

VISITOR ECONOMY

Strategy and Destination Management Plan

An Action Plan for Jobs and Growth
in Liverpool City Region



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Introduction by Chair of the Visitor Economy Board

Sara Wilde McKeown

The Visitor Economy Board endorses this plan and will play its part, alongside others, in its delivery. Specifically it is committed to improving engagement and communication with sector businesses and stakeholders, sharing best practice and inspiring innovation across our sector.

The Visitor Economy Board was created in September 2013, at an exciting time for the Visitor Economy with the setting up of Marketing Liverpool by Liverpool Vision and the prospect of a busy year to come. In 2014, the City Region hosted not only the first ever International Festival for Business in the UK but also the Open Golf Championship in Wirral and a major World War 1 commemorative spectacle, seeing the return of the Royal de Luxe Giants.

The Visitor Economy Sector has enjoyed sustained growth in recent years and is now worth £3.6 billion to the local economy supporting 49,000 jobs. Since Liverpool's landmark year as European Capital of Culture in 2008, nearly 3000 additional hotel rooms have opened and the cultural offering to visitors has simultaneously grown. Recent additions include the magnificent award winning Central Library in Liverpool and the splendid Atkinson in Southport. The new Everyman has opened whilst the Philharmonic is currently completing a makeover and extension to its facilities. The Royal Court is to continue to expand and improve its facilities. Meanwhile, work on the Exhibition Centre at ACC Liverpool continues apace and the Royal Institute of British Architects is developing its second national architecture centre, RIBA North, at Mann Island.

Thanks to funding from Europe this year it has been possible to stage major events and high quality cultural

programmes which have attracted worldwide media attention. Whilst our retail experience, especially Liverpool ONE, perfectly complements the cultural, sporting and business tourism offer.

More cruises than ever before are including Liverpool in their itineraries and our business tourism is further boosted by increasing conference numbers and Liverpool's success as a film location.

Alongside Superport, Low Carbon and the Knowledge Economy, the Visitor Economy is recognised as one of the four growth areas of the local economy.

The Liverpool City Region Local Enterprise Partnership (LEP) in its Local Growth Plan continues to recognise the importance of the Visitor Economy Sector and its ability to drive jobs and growth both in its own right as well as in the local economy as a whole. There are a myriad of opportunities to attract even more visitors and create even more jobs and wealth but funding remains a significant challenge. More than ever before, the private sector, through the Visitor Economy Board, must take charge of this agenda and ultimately play a central role in funding destination marketing activity.

This is not a business plan for the Visitor Economy Executive of the LEP or Marketing Liverpool, nor should it be. That is the role of the annual business plans for those organisations. Rather, this document sets out a number of



key priorities, activities and projects that stakeholders collectively feel offer the best prospects to increase the competitiveness of our City Region and maximise the wealth (or GVA) that the tourism sector can create. It sets targets for growth and provides a clear rationale for investment in the Visitor Economy and should influence investment decisions made by the private and public sector.

The Visitor Economy Board has recently set out its own priorities which it will be focusing on during coming months. You will find those on pages 18 - 21.

Growth will not come automatically - our Visitor Economy sector still requires intervention and support if we are to reap the economic benefits set out in this plan.

The Action Plan now incorporates the Vision and Strategy for the Visitor Economy of the Liverpool City Region to 2025 and is designed to reflect and complement more detailed strategies and action plans prepared by partners. Links to relevant documents are provided at the back of this document.

Sara Wilde McKeown
Managing Director, Influential
Chair of the Visitor Economy Board

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The National Strategic Context



4 Million
Extra
Visitors

The Government's tourism policy, published by the Department for Culture, Media and Sport (DCMS) in 2011 sets out a clear ambition to grow both overseas and domestic tourism to Britain.

IT AIMS TO:

- Fund the most ambitious marketing campaign ever to attract visitors to the UK in the years following 2012. The £100m campaign, co-funded by the government and the private sector, aims to attract 4 million extra visitors to Britain over the next 4 years. That equates to £2 billion more spend in our economy, and 50,000 new jobs. The GREAT campaign is now in its third year and has attracted approximately £30m support per year. The Government announced a further £90m of funding to be spent on the GREAT campaign between now and 2016
- Increase the proportion of UK residents who holiday in the UK to match those who holiday abroad each year. For longer stays (4 nights or more) this would mean 29% of travellers holidaying in Britain rather than just 20% today (creating 4.5m extra domestic trips each year, £1.3bn more spend and 26,000 new jobs). And if we can replicate this scale of improvement for shorter stays as well, we will create a further £750m of spend and 11,000 new jobs
- Improve the sector's productivity to become one of the top 5 most efficient and competitive visitor economies in the world

The Government has recently established a Tourism Industry Council, co chaired by Tourism Minister, Helen Grant, Matthew Hancock (Minister for

Skills and Enterprise at the Department for Business, Innovation and Skills (BIS)) and Simon Vincent from Hilton Worldwide.



The Council comprises 22 members from across the Tourism industry and has a remit to improve skills, increase the quality and quantity of jobs available and boost enterprise in the tourism industry. One of the key themes will be for the Council to build on the work already announced by BIS who earlier this year announced tourism and hospitality would be part of the trailblazers programme – an initiative designed to develop clear and concise apprenticeship standards throughout many industries in the UK.

England's national tourism body, VisitEngland, is currently reviewing its Strategic Framework for Tourism 2010-2020. The aim for the framework is to provide the "basis for the public and private sectors to continue to enhance the quality of product on offer and for Government at all levels to encourage such investment".

The framework highlights that the next decade offers the tourism industry some significant opportunities equally matched by a number of challenges.

THE NATIONAL VISION IS:

“To maximise tourism’s contribution to the economy, employment and quality of life in England.”

In achieving this vision, the Strategic Framework aims to achieve four interdependent objectives designed to address the opportunities and challenges for England's Visitor Economy.

THEY ARE:

- To increase England's share of global visitor markets
- To offer compelling destinations of distinction
- To champion a successful, thriving industry
- To facilitate greater engagement between the visitor and the experience

A number of Action Plans have been developed to take forward the Strategy and these can be found on this link. <http://www.englandtourismframework.co.uk/strategicframework.aspx>

VisitEngland and national tourism agencies such as the Tourism Alliance are calling on government to review arrangements for local destinations to ensure a 'functioning network' of destinations for English tourism.

VisitBritain published its strategy in 2013 – Delivering a Golden Legacy – a growth strategy for tourism to Britain for 2012 to 2020. The strategy has a headline target to increase visitor numbers from 30.8m to 40m and revenue from £18bn in 2011 to £31.3bn by 2020. This headline target is then divided into individual targets

for 20 core markets which, in turn, are categorised as markets that VisitBritain will either “Defend” (e.g., USA and Germany), “Grow” (e.g. Saudi Arabia and Russia) or “Make” (e.g. China and Brazil) – although a number of markets span different categories.

THERE ARE FOUR STRANDS TO THE VisitBritain STRATEGY.

1. Enhance Britain's Image by building on key strengths such as heritage, traditional and contemporary culture
2. Ensure that Britain is packaged and sold more widely by working with the travel trade in key markets
3. Broaden Britain's strong product offering so that it continues to meet the expectations of new visitors from growth markets
4. Making visiting Britain easier by addressing limiting factors such as aviation capacity and the current visa process

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Long Term Strategy and Targets to 2025



Visitor Economy
Targets for 2025



£35%
Increase in
visitor value



49%
Increase in Visitor
Economy Jobs

We set out a shared, ambitious vision for Liverpool City Region's Visitor Economy. Realising this ambition will require a strong partnership between the public and private sectors to deliver the right structures and the right levels of investment.

Since 2008, we have been in the throes of a deep rooted recession and yet Liverpool in particular has weathered the storm well thanks to ongoing investment in its visitor offering. We have also benefitted from the 'staycation' effect, the popularity of city breaks and our appeal to emerging international markets particularly Brazil, Russia, India and China (the BRIC countries).

Our targets are challenging but achievable and demonstrate our ambition and determination to grow the sector over the next 10 years. Later we set out the priorities that the Visitor Economy Board is adopting for the next five years which will take us on the journey to realise our longer terms aims.



© Aintree Racecourse



© Wirral MBC



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WITH CONTINUED INVESTMENT AND A CO-ORDINATED APPROACH THE VISION IS THAT:

BY 2025:

- The City Region's Visitor Economy will be worth £4.9 billion and support 72,000 jobs
- Liverpool will always be featured in the UK's top 5 cities for domestic and international visitors
- Liverpool will be a top 4 UK city for international conference tourism, with ACC Liverpool a leading UK conference venue
- Liverpool will become one of the top UK cruise ports
- Liverpool will be world famous for its exceptional and distinctive culture, music and sport; for its city centre including UNESCO World Heritage Site and iconic waterfront, the Mersey Ferries, two cathedrals and architecture and, of course, the Beatles and Premier League Football
- The City Region will be recognised for its high quality hotels, fantastic shopping, unrivalled public transport, digital connectivity and unique visitor welcome
- There will be a stronger food offering and better awareness of fine local produce
- The City Region will promote, create and shape distinctive visitor quarters, such as Hope Street, each with a strong sense of identity, individual market appeal, quality offering and sense of arrival
- Southport will build on its reputation as England's Classic Resort, and as a successful national conference destination
- England's Golf Coast will be internationally acknowledged as the finest stretch of championship golf in the world and host to major golfing events – attracting high spending staying visitors to Southport and the Wirral Peninsula as well as the city
- Wirral's aspiration is to have the fastest growing Visitor Economy in the region, and be the destination of choice for discovering quality; whether it is accommodation, coast, countryside, cuisine or golf, both for short breaks and day trips
- Day visitors will continue to play an important part in the Visitor Economy with the region's coast and countryside as well as the attractions of the urban area encouraging thousands of visitors to discover the wider City Region



THE STRATEGIC AIMS OF THE CITY REGION'S LONGER TERM VISITOR ECONOMY STRATEGY ARE TO:

- Promote the City Region through a single, integrated marketing agency, delivering innovative and effective marketing activity, with a clear focus on our destination brands (principal brand Liverpool, secondary brands, Southport, Wirral and England's Golf Coast), key themes and well defined target markets. This will complement the marketing undertaken by local destinations such as Southport and Wirral
- Place the Visitor Economy at the heart of a broader place marketing strategy that promotes the wider economic assets and key growth sectors of SuperPORT, Low Carbon and Knowledge Economy
- Capitalise on Liverpool City Region's global business and personal connections to ensure those individuals with connectivity to the area are encouraged to revisit
- Deliver the highest quality experience for visitors by investing in public realm, transport, visitor information and destination welcome with a particular focus on becoming a digital destination
- Ensure the leading assets of the City Region continue to meet the expectations of new visitors, particularly those from growth markets
- Secure public and private investment to improve the quality and range of hotels, restaurants, attractions, conference, exhibition and cultural venues and to attract major events
- Make visiting the City Region easier, especially for international business visitors, by ensuring Liverpool John Lennon Airport reverses recent declines in passenger numbers and develops its routes and reception facilities and that connectivity with Manchester Airport improves
- Help businesses in the Visitor Economy by working with them to improve their performance and productivity and share best practice. Identify the next generation of growth businesses for the sector and provide them with bespoke support
- To further integrate and align Transport and Visitor Economy policy and market opportunities
- Promote the Visitor Economy as an aspirational career choice and address skills gaps in the hospitality industry as identified in the Skills For Growth Agreement. Ensure training providers focus on the skills gaps and shortages and equip their students with the requisite skills for a fulfilling career within the Visitor Economy
- Develop the Visitor Economy in a sustainable and responsible way and spread the benefits across the City Region

LONG TERM TARGETS

Shared targets for the Liverpool City Region for 2025 are:

- Annual visitor impact of £4.9 billion (up from £3.6 billion in 2013)
- 23% growth in the number of 'bed nights' spent annually in the Liverpool City Region from 12.4 million in 2013 to 15.2 million
- 10% improvement in Liverpool City Region room occupancy (up from 71% to 78%) and average or better room yield than UK city competitors
- To maintain top 5 UK ranking for international visitors
- 49% more tourism supported jobs from 49,000 in 2013 to 72,000 in 2025
- Attainment of a top 75 place in the ICCA rankings for international conference business (up from 159th in 2013) and a top 4 place in the UK (7th in 2013)

How to Accelerate Growth in Liverpool City Region Visitor Economy

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The Visitor Economy covers a myriad of activities. Not all activities have the same impact on the City Region Economy however and it is important to understand which activities create real growth rather than simply redistribute existing revenues.

Taking the long term strategic targets for 2025 the table below highlights those activities that have the most impact on each of the key indicators

TABLE 1: CONTRIBUTORS TO LONGER TERM VISITOR ECONOMY GROWTH TO 2025

KEY INDICATOR	ADDITIONAL GROWTH TARGET BY 2025	DESTINATION DEVELOPMENT/ MANAGEMENT	DESTINATION MARKETING	EVENTS	CONFERENCES/ BUSINESS TOURISM
VALUE OF TOURISM £billion	£1.28	<ul style="list-style-type: none"> New attractions & cultural investment New hotels Destination Welcome New air routes to LJLA Improved rail and road connectivity ⁽¹⁾ New Company HQs and Northshoring 	<ul style="list-style-type: none"> Destination and tactical campaigns resulting in more midweek visitors, longer stays, repeat visits and higher spend 	<ul style="list-style-type: none"> Major events that attract large numbers of non residents 	<ul style="list-style-type: none"> Large, high-profile association conferences over several days Corporate conferences Independent Business Travellers
STAYING VISITOR NIGHTS – Liverpool City Region	2.8m	<ul style="list-style-type: none"> New quality hotels that complement existing provision Improved midweek occupancy Destination Welcome 	<ul style="list-style-type: none"> Destination and tactical campaigns resulting in more hotel nights sold especially midweek 	<ul style="list-style-type: none"> Major midweek events requiring overnight stay e.g. Golf, International Business Festival, blockbuster cultural exhibitions, and performances 	<ul style="list-style-type: none"> Large-scale conferences and exhibitions requiring range of accommodation over several days
HOTEL PERFORMANCE Average room occupancy/and room yield position out of 9 similar cities	9% improvement in room occupancy/ average or better room yield than UK city competitors	<ul style="list-style-type: none"> More selective policy on new hotel development especially with regard to budget hotels ⁽²⁾ 	<ul style="list-style-type: none"> Destination and tactical campaigns resulting in more hotel nights sold especially midweek 	<ul style="list-style-type: none"> Major midweek events/ European football 	<ul style="list-style-type: none"> Large-scale conferences and exhibitions requiring range of accommodation over several days Corporate business travel and meetings
LIVERPOOL'S POSITION - Most visited UK towns (international tourist visits)	Maintain top five position achieved in 2013	<ul style="list-style-type: none"> Growth of LJLA Growth of international brands e.g. Beatles, LFC, Tate, Liverpool Waterfront International Welcome BRIC markets penetration 	<ul style="list-style-type: none"> Further development of the Liverpool brand especially with BRIC markets 	<ul style="list-style-type: none"> Events with international draw 	<ul style="list-style-type: none"> Major international conferences
TOURISM SUPPORTED JOBS	23,000	<ul style="list-style-type: none"> New quality hotels, restaurants and attractions such as Kings Dock leisure developments Improved yield and business performance leading to re-investment and job creation 	<ul style="list-style-type: none"> Destination and tactical campaigns resulting in higher midweek occupancy and yield enabling business to expand Development of Liverpool brand Further build of other destination brands including Southport, Wirral and England's Golf Coast 	<ul style="list-style-type: none"> Major events attracting overnight visitors to hotels with widespread economic impact 	<ul style="list-style-type: none"> Major conferences and exhibitions with widespread economic impact
ICCA RANKING world wide ⁽³⁾	31 additional international conferences per year	<ul style="list-style-type: none"> New Exhibition Centre Liverpool at ACCL Destination Welcome leading to serial bookings 	<ul style="list-style-type: none"> More focussed conference sales activity and expansion of the ambassador programme leading to attraction of major international conferences 	<ul style="list-style-type: none"> IFB 2016 	<ul style="list-style-type: none"> Successful bidding for internationally rated conferences Subvention Fund

(1) Examples of the rail and road connectivity required we set out in Gateway / Transport Improvements on page 25.

(2) Proposed Hotel Development Policy is set out in the Hotel Futures Report see page 33.

(3) International Congress and Convention Association measures events of at least 50 delegates that rotate around the globe.

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Where Are We Now?

£22%
Increase in
visitor impact

Key destination performance indicators point to modest but steady growth in the last 3 years



5th best performing retail destination in UK
5th most popular city in England for domestic visitors

RECENT PERFORMANCE

- Overall value of tourism has increased from £2.97 billion in 2010 to £3.64 billion in 2013 with an additional 6,300 jobs created
- The number of staying visitor nights in Liverpool City Region has increased from 11.0 million to 12.4 million
- Average annual hotel occupancy has risen from 69.2% in 2010 to 71% in 2013 but average room yield has increased only marginally from £40.49 in 2010 to £41 in 2013
- The number of hotel rooms sold across Liverpool City Region has increased from 2.2 million in 2010 to over 2.6 million in 2013
- Liverpool is now the 5th best performing retail destination in the UK and the 5th most popular UK city for overseas visitors
- Liverpool is also the 5th most popular destination in England for domestic visitors
- Third party endorsements continue to underscore Liverpool's growing

reputation as a visitor magnet. Recent accolades include third place in Rough Guides Top 10 places to visit in the world during 2014 (behind Rio de Janeiro and Sarajevo), and 4th place in the UK Trip Advisor's Travellers' Choice Awards (behind London, Edinburgh and Torquay) as well as Group Travel Organisers' best overall destination for Groups

- Southport has experienced a slight increase in both staying visitor numbers and day visitors in 2013
- Wirral has seen growth in both overall value of tourism (up from £293m in 2010 to £327m in 2013), day visitor numbers (up from 5.8m in 2010 to 6.3m in 2012) and staying visitors (up from 737,000 in 2010 to 780,000 in 2012)

The City Region's tourism offering continues to develop and in the last 12 to 18 months has seen:

CULTURAL LEGACY

- Increasing popularity of the new Museum of Liverpool which opened in 2011 and is now the most popular museum in the UK outside of London (National Museums Liverpool)
- Blockbuster exhibitions including Turner Monet Twombly, Chagall: Modern Master, Mondrian (Tate 2012, 2013 and 2014), Titanic and Liverpool - the untold story (Maritime Museum 2012 and 2013) and David Hockney: Early Reflections (Walker Art Gallery 2013) to name but a few

- Hugely successful Liverpool Biennials 2012 and 2014
- Liverpool hosted the largest WW1 commemoration event which attracted 1m people continuing the legacy of 08
- Securing Cultural Destination funding from The Arts Council / VisitEngland
- Waterfront Events including the Battle of the Atlantic 70th anniversary, the Mersey River Festival and the Liverpool International Music Festival
- 50th anniversary celebrations of the Beatles marking their first appearance in the US
- Completion of work on new Everyman Theatre which also won the RIBA Stirling Prize 2014
- Completion of Phase 1 Philharmonic Hall extension and improvements
- Re-launch of the former Neptune Theatre as The Epstein
- Opening of The Atkinson in Southport
- Redevelopment of the Observatory at Catalyst Science and Discovery Centre, Halton
- Improvements to the waterfront and South Docks and completion of public realm works at Mann Island
- Redevelopment of award winning Central Library

SPORT

- The best attended Grand National at Aintree in 2013 with 154,000 visitors and 139,000 visitors in 2014



- Hosting the Ricoh Women's Open Championship in Hoylake (2012) and Birkdale (2014), the Open Championship in July 2014 in Hoylake, announcement of Birkdale as host for 2017
- New home of the Saints RLFC, Langtree Park continuing to develop its offer. Alongside Widnes Vikings Rugby League attracts an attendance of over a third of a million per year
- North West National Golf course now fully open (St.Helens)

CRUISE

- 47 Cruise calls in 2014 bringing £3.8m of Visitor Spend
- Liverpool Cruise Terminal won 'Best Port of Call' by Cruise Critic 2013 and 2014
- Further development of turnaround cruises from City of Liverpool cruise terminal with the return of Fred Olsen cruises
- Securing the 175th anniversary commemoration for Cunard in 2015 when all three 'Queens' will appear on the Mersey in May and the first transatlantic Cunard crossing since 1968 takes place in July

BUSINESS TOURISM

- Continuing success of both the Echo Arena and the BT Convention Centre with hosting of major conferences - securing return of the Labour Party Conference in September 2016 and 2018

- ACC Liverpool voted UK's Best Conference Venue at Meeting and Incentive Travel Awards 2014
- Exhibition Centre Liverpool, adjacent to ACC Liverpool now on site including new 4 star Pullman hotel to open in 2015
- Opening of Rum Warehouse, Stanley Dock
- Delivery of International Festival for Business in June-July 2014 - the biggest showcase for business since the Festival of Britain in 1951, attracting 75,000 delegates from 88 countries. Government support for IFB 2016 announced

LEISURE AND RETAIL

- Ongoing success of Liverpool ONE bucking the national retail downturn and maintaining footfall of 26 million in 2013. Attraction of major retail brands to the city including Harvey Nichols Beauty Bazaar and a new Forever 21 store on Church Street
- Attraction of new brands to newly opened leisure developments in New Brighton (Marine Point) and Widnes (the Hive)
- Expansion and improvement of the eating out offer with the opening of new independent restaurants as well as well known signature brands - including Browns, Sustenance, Trattoria 51, Fazenda, Salthouse Bacaro, Frederiks, Everyman Bistro, Button Street Smokehouse, The Art School, Claremont Farm Deli, Upstairs at Sheldrakes, and Wro Loft to name but a few

TRANSPORT

- Passenger numbers at Liverpool John Lennon Airport hit 5.25m a year in 2011 but have experienced some decline since then with 2013 figures of 4.2m
- Completion of Lime Street Gateway
- Completion of redevelopment work at Central station
- Government support for the Mersey Gateway river crossing at Runcorn with work getting underway

ACCOMMODATION

- Opening of new hotels and aparthotels in the city centre including Travelodge Central Exchange, Adagio, Ibis Styles, Epic Aparthotel, The Richmond, Signature Hotel, Hoax, Travelodge Strand, 30 James Street Titanic Hotel, Stanley Dock and Aloft
- New Travelodge in Southport, new Premier Inn in Birkenhead

GUIDED TOURS

- A large number of tour operators now offer guided tours of Liverpool with many new business start ups in this market
- A new open top bus tour to Anfield started in 2014
- 37 new Blue Badge Guides trained
- Royal Institute of British Architecture (RIBA) Tours commenced

6

The Destination Management Plan

Next Five Years



© VisitBritain

Visitor Economy
Targets for 2020



28%

Increase in Visitor
Economy Jobs

££££

20%

Increase in
visitor value

Section 3 set out the long term vision and targets for 2025. Sections 4 and 5 looked at what the key drivers are and our recent performance. Section 6 looks at the next five years and key milestones towards that longer term vision. Sections 7,8 and 9 look at opportunities and challenges over the next five years, priorities and key actions to 2020.

Given the levels of recent visits and steady growth, Liverpool City Region is poised to take advantage in the upturn of the economy as we come out of the depths of the recession.

SHORT TERM TARGETS 2015-2020

- To increase overall visitor value from £3.65 billion per year in 2013 to £4.4 billion per year by 2020
- To increase staying visitor nights in Liverpool from 5.6 million in 2013 to 6.4 million in 2020¹
- To support the creation of a further 13,000 new jobs in the visitor economy by 2020 from 49,000 to 62,000
- To improve average hotel occupancy from 71% to 76% and to grow room yield at least in line with our competitor cities
- To increase day visitor impact from £2.5 billion to £2.8 billion
- To improve our ICCA UK² ranking by at least two places (currently 7th)

(1) Whilst targets reflect growth aspirations right across the City Region, it is likely that Liverpool, as the strongest attack brand of the City Region, will be the focus of much of the growth between now and 2020 hence a target for staying visitor nights in Liverpool specifically, has been included.

(2) International Congress and Convention Association ranking for regularly occurring, internationally rotating association meetings of 50 or more delegates.



© Wirral MBC



TABLE 2: SUMMARY: SHORT TERM GROWTH TARGETS FOR LIVERPOOL CITY REGION

	ACTUAL	DMP TARGET
	2013	2020
VALUE OF TOURISM (£billion)	3.6 ¹	4.4
TOURISM SUPPORTED JOBS	49,000 ¹	62,000
STAYING VISITOR NIGHTS (m) Liverpool	5.6 ¹	6.4
HOTEL OCCUPANCY	71% ²	76%
VISITS TO ATTRACTIONS based on 2007 index of 100	131	145
CITIES RANKING FOR LIVERPOOL for international visitors to the UK	5 ³	5
ICCA RANKING World/UK	159/7 ⁴	100/5

The targets are based on assumptions around the pace of hotel development, hotel occupancy, the timely completion of investment projects and the staging of particular large scale events and attraction of conferences. There are some real opportunities to be built on and some significant challenges to overcome if we are to achieve our vision.



A full list of performance indicators set out year by year through to 2015 can be found on page 32.

¹ STEAM 2013 Economic Impact Model

² STR GLOBAL, LTD. Republication or other re-use of this data without the express written permission of STR GLOBAL is strictly prohibited.

³ International Passenger Survey

⁴ International Congress and Convention Association (ICCA) rankings are for regularly occurring internationally rotating Association meetings of 50 or more delegates.



14%
Increase in
Liverpool
visitor nights



11%
Increase
in visits to
attractions

7

Destination Management Plan 2015 - 2020

Opportunities and Challenges



There are a number of key opportunities and challenges that the Visitor Economy will face over the next 5 years.

See Section 9 for planned investments and activities that seek to address these issues.

TABLE 3: KEY OPPORTUNITIES AND CHALLENGES: NEXT FIVE YEARS

OPPORTUNITIES	CHALLENGES
<p>FUNDING</p> <ul style="list-style-type: none"> The LEP has secured a further £2.15m of European ERDF funding towards Place Marketing which runs to June 2015. There is an opportunity to bid for further funding albeit at a lower level for place marketing activity from 2015 to 2020 Liverpool is a recognised destination brand for VisitEngland and VisitBritain with opportunities to feature in national campaigns such as the Britain's GREAT campaign and potentially future opportunities in China Liverpool is a prime destination partner in VisitEngland's Regional Growth Fund, Growing Tourism Locally Campaigns, now in its final year. This provides match funding to support activity such as Liverpool Attractions Group campaigns Visitor Economy Board helping to develop new commercial business model for Visitor Economy Executive funding Local Growth Plan funding for transport improvements will aid connectivity 	<p>FUNDING</p> <ul style="list-style-type: none"> Public Sector funding is reducing, particularly in the next few years. A change of culture is therefore required which will see introduction of a more commercially focussed business model to support activity that was previously publicly funded Local Authorities working on austerity budgets with tourism related funding reducing Finding funding to sustain the Visitor Economy Executive of both Liverpool Vision and the LEP post June 15 remains a challenge Diminishing public funding threatens continued capital infrastructure and revenue programming investment for cultural institutions and no obvious allocation for such activity within the new ERDF programme Private Sector funding is still difficult to secure with only a small number of larger businesses putting significant funding into destination marketing Further work to integrate Transport and Visitor Economy funding bids is required
<p>GOVERNANCE</p> <ul style="list-style-type: none"> Visitor Economy continues to be a recognised growth sector by the Liverpool City Region LEP and is well represented within the City Region Growth Plan. The Tourist Board function continues to be part of the LEP remit A new Combined Authority came into being in April 2014 and has the opportunity to focus on the Visitor Economy if it so chooses The Visitor Economy Board is more engaged in sector leadership A ground-breaking partnership is in place between the LEP and Liverpool Vision which sees responsibility for marketing delivery undertaken by Marketing Liverpool - current arrangements expire in June 15 and discussions underway about what form a future agreement might take The alignment of resources with Marketing Liverpool has benefitted the sector 	<p>GOVERNANCE</p> <ul style="list-style-type: none"> The new private sector Visitor Economy Board has to take a longer term strategic view of their role Future structures need to take account of potential funders The private sector needs to drive and support destination marketing activity to unlock the potential of Liverpool and the City Region to grow market share

OPPORTUNITIES	CHALLENGES
<p>BRAND</p> <ul style="list-style-type: none"> • Liverpool's brand is getting stronger and better known amongst key markets • Uniqueness of architecture offer and the opportunity to build our architectural brand as Chicago has done • World Heritage City brand • Making more of organisations that 'export' the Liverpool brand such as Liverpool Football Club, The Beatles, the Royal Liverpool Philharmonic Orchestra and Tate Liverpool • Further brand development of Waterfront and St George's Quarter as set out in the City Centre Strategic Investment Framework • Further brand development of Wirral, Southport and England's Golf Coast 	<p>BRAND</p> <ul style="list-style-type: none"> • Persistent low awareness of broader product offering, ease of access and reasons to travel now among key UK segments. • London continues to dominate international visitors' perceptions of the UK • Lack of brand coherence for Liverpool
<p>INVESTMENT</p> <ul style="list-style-type: none"> • Interest in hotel and hospitality investment in the City Region, and in Liverpool in particular, remains buoyant due to strong evidence of weekend leisure business and improving midweek business. Opportunities for at least 18 further hotels by 2025 • Relatively attractive opportunities for re-use of redundant office buildings through Business Premises Renovation Allowance (BPRA) • City Region has rich heritage assets capable of delivering authentic and distinctive experience to visitors • Potential for enhancing Beatles experience • New attractions that keep Liverpool City Region in the vanguard of consumer, media and travel trade interest 	<p>INVESTMENT</p> <ul style="list-style-type: none"> • BPRA ends in 2017 <p>PRODUCT GAPS</p> <ul style="list-style-type: none"> • 5 star city centre hotel to complement Wirral's Hillbark, the only 5 star hotel in Liverpool City Region • Backpacker /youth group accommodation • Touring Camping and Caravan site close to Liverpool • City centre townhouse and B&B accommodation • More animated water spaces • More high end restaurant brands as well as quality independents • Family orientated commercial leisure operations • Joined up and improved Beatles experience • More investment in public realm, gateways and visitor welcome
<p>EVENTS</p> <ul style="list-style-type: none"> • A strong Events programme for 2015/6 will keep the City Region profile high • Cunard 175th anniversary 2015 • International Festival for Business 2016 • Making more use of Liverpool Waterfront as a major events stage • Major Events Group brings together key players 	<p>EVENTS</p> <ul style="list-style-type: none"> • Finding new ways of funding innovative events, including via Business Improvement Districts (BIDS) • The attraction of major world-class events requires significant funding • Lack of European funding for events • Clearer strategy on prioritising attraction of off season and midweek events with high economic impact that do not disrupt normal trade • Capacity of public transport networks around the larger street events
<p>BUSINESS TOURISM</p> <ul style="list-style-type: none"> • Liverpool and Southport have opportunities to become international and national conference destinations of excellence in their respective markets • Conference Ambassador scheme and the opportunity to work with key growth sectors of the City Region economy to bring more conference events and aid inward investment • The new Exhibition Centre at ACC Liverpool opens up opportunities for consumer and trade exhibition business • Film Business – Liverpool City Region offers huge locational advantages for filming with a well reputed Film Office that generates demand for hotel accommodation and other services • Capitalising on the strength of our universities and their international reach 	<p>BUSINESS TOURISM</p> <ul style="list-style-type: none"> • The corporate business market remains weak and can undermine strong leisure and conference performance • More inward investment from professional services and 'northshoring' of back office functions from London and the SE and overseas is required • The conference and exhibition marketplace is hugely competitive with new facilities opening all the time – only sustained and substantial marketing and PR investment will guarantee success over the next five years
<p>LEISURE TOURISM</p> <ul style="list-style-type: none"> • The City Region's high quality and diverse product is well placed to attract a larger share of the UK and European Short Break Market • Targeted leisure markets e.g golf, retail, culture and heritage markets can help fill empty midweek rooms • Evidence of increasing midweek leisure business driven by Online Travel Agents • UK Travel Trade especially coach trips and overnights have untapped potential • The return of European football 	<p>LEISURE TOURISM</p> <ul style="list-style-type: none"> • Domestic demand still compromised by the impacts of the recession • International leisure visits could be impacted by the decline in passenger numbers at LJLA • Day visitors markets are growing very slowly • Coach strategy for Liverpool needs developing and implementing

OPPORTUNITIES	CHALLENGES
<p>DEVELOPING ENTERPRISE, EMPLOYMENT AND SKILLS</p> <ul style="list-style-type: none"> • Opportunities abound for new business start-ups in the sector to help address the City Region's shortfall in new businesses • Various national and locally specific funding schemes available for employability and skills training • Skills for Growth Agreement in place for the Visitor Economy • WorldHost City Region status attained – the first in Great Britain • In principle extension to Skills for Growth Bank model with a focus on supporting SMEs • Careers in the Visitor Economy are successfully promoted through initiatives such as Jobs for Tomorrow and the Skills Show Experience 	<p>DEVELOPING ENTERPRISE, EMPLOYMENT AND SKILLS</p> <ul style="list-style-type: none"> • To develop and retain sufficient high quality talent in key skills areas e.g. cheffing and future sector leaders/managers • Promoting skills and career opportunities • Skills are improving within the sector but more people need to view the sector as a first choice career • Persuading sector businesses to maximise the use of apprentices as a means of supporting business growth and to take advantage of the National Apprenticeship Service as a recruitment pathway • Raising the profile of skills development with both employers and employees • Encouraging providers to be more responsive to industry needs building on the Skills for Growth agreement for the Visitor Economy as a catalyst to drive change • Nurturing new Visitor Economy businesses • Access to finance for SMEs in the sector remains a challenge
<p>ONLINE ACTIVITY</p> <ul style="list-style-type: none"> • Advances in technology provide significant opportunities for new business and income generation • The more responsive VisitLiverpool website • Social Media provides a low cost effective way of promoting the destination • Visitor focussed smart card linking transport and attractions 	<p>ONLINE ACTIVITY</p> <ul style="list-style-type: none"> • Ensuring we have the online marketing skills and understanding to exploit online channels and conversion to business • Alignment of partners' digital resources • Developing better CRM • Ongoing resource costs of smart card operations
<p>AREA-BASED PARTNERSHIPS</p> <ul style="list-style-type: none"> • A myriad of self-sustaining area-based partnerships are beginning to take responsibility for developing the quality of their visitor offering. These are important gateways for visitors and offer the opportunity to reinforce the character of the destination, assist orientation and connectivity • Liverpool Quarters Group brings together each of the area partnerships to take forward common initiatives 	<p>AREA BASED PARTNERSHIPS</p> <ul style="list-style-type: none"> • Greater engagement of a wide range of private sector stakeholders is required • Capacity of such groups remains limited and competition for scarce private sector funding between groups could be a challenge
<p>ACCESS, SUSTAINABILITY AND INCLUSIVITY</p> <ul style="list-style-type: none"> • Successful destinations will provide for a diverse population in terms of age, ability, gender and sexual orientation and will address environmental concerns such as climate change and impacts on the host community • A focus on more mature markets will prompt an accessibility response 	<p>ACCESS, SUSTAINABILITY AND INCLUSIVITY</p> <ul style="list-style-type: none"> • The private sector needs to embrace these issues widely and see them as mainstream commercial opportunities rather than niche markets
<p>CONNECTIVITY</p> <ul style="list-style-type: none"> • Further potential for growth exists at Liverpool John Lennon Airport (LJLA) to replace lost routes. This will open up new markets that are essential for the growth of international business tourism, particularly from Europe • Implementation of short-term LJLA Delivery Plan and Surface Access Delivery Plan for LJLA • The opportunity to work more closely with Manchester Airport on developing better routes from new and emerging overseas markets. • Virgin, as the holder of the franchise for the West Coast main line service, are supporting the destination more actively and making improvements to rail services • Other rail/transport improvements such as the Halton curve, Wrexham to Bidston line, smart ticketing • HS2 -Extending high speed rail link beyond Crewe to Liverpool • HS3 - Connecting cities in the North across the Pennines • The new Mersey Gateway • Development of a second Cruise Terminal • Implementation by Merseytravel of new Customer Transport Information Strategy brings advances in availability of digital public transport information 	<p>CONNECTIVITY</p> <ul style="list-style-type: none"> • Visitor Economy stakeholders need to support LJLA to develop new routes that will attract inbound business and conference visitors • Funding for transport and infrastructure schemes remains tight • Connectivity with Manchester Airport remains an issue • Road and rail access to Southport requires further improvement • HS2/HS3 - Strong lobbying required to ensure Liverpool connectivity • Resources required to support visitor friendly services such as CityLink and airport bus

OPPORTUNITIES	CHALLENGES
<p>VISITOR MANAGEMENT</p> <ul style="list-style-type: none"> • Most destinations within LCR have the capacity to absorb more visitors 	<p>VISITOR MANAGEMENT</p> <ul style="list-style-type: none"> • As we become a more successful visitor destination we need to manage visitor flows and potential negative impacts better
<p>MARKET INTELLIGENCE</p> <ul style="list-style-type: none"> • Up to date and consistent data will inform market share growth • Improved intelligence through ONS/VisitEngland Tourism Intelligence Unit • North West Research - Significant opportunity to provide added value research services • Hosting conferences for sector professionals will help promote Liverpool City Region and share best practice 	<p>MARKET INTELLIGENCE</p> <ul style="list-style-type: none"> • Consistency and communication: Benchmarking nationally is not always consistent in terms of participation • Finding effective ways of sharing intelligence across Liverpool City Region • Benchmarking - Liverpool City Region has performed well but so have our competitors - More regular benchmarking against high performing core cities in the UK (e.g. Manchester / Glasgow) and worldwide (e.g. Barcelona, Boston, Melbourne, Vancouver) is required including 'Best in class' in conferences (e.g. Vienna, Paris), waterfront cities (e.g. Toronto, Cape Town, Sydney, Shanghai), World Heritage cities and architecture (Chicago)

Destination Management Plan 2015 - 2020

Priorities for the Next Five Years



Growth is at the heart of this strategy. Growth in both the value of the Visitor Economy sector and what it contributes to the overall GVA of the City Region but also growth in jobs and the opportunities the sector offers to our young people in particular.

Previous sections have outlined our long term vision to 2025 and our short term targets to 2020. The key 'accelerators' of growth have been explained and the opportunities and challenges facing the City Region have been discussed.

The Visitor Economy Board (see page 2) is charged with producing this strategy and monitoring its implementation. Before determining which of the opportunities should be prioritised, substantial consideration was given to international and domestic market trends and forecasts.

It is essential to prioritise activity around those opportunities with greatest sustainable economic impact and therefore the Visitor Economy Board is focusing its attention initially on three market growth opportunities:

- **International and national conferences and exhibitions**
- **Staycations (overnight domestic visitor markets)**
- **International leisure visitors**

In addition there are four enabling priorities which will help deliver sustainable growth. These are:

- **Brand distinctiveness**
- **Digital Connectivity**
- **Transport Connectivity**
- **Welcome**

INTERNATIONAL AND NATIONAL CONFERENCES AND EXHIBITIONS



What is the priority?

To attract more national and international conferences and exhibitions to LCR.

Where are we now?

- ICCA Ranking 159th globally
- ICCA Ranking 7th in UK
- Liverpool 5th city in the UK for international business visitors
- 6th in the UK for British business visits

Where do we want to be by 2020?

- We aim to maintain our ranking as 5th city in the UK for international business tourism visits and a top 100 ICCA world ranking with hotels achieving 76% annual average occupancy and room yield above average for core cities
- We aim to improve midweek occupancy from 70% to 74%
- Award winning Convention Bureau

Why?

- Conferences performing well but low business base is inhibiting overall growth of business tourism. However, significant growth potential for conferences, exhibitions and major events
- High spending visitors £242 per head per trip compared to £183 for leisure visitors
- Brings influential business audience to who may relocate or invest here
- Boosts midweek business – critical for sector Gross Value Added (GVA) growth and employment
- Benefits widely spread
- Makes sense of capital investments e.g. Exhibition Centre Liverpool (ECL)

STAYCATIONS – CULTURE AND HERITAGE VISITORS



What is the priority?

To capitalise on the staycation market and drive more overnight domestic leisure visitors 7 days a week targeting more mature visitors interested in our culture, music, heritage, golf and retail.

Where are we now?

- 5th in England for all domestic tourism behind, London, Manchester, Birmingham and Bristol
- 6th in England for pure holiday trips behind London, Scarborough, Blackpool, Manchester and York

Where do we want to be by 2020?

- To make a contribution to improved hotel occupancy target of 76% and repair above average of core cities
- Improve midweek occupancy from 70% to 74%
- Increase visits to heritage and culture attractions especially midweek and 12 months a year
- Improve midweek retail traffic
- Improved awareness of world heritage site

Why?

- To grow jobs and GVA need more midweek business
- Demographic changes mean that there will be more active older people looking to take breaks with the flexibility to travel midweek
- We need more visitors who will enjoy our culture and heritage assets

INTERNATIONAL LEISURE VISITORS



What is the priority?

To attract more international leisure visitors to LCR using our international assets to drive business to the wider LCR.

Where are we now?

- Liverpool 5th in the UK for overall international visitors (behind London, Edinburgh, Manchester, Birmingham)
- Liverpool 4th in the UK for 'other' visits (sporting events etc)

Where do we want to be by 2020?

- We aim to always be in top five cities in the UK for international visits with more international tour operators featuring Liverpool

Why?

- Overseas tourism is London centric but Liverpool performs relatively well
- High spending visitors
- Growing more strongly than domestic
- Plays to our cultural, Beatles, sporting strengths
- Less image issues overseas than at home
- Supports Liverpool John Lennon Airport (LJLA) growth
- Supports Liverpool City Council and Liverpool City Region international ambition



BRAND DISTINCTIVENESS



What is the priority?

To further develop the distinctiveness and awareness of the Liverpool brand for the benefit of the wider city region.

Where are we now?

- Overall international public awareness of the Liverpool brand is high but one dimensional. We are not yet on the radar as global city brand according to Anholt.

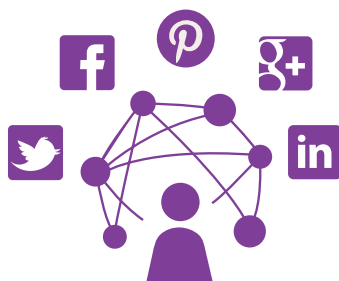
Where do we want to be by 2020?

- To be the most positively recognised English core city brand amongst international visitor audiences.

Why?

- Forecast tourism growth will be city driven
- Liverpool is already a distinctive, powerful brand, well known overseas
- Deepening and broadening awareness of brand Liverpool will benefit wider city region growth beyond the Visitor Economy
- Wider city region benefits from that success providing it connects to brand Liverpool

DIGITAL CONNECTIVITY



What is the priority?

To be the best digitally connected and promoted visitor destination in the UK.

Where are we now?

- VisitLiverpool unique visits – 150k per month (3rd of core cities)
- Email sign ups approximately 10,000 per year
- Twitter followers - 21,000
- Facebook likes - 14,600

Where do we want to be by 2020?

- Significant reduction in print
- Ask – inform – book by mobile universally available in LCR
- Digital city dressing
- City centre free Wi-Fi
- LCR recognised as best in class digitally for visitor connectivity

Why?

- The future is digital and with increased pressure on resources, this is the only affordable way to promote our destination and offer a seamless visitor experience
- Broadband access is generally good
- Visitliverpool.com is one of the best used visitor websites in the UK
- Easier to work collaboratively digitally
- Target markets are digitally savvy



TRANSPORT CONNECTIVITY



What is the priority?

To provide excellent transport connectivity with key visitor markets and visitor friendly gateways and transport on arrival.

Where are we now?

- Air, road, rail and sea connectivity generally good but Manchester and Transpennine connectivity is poor.
- Danger of Liverpool being excluded from HS2.
- Internal transport and transport information services are not organised around the needs of visitors
- Decline in passengers at LJLA is a concern

Where do we want to be by 2020?

- Best performing transport system in the UK
- Visitor friendly ticketing and information
- Positive resolution re HS2
- Reversal of decline at LJLA

Why?

- Good access to City Region is key prerequisite to tourism growth, especially international business tourism
- Easy to use public transport will attract more visitors and persuade others to leave their cars behind, keeping our destination more sustainable
- Visitors using public transport makes services more viable for residents

WELCOME



What is the priority?

To be recognised as the UK's most welcoming and friendly visitor destination.

Where are we now?

- Liverpool overall Visitor Satisfaction rate at 97 is above England average of 94
- Liverpool's score is higher than all other Core Cities (Manchester 85, Newcastle 88, Leeds 84, Birmingham 73, Nottingham 94 and Bristol 80 (Source Visit England Brand & Satisfaction Tracker)
- TripAdvisor most friendly destination in 2010 and 2011
- Many attractions and other visitor facilities have won awards and certificates of excellence
- 'Best Port of Call' - Cruise critic
- Coach friendly city
- Won 'Best UK Destination' at Group Travel Awards 2014
- First WorldHost accredited City Region in Great Britain

Where do we want to be by 2020?

- To outperform all competing UK destinations on warmth of welcome and destination recommendation indicators
- To build on and retain WorldHost accreditation for the LCR
- Excellent customer service and attitudes embedded in managers and front line staff
- Great destination knowledge by front line staff
- Young people equipped with the welcome and customer service skills to work in our sector
- Win more 'destination friendly' accolades

Why?

- Competitive advantage already
- Harnesses power of the people
- Can encourage word of mouth recommendation and repeat visits

9

Destination Management Plan 2015 - 2020

Investment and Activity Plans



**14,000
Jobs**

The following tables summarise planned developments and activities for the next five years.

THEY ARE INTENDED TO:

- Address the challenges and exploit the opportunities outlined in Section 7
- Highlight the key Visitor Economy Board priorities from Section 8
- Reflect priorities and plans of partners
- Maximise the City Region's performance against targets in Table 1, page 9

Successful visitor destinations are rarely created by chance. They are usually the product of:

- The development and management of the destination including public and private investment in the product, the quality of the visitor experience and access to that experience
- Innovative and sustained marketing of that offer
- Staging major events
- Developing a successful business tourism offer

This maximises use of capacity and resources and creates a balanced Visitor Economy. This section outlines intended activity in each of these areas.



Destination Development and Management

The next five years will see a continuation of austerity conditions for local authorities and other public sector agencies which will naturally curtail the development of new visitor facilities provided through public funds. Local authorities may well need to make further savings which could impact on destination management services and the maintenance of the public realm. However, private sector investments leading to sustainable job creation are still likely to receive support through various government and European funding initiatives.

Liverpool City Region has benefitted from significant levels of investment in recent years, helping to create the climate for further private sector investment.

Following the success of the International Festival of Business, its legacy will help build the Liverpool brand and further position the Liverpool City Region as a credible investment location.

Management of resources will need to be smarter and more aligned and growth will be achieved through increasing utilisation of existing facilities.

STRATEGY LINK AND AIMS

- Develop a new delivery funding model which is less dependent on the public sector
- The City Region will create, promote and manage distinctive quarters, each with a strong sense of identity - market appeal, quality offering and sense of arrival
- Make the City Region more accessible for visitors and easier to get around when they are here, promoting the use of public transport and investing in our gateways to create a sense of welcome
- Ensure the leading assets of the City Region continue to meet the expectations of new visitors
- Promote the Visitor Economy as an aspirational career choice and address skills gaps in the hospitality industry
- Deliver the highest quality experience for our visitors by investing in our public realm, our transport, visitor information and destination welcome with a particular focus on becoming a digital destination
- Secure public and private investment to improve the quality and range of our hotels, restaurants and attractions, our conference, exhibition and cultural venues and to attract major events
- Help businesses in the Visitor Economy by working with them to improve their performance and productivity by sharing best practice. Identify the next generation of growth businesses and provide them with bespoke support
- Develop the Visitor Economy in a sustainable and responsible way and spread the benefits across the City Region
- To further integrate and align Transport and the Visitor Economy Policy and market opportunities

TABLE 5: DESTINATION DEVELOPMENT AND MANAGEMENT 2015-2020

ACTIVITY AREA	ACTIVITY	AREA FOCUS & LEAD
TOURIST BOARD STRUCTURES AND FUNDING	<ul style="list-style-type: none"> Continued alignment of marketing resources by the City Region LEP and Liverpool Vision Investigation of further funding opportunities 	City Region (City Region LEP/Visitor Economy Board/Liverpool City Council)
GATEWAY/TRANSPORT ENHANCEMENT	<ul style="list-style-type: none"> Route development LJLA Implementation of Short Term LJLA Delivery Plan and Surface Access Strategy Upgrade of visitor arrivals and reception facilities at LJLA Lime Street Gateway – further improvements Completion of James Street upgrade. Additional Trans Pennine connections at Liverpool South Parkway Improvements to North Wales connections through Halton Curve and Wrexham-Bidston line Mersey Gateway – construction underway for 2017 completion New stations at Maghull and Newton-Le-Willows Delivery of Transport Information Strategy and Merseytravel Smart Ticketing Work on HS2 and TransPennine Links to commence 	<p>City Region (LJLA/Merseytravel/Network Rail/LCC)</p> <p>Halton</p>
BUSINESS SUPPORT AND QUALITY	<ul style="list-style-type: none"> Business support to encourage development of High Growth SMEs Promotion of Quality Schemes and Tourism Awards to reward excellence Promoting accessibility and sustainability Promotion of free wifi in City Centre and visitor venues 	<p>City Region LEP</p> <p>Private Sector</p>
DESTINATION WELCOME AND SKILLS	<ul style="list-style-type: none"> Undertake review of Visitor Information Services within Liverpool and introduce Digital City Dressing Development of new integrated approach to customer service across Retail, Visitor Economy and Transport sectors. Seek further Skills for Growth Bank resources or alternative public investment to increase the volume and level of customer service training. To include: <ul style="list-style-type: none"> Liverpool Welcome Workshops WorldHost Management and Leadership skills Tourist Guide and volunteer training Refresh Skills for Growth Agreement focusing on: <ul style="list-style-type: none"> Attracting high calibre, committed individuals to work in the sector Work with National Apprenticeship Service and Employment and Skills Board to meet employer expectations from those setting out on a Visitor Economy career Embed customer service principles in school curriculum Address skills needs of existing workforce 	<p>Liverpool City Council</p> <p>Merseytravel/Liverpool ONE and City Region LEP</p> <p>Skills for Growth Agreement partners including employers and training providers</p>
INSIGHTS AND RESEARCH	<ul style="list-style-type: none"> Improved sharing and joint commissioning of intelligence to underpin sector investment and marketing decisions Implementation of City Centre Strategic Regeneration Framework Monitor and review DMP Wirral Tourism Strategy 	<p>City Region LEP/ North West Research</p> <p>LCC / Private Sector</p> <p>City Region LEP/ Visitor Economy Board</p> <p>Wirral Council</p>

ACTIVITY AREA	ACTIVITY	AREA FOCUS & LEAD
AREA-BASED PARTNERSHIPS	<ul style="list-style-type: none"> Progress towards integrated business planning, branding, quality and welcome, promotion and PR and events activity in distinctive Visitor Economy quarters Establishment of Community Interest Companies and other self-managed instruments 	City Region LEP Hope Street Liverpool Waterfront Baltic Triangle Ropewalks Stanley Street Cavern Quarter World Heritage Site St George's Quarter Atlantic Avenue
BUSINESS IMPROVEMENT DISTRICTS	<ul style="list-style-type: none"> Local Tourism Business Networks Continuation of City Central and Commercial District BIDS Decision on potential Liverpool Waterfront BID Southport BID implementation following successful vote in 2014 	Wirral, St Helens, Halton, Knowsley, Southport Liverpool (Liverpool BID Area) Liverpool Waterfront Business Partnership Southport BID Company
LEISURE INVESTMENT FACILITATION	<ul style="list-style-type: none"> Improve intelligence to support new leisure investment and target underrepresented brands Implementation of recommendations of Hotel Futures study and the production of a Hotel Investment Prospectus and campaign in Liverpool City Centre 	City RegionLEP/ local authority partners Liverpool Vision Investment Team
PUBLIC ART	<ul style="list-style-type: none"> Making more innovative use of public art as a visitor attractor and to move people around the City Region 	Liverpool Biennial plus public and private partners including Merseytravel

Destination Marketing 2015-2020

Playing to the strength of the Liverpool brand, City Region marketing activity will be delivered by Marketing Liverpool with further alignment of LEP and Liverpool City Council resources to support this.

2015 sees the end of both the VisitEngland Regional Growth funded advertising campaigns and the destination marketing campaigns funded by the current New Approach to Place Marketing ERDF project.

Consequently, the private sector will have a bigger say on what marketing is undertaken as they increasingly become the main funders of such activity.

STRATEGY LINK AND AIMS

- Place the Visitor Economy at the heart of broader Place Marketing Strategy that promotes the wider economic assets and key growth sectors of SUPERPORT, Low Carbon and Knowledge and Innovation
- Capitalise on Liverpool City Region's global business and personal connections to ensure those individuals with connectivity to the area are encouraged to visit
- Promote the City Region through a single integrated marketing agency delivering innovative and effective marketing activity with a clear focus on our destination brands (principal brands Liverpool, secondary brands Southport, Wirral and England's Golf Coast), key themes of culture and heritage and well defined target markets. This will complement the marketing undertaken by local destinations such as Wirral and Southport

The marketing focus will be on the priorities identified by the Visitor Economy Board, namely:

- Building the distinctiveness of the Liverpool brand
- International and national conferences (see next section)
- International Leisure Visitors
- Staycations
- Digital Connectivity

BUILDING THE BRAND

- Capitalise on the powerful brands within the City Region e.g Beatles, World Heritage Site, Waterfront, culture, architecture including the two cathedrals, music, Tate, football, Grand National and England's Golf coast to build a stronger Liverpool brand
- Rally the whole of Liverpool City Region behind that Liverpool brand to deliver increased visitors and more spend
- Marshall the resources of the private sector behind the Liverpool brand so that they reinforce key destination messages in their own marketing and work closely with Marketing Liverpool
- Build on the strong sense of identity and connectivity that many individuals have with Liverpool throughout the world

- Place the Visitor Economy in the context of the wider economic assets of the City Region and promote Liverpool as a place to live, invest, work and study as well as visit.

INTERNATIONAL LEISURE VISITORS

- Work with airlines to position Liverpool in destinations served by Liverpool John Lennon Airport
- Work with VisitBritain, Manchester Airport and other core cities to develop emerging markets especially the BRIC (Brazil, Russia, India China) countries broadening the marketing message to place marketing in conjunction with UKTI
- Work closely with UK Inbound and international Tour Operators to encourage more of them to feature Liverpool in itineraries
- Target expat markets
- Continue to promote Liverpool as a cruise destination and welcome cruise 'port of call' visitors

STAYCATIONS (CULTURE AND HERITAGE VISITORS)

- Focus on driving more overnight domestic leisure business 7 days a week through marketing and media campaigns
- Target more mature markets interested in our culture, heritage, music, golf, retail, coast and countryside

- Target independent travellers through self-build itineraries
- Target 'discoverers' on rail/coach packages working closely with the travel trade especially coach and rail operators
- Promote culture and heritage programmes that take place midweek or run throughout the year
- Promote distinctive quarters and events such as Light Night which create a positive and creative local atmosphere and where visitors are made to feel at home as 'temporary residents'
- Encourage 'turnaround' cruise passengers to extend their stay
- Local destination media and marketing campaigns will complement the above and play to the strengths of their particular markets

DIGITAL CONNECTIVITY

- Continue to invest in VisitLiverpool and mobile enabled applications
- Develop more digital campaigns and CRM (Customer Relationship Management)
- Collaborate with the creative and digital sector to make Liverpool City Region best in class for digital destination marketing
- Fully develop and exploit social media to communicate key destination messages

Major Events 2015-2020

Liverpool City Region's success as a visitor destination has largely been driven by events and this is likely to continue over the next five years. The aim is to ensure a varied programme of events throughout the year to drive up visitor figures and raise the profile of the destination amongst key visitor and media audiences.

STRATEGY LINK AND AIMS

- To secure public and private investment to improve the quality and range of our hotels, restaurants and attractions, our conference, exhibition and cultural venues and to attract major events

The Major Events Group (a Sub Committee of the Visitor Economy Board) will continue to play an important role in developing the events programme of Liverpool City Region. In particular it will focus on:

- The City Region Major Events Strategy which aspires to have a transformational event each year, a small number of major events and a series of supporting events across the themes of business, culture, music, sport and maritime
- Rating potential events on their contribution to the economy based on a number of criteria and recommending those that score highly for support
- Keeping a forward event planner which will help identify clashes and gaps in the calendar
- Looking for opportunities to bid for major events and endorsing such bids
- Recommending which events should be afforded welcome banners
- Maximising the impact of major events through supportive actions

Individual Event Organisers from the public and private sectors are responsible for delivering the events.

FIGURE 1: MAJOR EVENTS STRATEGY

The aim is to have at least one transformational event a year delivering an economic impact of at least £30m and major events with a value of at least £10m across the themes of sport, music, business, culture and maritime.

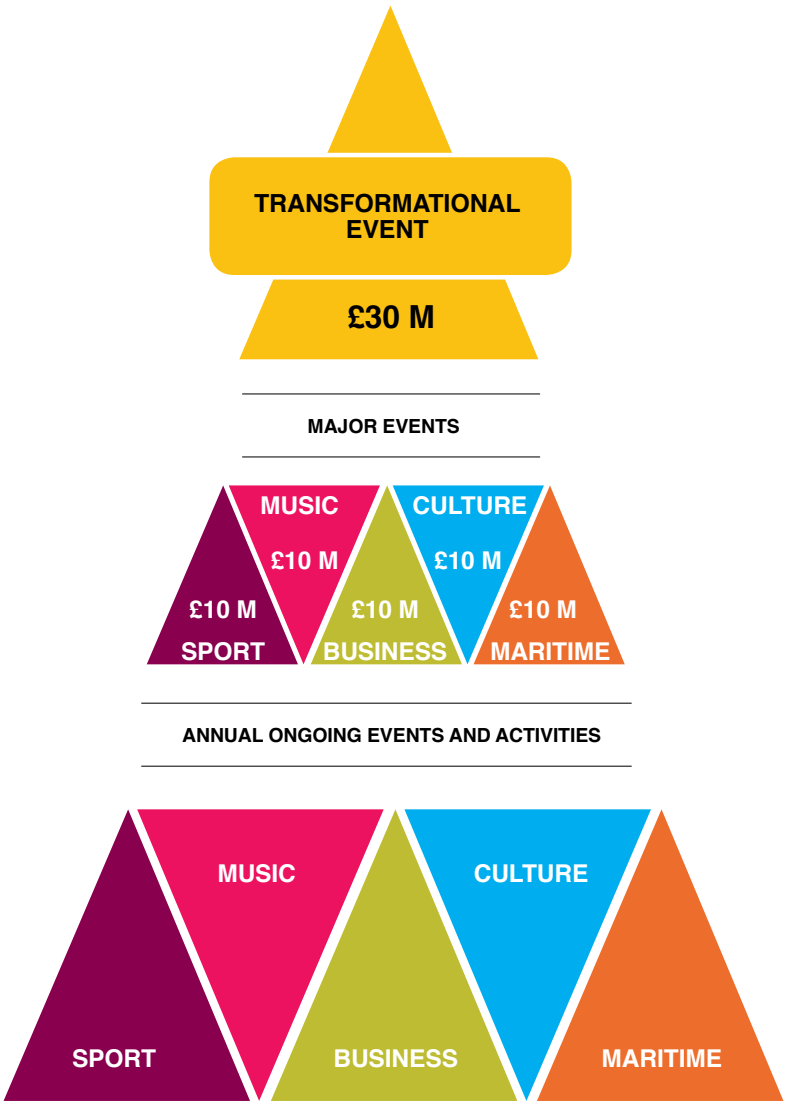


TABLE 6: MAJOR EVENTS CALENDAR

A comprehensive events calendar is available on VisitLiverpool.biz including cultural programmes. Business Events are included in the next section

MAJOR ANNUAL EVENTS 2015-2020	DATE	ORGANISER
Chinese New Year	Jan/Feb	Liverpool City Council
Grand National	April	Jockey Club
St George's Quarter Festival	April	St George's Quarter
Light Night	May	Open Culture
Sound City	May	Liverpool Sound City
Wirral Farm Feast	May	Claremont Farm
Southport Jazz Festival	May/June	Sefton Council
International Mersey River Festival	June	Liverpool City Council
Wirral Festival of Firsts	July	Wirral Council
Liverpool International Music Festival	August	Liverpool City Council
Beatles Week	August	Cavern City Tours
Southport Flower Show	August	Southport Flower Show
Liverpool Food and Drink Festival	September	SK Events
Southport Air Show	September	Sefton Council
Wirral Festival of Transport	September	Wirral Council
British Musical Fireworks Championships	October	Sefton Council
Wirral International Guitar Festival	November	Wirral Council

SPECIAL EVENTS 2015-2020	DATE	ORGANISER
Cunard 175th Anniversary	May and July 2015	Cunard and Liverpool City Council
International Festival for Business	June 2016	Liverpool Vision and partners
Liverpool Biennial	2016, 2018, 2020	Liverpool Biennial
The Open Golf Championship, Birkdale	2017	R&A/Sefton Council

BIDDING FOR MAJOR EVENTS AND POTENTIAL NEW EVENTS

Major Event Group Partners will continue to develop fresh events and bid to host national and international events that could take place in the years to 2020. Amongst others these include, a potential Regional Arts Festival in Southport, a Boat Show on the Liverpool Waterfront, the World Netball Cup, British Gymnastics Championships and World Cup Taekwondo ITF (Echo Arena).



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Conference and Business Tourism 2015-2020

With the opening of the new exhibition centre at ACC Liverpool there is both the opportunity and challenge of developing and winning further business for Liverpool to maximise use of the new facilities.

The aim will be to strengthen resources of the Liverpool Convention Bureau to support ACC Liverpool and wider LCR venues and to further expand the Conference Ambassador scheme. Government support for a second International Festival for Business opens up further opportunities to develop a lasting legacy for business tourism.

STRATEGY LINK AND AIMS

- To attract more national and international conferences and exhibitions to Liverpool City Region
- Securing public and private investment to improve the quality and range of our hotels, restaurants and attractions, our conference, exhibition and cultural venues and to attract major events

Liverpool Convention Bureau aims to be the best UK convention bureau and improve its commercial results. It will take a significant step up in its conference marketing through investing in the following activity:

- Liverpoolconventionbureau.com
- Venue directory
- Conference destination advertising and PR
- Selected UK and overseas exhibition presence
- Growing the number, quality and scope of conference ambassadors

The Liverpool Convention Bureau will continue to host familiarisation visits and showrounds, research conference leads, write bids, convert enquiries and organise destination welcome materials.



In Southport, new arrangements for the Southport Conference Desk will be implemented and the aim will be to further strengthen Southport's position as a national conference centre able to host major corporate, public and association events through the ongoing implementation of the Southport conference plan.

Conference venues will continue to invest in their facilities and seek recognition through appropriate industry schemes such as Meetings Industry Accreditation and Award Schemes.

The International Festival for Business in 2016 will open up new relationships with conference organisers and attract new business events to the City Region.

TABLE 7: KEY BUSINESS EVENTS

A full list of Business events can be found in the Major Events List on VisitLiverpool.biz

KEY BUSINESS EVENTS 2015-2020	
BBC Worldwide Showcase	Feb 2015 and annually
Liberal Democrats Spring Conference	Mar 2015
National Union of Students	Apr 2015
Royal College of Ophthalmologists	May 2015
Liverpool International Waterfront Forum	May/Jun 2015
NHS Confederation	Jun 2015
UK Radiological Congress	Jun 2015
Jehovah Witnesses	Aug 2015
Arbonne Advantage	Sep 2015
British Orthopaedic Association	Sep 2015
Renewable UK	Oct 2015 and 2017
NCRI Conference	Nov 2015
UK Stroke Forum	Nov 2015
Federation of Petrol Suppliers	Apr 2016, 2017 and 2018
International Festival for Business	Jun 2016
European Association for International Education	Sept 2016
Labour Party	Oct 2016 and 2018
Cancer Research	Nov 2016
Royal College of Ophthalmologists Congress	May 2017 and 2018
British Association of Dermatology	Jul 2017
International Bible Students Association	Aug 2017
British Society for Haematology Annual Meeting	Apr 2018
Royal Society of Chemistry – EuCheMS Congress	Aug 2018
National Association of Pension Funds	Oct 2018
British Orthopaedic Association	Sep 2019
BSI Congress	Dec 2019
Association of Surgeons of Great Britain and Ireland	May 2020
British Society of Gastroenterology	Jun 2020

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Destination
Performance Targets

TABLE 8. DESTINATION PERFORMANCE TARGETS

	2009	2010	2011	2012	2013	T2014	T2015	T2016	T2017	T2018	T2019	T2020	T2021	T2022	T2023	T2024	T2025
CORE MEASURES																	
TOTAL VISITOR SPEND (£ billion)	£2,835	£2,979	£3,268	£3,413	£3,641	£3,723	£3,832	£3,941	£4,049	£4,158	£4,267	£4,375	£4,484	£4,593	£4,701	£4,810	£4,919
VISITOR ECONOMY JOBS (1)	40,336	42,326	43,316	45,890	48,607	50,127	52,137	54,148	56,159	58,169	60,180	62,190	64,201	66,212	68,222	70,233	72,243
NO. OF STAYING NIGHTS (m) City Region (2)	10.3	11	11.1	11.7	12.4	12.7	12.9	13.2	13.4	13.6	13.8	14.1	14.3	14.5	14.7	15.0	15.2
NO. OF STAYING NIGHTS (m) Liverpool (2)	4.1	4.6	4.6	5	5.6	5.8	5.8	6.0	6.0	6.2	6.2	6.4	6.4	6.6	6.6	6.8	6.9
NO. OF STAYING NIGHTS (m) Wirral (2)	1.6	1.7	1.7	1.8	1.8	1.9	1.9	1.9	1.9	2.0	2.0	2.0	2.1	2.1	2.1	2.2	2.2
NO. OF STAYING NIGHTS (m) Sefton (2)	2.5	2.5	2.5	2.5	2.5	2.6	2.6	2.7	2.7	2.7	2.8	2.8	2.9	2.9	3.0	3.0	3.1
NO. OF OVERSEAS VISITORS NIGHTS (m) City Region(3)	2.7	2.6	3.4	3.4	3.7	3.9	4.0	4.2	4.3	4.4	4.5	4.7	4.8	5.0	5.1	5.3	5.4
TOTAL STAYING TOURISM IMPACT (m) (2)	£818	£862	£934	£992	£1,103	£1,152	£1,222	£1,292	£1,362	£1,432	£1,502	£1,572	£1,642	£1,712	£1,782	£1,852	£1,922
AVERAGE SPEND PER STAYING NIGHT	£79.03	£78.20	£84.21	£84.67	£89.31	£91.19	£93.90	£96.60	£99.30	£102.01	£104.71	£107.41	£110.11	£112.82	£115.52	£118.22	£120.93
INDEX OF ATTRACTIONS (indexed to 2004)	125	133	139	148	131	133	135	137	139	141	143	145	147	149	151	153	155
ROOM OCCUPANCY LCR (4)	70%	69%	71%	69%	71%	73%	73%	74%	74%	75%	75%	76%	76%	77%	77%	78%	78%
MIDWEEK OCCUPANCY (4)	68%	67%	69%	69%	70%	71%	71%	72%	72%	73%	73%	74%	74%	75%	75%	76%	76%
ROOM YIELD (5)	5	4	4	4	4	4	4	4	4	4	4	3	3	3	3	3	3
BED-SPACES (2)	33,000	35,000	35,000	36,000	38,000	39,000	40,000	41,000	42,000	43,000	44,000	45,000	46,000	47,000	48,000	49,000	50,000
ADDITIONAL INDICATORS																	
NO. OF DAY VISITS (m) (2)	48.2	50.1	50.5	52.1	52.9	53.7	54.5	55.3	56.1	56.9	57.7	58.6	59.4	60.2	61.0	61.8	62.6
TOTAL DAY VISIT IMPACT (m) (2)	£2,017	£2,117	£2,334	£2,421	£2,538	£2,572	£2,610	£2,649	£2,688	£2,726	£2,765	£2,804	£2,842	£2,881	£2,920	£2,958	£2,997
NIGHTS SPENT IN SERVICED ACCOMMODATION (m)(2)	3.2	3.8	3.9	4.3	4.7	5.0	5.1	5.3	5.4	5.6	5.8	6.0	6.1	6.3	6.5	6.7	6.8
TOTAL ROOM NIGHTS SOLD IN LCR (000) (4)	2009	2202	2352	2386	2,566	2,709	2,779	2,888	2,960	3,072	3,144	3,259	3,333	3,451	3,525	3,646	3,721
PASSENGER TRAFFIC VIA L.J.L AIRPORT (m)	4.9	5.0	5.2	4.5	4.2	TBC	TBC	TBC	TBC	TBC	TBC	TBC	TBC	TBC	TBC	TBC	TBC
RETAIL (m)	23.5	24.8	25.9	26.1	26.0	TBC	TBC	TBC	TBC	TBC	TBC	TBC	TBC	TBC	TBC	TBC	TBC
ICCA RANKING (UK) (6)	6	6	6	6	7	6	6	6	6	6	6	5	5	5	5	5	4
ICCA RANKING (International)	139	139	197	134	159	157	140	125	120	115	112	100	95	90	85	80	75
LIVERPOOL RANKING IN TOP TOWNS IN THE UK FOR INTERNATIONAL VISITORS (7) 1000s of visits	6 458	6 452	5 545	5 550	5 562	5 590	5 620	5 651	5 683	5 717	5 753	5 791	5 830	5 872	5 915	5 961	5 1009
LIVERPOOL RANKING IN TOP TOWNS IN THE UK FOR DOMESTIC VISITORS (000) (8)	12 1204	10 1194	9 1428	8 1470	5 1678	5 1728	5 1779	5 1832	5 1886	5 1942	5 2000	5 2060	5 2121	5 2184	5 2249	5 2316	5 2385

T= Target.
 Figures in bold are actuals.
 (1) Direct and indirect jobs supported through visitor spend.
 (2) STEAM economic Impact model.
 (3) International Passenger Survey.
 (4) STRGlobal. STR Global: Republication or other re-use of this data without the express

written permission of STR Global is strictly prohibited.
 (5) BDO Hotel Report - Room yield ranking in comparison to 8 other core cities - Belfast, Birmingham, Glasgow, Leeds, Manchester, Newcastle, Nottingham, Sheffield.
 (6) International Congress and Convention Association. Rankings are for regularly

occurring, internationally rotating association meetings of 50 or more delegates.
 Top 6 in the UK are: London (166 events), Edinburgh (55 events), Manchester (34 events), Glasgow (33 events), Oxford (19 events), Birmingham (18 events).
 (7) International Passenger Survey. Top 5 towns are: London (16,784), Edinburgh (1,303),

Manchester (988), Birmingham (941), Liverpool (562).
 (8) National Travel Survey: Shows the number of visits by UK (2009-11) or GB (2011+) residents. Top 5 towns in 2013 are London (12,305), Manchester (2,756), Birmingham (2,267), Bristol (1,921), Liverpool (1,678).



Monitoring and Further Information



This Action Plan is updated regularly. The Visitor Economy Board is charged with the monitoring of progress against targets to 2020, the implementation of the Plan and indeed the overall strategy to 2025. The Visitor Economy Board reviews destination key performance indicators every 2 months. The VEB will lead on discussions with Government regarding policy flexibilities that could assist delivery of the DMP. It also provides strategic oversight of the Visitor Economy Executive at both the LEP and Marketing Liverpool and is leading on the development of a new business model post-ERDF funding.

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FURTHER INFORMATION

There are a number of important documents which provide supplementary information to this Visitor Economy Strategy and 5 year Destination Management Plan

1. Liverpool City Centre Strategic Investment Framework

<http://www.liverpoolvision.co.uk/wp-content/uploads/2014/01/Liverpool-City-Centre-Strategic-Investment-Framework-2013-16-Delivery-Plan.pdf>

2. Hotel Futures 2014 – Executive Summary

[http://www.visitliverpool.biz/document-library/liverpool_](http://www.visitliverpool.biz/document-library/liverpool_hotel_futures_2014_-_executive_summary_-_26_august_2014.pdf)

[hotel_futures_2014_-_executive_summary_-_26_august_2014.pdf](http://www.visitliverpool.biz/document-library/tourism_data_summary_july_2014.pdf)

3. Liverpool City Region Tourism Data Summary

http://www.visitliverpool.biz/document-library/tourism_data_summary_july_2014.pdf

4. Strategic Framework for Tourism – VisitEngland

<http://www.visitengland.org/strategicframework/>

5. Delivering a Golden Legacy – VisitBritain

http://www.visitbritain.org/tourism_2012_legacy/britain_tourism_strategy/

USEFUL WEBSITE LINKS

VisitLiverpool.biz

Liverpool City Region LEP's website for the tourism industry – information on promotional opportunities, business support and advice, skills and training, research and intelligence

VisitLiverpool.com

The City Region's visitor website

VisitSouthport.com

Southport's website for visitors

VisitWirral.com

Wirral's website for visitors

VisitHalton.com

Halton's website for visitors

Liverpoollep.org

The corporate website for Liverpool City Region Local Enterprise Partnership

Liverpoolvision.co.uk

VisitEngland.org

VisitBritain.org







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