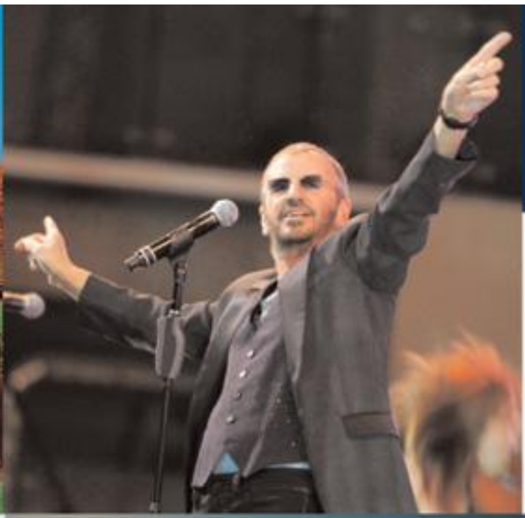
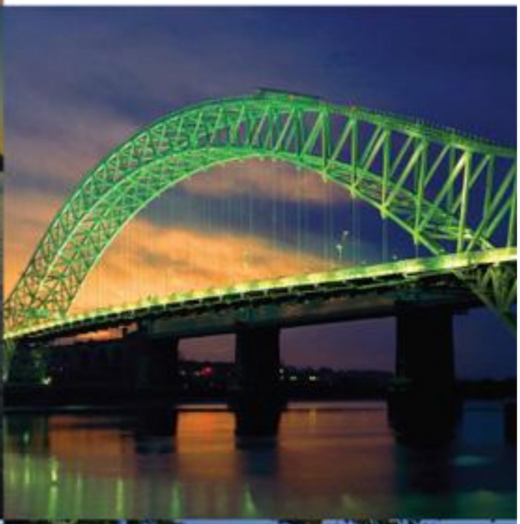
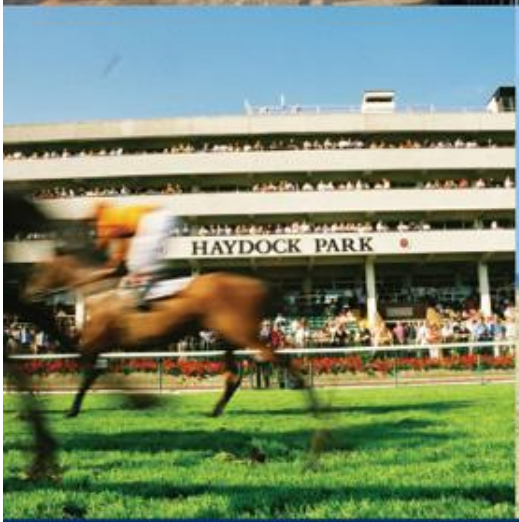


TheMersey Partnership

DEVELOPING THE ECONOMY OF THE LIVERPOOL CITY REGION





Digest of Tourism Statistics
July 2009

England's Northwest Research Service
for Economic Development and Tourism

INVESTING IN englandsnorthwest
EUROPEAN REGIONAL DEVELOPMENT FUND

Merseyside.org.uk

Digest of Tourism Statistics, July 2009

Contents

1. Introduction

Welcome to the latest edition of the Digest of Tourism Statistics, and for those regular users of this publication, we start with an apology.

Many of you will be aware that we have been a long time in awaiting the 2007 STEAM estimates for our region (see section 2.1); hence this edition has been delayed whilst these were produced. A further explanation is included within the relevant section. Naturally we are all interested in seeing what the number of visitors to the city were in 2008, our year as Capital of Culture, and the second of this year's Digests will be produced as soon as these figures are available.

1

The Digest is written about Tourism Research in the Liverpool City Region and is intended for users of Tourism Research data; whether businesses, consultants or students. Each quarter sees a presentation of key tourism statistics – which may change only once during a year – together with the latest statistics and any recent research that The Mersey Partnership has commissioned or sponsored, and with links for further information.

The Liverpool City Region

Although there are a number of definitions of what comprises the Liverpool City Region, as far as tourism data is concerned this covers the six districts comprising 'Merseyside':

The next edition of the Digest will be published as soon as the STEAM results for 2008 are available, with an in-depth look at what the information shows; it will also contain more details of the 2008 Liverpool Destination Benchmarking and 2009 Liverpool John Lennon Airport Gateway Studies.

England's Northwest Research Service

The Digest is produced by the research team at The Mersey Partnership, who are also responsible for the annual Merseyside Economic Review and conducting many of the local tourism surveys including Destination Benchmarking, the Airport Gateway study and a quarterly Tourism Business Performance Survey.

Under the banner of England's Northwest Research Service, the team conducts commercial research in a range of different sectors across the Northwest, with a particular specialism in the tourism industry and event impact evaluation. For more information, contact research@merseyside.org.uk.

England's Northwest
Research Service
for Economic Development and Tourism

2. Core Tourism Statistics

2.1 Volume and Value of Tourism on Merseyside (STEAM)

2.1.1 Headlines

The **volume** and **value** of tourism to the Liverpool City Region refers to how many visitors there are to the area and how much they were worth to the local economy – either through direct or indirect spend.

Key STEAM figures 2007

Type of visitor	Tourist numbers (m)	Tourist days[1] (m)	Revenue (£m)
Staying – serviced accommodation	2.01	3.62	£379.82
Staying – non-serviced accommodation	0.18	1.21	£46.39
Staying – with friends and relatives	2.25	6.14	£125.64
All staying visitors	**4.45**	**10.97**	**£551.85**
Day visitors	58.58	58.58	£793.34
All visitors	**63.03**	**69.55**	**£1,345.18**

Change from 2006 to 2007

Type of visitor	Tourist numbers (m)	Tourist days (m)	Revenue (£m)
Staying – serviced accommodation	6.5%	6.4%	7.0%
Staying – non-serviced accommodation	-0.4%	3.7%	4.0%
Staying – with friends and relatives	-0.3%	-0.3%	-0.4%
All staying visitors	**2.7%**	**2.3%**	**5.0%**
Day visitors	2.1%	2.1%	1.6%
All visitors	**2.1%**	**2.1%**	**3.0%**

- In 2007, there were **63m visitors to the Liverpool City Region**, who generated **£1,345m** for the local economy.
- It is estimated that tourist volume grew by 2.1% from 2006 to 2007, and that value grew by 3%. There was a particularly strong growth in the number of visitors staying in serviced accommodation.

[1] Tourist *days* refers to the number of days that visitors spent, as opposed to the absolute number of tourists.

2.1.2 About the volume and value estimates

To estimate volume and value of tourism, the Northwest region uses the STEAM[2] model – this model is widely, though not universally, used across the UK. STEAM is owned and operated by Global Tourism Solutions (UK) Ltd.

STEAM relies on local-level data to drive the estimates, principally[3]:

- Accommodation stock
- Local occupancy surveys
- Visits to attractions / events
- Visits to Tourist Information Centres
- Hotel Occupancy on Merseyside
- Conferences on Merseyside
- Visits to Tourist Information Centres

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 and 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.

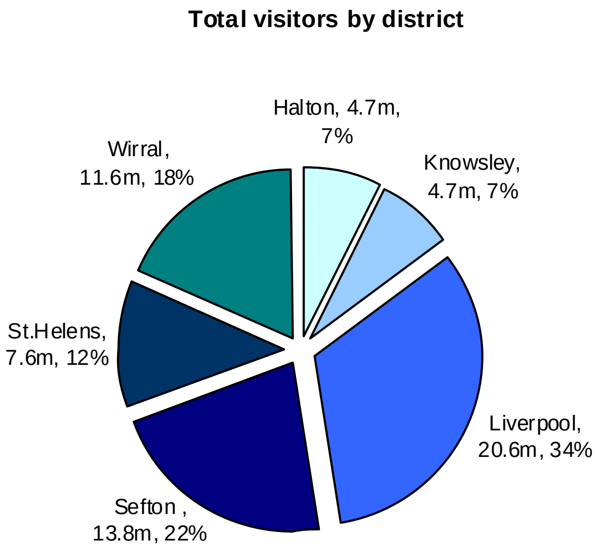
Local data for the preceding year is gathered by the research team in January-March each year. This data is passed to Global Tourism Solutions, with reports typically available by mid-year.

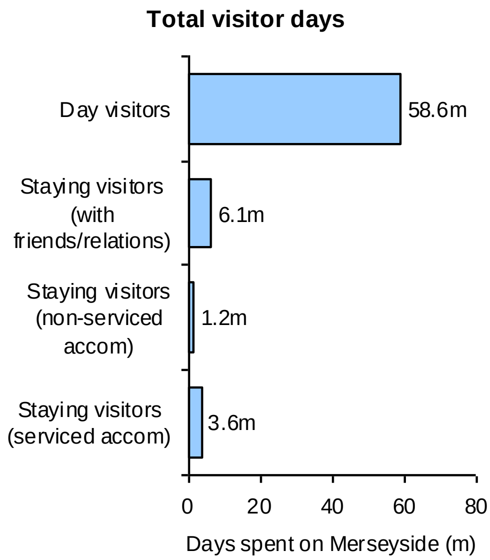
Methodological Note:

A particular accuracy for STEAM is in its tracking of year on year changes in tourism volume and value. In order to improve the underlying accuracy of the baseline data in the STEAM model for Northwest England, the Northwest Regional Development Agency is funding a series of studies which will provide a much greater understanding of the volumes of visitors. Reporting is projected to be in early 2010, with the aim of the results being fed to Global Tourism Solutions for inclusion in the 2009 STEAM reports.

[2] Scarborough Tourism Economic Activity Monitor
[3] Notice that STEAM uses a further range of inputs, although the components which influence the model most are listed here.

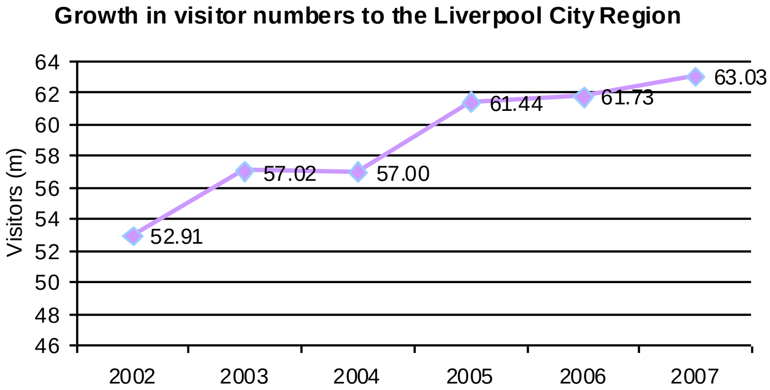
2.1.3 Volume of tourism





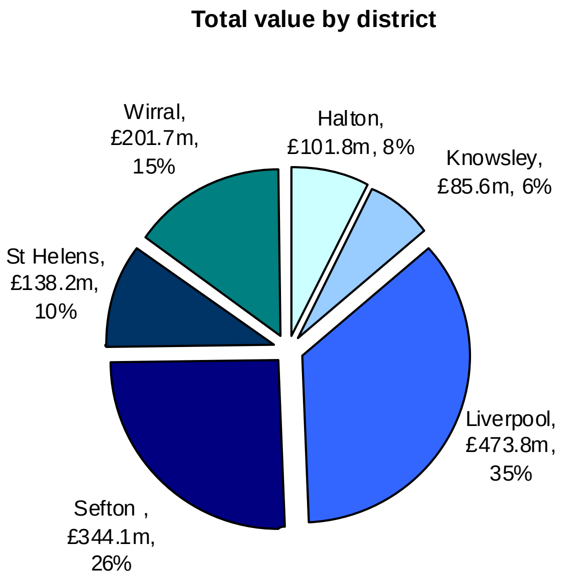
The above chart shows the number of all visitors broken down by district, whilst that above to the right breaks down the total number of visitor days. This is broken down in more detail below.

	Number of visitors (000s)			Visitor days		
	Staying visitors	Day visitors	Total visitors	Staying visitors days	Day visitors	Total visitor days
Halton	356	4,363	4,720	743	4,363	5,107
Knowsley	324	4,341	4,665	720	4,341	5,061
Liverpool	1,703	18,914	20,617	3,845	18,914	22,759
Sefton	913	12,932	13,845	3,062	12,932	15,995
St.Helens	451	7,172	7,623	962	7,172	8134
Wirral	699	10,858	11,558	1,641	10,858	12,499
Total	**4,446**	**58,580**	**63,027**	**10,974**	**58,580**	**69,554**



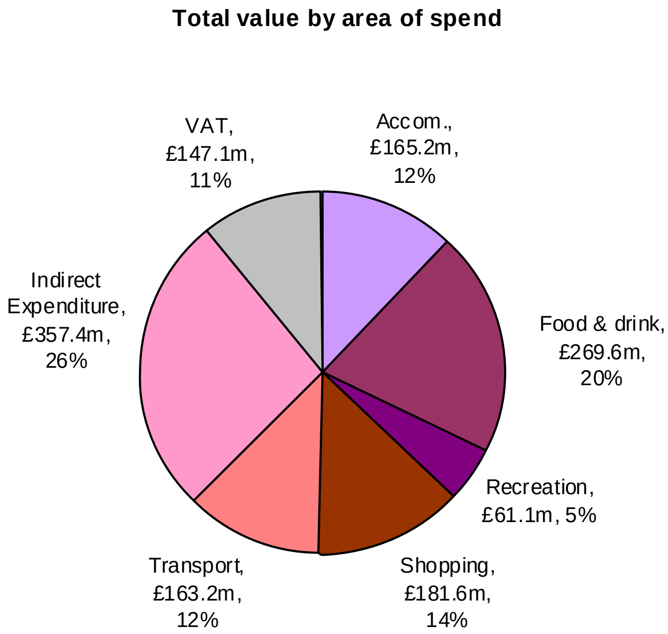
Since 2002, the volume of tourism in the Liverpool City Region has grown by some 19.1%.

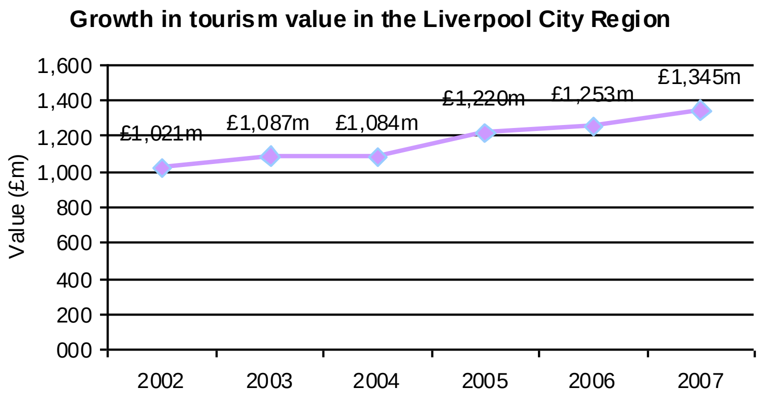
2.1.4 Value of tourism



The above charts shows the value of all visitors to the Liverpool City Region economy by district and by the type of visitor. Below, this is broken down at a district level and by type of spend.

	Value of tourism (£000s)		
	Staying visitors	Day visitors	Total visitors
Halton	£44,029	£57,776	£101,806
Knowsley	£28,130	£57,512	£85,642
Liverpool	£219,668	£254,129	£473,798
Sefton	£157,742	£186,335	£344,078
St.Helens	£43,367	£94,791	£138,158
Wirral	£58,912	£142,792	£201,703
Total	**£551,848**	**£793,336**	**£1,345,185**



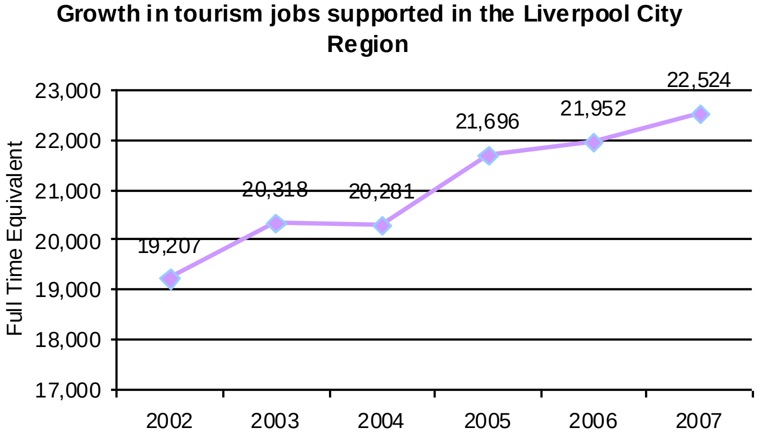


Since 2002, the value of tourism to the Liverpool City Region has grown by 31.7%.

2.1.5 Employment in tourism

Based on the value figures, STEAM estimates the number of jobs supported by tourism in the Liverpool City Region. This covers both *direct* and *indirect* employment.

	Employment Supported – Full-time equivalent (FTE)		
	Direct	Indirect	Total
Halton	1,256	391	1,648
Knowsley	1,123	339	1,462
Liverpool	5,852	1,845	7,697
Sefton	3,937	1,807	5,744
St.Helens	1,795	545	2,340
Wirral	2,827	806	3,633
Total	**16,792**	**5,732**	**22,524**



Since 2002, the number of jobs supported by tourism in the Liverpool City Region has grown by 17.3%.

Of course, the STEAM data is somewhat hampered in its calculations of tourism related employment, as this is based solely on how much visitor spend it takes to support a job, and may represent something of an underestimation. Data from the Annual Business Inquiry (ABI) suggests that the following were the employment levels in those businesses with SIC[4] codes connected to tourism:

	ABI Tourism sector employees
Halton	2,121
Knowsley	1,703
Liverpool	15,225
Sefton	6,598
St.Helens	3,784
Wirral	6,297
Total	**35,729**

[4] Standard Industrial Classification. Just as STEAM data has its limitations, so ONS data is somewhat hampered by there being no clear SIC codes defined as 'tourism'. The codes which have been used may include some businesses which are not tourism related – but equally, may omit some which *are*.

2.2 Hotel Data

2.2.1 Hotel room occupancy

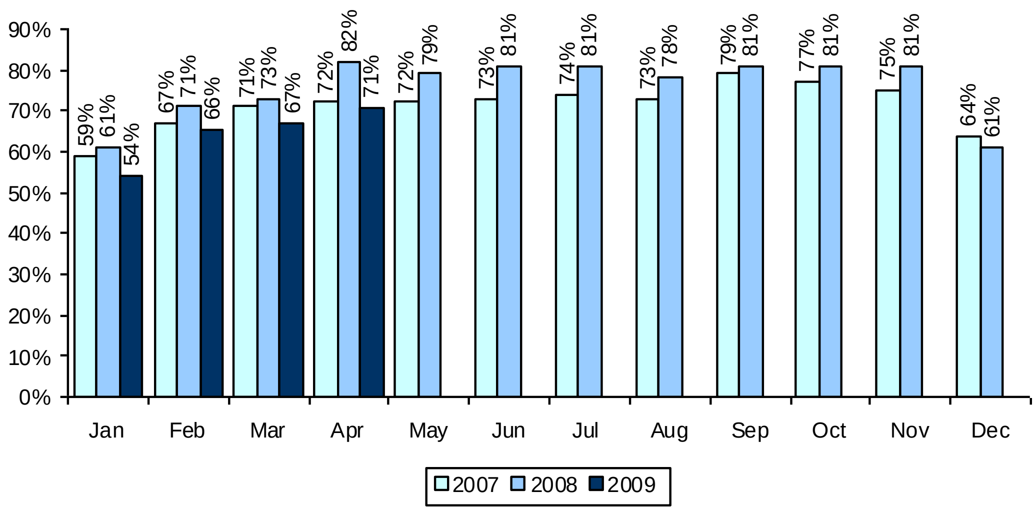
The Mersey Partnership uses a tool called the LJ Forecaster, created by Lynne Jones Research, to analyse hotel occupancy levels and trends. This is funded by The Mersey Partnership and the Northwest Regional Development Agency. LJ Forecaster measures occupancy for the previous month as well as advance bookings for the year ahead, with a separate module providing analysis of average revenues for this period.

There are currently 20 hotels participating in the LJ forecaster. Although predominantly reflective of the larger hotels in Liverpool City Centre, it includes a number of establishments based in the districts.

The **average room occupancy in 2008 was 76%**; significantly above the 71% recorded in 2007. To date 2009's figures were below those seen in recent years, potentially an impact of the current economic situation.

	Room Occupancy Summary		
	2007	2008	2009
Whole Year	71%	76%	
January-June	69%	75%	66%

Monthly room occupancy



Note: When viewing any monthly tourism data, it should always be remembered that the different position of Easter each year (and associated school holidays) can represent a distorting influence.

A particular feature of the hotel market in Liverpool is the peak seen in weekend occupancy levels; for 2008 the pattern of occupancy was as follows, whilst the table beneath compares the most recently-available figures for 2009 with that in 2008:

- 2008 Weekday occupancy (Mo-Thu) 77%
- 2008 Weekend occupancy (Fr-Sa) 86%
- 2008 Sunday occupancy 54%

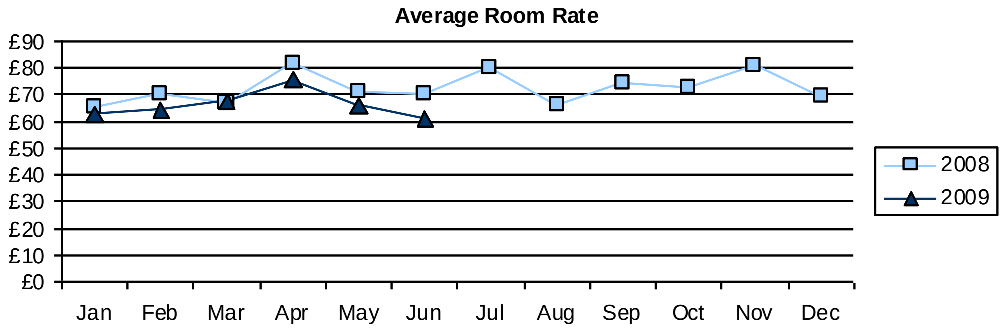
	Jan-Jun 08	Jan-Jun 09
Weekday occupancy (Mo-Th)	76%	63%
Weekend occupancy (Fr-Sa)	83%	82%
Sunday occupancy	52%	49%

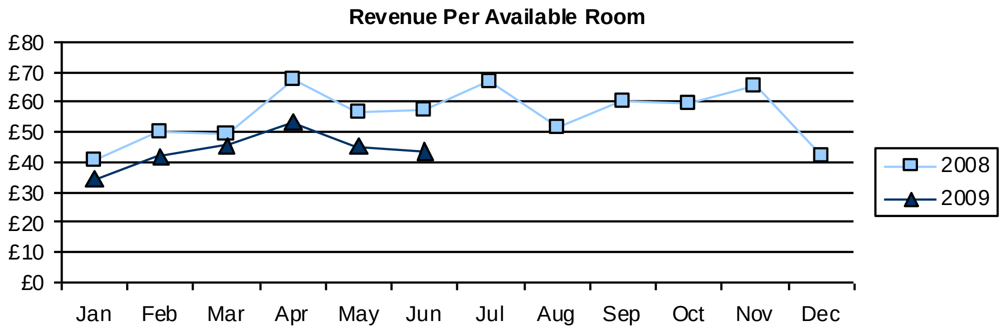
Note that despite lower occupancy levels overall – and an increased level of hotel stock (see 2.2.4) – the weekend market appears to remain strong, with the weekday market being weaker.

2.2.2 Hotel revenue analysis

A number of hotels[5] also complete a section of the LJ forecaster dealing with revenue analysis. This gives the Average Room Rate (ARR) and Revenue Per Available Rooms (RevPAR)

	Revenue Summary (RevPAR mean) 2007	2008	2009
Whole Year	£48.90	£55.57	
January-June	£48.61	£53.57	£43.96





ARR Average Room Rate (total room revenue / total rooms sold)	**RevPAR** Revenue Per Available Rooms (total room revenue / total available rooms) Often referred to as the "Yield"

To date the *yield* is lower in 2009 for Liverpool hotels than that reported on for the same period in 2008; an average of £43.96 compared to £53.57 last year. This may suggest discounting in the current climate to maintain the current occupancy levels.

[5] Note: this does not mean *all* hotels; for example in the most recent monthly survey, 17 out of the 20 supplied revenue figures.

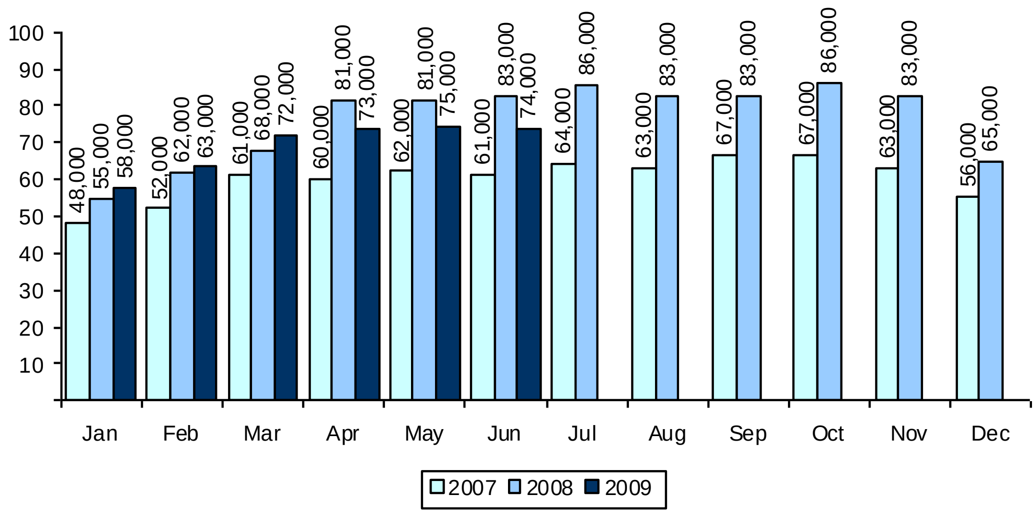
2.2.3 Hotel rooms sold

Although occupancy tells one side of the story, with a background of changing room stock levels it does not give the full "message". For example, it is feasible to have a lower occupancy level across the destination, but a higher level of staying visitors if hotel stock has increased significantly (2.2.4).

	City centre rooms sold Summary		
	2007	2008	2009
Whole Year	724,783	915,204	
January-June	345,579	430,193	414,588

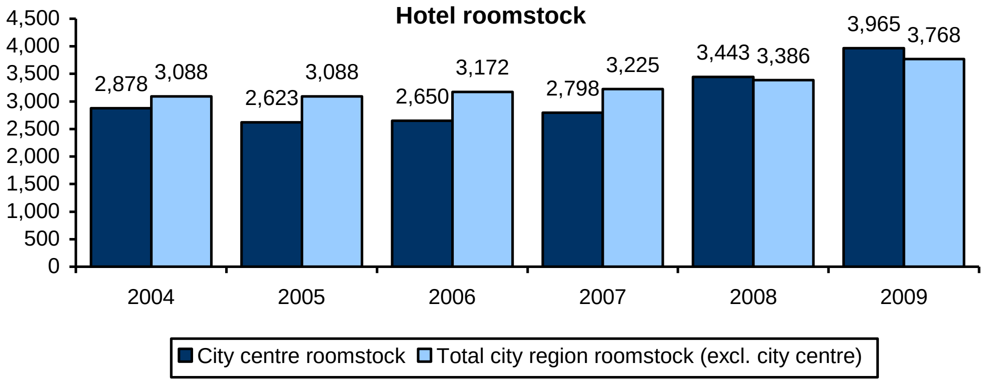
To calculate the total rooms sold across the city centre, we overlay the LJ Forecaster occupancy figures onto the level of known hotel roomstock in the city centre. Thus, in the year to date, the total level of visitors staying in hotels is down 4% on 2008 but is still up by 19% on 2007.

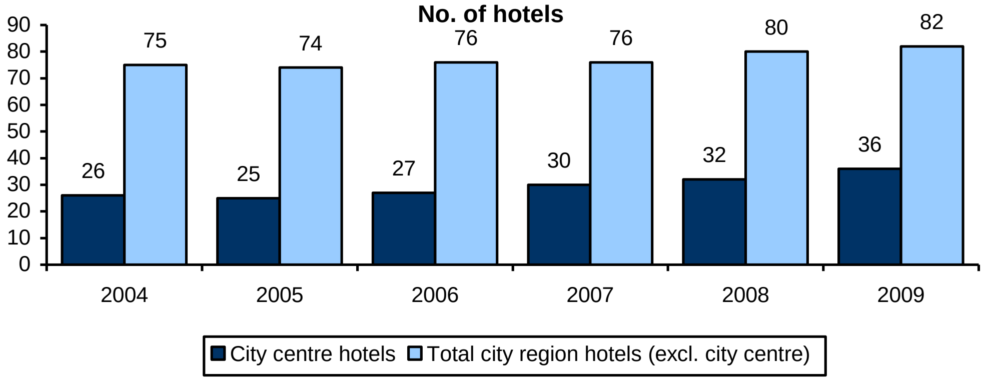
City centre rooms sold – by month



2.2.4 Hotel room stock

As indicated above, occupancy levels are one factor, but the actual *level* of hotel stock is another. In the two charts below we present both roomstock and the number of establishments. Thus, from 2004 the roomstock available in Liverpool city centre has grown by 38% and in the entire city region by 30%.





Note: charts do not currently include small Sefton hotels.

2009	Hotel stock summary Rooms	Establishments
Liverpool City Centre	3,965	36
Liverpool Suburbs	572	10
Halton	628	10
Knowsley	352	5
Sefton	1,707	67
St.Helens	641	8
Wirral	629	32
Total	8,494	168

Note: table includes small Sefton hotels.

2009	Hotel grading information: number of establishments where grading is known City centre	Total city region
4 star	10	21
3 star	10	24
2 star	1	5
1 star	-	1
Budget	7	29

Note: table excludes accommodation where grading is not currently known.

2.3 Conferences

Data on conferences on Merseyside comes from that recorded by the Merseyside Conference Bureau, and as such may not include all events and conferences held.

Whole-year conference statistics

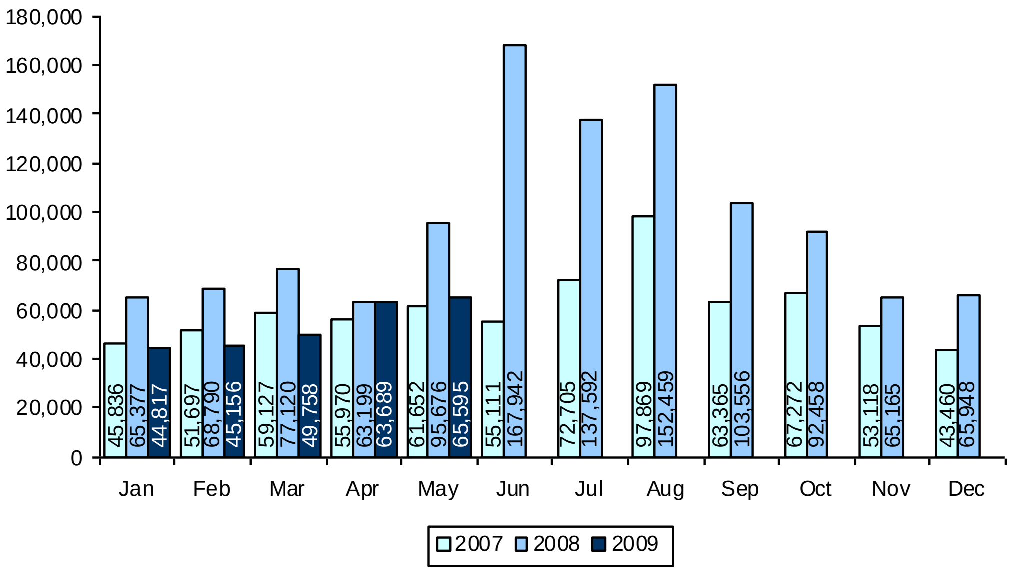
	2006	2007	2008
Conference Enquiries	434	437	410
Events booked	187	127	150
100+ delegate conferences held	46	46	55

During 2008 there were 150 events booked, of which 55 were 100-plus delegate conferences.

2.4 Tourist Information Centres

A total of **1,155,282 people visited tourist information centres (TICs) in the city region during 2008,** a rise of 59% on 2007 (727,182) and above that reported for 2006 (765,528) though not 2005 (1,295,810). Besides the influence of Capital of Culture, and its generation of large numbers of first-time visitors to the city, there are a number of other factors behind these changes, other than this data representing a decline in tourist numbers.

- Feb 2006 The move of the central Liverpool TIC from Queen Square to the '08 Place on Whitechapel.
- May 2006 Closure of the Liverpool Albert Dock TIC.
- Jul 2006 Closure of the Halton Runcorn TIC.
- Mar 2007 Closure of Wirral Woodside TIC.
- Oct 2007 Albert Dock TIC reopens



If we view just the year-to-date figures for Liverpool, the impact of last year's Capital of Culture is easily visible; although to date this year the TIC at the airport has seen a significant increase in visits:

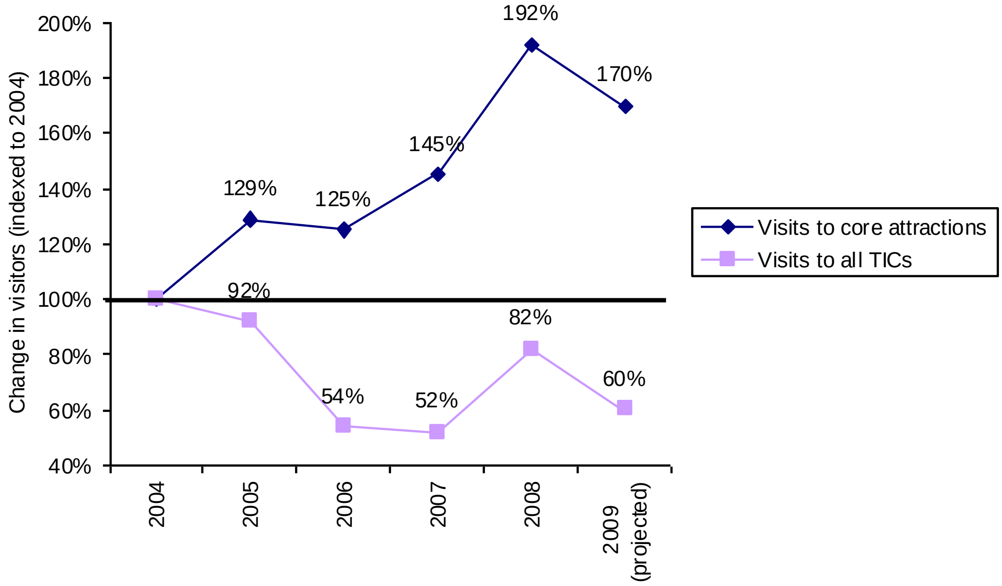
Year to date TIC Statistics

	Jan-Jun 2006	Jan -Jun 2007	Jan -Jun 2008	Jan -Jun 2009
The '08 Place[6]	145,364	97,169	170,419	88,650
LJLA	35,992	53,515	51,822	66.299
All Liverpool TICs	**190,697**	**150,684**	**366,022**	**242,772**

[6] Queen Square January 2006 and previous.

2.5 Attractions

A number of attractions respond monthly with figures on their visitor numbers, and these attractions form a panel. As the chart below shows, this indicates a trend of growth in visitors when indexed to 2004 as a base year at a time when – as noted in 2.4 – there has been a fall in numbers using the TICs. Understandably, there was a huge jump in the visits on both measures during Capital of Culture Year – but to date projections for 2009 suggest although numbers this year will be lower they will be above 2007 levels.



Comparison of growth in visits to core attractions against change in visits to TICs.

Note that the 2009 projections are based on data from January – April, and should be treated as a qualitative result at this stage, not quantitative.

As well as the panel of attractions, we regularly provide an update on the 'top attractions' in our area, based on those who have both provided data for 2008 and who have not indicated that their data to be confidential.[7]

Where an attraction has not responded in 2008, but reported numbers in 2007 we use these – although note that with the impact of Capital of Culture, these might be expected to be somewhat higher, especially for attractions based in Liverpool itself.

2.5.1 Top 10 free attractions 2008

	Attraction	District	Attendance
1	Tate Liverpool	Liverpool	1,088,504
2	Merseyside Maritime Museum	Liverpool	1,020,712
3	World Museum Liverpool	Liverpool	787,767
4	Liverpool Cathedral	Liverpool	520,355
5	International Slavery Museum	Liverpool	414,480
6	Walker Art Gallery	Liverpool	396,356
7	National Trust, Formby*	Sefton	370,710
8	Liverpool Metropolitan Cathedral	Liverpool	364,347
9	Southport Pier	Sefton	292,741
10	Atkinson Art Gallery*	Sefton	217,122

** 2007 figures*

2.5.2 Top 10 paid attractions 2008

	Attraction	District	Attendance
1	Mersey Ferries	Liverpool / Wirral	697,222
2	Knowsley Safari Park	Knowsley	525,000
3	Beatles Story	Liverpool	188,834
4	Aintree Racecourse	Liverpool	188,603
5	Haydock Park Racecourse	St.Helens	182,774
6	Croxteth Hall & Country Park	Liverpool	171,071
7	Royal Court Theatre*	Liverpool	143,905
8	Liverpool Football Club Museum & Tour*	Liverpool	143,122
9	The Brindley*	Halton	124,499
10	Speke Hall, Gardens & Estate	Liverpool	82,392

** 2007 figures*

[7] Note this currently omits certain key attractions who have not supplied recent data in the last two years; where this becomes available, an updated list will be provided in the next edition of the Digest.

2.6 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.

It should be noted that a higher degree of reliability is associated with the visitor numbers at paid events. In addition to all events shown, during 2008 Liverpool played host to a number of city-wide public art festivals including Go Superlambananas and Liverpool Biennial of Contemporary Art; whilst both these were expected to draw significant numbers of visitors to Liverpool, attendance numbers are not as easily quantified.

2.6.1 Top free events

	Event	District	Attendance
1	Tall Ships Races	Liverpool / Wirral	325,000
2	Wirral Show	Wirral	300,000
3	La Machine	Liverpool	200,000
4	Mathew Street Festival	Liverpool	185,000
5	Vintage Organ & Steam Rally	Halton	50,000
6	Halton Fireworks	Halton	45,000
7	Opening Event – The People's Opening	Liverpool	38,500
8	Southport Food & Drink	Sefton	36,000
9	Hoylake RNLI Open Day	Wirral	30,000
10	Birkenhead Festival of Transport	Wirral	28,000

2.6.2 Top paid events

	Event	District	Attendance
1	Southport Airshow	Sefton	150,000
2	Grand National	Liverpool	149,114
3	Southport Flower Show	Sefton	71,200
4	Imagine	Liverpool	63,750
5	Creamfields	Halton	48,000
6	Liverpool Sound	Liverpool	36,000
7	Musical Fireworks	Sefton	30,000
8	Wirral Food and Drink Festival	Wirral	26,000
9	Southport Jazz Festival*	Sefton	22,000
10	World Fire-fighters Games	Liverpool	18,000

** 2007 figures*

2.7 Travel Data

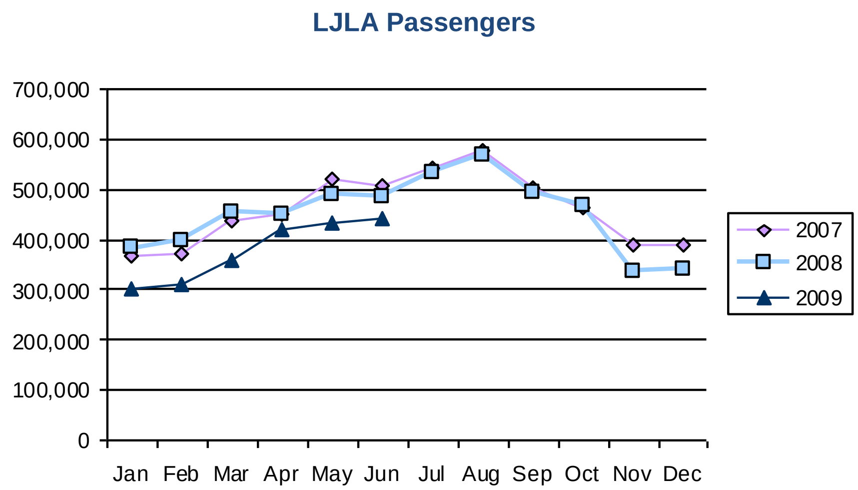
2.7.1 Passengers through LJLA

A range of airlines, including the scheduled operations of EasyJet, FlyBE, Ryanair and Wizz Air provides routes out of Liverpool John Lennon Airport.

- From late June 2009 KLM also began operating out of Liverpool Airport, with flights to its Amsterdam Schiphol hub providing global connections.
- From July 2009 Eastern Airways began providing flights to Aberdeen and Southampton.

During 2008 there were **5,402,982 passengers travelling through Liverpool John Lennon Airport** (LJLA). This is a 2% drop on levels in 2007 (5,517,667), which might be considered unexpected, given the draw presented by Liverpool as a European Capital of Culture. However, two points should be noted here:

1. This figure represents both inbound and outbound travellers, so there is no way of disaggregating changing tourism levels from (potentially lower) domestic outbound travellers[8].
2. Over this period the earlier part of 2008 saw increased fuel costs affecting travel patterns, whilst the latter part of the year saw the initial impact of the economic downturn.



To date this year, passenger numbers were lower than last year; 2.3m between January and June, compared to 2.7m in 2008. Again as mentioned above this reflects on a range of factors, including changes in schedules and routes as airlines respond to the economic situation.

LJLA	Jan-Jun 07	Jan-Jun 08	Jan-Jun 09
Passenger numbers	2,652,969	2,661,469	2,266,040
Change on period preceding year	+13.3%	+0.3%	-14.9%

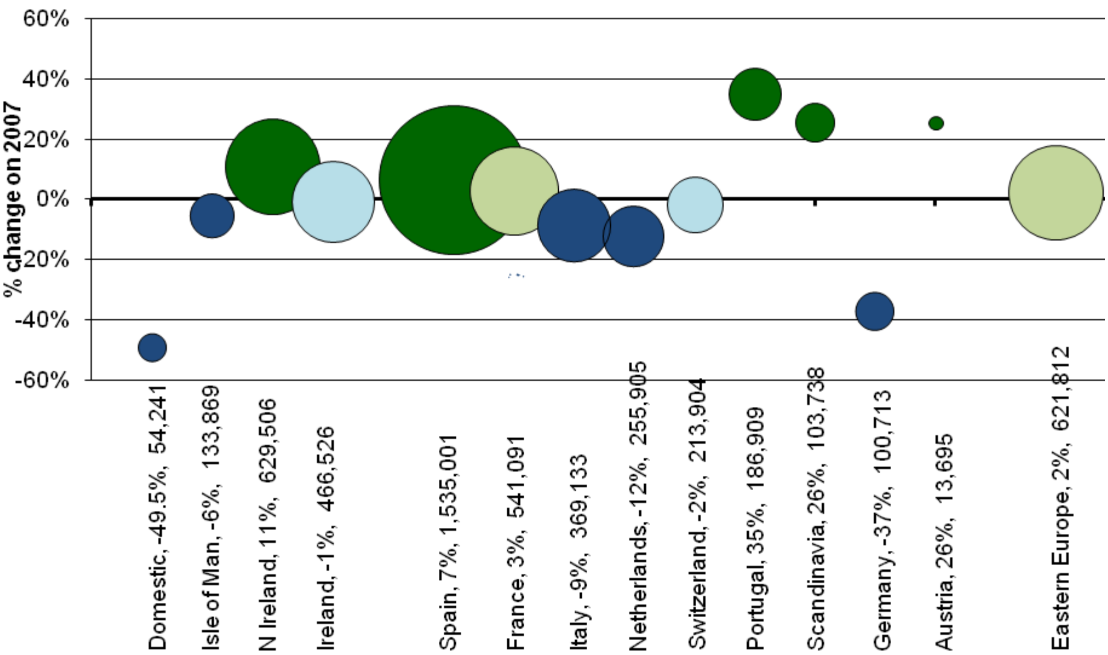
All UK Airports	Jan-May 07	Jan- May 08	Jan- May 09
Passenger numbers	80.1m	81.7m	73.8m
Change on period preceding year	+2.4%	+1.9%	-9.7%

Looking at the figures for all UK airports over this period provides some measure of context, showing the drop that there has been nationally.

[8] Every two years The Mersey Partnership conducts the Gateway Survey, which provides an analysis of outbound visitors and includes a measure of what the split is between inbound and outbound travellers.

The total passenger numbers shown for 2008 might seem to indicate a general situation of 'no change' for passenger numbers through Liverpool John Lennon Airport. This ignores the considerable variance by route.

In the chart below, using data from the Civil Aviation Authority, each bubble represents a country or area flown to by scheduled service from LJLA. The *size* of the bubble represents the number of passengers, whilst the vertical height represents the level of increase or decrease in numbers when compared against 2007.



Source: CAA domestic[9] / international route analysis

This suggests significant increases for 2008 in travel to/from the Iberian peninsula, Scandinavia and Northern Ireland, and to a lesser extent France and Eastern Europe.

The biggest drop appears to be in terms of domestic air travel, with the ceasing of routes to Southampton, Aberdeen and Inverness (although the first two are shortly to be relaunched by Eastern Airways).

	2007		2008	
	No. of pax	No. of routes	No. of pax	No. of routes
Domestic	119,849	5	54,241	1
Liverpool - Isle of Man	141,924	1	133,869	1
Liverpool - N Ireland	567,801	3	629,506	3
Liverpool - Ireland	469,888	4	466,526	4
Liverpool - Spain	1,440,618	17	1,535,001	16
Liverpool – France	526,438	7	541,091	9
Liverpool - Italy	404,516	6	369,133	6
Liverpool - Netherlands	292,419	1	255,905	1
Liverpool - Switzerland	217,381	2	213,904	2
Liverpool - Portugal	138,400	3	186,909	3
Liverpool - Scandinavia	82,452	3	103,738	2
Liverpool - Austria	10,912	1	13,695	2
Liverpool - Germany	160,424	3	100,713	3
Liverpool - Eastern Europe	608,085	12	621,812	13

9 Note: 'Domestic' figures do not include the direct Link to London City Airport, closed following stiff competition from Virgin Trains on the now-upgraded West Coast Main Line, offering London to Liverpool in as little as 2 hours and 8 minutes.

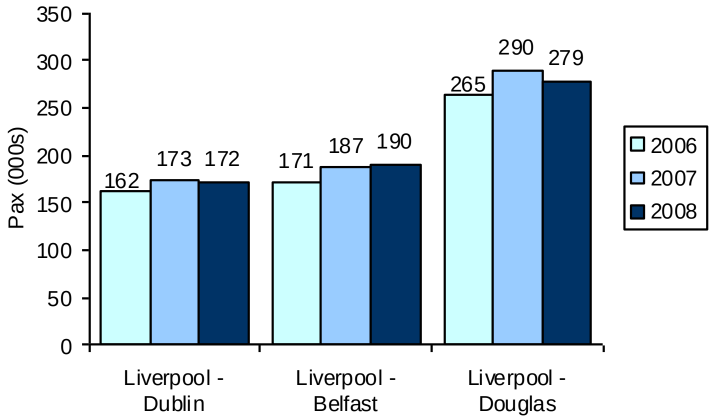
2.7.2 Irish Sea Ferry passengers

Four passenger routes are operated from Merseyside:

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

Latest figures from the Sea Passenger Statistics (DfT) appear to show strong that although the compounded issue of increased fuel costs and the onset of the recession are evident, levels remained above 2006 with particularly strong performance in this light on the Belfast link. There has been considerable investment over recent years by both Norfolkline[10] and the Isle of Man Steam Packet in terminals, vessels and branding; this coupled with negative perceptions of air travel may drive future growth.

Sea Passenger Statistics



Source: DfT.

Just as with air travel, 2009 may present a more challenging year. January-June saw passenger numbers on the route to Douglas at 28,000 compared to 33,000 in January-June 2008[11].

Irish sea passengers	Jan-May 07	Jan-May 08	Jan-May 09
Passenger numbers	1,075,027	1,097,095	976,950
Change on period preceding year	+2.3%	+2.1%	-11.0%

Source: DfT

Although there is no Liverpool-specific data available yet for 2009, looking at the wider Irish market suggests that this has seen a similar impact to that experienced by the airports; growth for the last two years, but an 11% drop up until May.

[10] Now owned by the Maersk shipping group
[11] However, indications are that July will be the strongest year since before 2004 for the Liverpool to Douglas route.

2.7.3 Cruise ships

With Liverpool's cruise line terminal now allowing vessels to berth alongside the waterfront rather than mid-river or in the North Docks, the cruise market is expected to show significant growth. Whilst most cruise ships, for which Liverpool is a calling point, have been able to use this new facility since September 2007, those which are on a cruise *originating* or *terminating* in Liverpool use the Langton Dock facilities.

Cruise Ship statistics

	2006	2007	2008[12]	2009[13]
Cruise calls	8	9	13	15
(potential pax)[14]	*5,790*	*8,159*	*17,700*	*24,384*
Originating / terminating cruises	10	14	29	25
(potential pax)	*4,061*	*6,146*	*15,995*	*10,990*
Total calls	**18**	**23**	**42**	**40**
(potential pax)	***9,851***	***14,305***	***33,965***	***35,374***

[12] All 2008 figures are pending confirmation for the next Digest.
[13] All 2009 figures are as forecast.
[14] "Potential pax" refers to the *potential* maximum number of passengers, if each ship were operating at capacity, (based on the listed passenger capacity on the operators' websites) and hence may not reflect actual passenger numbers.

2.8 '08 Summary

Within this section we briefly detail what the data has shown us to date regarding our year as Capital of Culture for the first half of the year. An extensive look at the figures will be following in the Autumn. The headline figures for the year are as follows:

- 26% increase in the number of rooms sold in the city.
    - Up from 724,783 to 915,204.
    - This increase in particular is an indicator of growth in hotel stock, as well as rising occupancy levels.

- 32% increase in the number of visits to attractions.
    - Up from 4.2m to 5.5m.

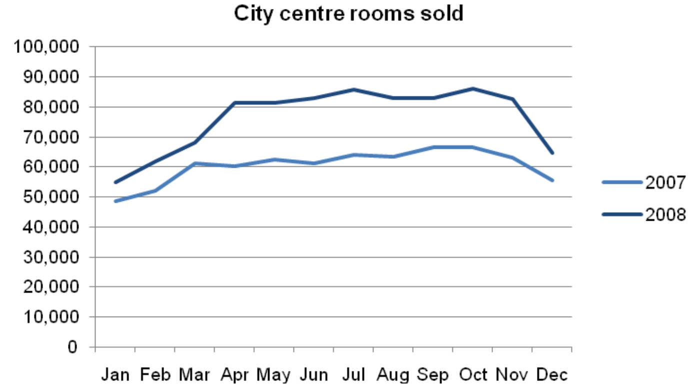
- 118% increase in visits to city centre TICs.
    - From 351,366 to 767,008 visits.
    - This bucks the trend previously noted, and may be a strong indicator of the rise in visitors to Liverpool, particularly first-time visitors unfamiliar with the city.

- As we have seen above, there was a small decrease in <u>overall</u> numbers through Liverpool John Lennon Airport.
    - From 5.5m to 5.4m
    - This may reflect falling number of visits by UK residents being balanced by increased inbound visitors.

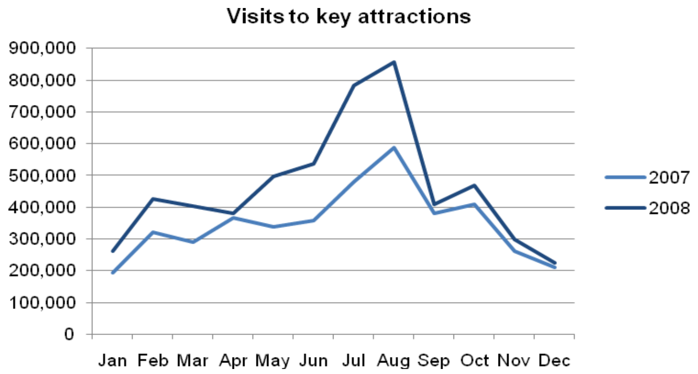
Charts of the data headlines are displayed overleaf

Notwithstanding the lowering of passenger numbers via LJLA, this all points to considerable growth in the number of visitors in the city for Capital of Culture Year, prior to the peak season when high-profile events such as the Tall Ships, La Machine and Superlambanana were expected to exert a considerable draw.

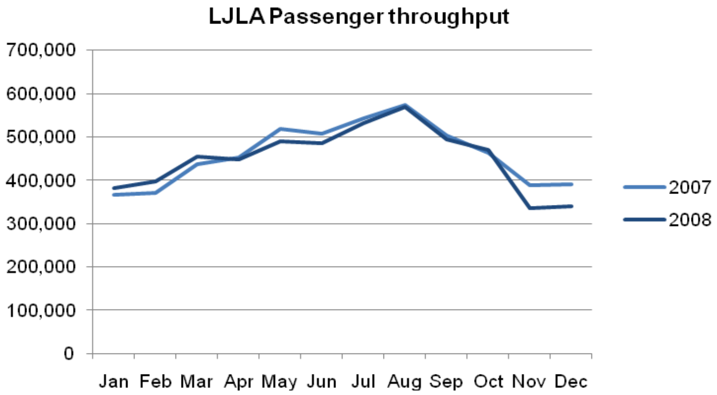
The Mersey Partnership is working with the Culture Company, the Northwest Regional Development Agency and the Impacts '08 team at the University of Liverpool to evaluate and identify the impact of Capital of Culture year. Part of this work will involve producing estimates of the number of visitors who were *additional* to Liverpool's visitor market – that is, who would not have visited the city had the '08 offering not taken place. Key findings will feature in future editions of the Digest.



Source: LJ Forecaster / TMP Room Stock



Source: TMP core tourism attractions monitor



Source: LJLA

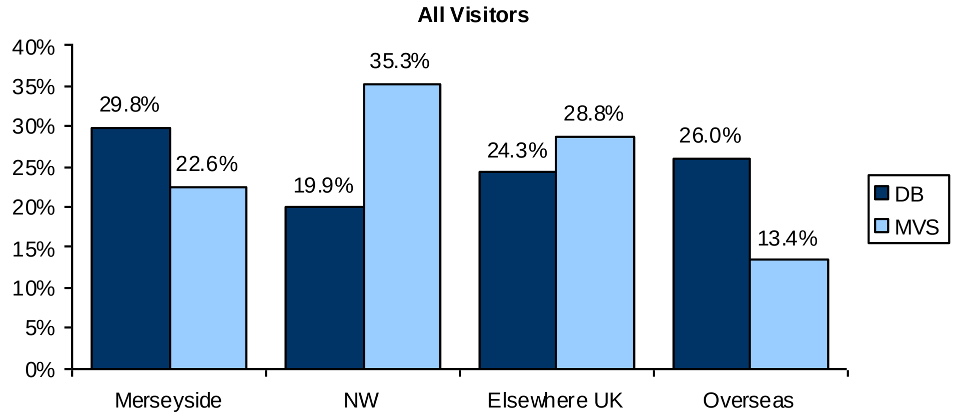
Source: TMP

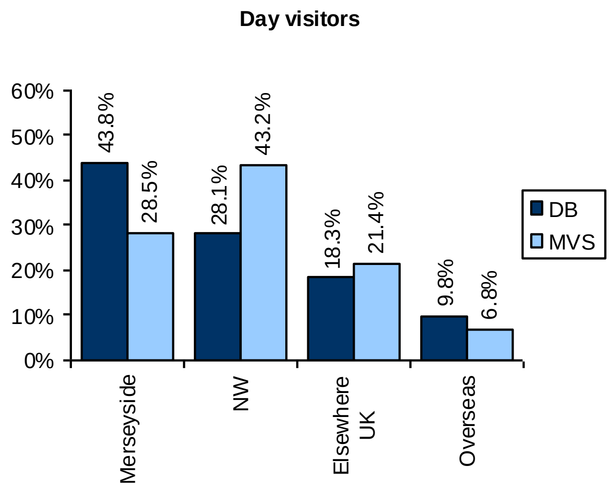
3. Recent TMP Surveys

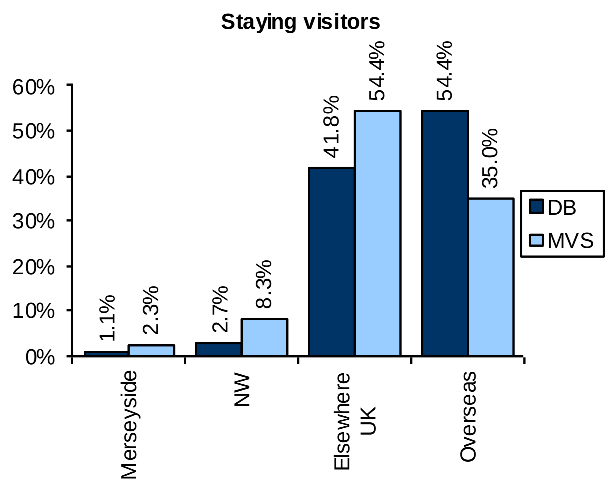
A number of major surveys are conducted periodically by The Mersey Partnership, which aids the tourism intelligence of the area. These include the Merseyside Visitor Survey[15] and the Destination Benchmarking[16] survey (on alternate years). Recent copies of the digest have featured fuller results, but here we condense down to focus on what these results show us in terms of visitor origin, spend and behaviour. For the Merseyside Visitor Survey, the results have been weighted so that response levels are consistent with the STEAM proportions. (Note that the visitor market is changing all the time and these figures should be viewed as representing the situation in 2005/8, not necessarily of that at the present time).

3.1 Visitor Origin

The Destination Benchmarking (DB) study was based on 700 interviews in the city centre; the Merseyside Visitor Survey was based on 1,000 interviews conducted across all six districts of Merseyside. Hence, the former may be viewed as representing the situation in Liverpool itself, the latter that of all Merseyside.







The above charts break the visitor market down between those on a staying visit in Liverpool / Merseyside and those who are on a day visit. Note that day visitors include both those on a day outing from home and those on a day visit whilst staying somewhere else in the UK.

- 54% of staying visitors in Liverpool were identified as being "overseas", as were 35% of staying visitors throughout Merseyside.
- 42% of staying visitors in Liverpool were identified as being "elsewhere UK", as were 54% of staying visitors throughout Merseyside.

[15] The Merseyside Visitor Survey is conducted every 5 years, most recently in 2005.
[16] The Liverpool Destination Benchmarking study is conducted on alternate years, most recently in 2008. The data used here is summarised with a fuller version in the next digest.

3.1.1 The domestic market

In the table below, the origin of all domestic visitors is shown (excluding Merseyside residents) to identify where our UK visitors come from. This includes both staying and day visitors.

The domestic market

Origin by region	DB	MVS
Channel Isles	-	0.3%
East	2.1%	1.6%
East Midlands	8.0%	2.3%
Isle of Man	0.8%	0.3%
London & Southeast	15.5%	5.7%
Mid / South Wales	1.3%	1.0%
North Wales[17]	3.8%	4.4%
Northeast	0.4%	2.4%
Northern Ireland	5.0%	2.4%
Northwest	42.0%	55.1%
Cheshire	*13.9%*	*22.6%*
Greater Manchester	*15.5%*	*18.1%*
Lancashire	*12.6%*	*13.1%*
Scotland	3.4%	3.2%
Southwest	2.9%	2.9%
West Midlands	7.1%	8.4%
Yorkshire	7.6%	10.0%

Other than the Northwest, areas of particular draw appeared to be London & the Southeast (16% of visitors to Liverpool), West Midlands (7%), East Midlands (8%) and Yorkshire (8%). It is also worth noting what appears to be a strong market from North Wales (4%) and Northern Ireland (5%).

3.1.2 The overseas market

Similarly, we analyse the overseas visitor market below by key areas.

The overseas market

Origin by area	DB	MVS
Eire	3.9%	10.9%
Western Europe	37.9%	31.8%
Eastern Europe	5.3%	10.1%
Africa	0.8%	0.8%
Asia	13.6%	5.4%
North America	22.7%	24.8%
South America	2.3%	0.8%
Australia / New Zealand	13.6%	15.5%

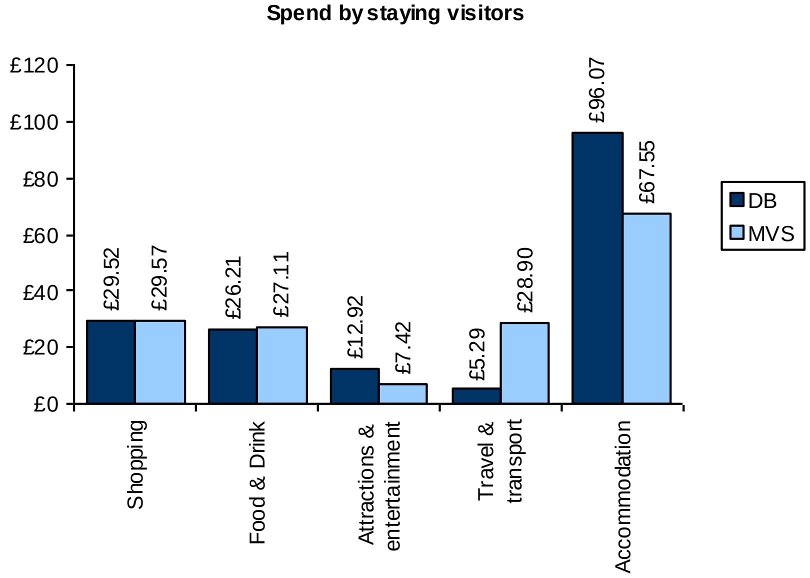
A frequent request received is for the top countries of origin of overseas visitors; this is estimated as follows (note – includes figures from Northern Ireland as part of the "Ireland" figure):

- USA 12.1%
- Australia 11.1%
- Spain 10.6%
- Canada 9.8%
- Germany 9.8%
- Ireland 8.9%
- France 3.8%
- Netherlands 3.8%
- Japan 2.3%
- Malaysia 2.3%
- Poland 2.3%
- Belgium 2.3%
- Brazil 2.3%

[17] Notice that North Wales is shown as a separate entity from the rest of Wales; this is as previous studies have identified a strong relationship between this area and Merseyside.

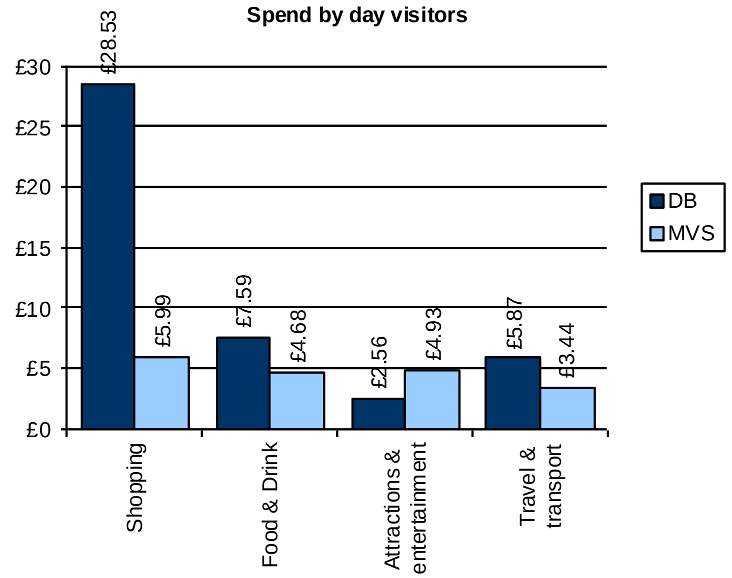
3.2 Visitor Spend

The following details key components of visitor spend. All figures are per person across the course of their whole visit.



Total spend per staying visitor is estimated at:
- £168.01 per person (Destination Benchmarking)
- £167.12 per person (Merseyside Visitors Survey)

This would infer that the spend by staying visitors in Liverpool is higher than that seen in general by visitors staying across all Merseyside. In part this is influenced by a higher proportion of visitors staying in paid accommodation in Liverpool; respondents staying with friends and relatives typically have a lower spend on food and drink, and a zero accommodation spend.



Thus in total it indicates Day Visitors spent:
- £44.57 per person (Destination Benchmarking)
- £20.02 per person (Merseyside Visitors Survey)

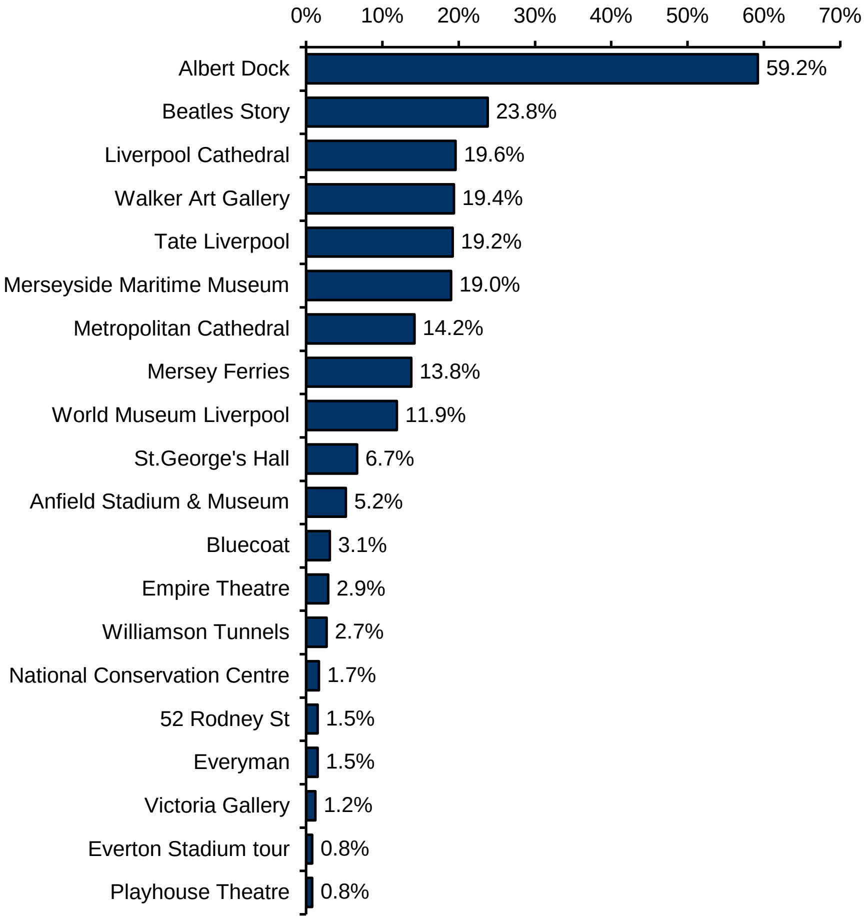
This is highly suggestive of the greater 'retail' component of visits to Liverpool compared to the rest of Merseyside, a factor which has grown with the opening of Liverpool One.

3.3 Visitor Behaviour

The following looks at what attractions visitors attended whilst on Merseyside. For visitors to Liverpool we use the Destination Benchmarking survey, for visitors to the districts we use the Merseyside Visitors Survey.

Note; the analysis is based on attractions visited by all respondents who were visiting each location, regardless of whether the attractions are in the same district or not. It should also be noted that for the district data gathered in 2005, each area's tourist offering may have increased since. The data here is meant to indicate *behaviour* by individual visitors within the area, and should not be confused with the absolute numbers of visitors presented within section 2.5.

Top 10 attractions visited by visitors to Liverpool



Top 5 attractions by visitors to…

	Halton	Knowsley	Sefton	St.Helens	Wirral
1st	Catalyst (58%)	Safari Park (75%)	Southport Pier (57%)	World of Glass (28%)	Mersey Ferries (40%)
2nd	Norton Priory (32%)	National Wildflower Ctr. (13%)	Botanic Gardens (20%)	Haydock Park (22%)	Spaceport (27%)
3rd	Daresbury Church (2%)	Albert Dock (3%)	Pleasureland (18%)	Albert Dock (7%)	New Brighton (25%)
4th	Albert Dock (1%)	Southport Pier (1%)	Albert Dock (8%)	Southport Pier (6%)	Albert Dock (23%)
5th	Knowsley Safari Park (1%)	Prescot Museum (1%)	Floral Hall (7%)	Mersey Ferries (4%)	Aquarium (21%)
None visited	6%	13%	1%	46%	-

4. Tourism Business Performance Survey

4.1 Introduction to Tourism Business Performance

In previous editions of the Digest, we have reported on the "tourism business performance survey" (sometimes referred to as "How's business"). Currently, rather than running this survey we are running a survey who's main focus is the current economic conditions being experienced by businesses.

This survey takes place every 1 or 2 months, with an email invite being sent to all tourism or tourism-related businesses. A link in the email takes respondents to a short (2 page) web survey form, which collects data in a completely anonymous manner.

For the months of April/May, the invite was sent out at the end of May; by mid-June some 37 responses had been entered – a hit rate of approximately 3%. As we have commented on before, this represents a somewhat low level of response, and means that a) results must be treated with caution and b) that it is not possible to provide any in-depth analysis – for example, by district or industry sector.

4.2 Business Profile

4.2.1 Business Location

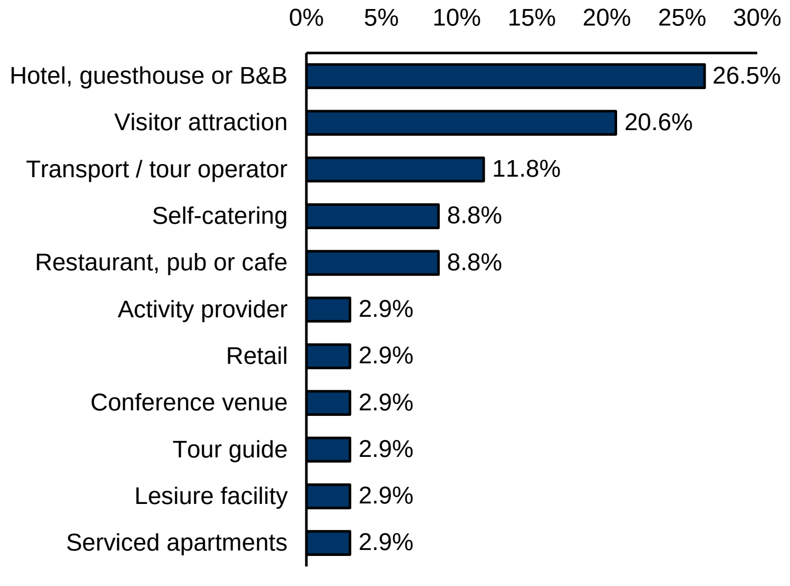
Respondents were asked to indicate within which local authority area their business was located.

Halton	Knowsley	Liverpool	Sefton	St Helens	Wirral	Total
12%	9%	43%	18%	-	18%	100%

Note that no responses were received from St.Helens businesses this month.

4.2.2 Business Activity

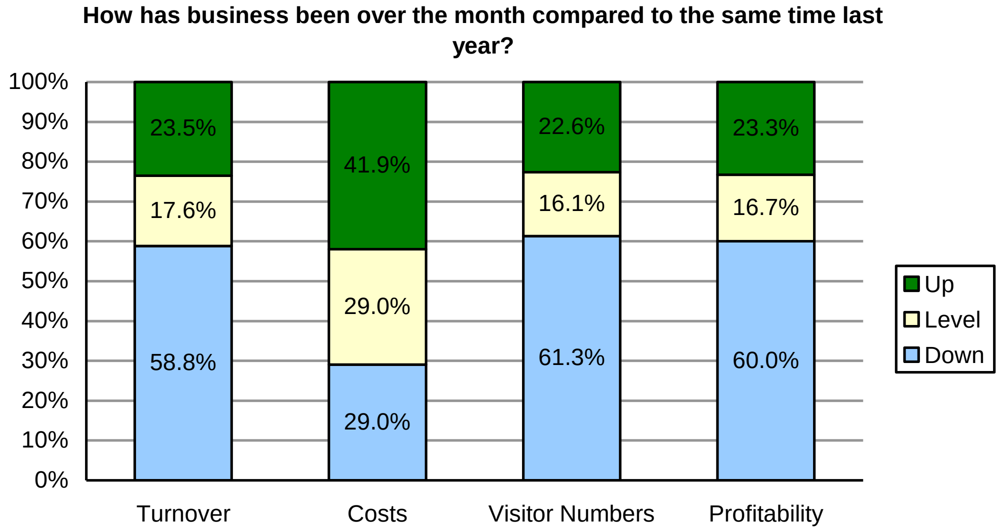
Respondents were asked to state their main business activity.



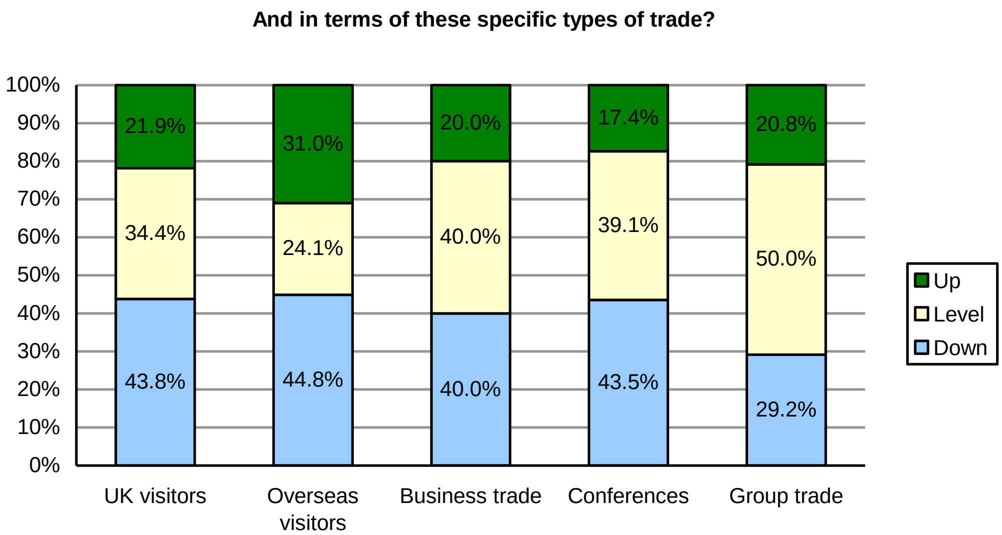
Some 38% of those responding were accommodation providers, 18% were attractions and 15% were transport or tour providers.

Note also that a quarter of those responding had a turnover of below £50k per annum; hence providing some measure of the views of smaller businesses. Still, almost half said that their turnover was £500k (or greater) per annum.

4.3 Business Performance over the past two months



The experience for April/May 2009 compared to April/May 2008 was mostly negative, with 59% of businesses reporting turnover down and 61% that visitor numbers were down. Approximately 42% of all businesses reported that their costs were higher than this time last year. 60% of businesses reported profitability as down; however, for approximately a quarter (23%) profitability was up. It should also be noted that a similar number reported that turnover and visitor numbers were up in this period (24% and 23% respectively) - although this is a slightly less favourable number than seen in the last report.



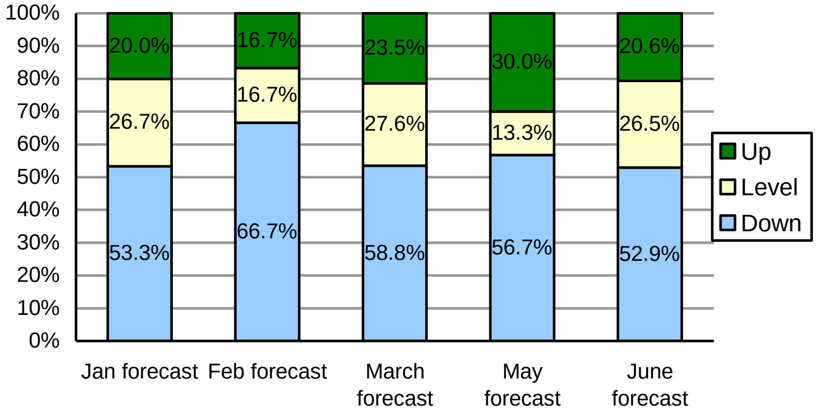
Businesses were also asked about their experience of differing types of trade. Below this is 'balanced'; the proportion of those reporting an increase less those reporting a decrease.

- UK visitors -22%
- Overseas visitors -14%
- Business trade -20%
- Conferences -26%
- Group trade -8%

All sectors show a net negative level – though with Overseas and group trade the most 'positive' areas. It should be noted that these figures indicate a slightly more negative level than that reported on previously – though still within error margins bearing in mind the sample size.

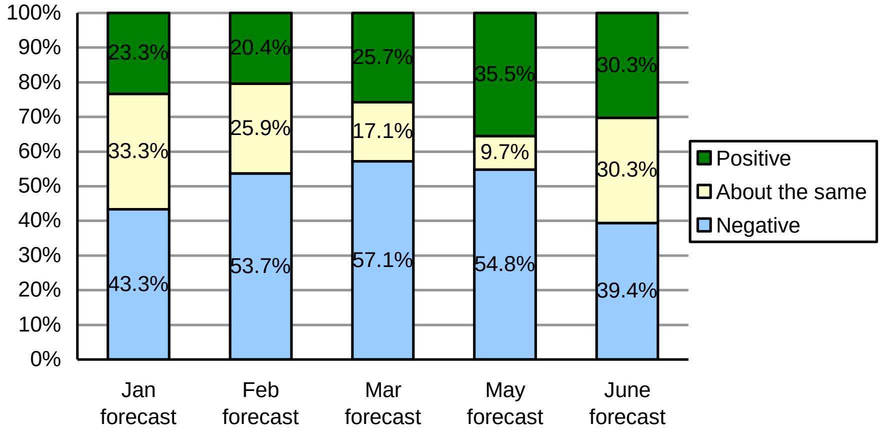
4.4 Forecasting

How would you forecast profitability for June 2009 compared to June 2008?



Turning now to the *forecasts* made by businesses, June showed a more lower number of businesses expecting increased profitability than in May (21% compared to 30%); however there were also fewer businesses expecting reduced profit (53% compared to 57%). A similar story is evident when looking at expectations for the year overall compared to 2008.

What are your business expectations overall for 2009 compared to 2008?



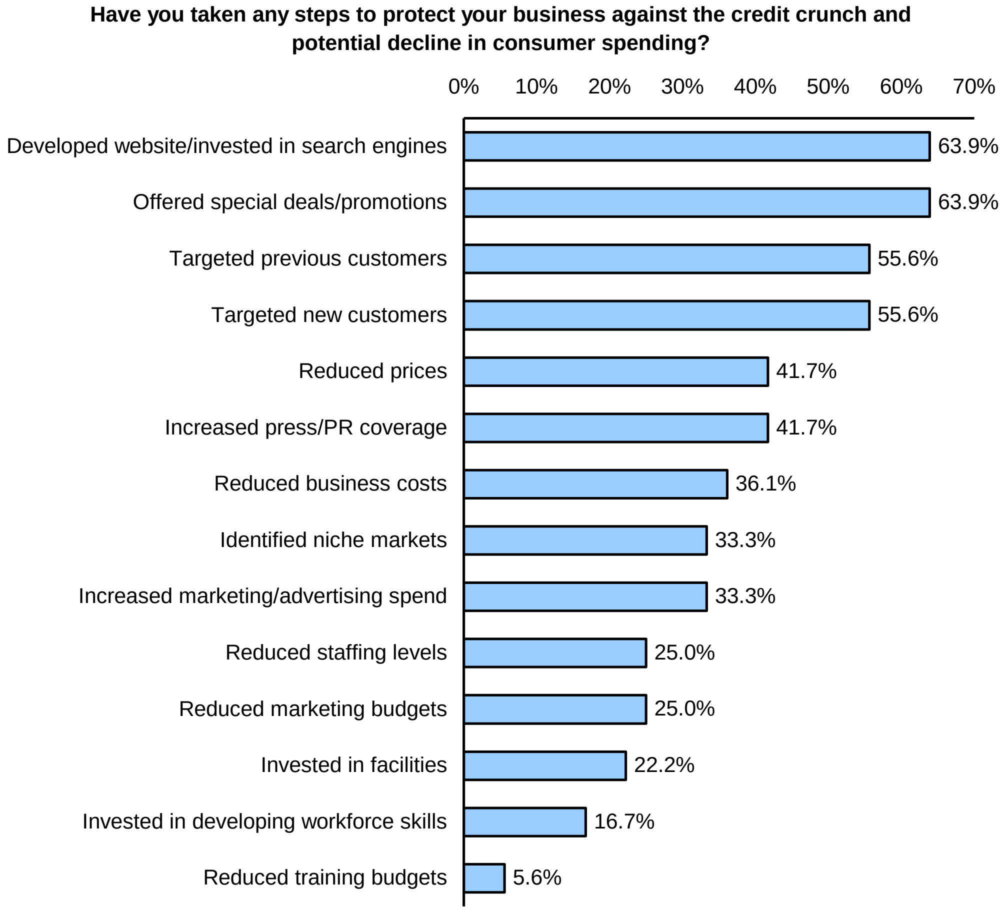
As indicated above, fewer businesses this month said that they expected their yearly profit to be greater this year than was the case in May (30% compared to 36%), although the flip side to this is that just 39% expected reduced profits (39% compared to 55%).

Again, the above figures are 'balanced' to assess the overall mood:

	Jan	Feb	Mar	May	Jun
Forecast for the coming month	-33.3%	-50.0%	-35.3%	-26.7%	-32.4%
Forecast for the year overall	-20.0%	-33.3%	-31.4%	-19.4%	-9.1%

The prediction figures, for the coming month are similar to those seen previously; the yearly forecast is more positive than it has been so far this year, and is close to a 'neutral' change in the sector overall.

4.5 Steps taken to protect the business



Note: all businesses indicated they had taken some action to protect their business against the credit crunch and potential decline in spending. Most businesses were using a multitude of options, so the percentages above will equal more than 100%.

The above chart indicates the wide range of tactics:

- Internet technology continues to be seen as key during this period; almost two thirds of businesses were investing in websites and search engine rankings to improve their bookings.

- Aggressive pricing strategies are becoming more widely mentioned; 64% of businesses this month were offering customers special deals or promotions and 42% were reducing prices. This reflects findings from Liverpool's LJ Forecaster, which indicated that hoteliers were reducing rates to maintain high occupancy levels.

- 56% said that they had tried to fight the decline by re-targeting previous customers, whilst, equally, 56% said that they were targeting new customers; included in the latter some 33% were looking at niche markets to develop this.

- Reducing the business costs was mentioned by almost half of all businesses (36%). As part of this some 25% were reducing their workforce, marketing budgets (25%) or training budgets (6%).

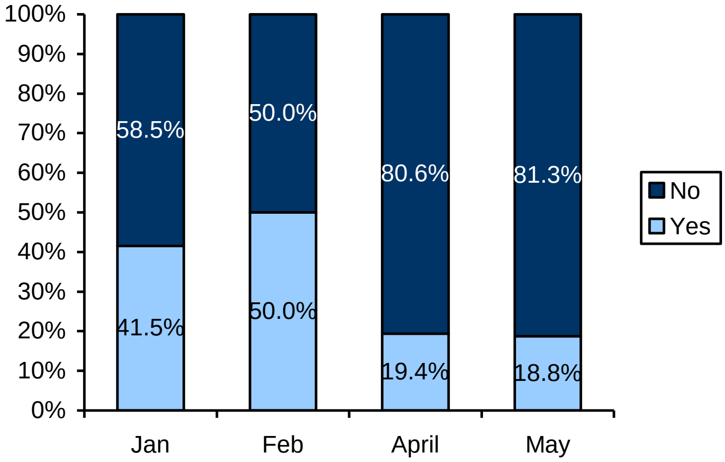
- It remains the case that reducing business costs is a less likely activity than investing in the business; 22% were investing in facilities, 17% in skills training for the workforce and 33% in increasing their marketing spend / 42% increasing the PR coverage of their business.

Other approaches being used not covered by the above were:

"developed new business linked initiatives"
"community based activity"

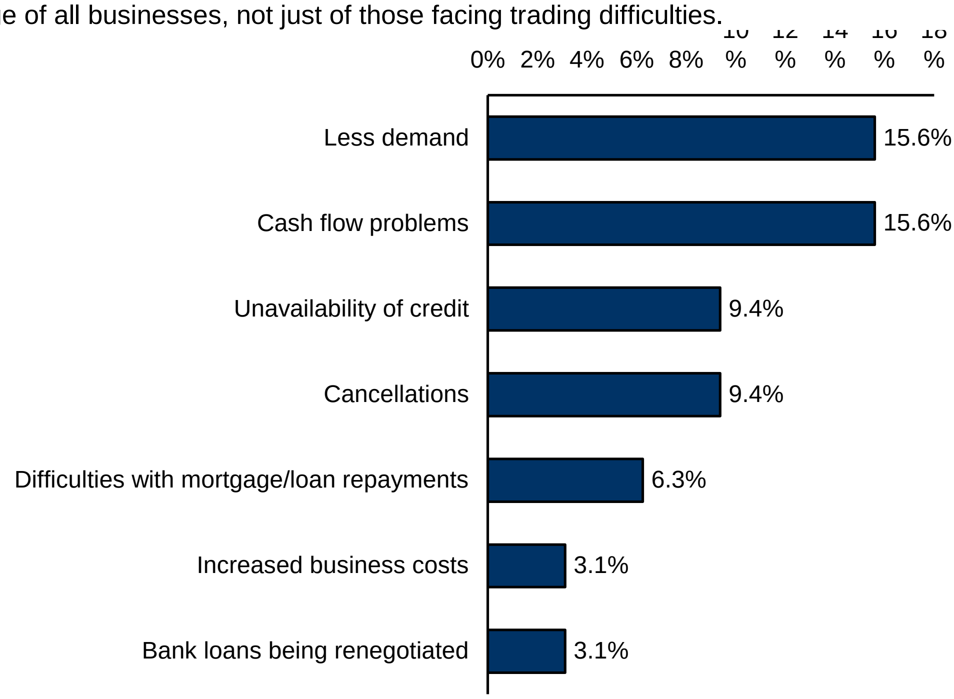
4.6 Current trading difficulties

Businesses were asked if they were currently facing any trading difficulties. They were then asked *what* these difficulties were.



As with last month's report, only 19% of the businesses said that they *were* experiencing trading difficulties, emphasising a much improved situation from earlier in the year.

The chart below shows what trading difficulties were being met; note that these are shown as a percentage of all businesses, not just of those facing trading difficulties.



- Key difficulties indicated by Merseyside tourism businesses continue to be a lack of demand (16%, although this to a lower extent than earlier in the year) and Cash flow problems (16%) – with 9% of businesses finding the unavailability of credit an issue.

One business commented, *"our footfall is up on 2007, down on 2008"*.

5. Information from VisitBritain

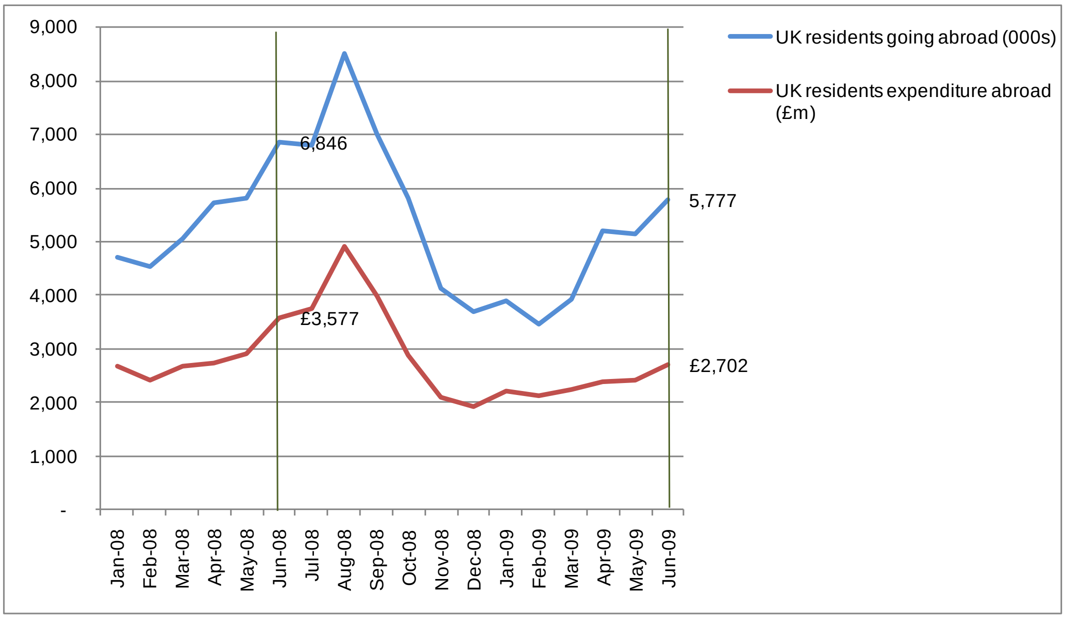
5.1 The "Credit Crunch"

Within this section of the report we include some of the latest figures and details coming out of VisitBritain, the national tourism organisation. Of course, it must be emphasised that at all times this represents the national picture rather than that pertaining to the local business environment.

5.1.1 International Passenger Survey

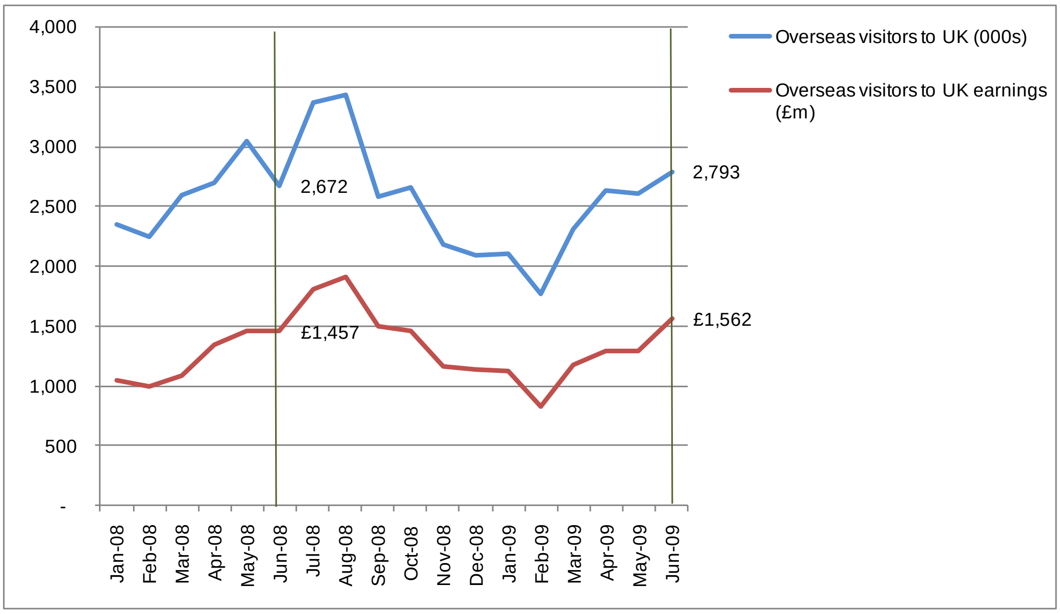
VisitBritain continues to produce data related to the current economic situation: much of the material in this section is sourced from their main website, www.tourismtrade.org.uk.

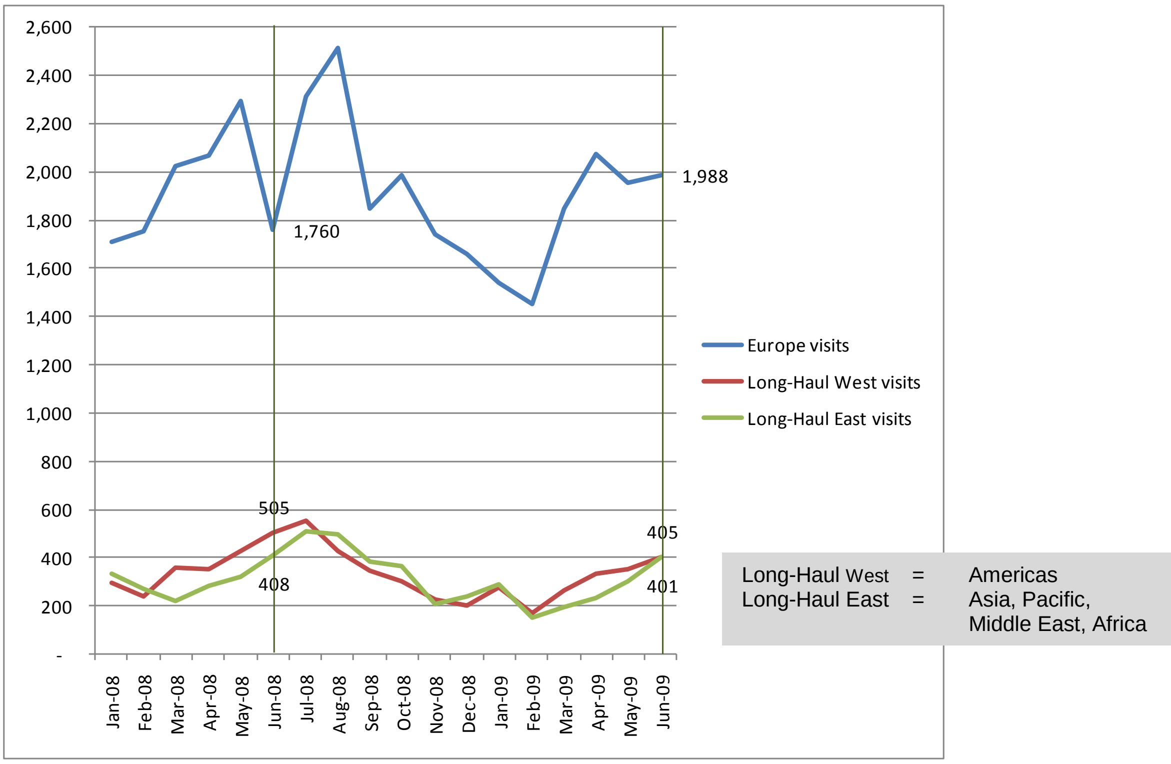
The most recent data from the International Passenger Survey showed that in June 2009 visits by UK residents abroad were down by **16%** on June 2008 and that expenditure abroad down by **24%**.



Source: IPS, ONS

By contrast, the data showed that in visits to the UK by overseas residents were up by 5% on June 2008 and their expenditure was up by 7%.

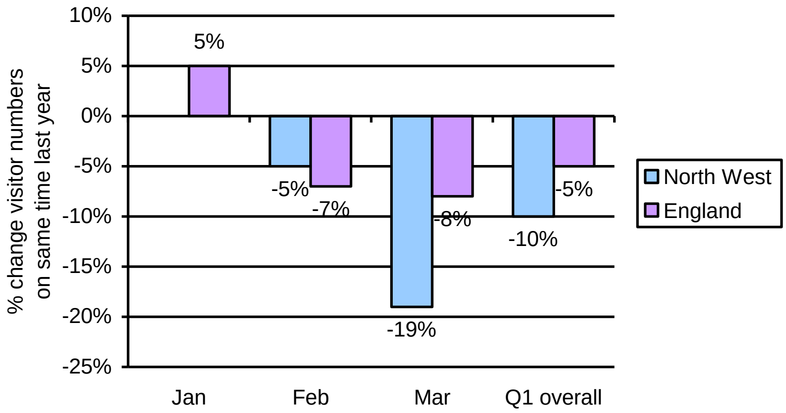




This varied considerably by area; visits from the Eurozone were up by **13%** and from Long Haul West destinations *down* by **20%**. This is expected to be in particular due to the strength of the Euro against the pound.

5.1.2 England Attractions Monitor

Available statistics on the performance of the domestic tourism market are limited. One source is the *England Attractions Monitor.* This is a quarterly survey conducted with a wide range of attractions across England to identify trends in number of visits, and the chart beneath summarises results from the first quarter of this year.



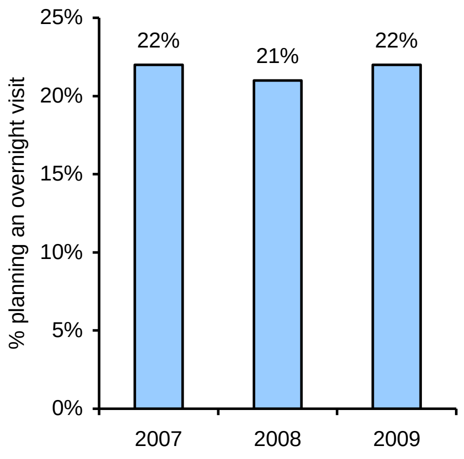
Source: VisitBritain: quarterly England attractions monitor

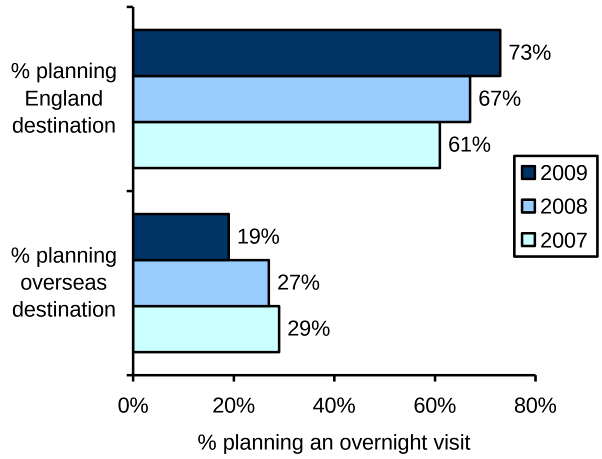
Although this would appear to show that attractions have seen a drop in visits compared to the same time last year, in fact this data is distorted by the changing position of Easter (March last year, April this year) which makes a true comparison difficult.

5.1.2 Short-term domestic tourism tracker

Further information can be gleaned from the *short-term domestic tourism tracker*.

This is a survey conducted by VisitBritain three times a year, collecting data on those Great Britain consumers who may be planning to take an overseas visit within the next fortnight. The research results below were conducted over the week before Easter (in each year indicated).





Source: VisitBritain: Short Term Domestic Tracker

There was little change in the proportion who were actually planning an overnight visit, emphasising the value that consumers placed on their holiday trips. Although obviously this is prior to the 'peak' holiday season it does seem to confirm a growth in the domestic market for home trips.

6. Recent research articles

6.1 Creamfields 2008 - Summary

Creamfields
2008–10th Anniversary

6.1.1 Background

Creamfields 2008 was held during the weekend of 23rd-24th August 2008, at Daresbury on the edge of Halton. This was the third time the event was held at this venue since moving from its previous Liverpool location.

The event is one of the leading dance music events in the UK. This year's event was a first, being a 2-day event (as opposed to a one-day previously), with a camping option available at the site. The 2008 event attracted approximately 48,000 people.

England's Northwest Research Service (ENWRS) were commissioned by Cream to research the profile, opinions and economic impact of visitors to the event.

The specific objectives of this research were to:

- Establish the profile and origin of visitors to Creamfields
- Evaluate the festival's economic impact through an estimation of visitor spend
- Identify visitor satisfaction with the festival
- Evaluate the effectiveness of marketing activity and identify influences on visiting
- Examine visitor behaviour
- Compare the findings (where appropriate) to previous research

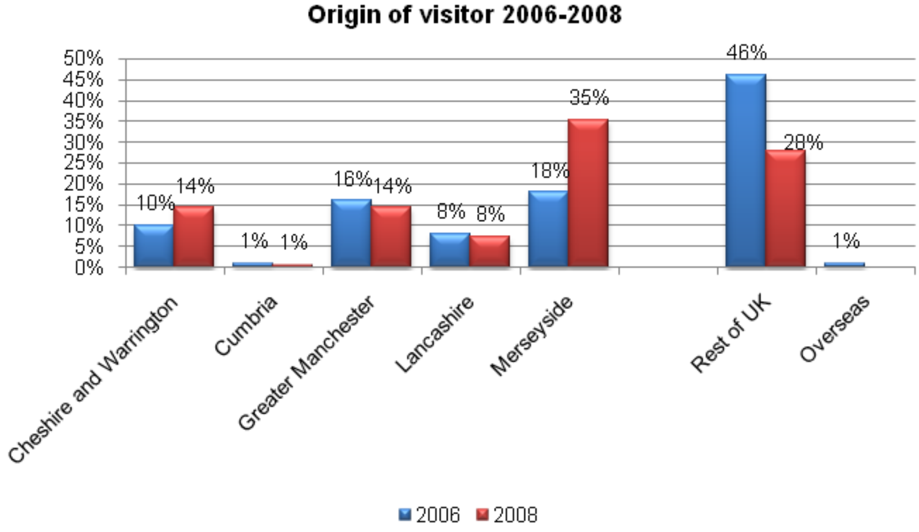
To meet these objectives, ENWRS staff conducted a series of face-to-face visitor surveys. Visitors were randomly sampled at the event to ensure a cross-section of respondents was covered. A total of 241 completed interviews were achieved.

This report presents a <u>summary</u> of key findings from the research, together with a comparison of the previous survey (2006). Both sampling method, sample size and questionnaire design was used to ensure results would be comparable. This summary includes data reported as standard in event evaluation reports but excludes information particular to Creamfields or which may be deemed as sensitive.

When comparing results it is necessary to be aware of the *confidence interval*: this is the range at which survey results may vary from the population as a whole. For both this year's survey and that conducted in 2006 we would estimate a confidence interval of 3.4%. What this means is that if (for example) 14.3% indicated they were influenced to attend by the event website, this would apply to between 10.9% and 17.7% of all attendees.

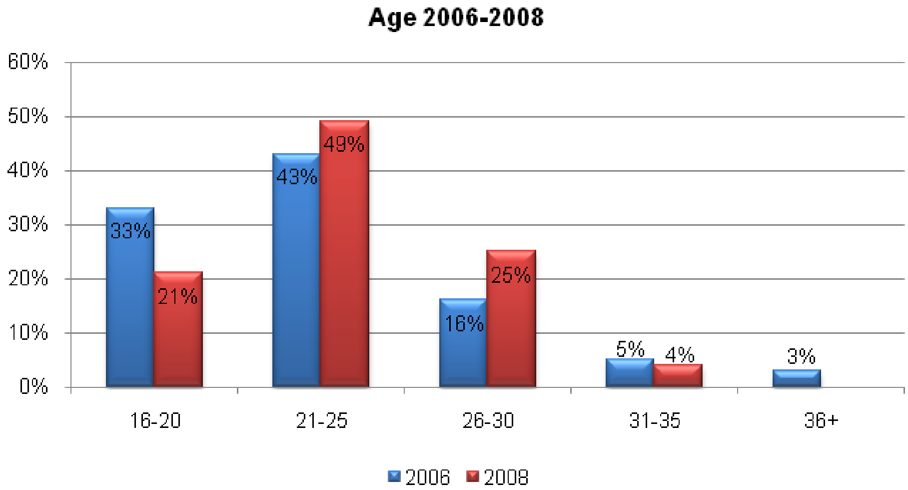
6.1.2 Visitor profile

- The event drew the majority of its audience from locations within the Northwest (in particular with 49% coming from the Merseyside / Cheshire areas. 28% came from further afield, and appeared to particularly draw visitors from the Southeast, Yorkshire and the Northeast.

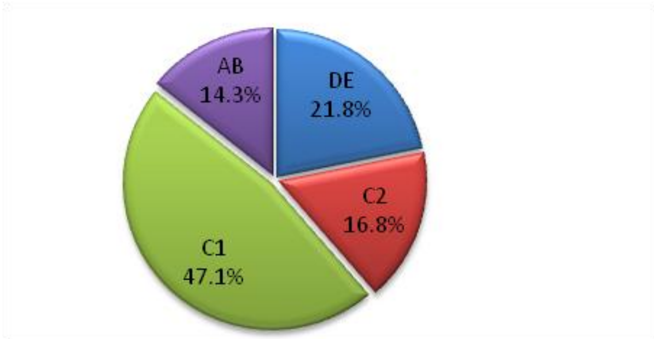


- Almost half (45%) reached the event by car, although 32% used public transport (including the shuttle buses provided).

- Half of the audience was aged 21 to 25, with a quarter aged 26 to 30.



- The majority of event attendees were economically active; 61% were in social grades A/B/C1.



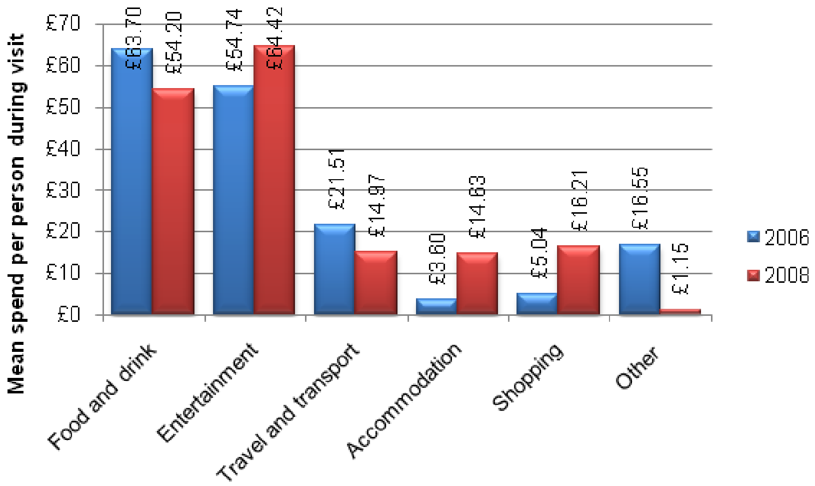
- Visitors were most likely to be at the event in groups of between 2 and 4 people..

6.1.3. Economic Impact

- 29% of event attendees were staying in the area as part of their trip – this excludes the camping at Creamfields itself – on an average length of stay of 2 nights. This compares to 13% of visitors staying for 1.5 nights in 2006.

	2006	2008
Resident in area	10%	6%
Staying in area for event only	76%	64%
Staying in area for longer	13%	29%
Mean length of stay (nights)	*1.5*	*2.0*
Staying in hotel	*35%*	*44%*

- The average spend per person was £150.83 over the duration of their trip.



- An estimated 48,000 people attended the event.
  - Creamfields 2008 generated £7.2m (inclusive of ticket prices)
  - Although 'only' 7% higher in economic terms than 2006, a much greater impact was made on local retailers and accommodation providers (as indicated in the above chart), this being particularly due to the 2-night nature of the 2008 event.

6.1.4 Influences on attending event

- The most popular influence behind a visit was through word of mouth recommendation.
  - 18% attended due to radio
  - 16% attended due to being a previous visitor
  - 14% influenced by a Creamfields leaflet
  - 11% by Cream or the Creamfields websites
- The influence of leaflet, website and press is much stronger than in 2006.
- 41% of event attendees were on their first visit to Creamfields. This is less than in 2006 (58%), and is indicative of a growing 'regular' visitor segment.

6.2 2008 Liverpool Destination Benchmarking

6.2.1 Introduction

2008 was Liverpool's year as European Capital of Culture, with a range of events and attractions particularly designed to attract visitors to the city.

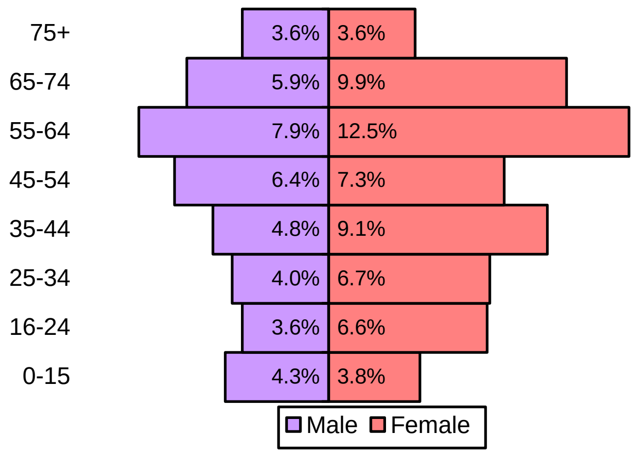
Destination Benchmarking surveys are designed to update information from previous surveys on the profile, behaviour and opinions of tourists in Liverpool in order to identify emerging trends. In addition, the survey includes the Regional Tourist Boards' standard 'destination benchmarking' questions which are designed to measure levels of satisfaction for reference as data on the destination itself and for comparison with other destinations taking part in the 2008 programme.

To meet these objectives, an on street visitor survey was carried out by the TMP interviewing team between June 2008 and October 2008. Some 700 Adults were sampled on a random basis at five sampling areas in Liverpool, as indicated below:

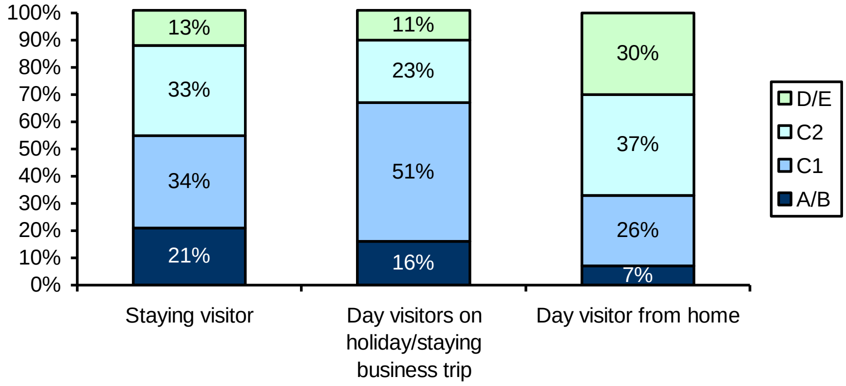
Albert Dock / Pier Head	28%
Matthew St / 08 Place	20%
William Brown St.	22%
Church St. / Liverpool One	16%
Cathedrals / Hope St.	14%

6.2.2 Visitor Profile

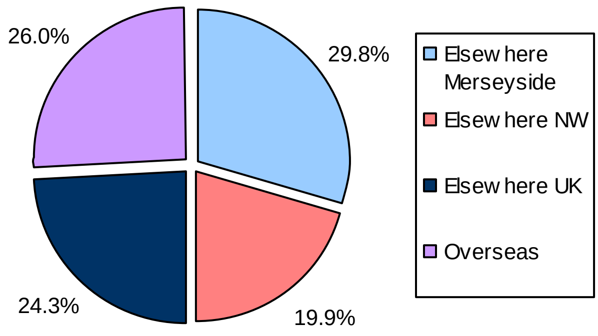
The following shows the "population pyramid" of visitors to Liverpool:



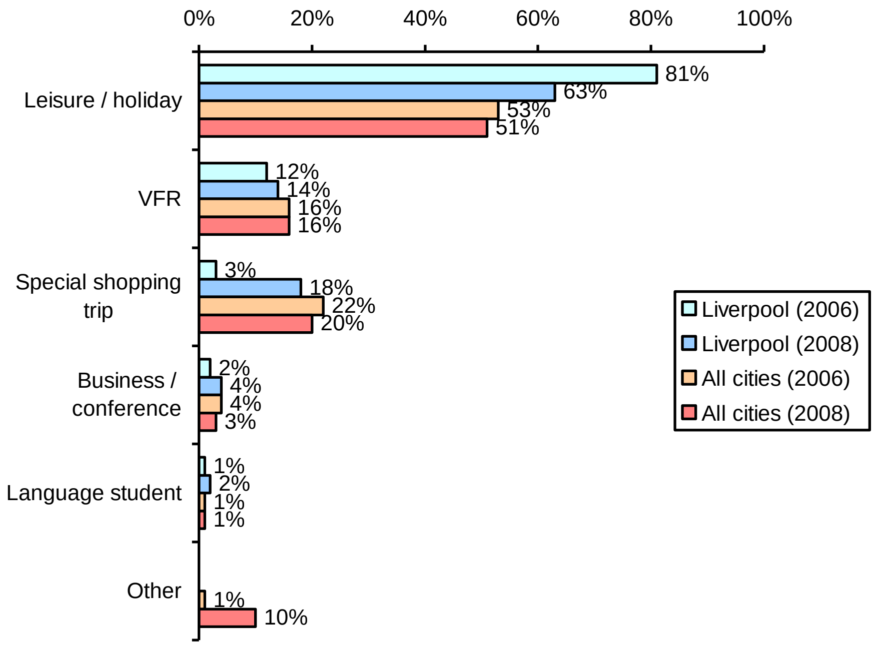
Some 46% of visitors to Liverpool were in the A/B/C1 social grades compared to 53% in all destinations. Naturally, this was higher for those on a staying visit (below).



We have already seen the origin of visitors classified in detail in section 3.1; that below represents a summary. This suggests a broad mix of visitor profile, ranging from over a quarter (30%) being from “elsewhere in Merseyside” to 24% from UK Locations outside the Northwest and a similar level being overseas visitors.



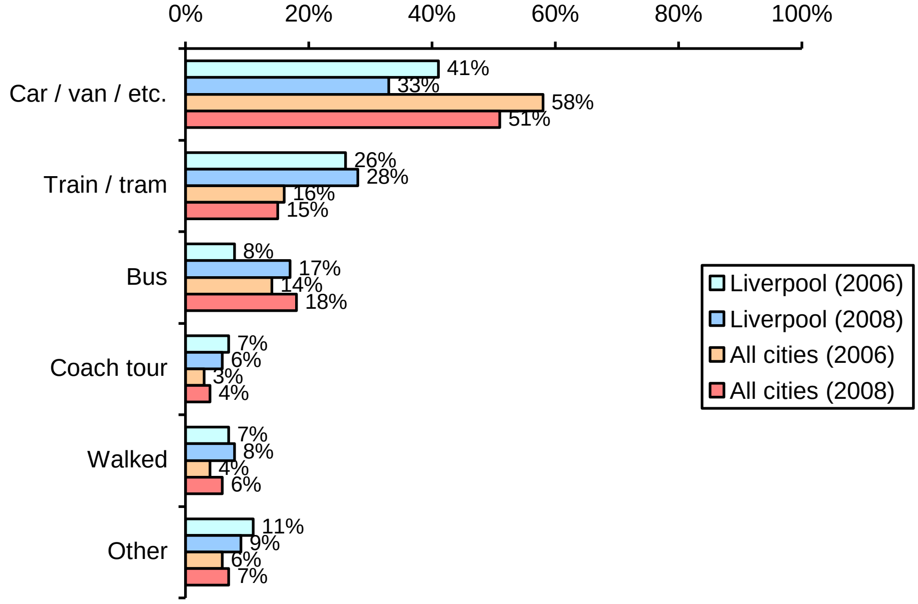
6.2.3 Visit Purpose



Visitors in Liverpool were *most* likely to be in the city for a leisure or holiday visit (63%). Although a somewhat higher purpose than that recorded for all large towns or cities, it is significantly below the figure recorded in 2006 (81%). The prime driver behind this change appears to be the growing appeal of Liverpool as a shopping destination; this as a factor has increased from 3% to 18%.

6.2.4 Mode of transport

Respondents were prompted for the *main* form of transport they used to reach the destination on the day of the interview. Hence, for those who were part-way through a staying visit this might be expected to differ from that used to reach the city in the first place.



Typically, visitors to Liverpool had a *lower* level of car use and were *more* likely to make use of train services. The background here would appear to be a lower level of car use across all destinations when compared with 2006 and a increased use of scheduled bus services – this latter may in part be connected with free travel for pensioners nationally on buses.

6.2.5 Staying visitors

Some 28% of all visitors were staying in Liverpool, but 26% were staying *outside* Liverpool. We would estimate that the full breakdown of accommodation to be as follows:

% of all visitors	'Paid' accommodation	'Free' accommodation
Merseyside	22%	17%
Cheshire	3%	1%
Greater Manchester	1%	3%
Lancashire	1%	3%
Cumbria	1%	<1%
Outside the Northwest*	3%	1%

* The data seems to suggest North Wales was the most likely origin for visitors staying outside of Northwest England.

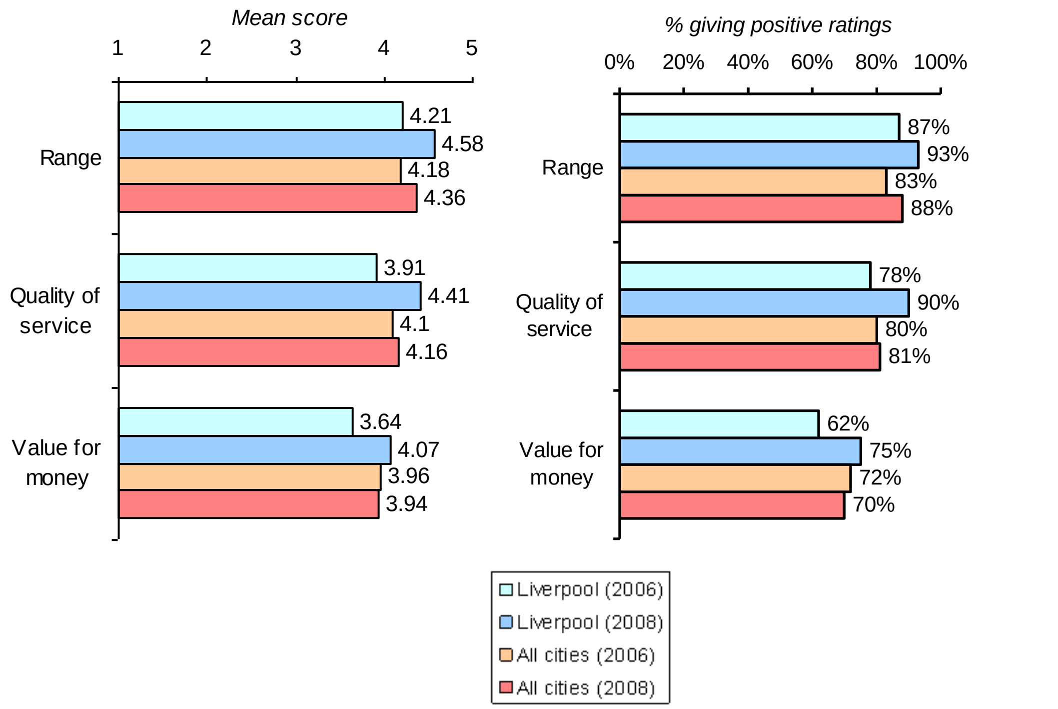
6.2.6 Improvements in perceptions of Liverpool amongst visitors

A key message emerging from the 2008 Liverpool Destination Benchmarking is how much *more* satisfied with their experience of the city visitors were likely to be in 2008. This was particularly the case for the shopping environment, range of shops, range of places to eat and drink and range of attractions. As the series of charts below display, this was a greater rate of improvement than that recorded across all destinations.

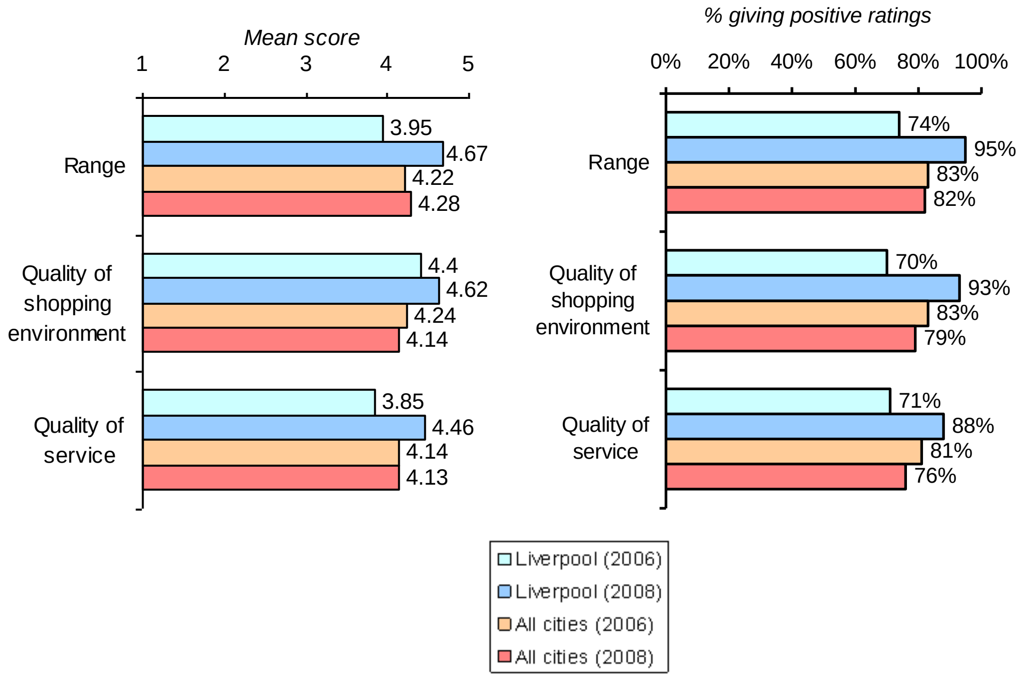
Indeed, in some aspects, Liverpool has improved whilst the benchmark shows a decline.

<u>Places to eat and drink</u>

<u>Visitor attractions</u>



Shops



Mean score
1
2
3
4
5
Range
3.95
4.67
4.22
4.28
Quality of shopping environment
4.4
4.62
4.24
4.14
Quality of service
3.85
4.46
4.14
4.13
% giving positive ratings
0%
20%
40%
60%
80%
100%
Range
74%
95%
83%
82%
Quality of shopping environment
70%
93%
83%
79%
Quality of service
71%
88%
81%
76%
Liverpool (2006)
Liverpool (2008)
All cities (2006)
All cities (2008)

Appendix I: Links to further information

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/
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.merseyside.org.uk/
The website of **The Mersey Partnership**, where you can access details of all the work we are involved in – tourism, economic development and inward investment – and download key documents.

http://www.merseyside.org.uk/most/
MOST (Merseyside Online Support for Tourism); The Mersey Partnership tourism extranet. The only online resource for businesses & advice, the latest industry news, information on training and skills and contacts to many businesses within the sector.

http://www.northwestcultureobservatory.co.uk
The **Northwest Culture Observatory** – championing evidence, sharing insight and building intellectual capacity across the cultural sector

http://www.nwda.co.uk/
The Northwest Development Agency leads the economic development and regeneration of England's Northwest. Contains key details about the regional economic policy.

http://www.occupancy.org.uk/
Website for information about **EOS** – the England Occupancy Survey for England, currently run by BDRC on behalf of VisitBritain.

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

http://www.tourismtrade.org.uk/
The trade website for **VisitBritain**; you can follow a link on this page to "Insights & Market Intelligence" for the national market research they gather, including inbound visitor statistics and domestic tourism statistics.

Appendix II: Details of available publications

Note: this is a provisional list, which will be updated with the next edition of the Digest.

The following documents are available to download by going to the www.merseyside.org.uk/most website and clicking on **Research**:

Destination Plans:
Destination Management Plan 2008-11

Statistics
Latest versions of the Digest of tourism statistics

The following documents are available to download from the Research Documents section of the www.visitliverpool.com/merseywise website:

Tourism Strategy:
A Vision & Strategy for Tourism to 2015 (Full Report)

Tourism Data:
Merseyside Visitors Survey 2005 (full report)

The following documents are available to download from the Publications section of the www.merseyside.org.uk website:

Economic Strategy & Research:

Merseyside Economic Review 2008	(Summary – go to Economic Development and choose Merseyside Economic Review 2007 for the full version)
Liverpool City Region Development Plan 2006	
Liverpool Superport 2008	

About The Mersey Partnership:
TMP Annual Review 2008

Please note: content on both websites is currently being updated and restructured; downloads available by the time this digest is issued may reflect a more recent version of the above article.

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.

% result[18]	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%

[18] (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)