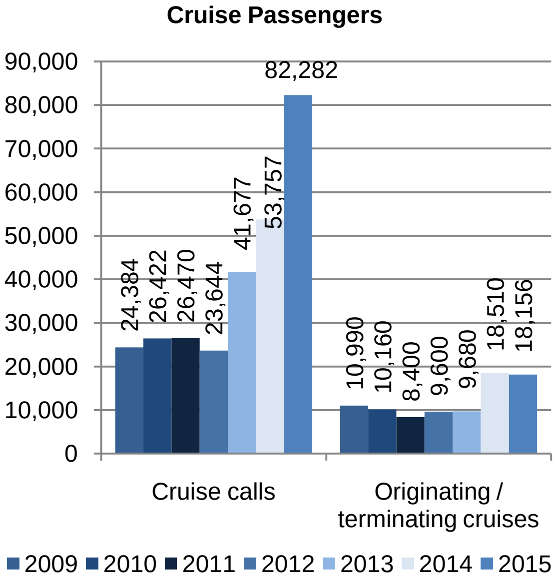
Source: Sea Passenger Statistics, DfT

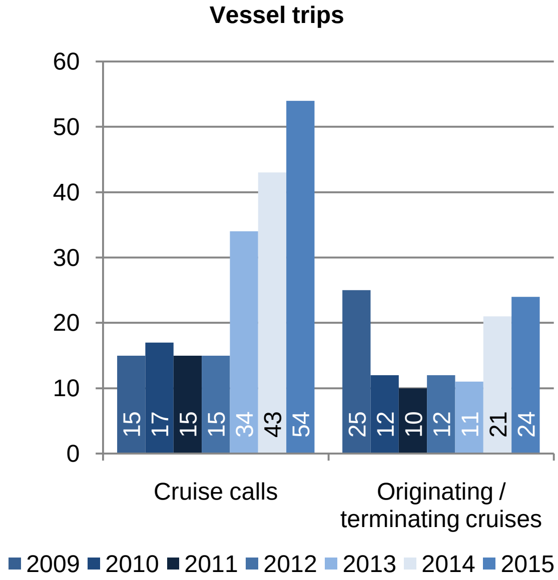
- In 2014, some **656,000** passengers travelled to and from Liverpool by one of the three ferry routes with a significantly high increase of traffic on the Liverpool – Belfast route.

c) Cruise Ship Passengers

Since Liverpool's Cruise Terminal was inaugurated in September 2007, allowing vessels to berth alongside the waterfront (rather than mid-river or in the North Docks), the cruise market has shown significant growth. In 2012 those which are on a cruise *originating* or *terminating* in Liverpool were permitted to this facility for the first time, having previously been located in the Langton Dock; temporary terminal check-in and baggage facilities have been constructed on adjoining land.

The charts below show both cruise ship *calls* and *originating/terminating* cruises; both in terms of passenger numbers[15] and vessel trips.





Source: Port / operator publicity

- In 2015 it is estimated that there would be potentially **82,282** passengers on cruise ships visiting the city and an estimated 18,156 on cruise ships departing the city.
- The estimated number of passengers on 'cruise calls' at the terminal in 2015 is significantly higher on last year, though broadly comparable.
- 2015 saw a slight decrease in cruises/pax originating or terminating in the city. Partially this is due to the ability to now use the Liverpool Cruise Terminal (operators had expressed dissatisfaction with the location, facilities and the need to 'lock in and out' at the Langton Dock terminal, especially in comparison with the Liverpool Cruise Terminal).

[15] Passengers shown is for the "potential pax", i.e., if each ship were operating at capacity, (based on the listed passenger capacity on the operators' websites) and hence may not fully reflect actual passenger numbers.

d) Rail Passengers

Data on rail passengers is hard to come by; despite rail operation in the UK being operated through government-supported franchises, less information is available than in the private sectors of shipping and aviation.

Possibly the only usable data comes from the Rail Regulator's monitor of station usage. This only covers *total* passengers not just visitors. Nevertheless we show on the left the top UK stations[16] compared to other major UK cities and on the right usage levels of other key stations[17] within the Liverpool City Region.

Most recent data comes from the 2013-14 financial year.

Key destinations	Exits
Birmingham New St	17,374,492
Leeds	13,864,727
Glasgow Central	13,576,311
Manchester Piccadilly	12,238,050
Edinburgh	10,003,169
Brighton	8,470,582
Liverpool Lime St	**7,118,395**
Cardiff Central	5,869,815
Bristol Temple Meads	4,761,420

Selected key city region stations	Exits
Liverpool Central	7,310,792
Moorfields	3,270,618
Liverpool James Street	1,539,114
Liverpool South Parkway	892,722
Waterloo	738,302
Formby	641,358
St.Helens Central	548,422
New Brighton	455,400
Port Sunlight	308,316

Source: Station usage data, Office of the Rail Regulator.

Statistical note:

As data is drawn from ticket sales data from the rail industry, trips undertaken using multi-modal ticket in former metropolitan areas (such as "Merseyside") are *estimated* and included within these figures.

[16] *Excluding London & key commuter terminals*
[17] *Stations are selected based on their central locations or proximity to key visitor attractions.*

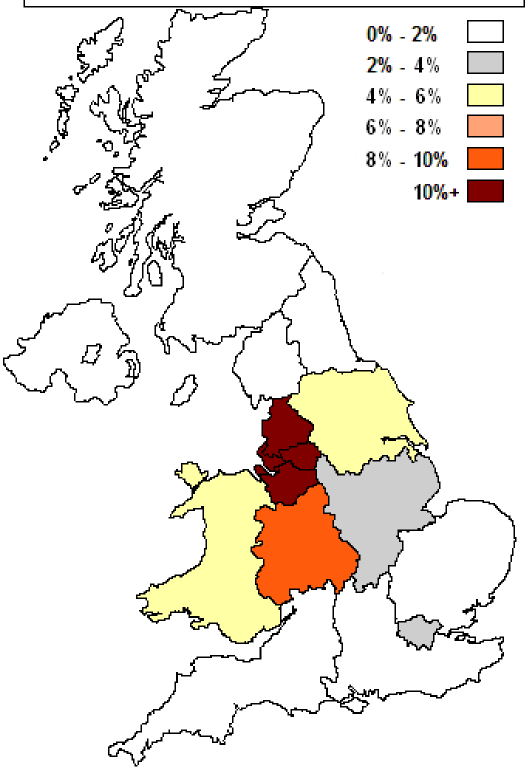
3 Visitor Profile data

A number of major surveys are conducted periodically by The Liverpool LEP, which aids the tourism intelligence of the area. These include the Liverpool City Region Visitor Survey[18] and the Destination Survey[19]. Within this section we present key data from both – be aware the former represents the profile of visitors to the whole area, the latter just that of visitors to the city centre.

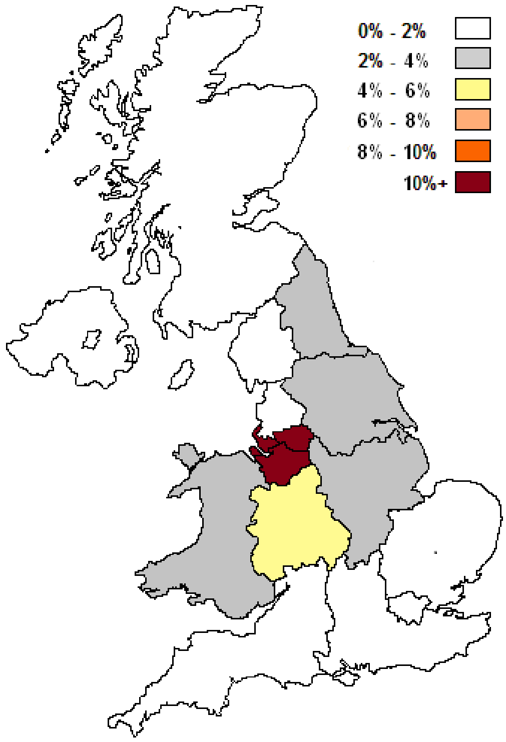
3.1 Visitor origin

a) Day Visitors

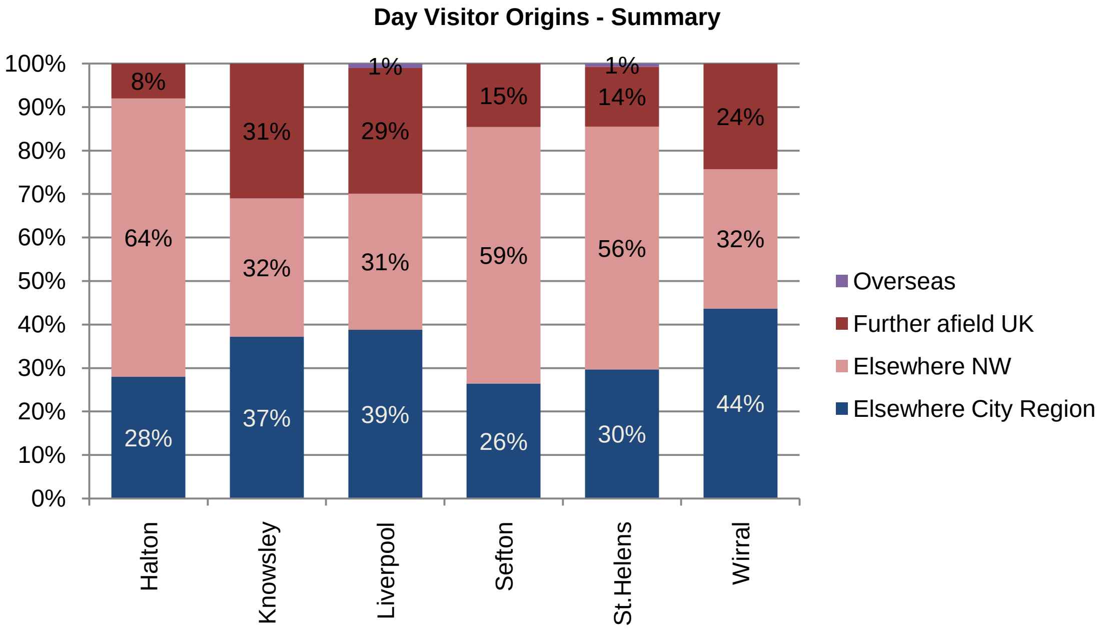
Visitors to the whole City Region	% of day visitors
City Region residents	36%
Cheshire	13%
Greater Manchester	16%
Lancashire	13%
Cumbria	<1%
Northeast	<1%
Yorkshire	5%
East Midlands	3%
West Midlands	8%
London & Southeast	2%
Southwest	<1%
Wales	4%
Scotland	1%
Northern Ireland	<1%



Visitors to Liverpool City Centre	% of day visitors
City Region residents	40%
Cheshire	16%
Greater Manchester	14%
Lancashire	9%
Cumbria	1%
Northeast	3%
Yorkshire	4%
East Midlands	3%
West Midlands	6%
London & Southeast	2%
Southwest	1%
Wales	4%
Scotland	1%
Northern Ireland	<1%



[18] *The Merseyside Visitor Survey is conducted every 5 years. Latest data is for 2010.*
[19] *The Liverpool Destination Survey is conducted on alternate years. Latest data is for 2014*



Besides those living elsewhere in the city region, there were strong levels of day visits from Lancashire and Cheshire. To some extent these form part of the City Region's natural hinterland.

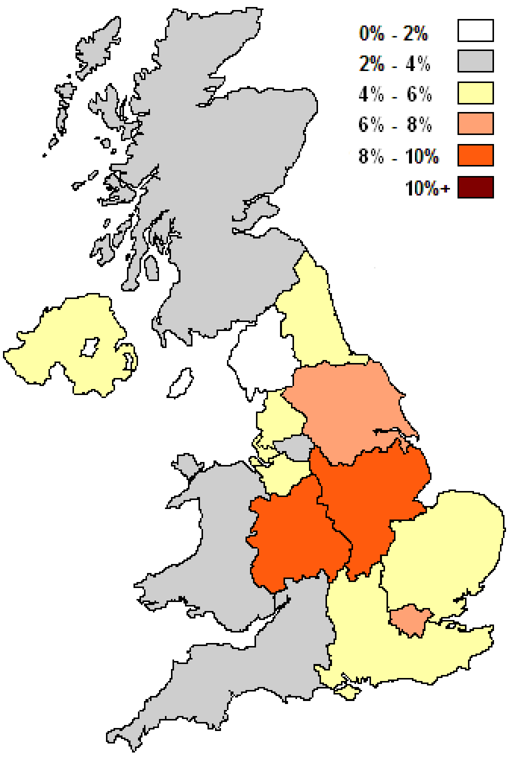
Other major day visitor markets included Greater Manchester and Yorkshire (the latter thanks in part to good Trans-Pennine links); but we also see relatively high levels of day visitors from the West Midlands.

For Wales, day visitors tend to be a reflection of visitors from the North Wales area; this extending as far as Gwynedd, rather than the whole principality.

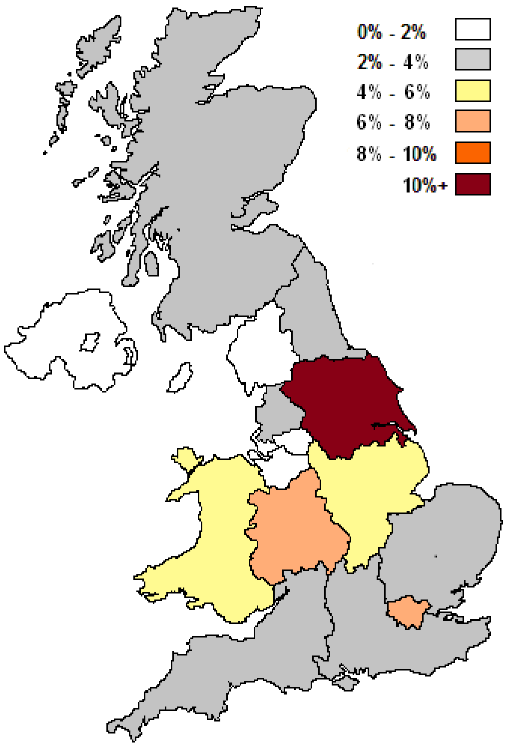
As indicated in the previous *Digest*, the timings now offered on the upgraded West Coast Main Line mean that there were day visitors from Greater London evident too.

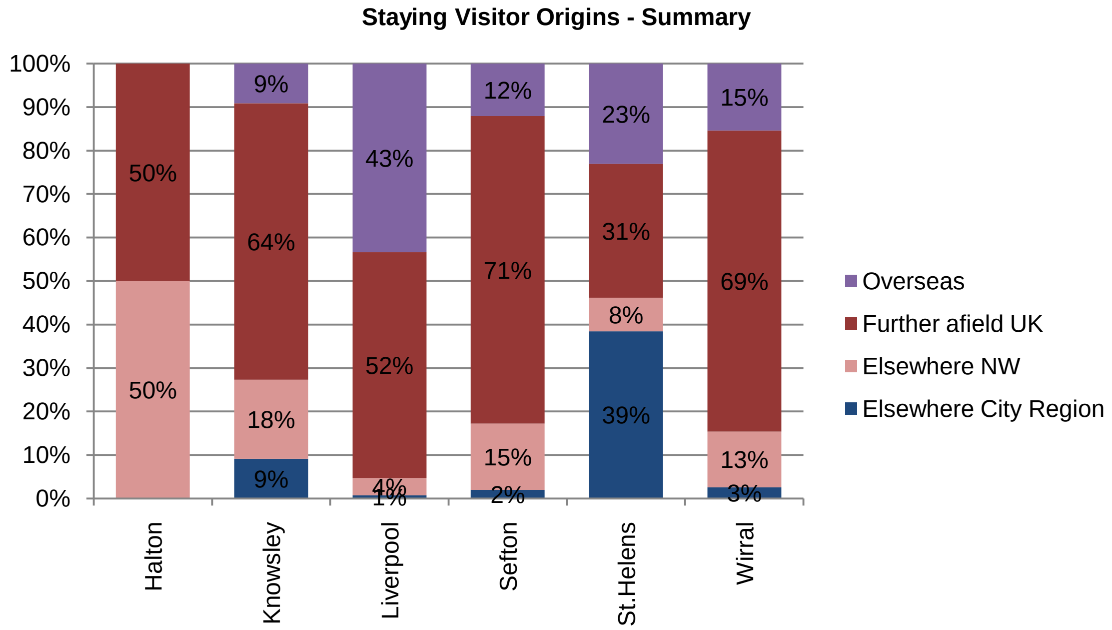
b) Staying Visitors

Visitors to the whole City Region	% of staying visitors
City Region residents	6%
Cheshire	5%
Greater Manchester	3%
Lancashire	5%
Cumbria	<1%
Northeast	5%
Yorkshire	7%
East Midlands	9%
West Midlands	8%
London & Southeast	17%
Southwest	4%
Wales	2%
Scotland	3%
Northern Ireland	5%
Overseas	22%



Visitors to Liverpool City Centre	% of staying visitors
City Region residents	2%
Cheshire	1%
Greater Manchester	2%
Lancashire	3%
Cumbria	1%
Northeast	3%
Yorkshire	11%
East Midlands	4%
West Midlands	7%
London & Southeast	9%
Southwest	4%
Wales	5%
Scotland	4%
Northern Ireland	2%
Overseas	38%





There is a relatively low level of staying visitors from the Southwest, Northeast or Scotland; this may owe much to relatively poor direct transport links from these locations.

There is strong evidence of London & the South East being important markets; in total, over a fifth of all staying visitors to Liverpool (21%) came from these areas. As evidence of a growing market, this was 15% in 2006 (more information on growth / decline by geography can be found in the previous *Digest*).

Notice that overseas visitors form a very important part of the staying visitor market in Liverpool; less so elsewhere in the city region.

c) Key Overseas Markets

As evidenced above, overseas markets form a very important part of the inbound visitor market for Liverpool.

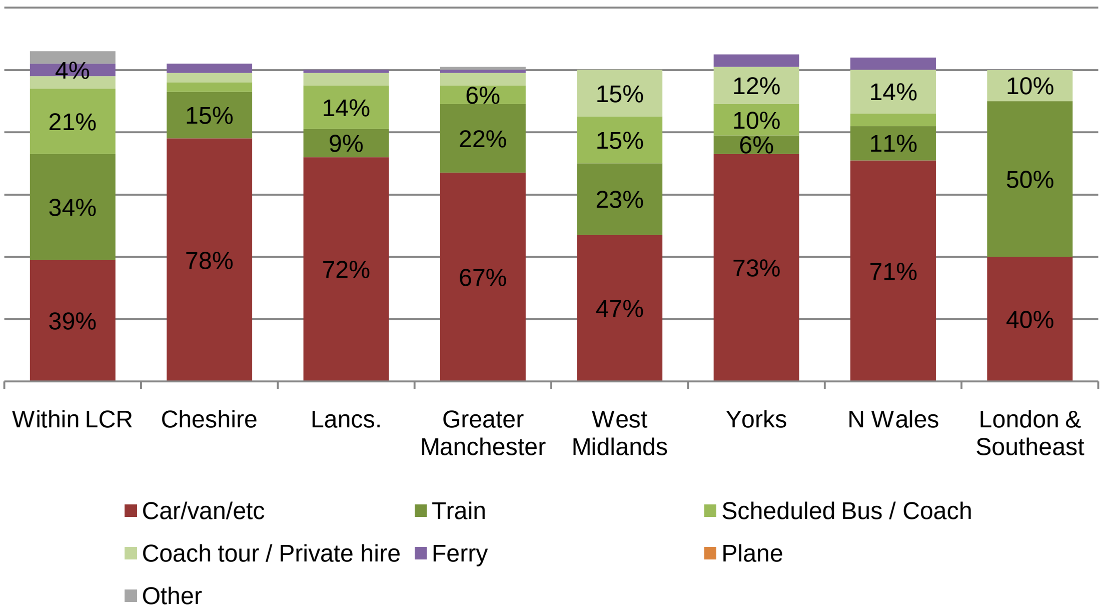
Data from our Destination Survey study suggests that the following were the top origins visiting Liverpool itself in 2014. Although Australia may be a surprise being placed so high on this list, data from Visit Britain has confirmed something of a boost for visits to the UK from that location during recent periods, partially a result of beneficial economy performance / exchange rates.

	% of all staying visitors
Eire	4%
USA	3%
Australia	3%
Germany	2%
Spain	3%
Netherland	1%
France	3%
Switzerland	1%
Austria	1%
Italy	2%
Poland	2%
New Zealand	1%
Japan	1%
Canada	1%
Norway	<1%

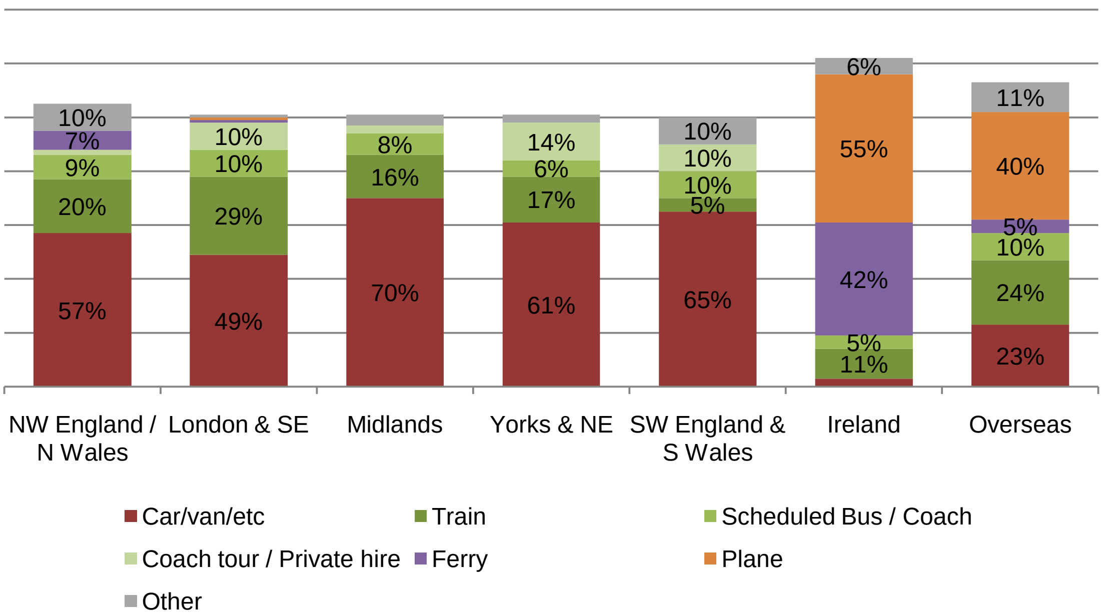
3.2 Mode of transport

Transport mode is an important aspect of understanding the visitor market. On the one hand, it may reflect where good linkages exist, with the potential for further visit generation; on the other hand, coupled with visitor origin, it may reveal where markets are underperforming due to lower than ideal levels of connectivity. This is especially important in the current climate, where twin pressures of costs and environmental concerns influence modal choice. Below we summarise transport choices both for day and staying visitors from key markets.

a) Modal Choice: Day Visitors



b) Modal Choice: Staying Visitors



Note: percentages may add up to more than 100% as more than one mode of transport may have been involved in the trip. Also note that 'ferry' covers both Mersey Ferry and Irish Sea routes, and that whilst 'plane' may relate to Liverpool John Lennon Airport, it may also reflect on other UK gateways.

3.3 Purpose of visit

The data shows the key reasons behind the visit to the area. Note that this data shows the *main* reasons; the survey length unfortunately means that ‘contributory’ reasons were not asked. It is worth noting that due to the survey methodology, the data shown probably ‘undervalues’ the level of business and golf/sporting trips to the city region.

Notice also that especially in the case of St.Helens, “Events” includes sporting events, such as horse racing at Haydock Park.

a) Purpose: Day Visitors

Halton		Knowsley		Liverpool	
Attractions VFR Explore area	**89%** 3% 3%	**Attractions** Events VFR Explore area	**82%** 14% 2% 2%	**Sightseeing** **Shopping** VFR Attractions Events	**41%** **22%** 13% 5% 5%
Sefton		**St.Helens**		**Wirral**	
Explore area Attractions Shopping Events VFR	**68%** 15% 8% 4% 3%	**Attractions** **Events** Shopping VFR Explore area	**63%** **20%** 10% 5% 2%	**Attractions** **Explore area** VFR Events Shopping	**46%** **45%** 6% 4% 1%

b) Purpose: Staying Visitors

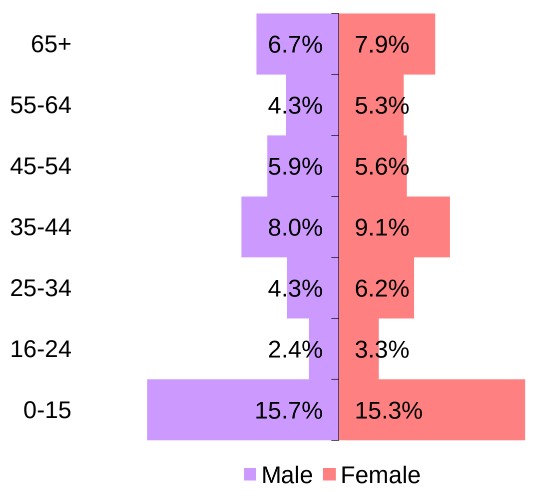
Halton		Knowsley		Liverpool	
VFR Attractions	50% 50%	**Attractions** VFR	**92%** 8%	**Sightseeing** VFR Attractions Events Conferences	**60%** 13% 9% 7% 2%
Sefton		**St.Helens**		**Wirral**	
Explore area VFR Events Attractions Golf	**66%** 15% 9% 6% 2%	**VFR** **Events** Attractions Shopping	**60%** **20%** 7% 7%	**Attractions** **Explore area** **VFR** Events Cycling	**40%** **27%** **27%** 2% 2%

3.4 Visitor Demographics

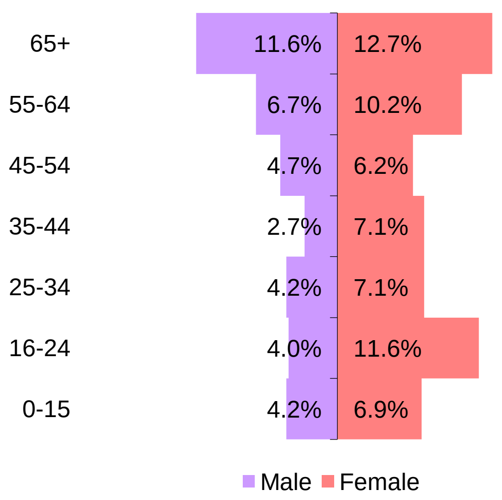
In terms of the visitor age / gender composition, the data comes from asking about both the respondent *and* all the people in the group they were visiting the Liverpool City Region with.

a) Day visitors

Visitors to the whole City Region	% of day visitors
Children (<16)	31%
16-24	6%
25-44	28%
45-64	21%
65+	15%



Visitors to Liverpool City Centre	% of day visitors
Children (<16)	11%
16-24	16%
25-44	21%
45-64	28%
65+	24%



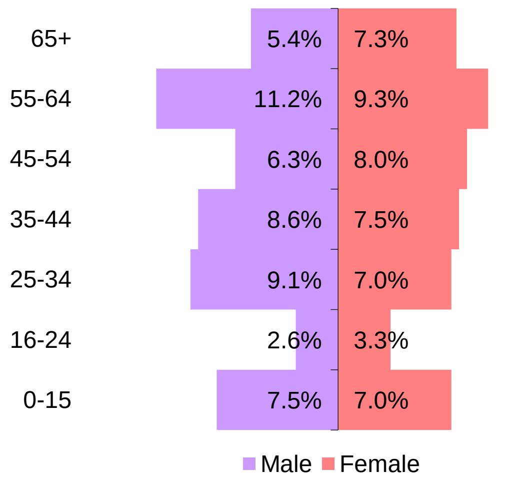
The proportion of children amongst day visitors was relatively high (31% across the whole city region, 11% in Liverpool City Centre) – showing especially the importance of the family market, although clearly this is of greater significance to parts of the region outside the city centre.

Note that there was a higher level of young adults (aged 16-24 – 16%) in the city centre.

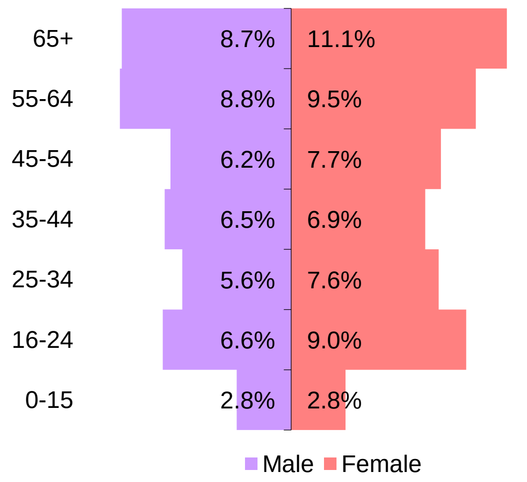
The city centre day visitor profile also showed a much higher female bias and a greater presence in the age 45-64 groups.

b) Staying visitors

Visitors to the whole City Region	% of day visitors
Children (<16)	14%
16-24	6%
25-44	32%
45-64	35%
65+	13%



Visitors to Liverpool City Centre	% of day visitors
Children (<16)	6%
16-24	16%
25-44	27%
45-64	32%
65+	20%



14% of visitors staying in the city region were children; at the other end of the scale there were *relatively* low proportions aged 65 or older (13%). We see that 'just' 6% of visitors staying in the city itself were children, although likewise a relatively high proportion of the staying audience were aged 65 or older (20%).

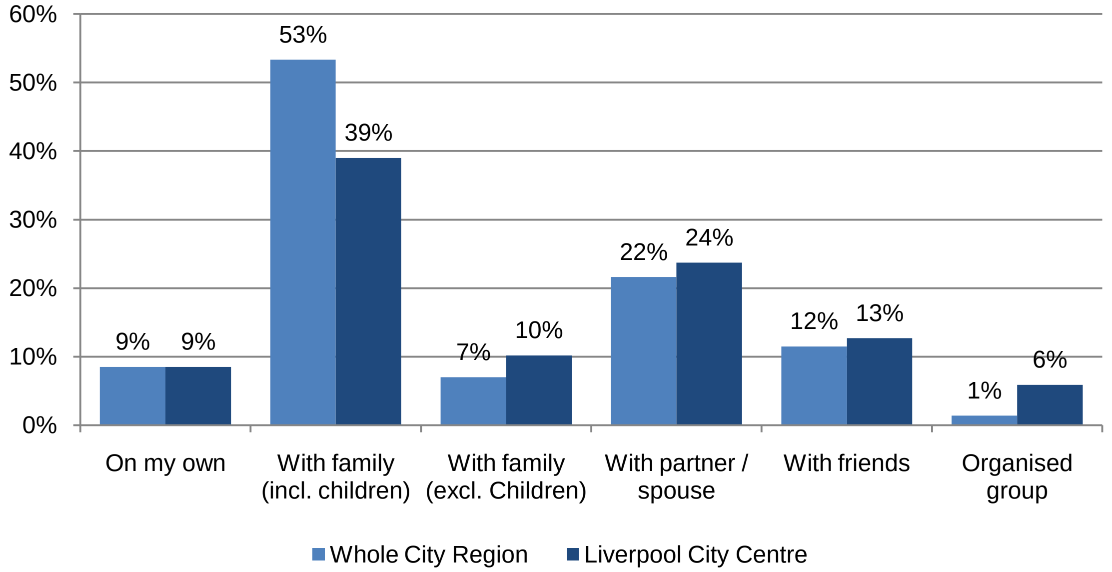
Note that just 6% of visitors staying across the whole city region were aged 16-24, although this group is of far more importance in the city itself (16%).

The 25-44 age bracket forms a very important part of those staying in the city, an estimated 27%.

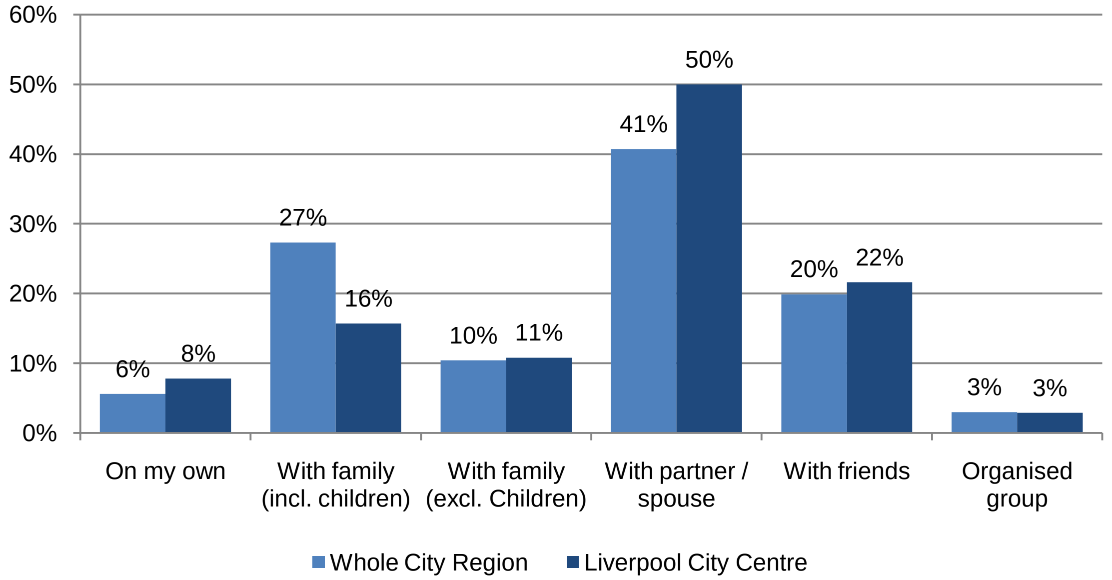
3.5 Group Type

Besides raw demographics, there is also the question as to which type of group visitors were with. Those visiting with their children made up over half of the total day trip market in the area (53%); those on a staying trip were most likely to be with their partner or spouse (41% - and this is even more likely in Liverpool itself, at 50%).

a) Day visitors



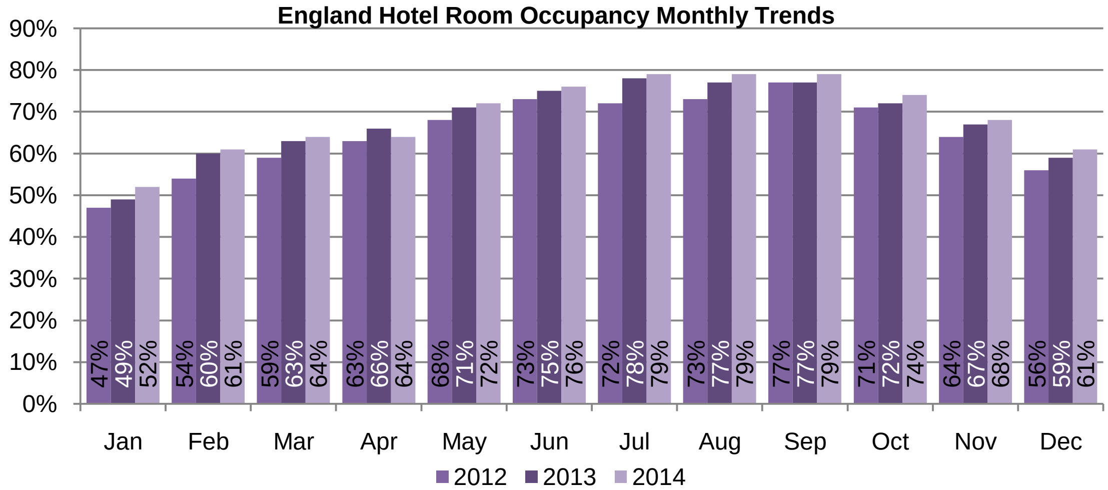
b) Staying visitors



4 National data

Within this section of the report we turn to what national data tells us is happening in the visitor economy across the country. This helps us benchmark the city region's current performance and understand emerging trends. Much of this information comes from Visit Britain and Visit England's tourism intelligence pages, and links to a full range of data sources are provided within the appendix. In all cases, the data should be compared with the relevant local data, as provided earlier in this *Digest*.

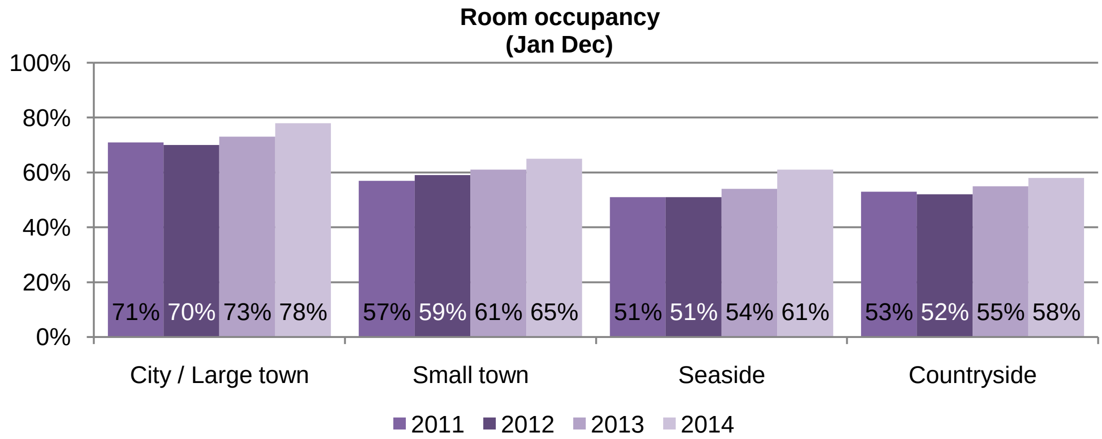
4.1 Occupancy trends



Source: England Occupancy Survey

National data indicates that overall for 2014 occupancy figures were equal to 2013 occupancy figures at 69%.

The chart below shows growth by location type.

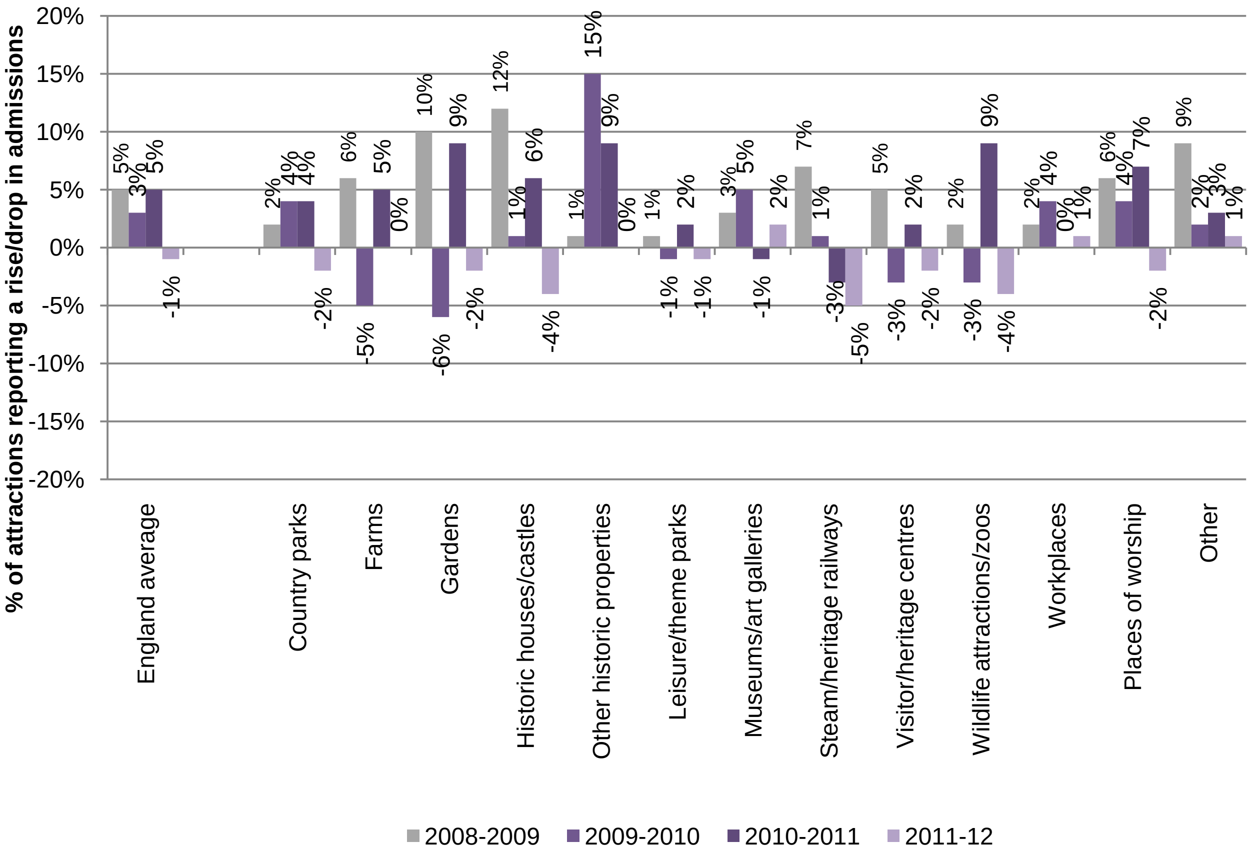


Source: England Occupancy Survey

4.2 Visits to attractions trends

The chart below highlights changes in visitor growth to different attraction genres across the country. We note first of all that *overall* there have been three consecutive years where attractions have recorded growth in visits – a net -1% of all attractions showed growth decreasing visitor numbers from 2011 to 2012.

Year on year change in visits to attractions, England



Source: Annual England Attractions Survey

- The graph suggests that over the last year growth across England has been strongest in visits to, Museums/art galleries and workplaces.
  - Growth has been weakest for Wildlife attractions/zoos, Gardens and Historic houses/castles – and a relatively neutral experience for Farms.
  - Note that despite the economic climate, -3% of paid attractions saw a decrease in admissions, against +2% of free attractions.

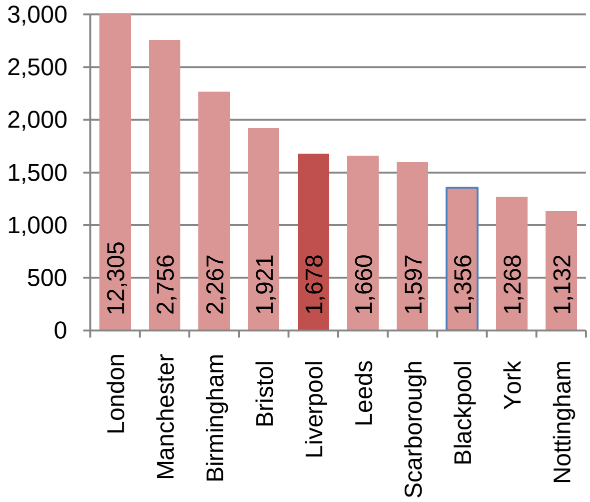
4.3 Domestic visitors (GBTS)

a) Overall results

The Great Britain Tourist Survey (GBTS) is the main measure of the national volume of domestic tourism and is supported by the national tourist boards. GBTS[20] measures overnight trips, rather than the total domestic market.

Data from the Great Britain Tourism Survey 2013 (GBTS) indicates that Liverpool was the 5th most visited town/city in England by domestic tourists[21], with an estimated 1,678,000 overnight trips. .

Top Towns 2013: Staying visits (000s) by GB residents



Source: GBTS, Visit England

Top 20 most visited English Cities & Towns by UK residents

	2011 Town/City	Visits (000s)		2012 Town/City	Visits (000s)		2013 Town/City	Visits (000s)
1	London	11,093	1	London	12,152	1	London	12,305
2	Manchester	2,613	2	Manchester	3,126	2	Manchester	2,756
3	Birmingham	2,251	3	Birmingham	2,748	3	Birmingham	2,267
4	Bristol	1,828	4	Scarborough	1,726	4	Bristol	1,921
5	Scarborough	1,645	5	Leeds	1,548	**5**	**Liverpool**	**1,678**
6	York	1,615	6	Bristol	1,518	6	Leeds	1,660
7	Leeds	1,493	7	York	1,517	7	Scarborough	1,597
8	Blackpool	1,478	**8**	**Liverpool**	**1,470**	8	Blackpool	1,356
9	**Liverpool**	**1,428**	9	Blackpool	1,298	9	York	1,268
10	Newcastle upon Tyne	1,303	10	Newcastle-upon-Tyne	1,251	10	Nottingham	1,132
11	Sheffield	1,293	11	Sheffield	1,233	11	Newcastle-upon-Tyne	1,081
12	Brighton and Hove	1,096	12	Nottingham	1,081	12	Brighton and Hove	1,023
13	Nottingham	1,066	13	Skegness	1,074	13	Sheffield	1,010
14	Isle of Wight	1,053	14	Brighton and Hove	1,047	14	Isle of Wight	972
15	Bournemouth	1,051	15	Isle of Wight	1,006	15	Bournemouth	890
16	Skegness	992	16	Bournemouth	917	16	Southampton	822
17	Southampton	973	17	Portsmouth	855	17	Coventry	764
18	Norwich	934	18	Southampton	792	18	Norwich	757
19	Cambridge	769	19	Oxford	780	19	Portsmouth	743
20	Plymouth	745	20	Norwich	771	20	Chester	709

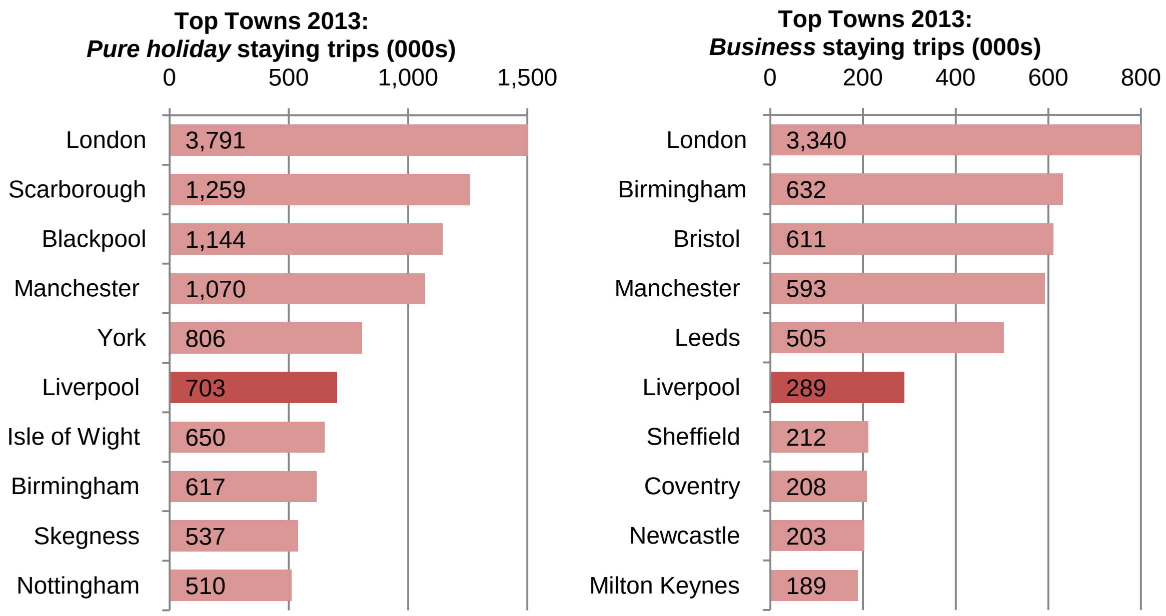
Source: GBTS, Visit England

[20] *Note that the GBTS is primarily a national survey and not as accurate at destination level; whilst we would use our STEAM numbers at local level, the rank order is useful.*

[21] *Defined as staying visitors from England, Scotland and Wales; those from Northern Ireland are no longer included in the survey (to reflect this, the survey is now known as "GBTS" – previously it was "UKTS").*

b) Results from different markets

The data shows that Liverpool is ranked **6th** for "pure holiday visits" and 6th though for business visits.



Source: GBTS, Visit England

Source: GBTS, Visit England

> *A fuller briefing note on key messages from the GBTS is available on request from the LEP.*

4.4 Inbound visitors (IPS)

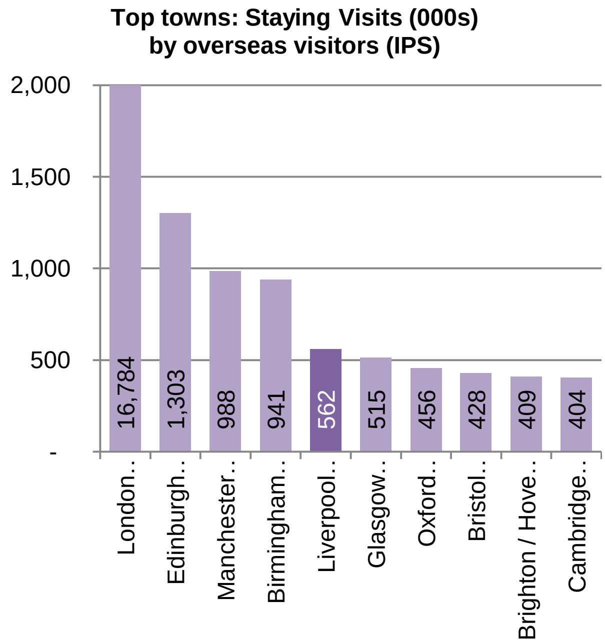
a) Overall results

The International Passenger Survey is conducted by ONS on behalf of Visit Britain. Passengers arriving through major airports (including LJLA), seaports and the Channel Tunnel are surveyed.

The survey shows that Liverpool's ongoing growth as a visitor destination means it is now the **5th-most visited city in Britain** by overseas residents.

The city recorded approximately 562,000 overseas staying visits in 2013, and is only behind London, Edinburgh, Manchester and Birmingham.

In terms of geographically close 'competitors' (who might also feed our day visits market), Manchester recorded an estimated 1.3m overseas staying visits..



Source: IPS, VisitBritain / ONS

Top 20 most visited UK Cities & Towns by Overseas residents

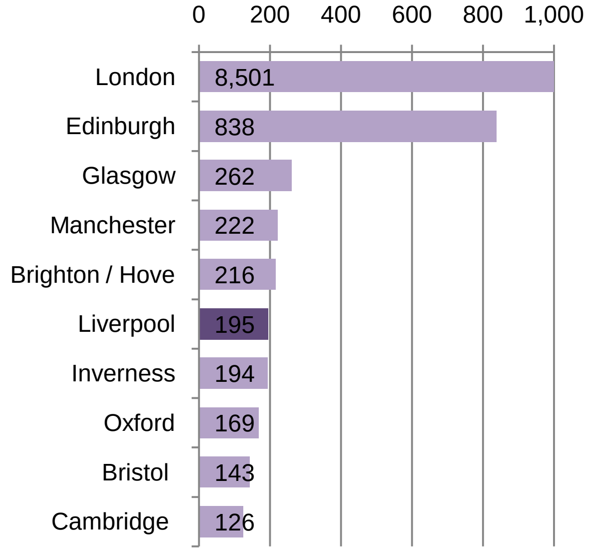
	2011 Town/City	2011 Visits (000s)		2012 Town/City	2012 Visits (000s)		2013 Town/City	2013 Visits (000s)
1	London	15289	1	London	15,461	1	London	16,784
2	Edinburgh	1342	2	Edinburgh	1,256	2	Edinburgh	1,303
3	Manchester	934	3	Manchester	932	3	Manchester	988
4	Birmingham	733	4	Birmingham	713	4	Birmingham	941
5	**Liverpool**	**545**	**5**	**Liverpool**	**550**	**5**	**Liverpool**	**562**
6	Glasgow	475	6	Glasgow	521	6	Glasgow	515
7	Oxford	465	7	Oxford	430	7	Oxford	456
8	Bristol	430	8	Cambridge	398	8	Bristol	428
9	Cambridge	387	9	Bristol	395	9	Brighton and Hove	409
10	Leeds	306	10	Brighton and Hove	345	10	Cambridge	404
11	Brighton and Hove	304	11	Cardiff	301	11	Leeds	299
12	Cardiff	291	12	Leeds	299	12	Cardiff	297
13	Aberdeen	250	13	Nottingham	215	13	Bath	283
14	Nottingham	244	14	Inverness	213	14	York	271
15	Newcastle-upon-Tyne	239	15	Newcastle-upon-Tyne	212	15	Nottingham	247
16	Bath	232	16	Bath	211	16	Aberdeen	241
17	York	222	17	Aberdeen	208	17	Inverness	226
18	Inverness	215	18	York	199	18	Southampton	221
19	Windsor	211	19	Reading	196	19	Newcastle-upon-Tyne	201
20	Canterbury	191	20	Windsor	182	20	Reading	193

Source: IPS, VisitBritain / ONS

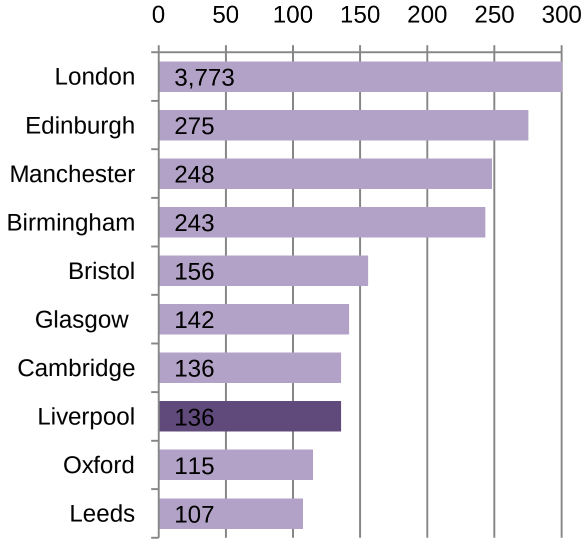
b) Results from different markets

The following charts breakdown the information by purpose of visit. Please note that those visiting to attend sporting events are an important contributor to the figures relating to 'other purpose'.

Top Towns:
***Pure holiday* staying trips (000s)**

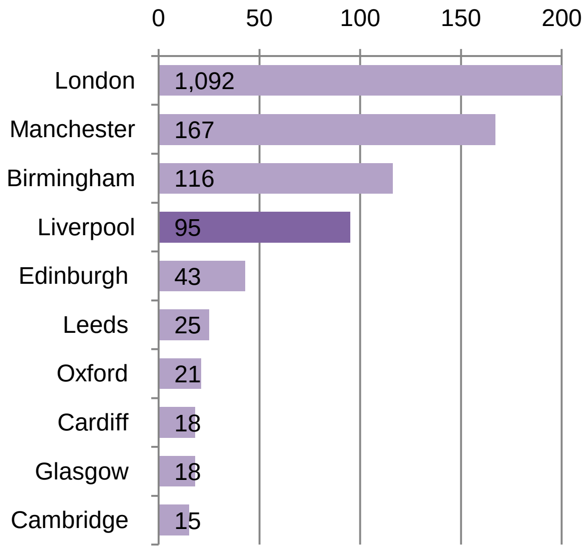


Top Towns:
***VFR* staying trips (000s)**



Top Towns:
***Business* staying trips (000s)**

Top Towns:
"*Other purpose*" (000s)

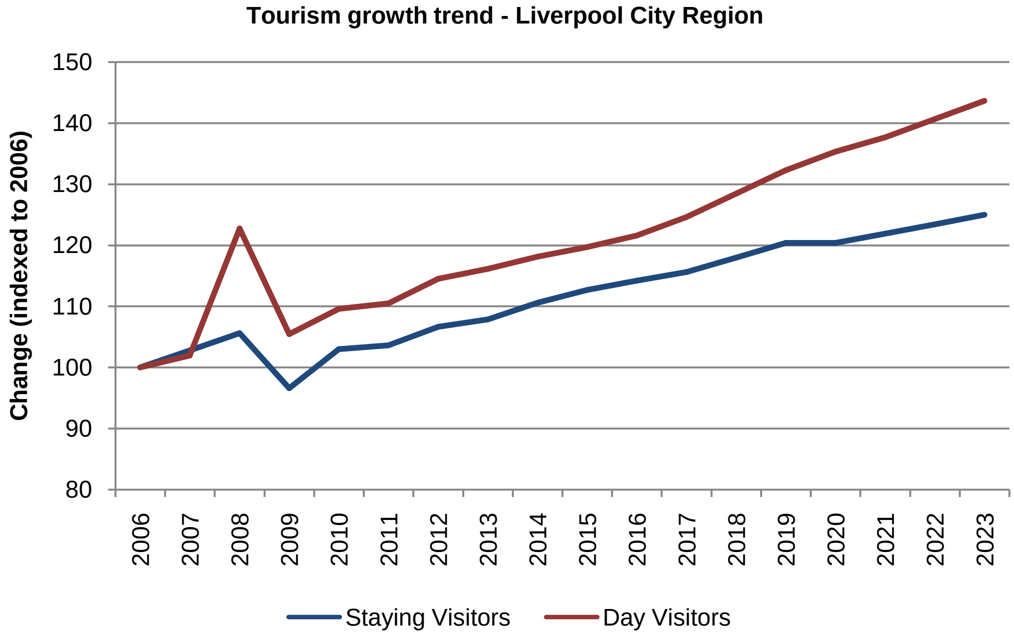


Source: IPS, VisitBritain / ONS

5 Forecasts

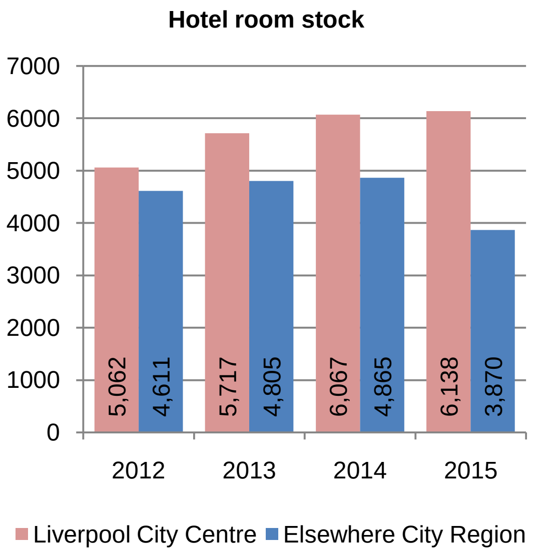
5.1 Trends from the Liverpool City Region 3-year Action Plan

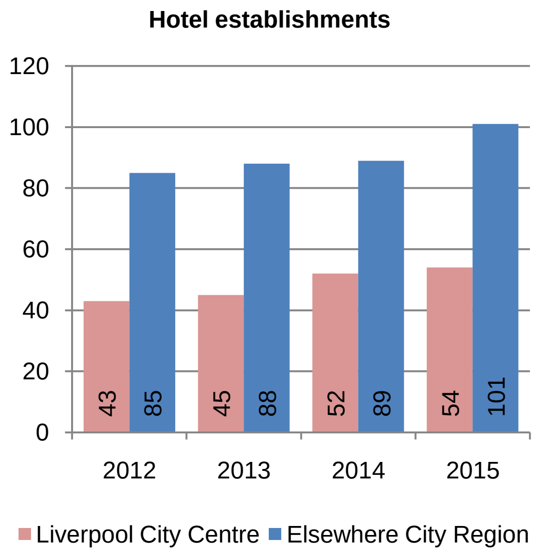
The visitor economy has seen strong growth over the last few years, as evidenced earlier in this *Digest*. Despite current economic conditions, strong growth is still expected from the sector. The graph below shows the expected *trends* (indexed to 2006). Figures have been updated from the previous *Digest*, following the latest STEAM data (as noted in section 1) and known hotel developments.



Source: Destination Management Plan

Certain components of change we already know; below we summarise the key hotel developments, both currently under way and those planned over the next few years.





Source: Tourist board hotel stock data

6 Articles

6.1 Business performance

Introduction

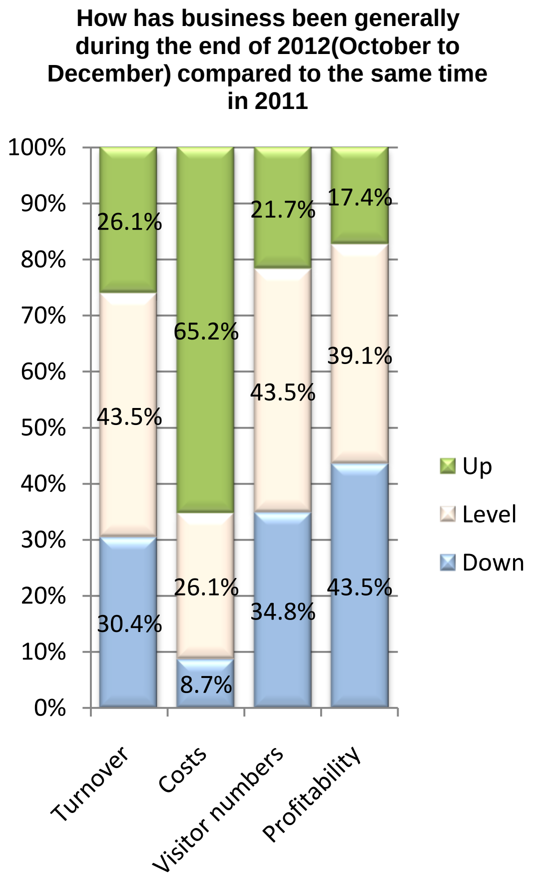
Throughout the year North West Research conducts the 'How's Business' survey in order to monitor performance of the sector locally and identify any emerging concerns that businesses may have. This was of particular importance during the recession.

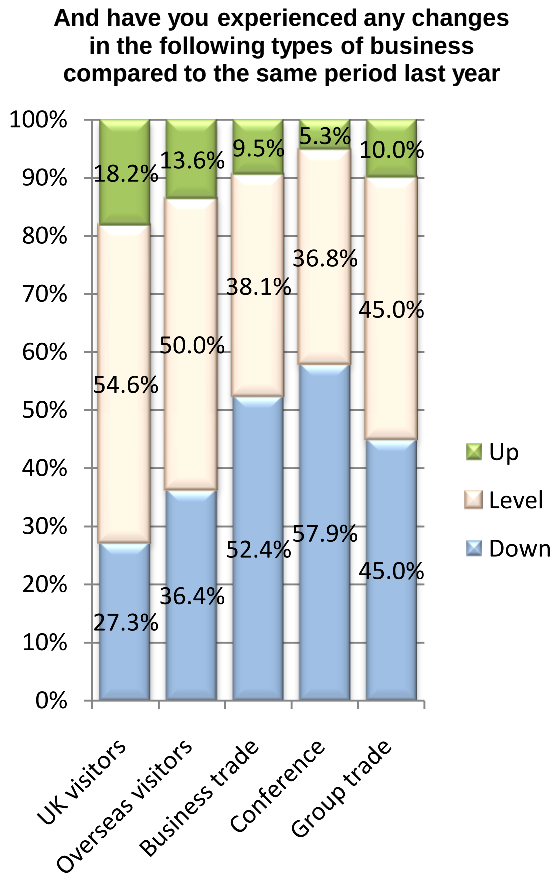
A web-based survey is currently used. All LEP's tourism and conference members / contacts are sent an email inviting them to participate in the research, highlighting the reasons for the survey. Unfortunately response rates are currently relatively low with an average 'strike rate' of less than 5% typically yielding < 50 responses. This means that although we are able to gauge the overall 'mood' amongst businesses, we are not able to view to any depth what is happening in different sub-sectors of the visitor economy.

This report presents the findings from the latest survey conducted at the beginning of 2013.

Industry performance over the past few months

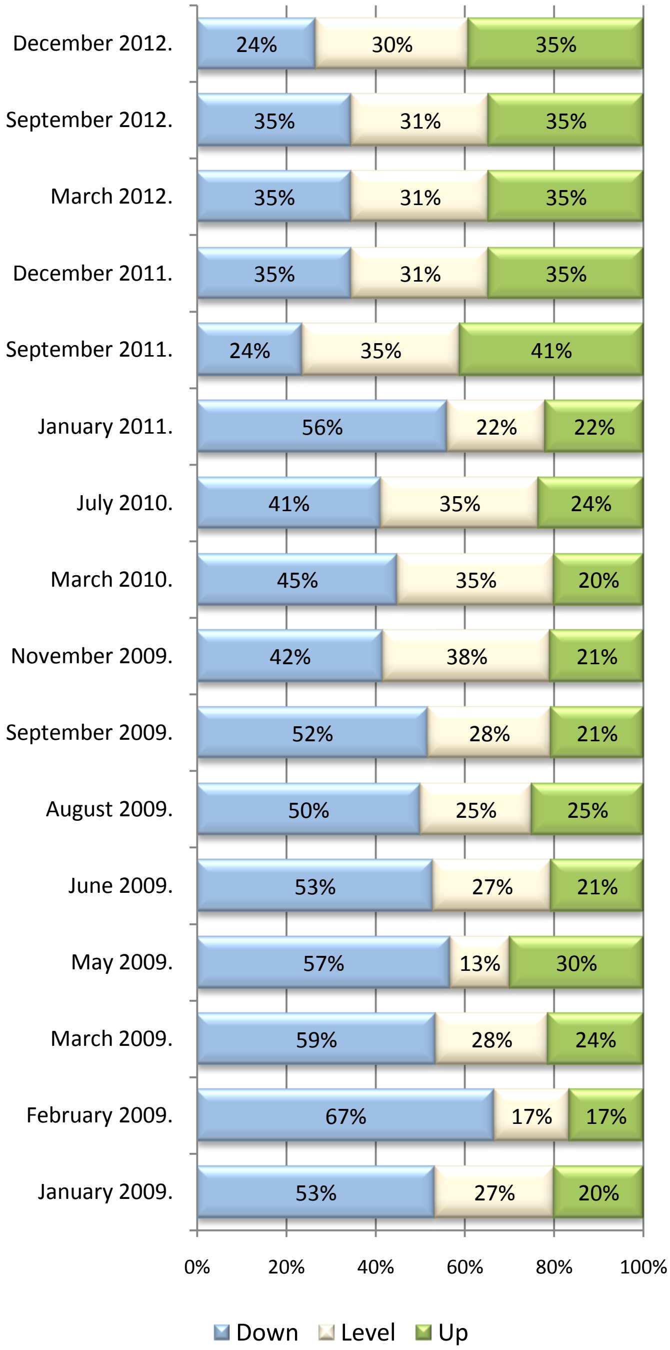
Businesses were asked how their performance had been, compared with the same period a year ago.





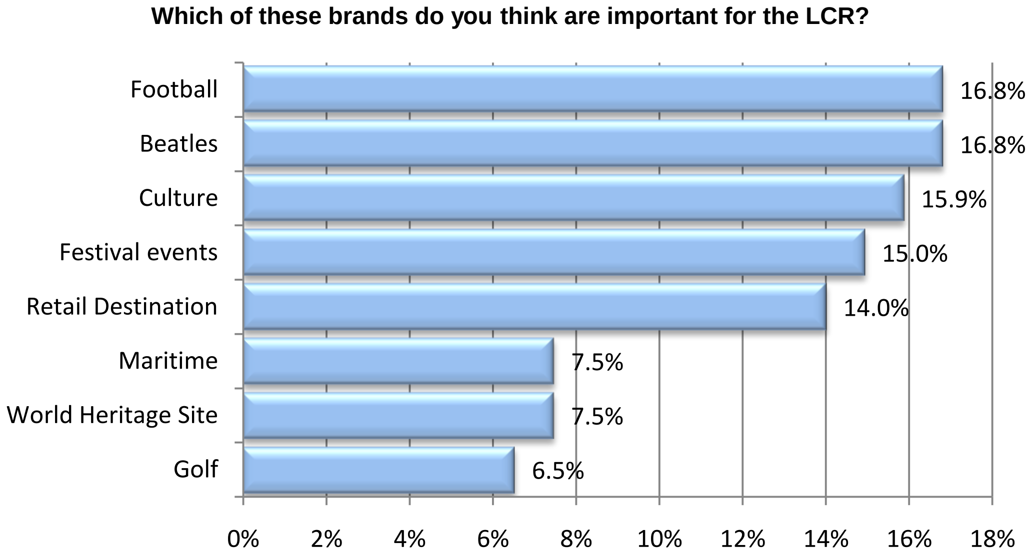
Industry Forecast

Businesses were then asked how they would forecast their overall profitability over the next three months – compared to the same period last year (note that during the recession this survey ran more frequently).



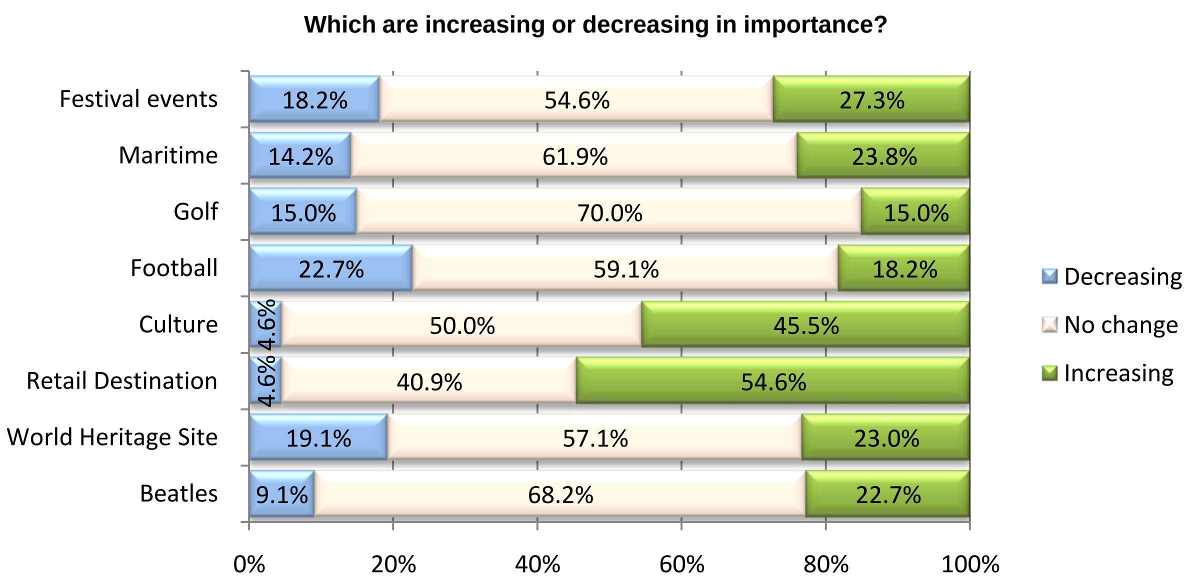
Market branding

A new question used in this edition of 'How's Business', asked people what they think about all the different brands that are important to the City Region.



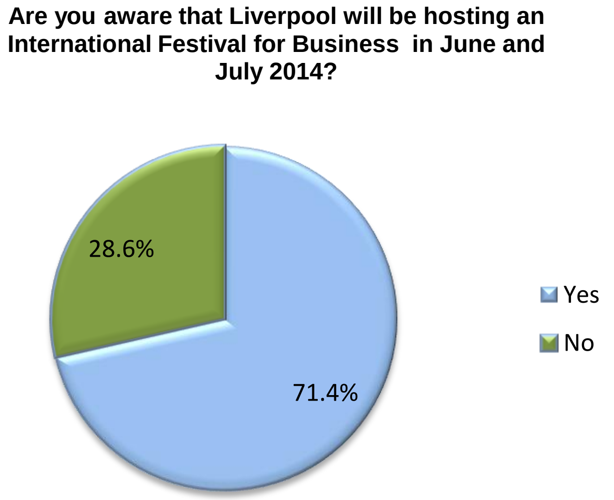
The most common responses for this question were that people thought the most important brands for the City Region were the 'Football' (17%) and the 'Beatles' (17%).

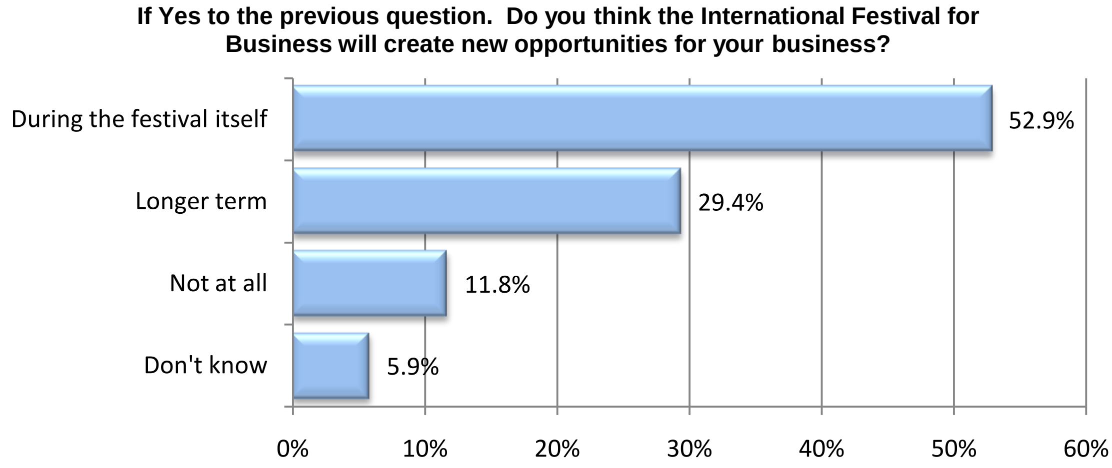
Following on from the previous question, respondents were asked whether they thought the brands importance were in increasing or decreasing in the City Region.



International Festival for Business

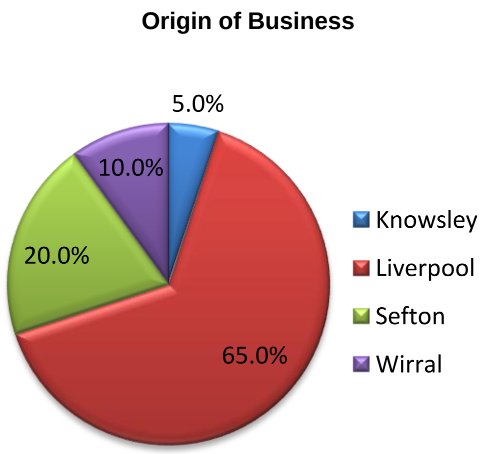
Also a new question, respondents were then asked if they were aware of Liverpool hosting the International Festival for Business.

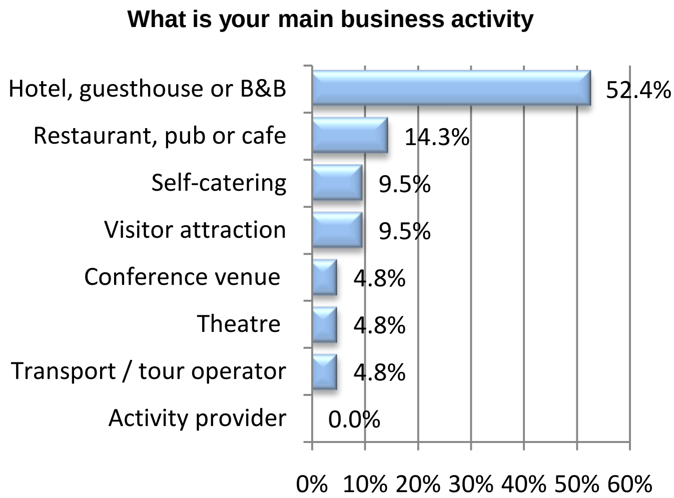


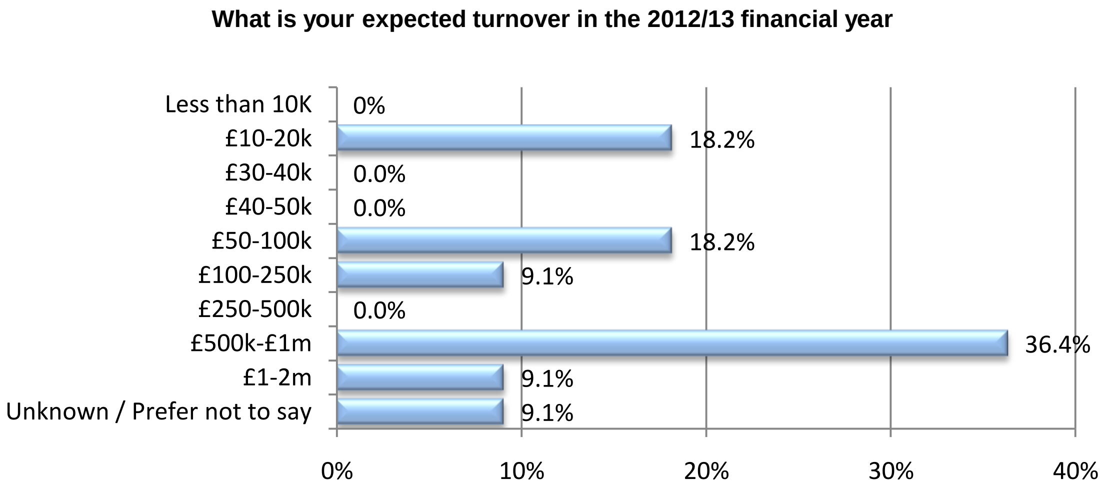


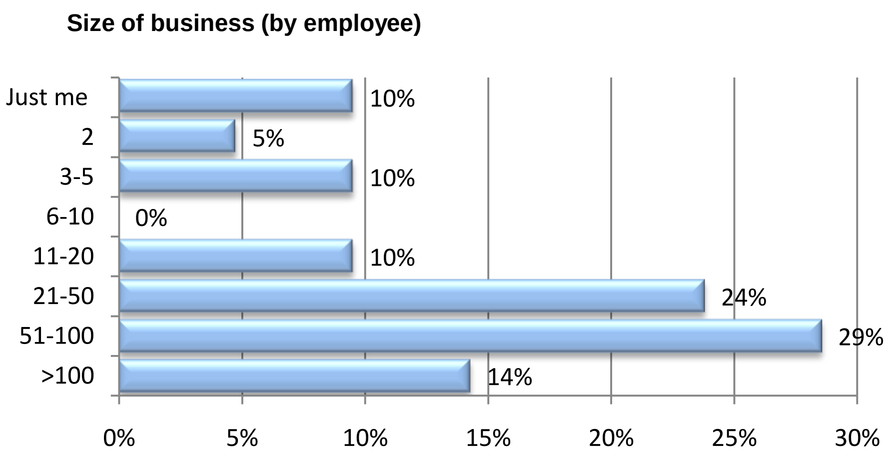
Business Profile

Respondents were finally asked a few questions about their businesses:





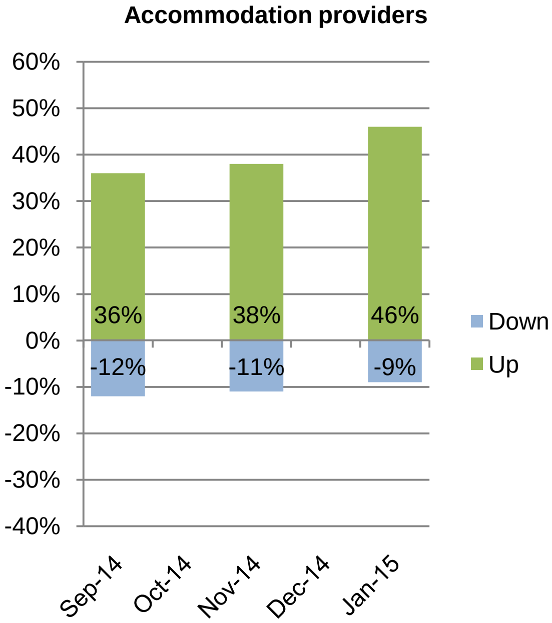


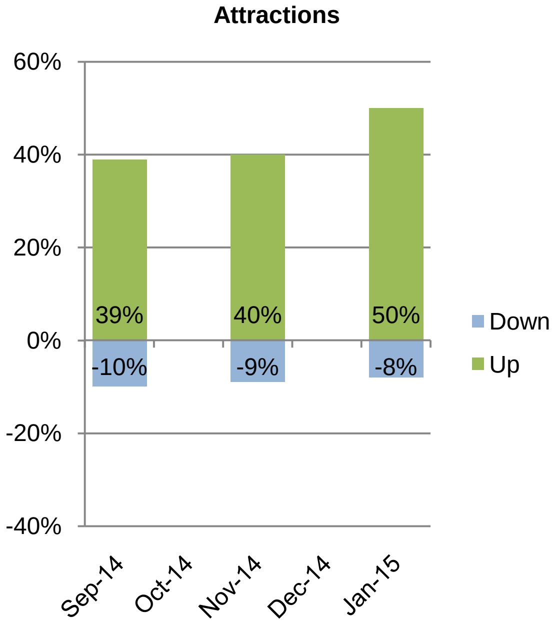


6.2 Tourism Business Confidence – Nationally

Data from Visit England provides a barometer in terms of national business performance; at different points in the year 500 accommodation providers and 300 visitor attractions are asked for their recent performance and expectations for the short-term.

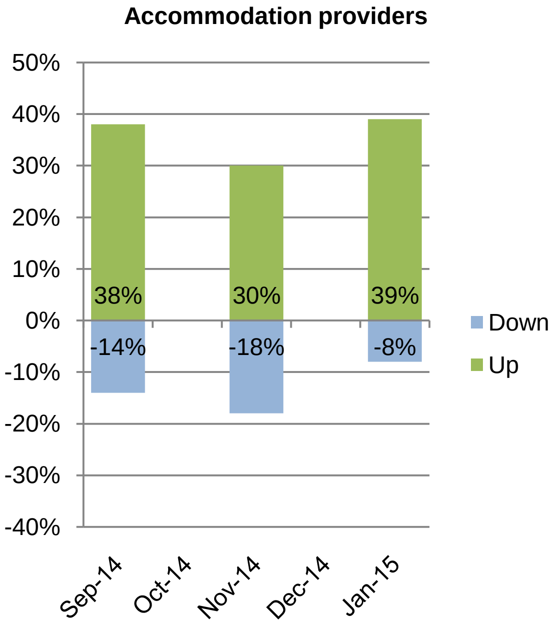
a) Performance of the Domestic Visitor market

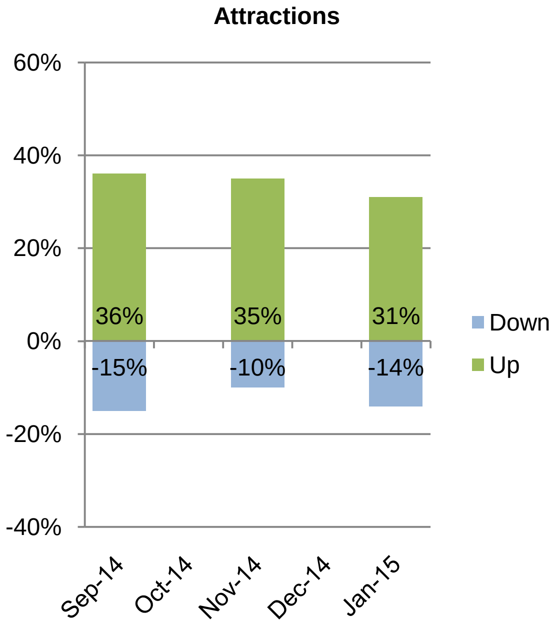




Source: Visit England Tourism Business Monitor,

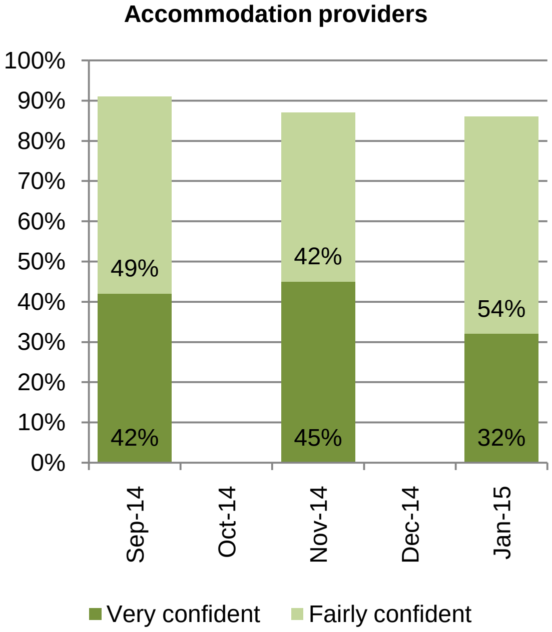
b) Performance of the Overseas Visitor market

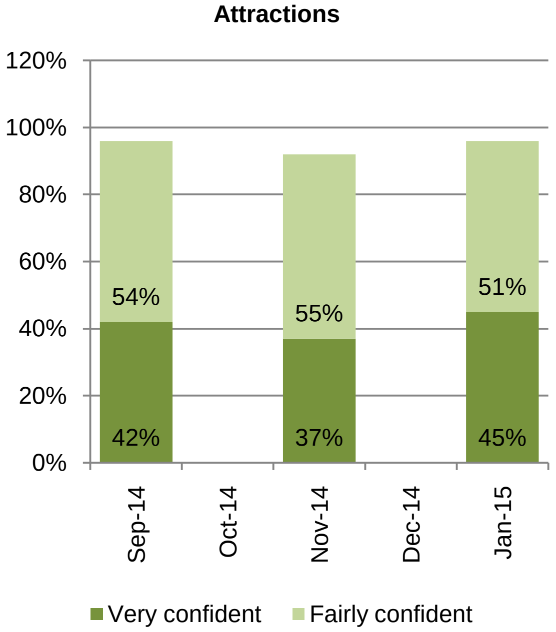




Source: Visit England Tourism Business Monitor,

c) Business confidence





Source: Visit England Tourism Business Monitor

6.3 News

In response to requests from some of our businesses, within this section of the report we present some of the key aspects that have impacted on the local visitor economy over the last 12 months. We also indicate some of the current activity by the research team, which may be of interest.

Clearly we cannot cover every single one of the many items involved, but if you know of something which should be included here, do let us know about it.

a) 2014

Hotel Openings

March 2014	Doubletree by Hilton, Sir Thomas Street – 87 rooms
May 2014	Titanic Hotel, Stanley Street – 153 rooms.
Mid 2014	Aloft, North John Street – 116 rooms
Mid 2014	Signature, Albion House - 67 rooms
Mid 2014:	Royal Hillbre – 8 rooms

Major events:

July 2014:	Liverpool International Festival for Business The International Festival for Business (IFB) 2014 is the largest global concentration of business events during 2014. The 50-day festival runs across 7 weeks in June and July and will attract business delegates and trade intermediaries from around the world.
August 2014:	Liverpool Biennial: Liverpool Biennial delivers the UK Biennial of Contemporary Art, the leading festival of visual arts in the UK, every 2 years. The Biennial is underpinned by a year-round programme of research, education, residencies and commissions..
July 2014:	Giants A three-day piece of street theatre featuring three giant puppets and inspired by the Titanic, watched by an estimated 1 million people.

Other:

Aug 2014:	Liverpool International Music Festival
March 2014:	Reopening of the Everyman Theatre
July 2014:	Mersey River Festival
July 2014:	Open Golf Championship at Royal Liverpool

b) 2015

Hotel Openings	
Early 2015:	Pullmans Hotel – 200 rooms
Mid 2015:	Tune Hotel - 99 rooms
Apr 2015:	Signature Living, Bill Shankly – 76 rooms
Major events:	
Feb 2015:	TATE Andy Warhol exhibition
Mar 2013:	Liberal Democrats Spring Conference, ACC
April 2015:	Grand National, Aintree
May 2015	3 Queens meet
May 2015:	Liverpool Rock N Roll Marathon
Aug 2015 :	Liverpool International Music Festival

Other:	
Jun 2014	British Medical Association, BT Convention Centre
Jul 2015:	Southport Air Show
Aug 2015:	Southport Flower Show

c) Research Activity

The following is activity underway by the research team on behalf of the tourist board:

- Hotel Occupancy interpretation
- STEAM data collection

Appendix i: Further reference sources

http://liverpoollep.org/
The homepage of the Liverpool City Region Local Enterprise Partnership, with links to all the documents we produce.

http://www.visitengland.org/insight-statistics/
The research part of the **VisitEngland** website; includes many useful research elements included the short-term tourism tracker, England Occupancy Survey (EOS) and attractions monitor.

http://www.visitbritain.org/
The trade website for **VisitBritain**; you can follow a link on this page to "Insights & Statistics" for the national market research they gather, which includes inbound visitor statistics and domestic tourism statistics, as well as useful country profiles.

http://www.caa.co.uk/airportstatistics
The **Civil Aviation Authority** has pages containing details of all UK airport passenger numbers (including Liverpool John Lennon Airport) both in total and by route.

http://www.etc-corporate.org/
The **European Travel Commission**; aimed at industry, government and educational personnel interested in tourism to Europe, with link to market intelligence reports and studies.

http://epp.eurostat.ec.europa.eu/portal/page/portal/eurostat/home
Eurostat – the official statistics website from the European Commission, including a section of the website devoted to tourism with statistics and publications.

http://www.liv.ac.uk/impacts08/
Impacts 08 – European Capital of Culture research programme evaluating the social, cultural, economic and environmental effects of Liverpool's hosting the European Capital of Culture title in 2008. Reports available for download.

http://www.statistics.gov.uk/
The **UK Statistics Authority**; contains details and links to a range of information resources across all topics and areas.

- For transport-related data visit www.dft.gov.uk
- For labour market data visit www.nomisweb.co.uk

Appendix ii: SIC codes defining the visitor economy

The Standard Industrial Classification Codes (SIC) shown below are those which are chosen as best representing the visitor economy. Inevitably, there will be some overlap, with some businesses in these sectors performing wholly non-tourism related functions and some businesses in sectors not included having a tourism focus.

4932 : Taxi operation
5010 : Sea and coastal passenger water transport
5030 : Inland passenger water transport
5510 : Hotels and similar accommodation
5520 : Holiday and other short stay accommodation
5530 : Camping grounds, recreational vehicle parks and trailer parks
5590 : Other accommodation
5610 : Restaurants and mobile food service activities
5621 : Event catering activities
5629 : Other food service activities
5630 : Beverage serving activities
7711 : Renting and leasing of cars and light motor vehicles
7721 : Renting and leasing of recreational and sports goods
7912 : Tour operator activities
7990 : Other reservation service and related activities
8230 : Convention and trade show organizers
9001 : Performing arts
9002 : Support activities to performing arts
9003 : Artistic creation
9004 : Operation of arts facilities
9102 : Museum activities
9103 : Operation of historical sites and buildings & similar visitor attractions
9104 : Botanical and zoological gardens and nature reserve activities
9311 : Operation of sports facilities
9321 : Activities of amusement parks and theme parks
9329 : Other amusement and recreation activities

For full detail of all SIC codes and their structure, the following document may be of use:
http://www.statistics.gov.uk/methods_quality/sic/downloads/sic2007explanatorynotes.pdf

Appendix iii: Crude guide to statistical confidence levels

In much of the survey data that is presented within the *Digest* and other research publications, the results are indicative of the views, activities and behaviour of respondents. The question arises at some point as to how *likely* are these results to apply to the "universe"; what is the potential that those surveyed are not truly representative of the population as a whole?

There are two tables shown. The first gives the range around a particular percentage result within which one can be confident that the true result across the whole population lies; the second shows the minimum difference you would need between two results to be confident that there was really a difference.

These tables are based on the following assumptions:

- The samples have been randomly drawn (in actuality this is never true in survey research, because there is always an element of refusal to cooperate - but, for practical purposes it is standard to assume that it is true).
- The degree of confidence is 95%. This means that there is still a 5% chance that the result is outside of the range by chance. 95% is used as it has become the convention in balancing degree of confidence against cost of data collection.

Table 1. Confidence in a single percentage result.

The +/- figures show the variation around the result (left hand column) that applies for each chosen sample size. Thus a survey result of 40% from a sample of 500 would mean that we were 95% confident that the true result across the whole population lies between 35.7% and 44.3%.

% result	Sample Size				
	100	200	500	1,000	5,000
50%	+/- 9.8%	+/- 6.9%	+/- 4.4%	+/- 3.1%	+/- 1.4%
40% / 60%	+/- 9.6%	+/- 6.8%	+/- 4.3%	+/- 3.0%	+/- 1.4%
30% / 70%	+/- 9.0%	+/- 6.4%	+/- 4.0%	+/- 2.8%	+/- 1.3%
20% / 80%	+/- 7.8%	+/- 5.5%	+/- 3.5%	+/- 2.5%	+/- 1.1%
10% / 90%	+/- 5.9%	+/- 4.2%	+/- 2.6%	+/- 1.9%	+/- 0.8%
5% / 95%	+/- 4.3%	+/- 3.0%	+/- 1.9%	+/- 1.4%	+/- 0.6%

Table 2. Confidence in a difference between two percentage results.

The +/- figures show the difference from the first result (left hand column) that the second result needs to display. Thus if the first survey result was 40% from a sample of 500, the second result would have to be either over 46.1% or under 33.9% for us to be 95% confident that there was a true difference in the population at large.[22]

% result	Sample Size				
	100	200	500	1,000	5,000
50%	+/-13.9%	+/- 9.8%	+/- 6.2%	+/- 4.4%	+/- 2.0%
40% / 60%	+/-13.6%	+/- 9.6%	+/- 6.1%	+/- 4.3%	+/- 1.9%
30% / 70%	+/-12.7%	+/- 9.0%	+/- 5.7%	+/- 4.0%	+/- 1.8%
20% / 80%	+/-11.1%	+/- 7.8%	+/- 5.0%	+/- 3.5%	+/- 1.6%
10% / 90%	+/- 8.3%	+/- 5.9%	+/- 3.7%	+/- 2.6%	+/- 1.1%
5% / 95%	+/- 6.0%	+/- 4.3%	+/- 2.7%	+/- 1.9%	+/- 0.9%

[22] *Footnote to this table. These are approximations - for guidance only. The precise difference required for the second percentage will vary with whether it is below or above the first percentage)*

Appendix iv: Details of available publications

A. Tourism publications

The following documents are available to download by going to the visitor economy section of our website at http://liverpoollep.org/priorities/visitor_economy.aspx

Destination Plans:
Liverpool City Region 3 year Action Plan
Liverpool City Region Visitor Economy Strategy to 2020

Research:

The latest research publications, including the *Digest* will also be kept here.

Other news:

"The Biz" – publication featuring news and views for tourism businesses across the Liverpool City Region,

B. Other publications

The following documents are available to download from the *Key Documents* section of the website at http://liverpoollep.org/about_lep/key_documents.aspx

You can also Visit the Facts and Figures section of VisitLiverpool.biz:
http://visitliverpool.biz

Sectors

Visitor Economy 3 Year Action Plan
Low Carbon Economy Action Plan
Superport Action Plan
Knowledge Economy Plan

Please note: content on the website is subject to updates and restructure; downloads available by the time this Digest *is issued may reflect more recent version of the above.*

North West Research provides a comprehensive service designed to provide the best intelligence for businesses within the City Region and further afield, with a particular focus on sectors connected to the visitor economy.

The in-house research agency provides a wide range of market research services to an array of clients across the North West of England and beyond. The service produces exceptional bespoke market research tailored to organisations' needs which is value driven. Effective research can provide the foundation for understanding your customers/clients, gathering up-to-date market information, reviewing options, allowing for objective and informed decision making.

Amongst our services are:

- **Satisfaction surveys**
- **Marketing impact studies**
- **Economic impact assessment**
- **Branding and positioning research**
- **Customer segmentation**
- **Event evaluation**
- **Benchmarking**
- **Economic reviews**
- **Proposition testing**
- **Geographic-based research**

Research is undertaken in a variety of ways dependant on the project and may include face-to-face fieldwork, web/email surveys, postal surveys, omnibus studies, depth interviews, desk research, focus groups and hall tests.

Over the past ten years the research service has conducted more than 250 studies, with clients including: Tate Liverpool, MerseyBio, The National Trust, National Museums Liverpool, Merseytravel, Heineken and Albert Dock (Gower St Estates).

Research Opportunities

Priced on request dependant on requirements

Sponsored Questions

There are also opportunities to buy into dedicated visitor surveys which include:

- **Destination benchmarking**
- **Tourism business performance survey**

This Digest has been compiled by North West Research, the in-house research team at the Liverpool City Region Local Enterprise Partnership. The team produce numerous key publications for the region, including the annual Economic Review, as well as managing many regular research projects including Liverpool Destination Benchmarking and the Liverpool John Lennon Airport Gateway study.

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