Impacts 08 Team
Dr Beatriz García, Director
Ruth Melville, Programme Manager
Tamsin Cox, Programme Manager

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IMPACTS 08
European Capital of Culture Research Programme

The Economic Impact of Visits Influenced by the Liverpool European Capital of Culture in 2008

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Report for Impacts 08 by Ian Raymond at

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for Economic Development and Tourism

Edited by Impacts 08

Impacts 08 is a joint programme of the University of Liverpool and Liverpool John Moores University
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Executive summary

Background

This report is based on research which has, to some extent, built on a range of background research undertaken in the early part of the Impacts 08 five-year programme. Two literature reviews, one on economic impact models for events tourism and the other on economic multiplier effects, have been valuable in shaping the approach to understanding the visitor economy in 2008, and in estimating the impact of the Liverpool European Capital of Culture (ECoC) on that economy.[1] Whilst not all of the recommendations of those reviews have been implemented in this study, they remain valid contributions to the debate about and development of methodologies in this area, and can usefully stand alone as well as being seen in the context of the findings laid out in this report. An abridged version of the methodology utilised in this report was published in 2008, in order to offer an early view of the approach being taken by Impacts 08 and England's Northwest Research Service (ENWRS), which is based at The Mersey Partnership.

It is important to understand the approach to this assessment of economic impact in the context of the broader Impacts 08 framework. Whilst more investment in economic impact assessment would have strengthened this area, both in terms of methodological validity and contribution, and in terms of findings, it would have been at the expense of some other thematic areas of focus.[2]

Throughout the duration of the programme Impacts 08 has specifically sought to ensure that it can be part of a genuine and meaningful dialogue with local policy-makers and deliverers, across different agencies and sectors. Local policy-makers formed a steering group for this study, which met with researchers from the Impacts 08 team regularly throughout 2008 and 2009. The aim of the group was to support an understanding of the impacts of the Liverpool ECoC which could transfer easily from a research to a policy-making or delivery context.

There were, therefore, two significant strands of work undertaken as part of this project:

1) A substantial visitor survey, constituting in excess of 2,000 on-street interviews over the course of 2008, and across a range of locations, to determine the motivations and behaviour of visitors to Liverpool in 2008 and, in particular, to determine the profile of those visits which could be directly attributed to the Liverpool ECoC.

2) Bringing together the results of the visitor survey and a range of other data - including the economic impact assessments of events which had been commissioned by Liverpool Culture Company, Destination Benchmarking studies and a North West visitor survey - to establish the economic impact of those visits which could be directly attributed to the Liverpool ECoC.

[1] The two reports referred to here are: Bond (2008) *Estimating the Economic Benefits of Event Tourism: a review of research methodologies* and Phythian-Adams, Sapsford and Southern (2008) *Considering the Economic Impacts of the Liverpool European Capital of Culture: a review on the literature concerning economic multiplier effects*.

[2] The Impacts 08 programme has developed research on six interrelated thematic clusters: economy and tourism, cultural vibrancy and sustainability, cultural access and participation, image and identity, physical and management of the process (see www.impacts08.net).

Methodology

In assessing the economic impact of the Liverpool ECoC on the visitor economy, three measures were sought at local,[3] city region[4] and regional levels:[5]

1) The number of additional visits created by the Liverpool ECoC.
2) The estimated spend from these visits.
3) The jobs created or supported by this additional tourism activity.

A number of basic premises were established to underpin the construction of the methodological model, with an emphasis on: recognising and following best practice where possible; aiming for a transparent and understandable methodology; being absolutely clear about any limits or issues with data and data sources, particularly with external data; and ensuring that the methods used should be capable of replication, enabling their use for measuring the impacts of other similar large-scale cultural interventions.

The methodology used for this project differs significantly from that employed by John Myerscough in his assessment of the economic impacts of Glasgow's year as European City of Culture in 1990[6] and from many other approaches to event-based interventions. Crucially, the key difference within the Impacts 08 study is the focus on the whole visitor economy, and on identifying attribution to the Liverpool ECoC within that whole, rather than a focus on a series of events and the additionality created by those events. Whilst this approach has had its benefits, it has a number of challenges and potential issues.

The most significant of these challenges relates to establishing a reliable measure for a total volume of visits to Liverpool in 2008. The locally used method for assessing the volume of visits in any given year is STEAM.[7] STEAM is not used universally, but it is the measure utilised throughout the North West region, and as such provides an important opportunity for comparison with data sets from years prior to and post 2008. The primary challenge to STEAM's usage is that, whilst it is usually considered to offer an accurate assessment of the trends taking place within the visitor economy, it is not considered to be a very valid source for the precise measurement of tourism in any given year (see Section 4.1 for a more extensive explanation of the issues with STEAM).

STEAM is, however, the only available measure of total volume for tourism in the city and city region, and does benefit from being constantly refined through local data inputs. In addition, improvements to the STEAM baseline data which have been applied to the 2009 period can potentially enable a regressive assessment of the 2008 tourism volume with that improved methodology. Such a revised assessment could be run through

[3] Throughout this report, references to Liverpool encompass the local authority area administered by Liverpool City Council.
[4] Throughout this report references to the Liverpool city region, or city region, constitutes the local authority areas of Liverpool, Halton, Knowsley, Sefton, St Helens and Wirral.
[5] Throughout this report, references to the North West region, or region, comprises the area covered by the Northwest Development Agency: Merseyside, Cheshire, Cumbria, Greater Manchester, and Lancashire.
[6] Myerscough, J. (1991) *Monitoring Glasgow 1990*. Report for Glasgow City Council, Strathclyde Regional Council and Scottish Enterprise.
[7] STEAM (Scarborough Tourism Economic Activity Monitor) is a model utilised by a number of tourist boards and agencies, including The Mersey Partnership, the tourist board for the Liverpool City Region, and the Northwest Regional Development Agency (NWDA), to measure the volume (i.e. the number of visitors) and value of tourism (how much visitors spend) in a given area. STEAM is widely used by official tourist boards across the UK, as well as internationally, allowing for comparisons to be made.
STEAM is owned and operated by Global Tourism Solutions. It measures a number of aspects of tourism, including day visitors, visitors who stay in serviced and non-serviced accommodation and those who stay with friends or relatives (SFR). Day visitors include those who visit for non-routine shopping.

the economic impact model used in this study, creating a revised and refined set of findings. It is anticipated that such a revision could affect day visitor and staying visitor ratios more substantially than other areas.

The model used in this study for assessing the economic impact of the Liverpool ECoC combines the volume data from STEAM for 2008 with primary survey work to gain the profile of visitors, with a focus on the extent to which their visit was influenced by the Liverpool ECoC. A process of applying typical visitor frequencies to the raw data allows the removal of visits made by visitors who would be expected to be making a visit anyway, even where they indicated the influence of the Liverpool ECoC. Visitor spend data is provided by the primary data of the survey, allowing calculations to be made about the total spend – and, therefore, economic impact – created by those visits which are influenced by the Liverpool ECoC.

Finally, multipliers from a local version of the Cambridge Model are applied to this data to produce estimates of indirect economic impact, and the number of jobs created by that direct and indirect spend.[8] The use of the Cambridge Model multipliers is not in accordance with the recommendations made in the literature review commissioned by Impacts 08 on the same topic (see section 1 for more detail), but utilises a locally specific model which includes a locally determined baseline and which it was possible to update with current values.

Findings

Visitor survey

Visitors responding to the Impacts 08 commissioned Liverpool visitor survey in 2008 were most likely to mention a sightseeing visit (45%) as a reason for visiting Liverpool, with a 'special' shopping trip (25%) being the second most popular reason. Almost half of all survey participants suggested that the Liverpool ECoC had been of some importance in their decision to visit; of these, 83% also indicated that the Liverpool ECoC events programme had been an important factor in their decision to visit. This is particularly interesting given the fact that only 7.5% of all visitors stated that they would be attending an event (either a Liverpool 08[9] branded event or otherwise), suggesting that the *profile* of the events programme was helping to make the broader Liverpool 'offer' tangible for prospective visitors.

First-time visitors were more likely than repeat visitors to rate the Liverpool ECoC as being an important factor behind their visit, and to rate other aspects of the Liverpool visitor offer – with the exception of 'shopping facilities' - as being of importance. Over the course of 2008, the Liverpool ECoC was a dominant influence for visits, although it waned towards the end of the year. By comparison, 'special' shopping trips as a factor grew particularly towards and during the Christmas retail period.

Of visitors influenced by the Liverpool ECoC, 20% came from the Merseyside area, rising to 32% from elsewhere in the UK and 50% from outside the UK. This pattern was broadly repeated in the origin of first-time visitors being influenced by the Liverpool ECoC, but with more accentuated differences between the Merseyside origin at 0.6% and outside the UK at 67%. Within the UK, the origin of Liverpool ECoC-influenced first-time visitors shows 10-15% concentration in London and the South East of England (in comparison with all Liverpool ECoC-influenced visitors, at 5-10%).

Visitors who were influenced by the Liverpool ECoC had a slightly higher propensity to be staying visitors (at 39%) in comparison to all visitors to the city (at 33%). Those who were both influenced by the Liverpool ECoC and on their first visit were significantly more likely to be staying visitors, at 53%. Visitors who were influenced

[8] The Cambridge Model for estimating local tourism is a model used relatively widely in the UK. It was the predecessor to STEAM in the Merseyside area, and therefore the multipliers available within the city region specific version of the model contains some locally specific data.

[9] 'Liverpool 08' was the official brand developed by the Liverpool Culture Company to promote the Liverpool ECoC programme.

by the Liverpool ECoC also spent, on average, slightly more per person in the course of their visit, in comparison to those who were not influenced by the Liverpool ECoC.

Tourism in the Liverpool city region in 2008

Overall, tourism in the city region showed substantial increases between 2007 and 2008. The number of visits to Liverpool grew by 34%, and the number of visits to the city region as a whole grew by 19%. In comparison to other sub-regional areas in the North West, the Liverpool city region showed increases substantially above the rest of the region in both day and staying visitors.

Economic impact

Application of typical visitor frequencies to the raw data from the visitor survey results in an estimate that 35% of all visits to Liverpool in 2008 were influenced by the Liverpool ECoC, and would not have happened otherwise. This equates to 9.7 million visits being generated by the Liverpool ECoC, with 6.4 million (66%) of those being first-time visits (and therefore first-time visitors). Almost 3 million of these visitors who came from the UK were from outside the North West; and almost 2.6 million (87%) of these were first-time visitors. The proportion of first-time visitors amongst those influenced by the Liverpool ECoC rises significantly in those visitors coming from outside the UK (almost 2.6million), with 97% of all ECoC influenced international visitors visiting the city for the first time.

The economic impact of these additional visits is calculated as follows:

The 9.7 million visits motivated by the Liverpool ECoC resulted in a total of 1.14 million visitor nights in serviced accommodation in Liverpool, with 1.29 million visitor nights in serviced accommodation being generated in Merseyside and1.7 million in the rest of the North West.

Data from evaluation work undertaken on the Liverpool 08 events programme helps to support an estimate of 606,000 additional visits (from non-residents) being created by the events programme itself (this is a portion of the 9.7million visits referred to previously).

It is estimated that the additional visits driven by the Liverpool ECoC, including both event attendees and non event attendees, generated £753.8million of direct visitor spend. With the application of the Cambridge Model multipliers, this creates £201.million in indirect spend, providing a total economic figure of £954.9m for the North West region as a whole, and gives an indicative figure of 14,912 for the number of jobs supported.

The impact of this additional spend, indirect impact and jobs supported are estimated as impacting at a city, city region, regional and extra-regional level as follows:

Visitor Type	Liverpool City	Elsewhere City Region	Elsewhere North West	Outside North West
Direct spend	£521,630,000	£130,566,000	£49,113,000	£52,538,000
Indirect spend	£141,383,000	£33,597,000	£12,699,000	£13,403,000
Total	£663,013,000	£164,163,000	£61,812,000	£65,942,000
Jobs supported (FTE)	10,225	2,632	991	1,065

Conclusion

Whilst this study raised a range of methodological challenges, the approach used by Impacts 08 and England's Northwest Research Service has identified the importance of considering the broader motivation and behaviour of visitors, and not just their attendance at events or venues. It is difficult to identify whether the fact that the Liverpool ECoC has had a significant impact on visitor numbers beyond those driven by its events programme is a particular result of the destination marketing and branding approach undertaken in relation to promoting Liverpool, and particularly 2008, or whether this effect is one which is apparent in relation to other large-scale event-led interventions.

Liverpool's challenge for the future will be whether it can convert the wealth of first-time visitors it attracted through the ECoC title back to the city again, and whether it can continue to maintain some of the high profile which its Liverpool 08 events programme garnered, to raise the perceived 'offer' of the city to potential visitors. It is not possible to make predictions at this stage, though the results of the visitor survey indicate that many visitors enjoyed their stay and reflected on multiple aspects of the city and the visitor offer favourably.

Important note on citation:

Contents

1. Research Aims

In 2007, Impacts 08 commissioned England's Northwest Research Service, operated by The Mersey Partnership (TMP), to undertake work surveying visitors to the city during 2008, and to build a transparent and replicable methodology for studying the economic impact of the Liverpool European Capital of Culture (ECoC).[10] Work was already being undertaken by Impacts 08 and by the Liverpool Culture Company on a range of data collection and assessments, which provided a context for this particular project and included the following:

- Impacts 08 had been tracking general economic indicators across a time-series as part of constructing a series of benchmark indicators. This aimed to give a general picture of economic growth in the city, sub-region and region, but no indication of causality or relationship to the ECoC designation.[11]
- Liverpool Culture Company had commissioned a study of the economic impact of a range of key events[12] in the Liverpool 08 programme.[13]
- The collation of attendance figures across the official Liverpool 08 programme, from Liverpool Culture Company monitoring data.
- A literature review of economic impact studies commissioned by Impacts 08 from academics in the University of Liverpool's School of Management, focusing on best practice for understanding multiplier effects in the creative economy.[14]

In commissioning a literature review of approaches to multiplier effects, the original intention was to explore options in terms of creating a bespoke approach to multiplier effects for application to the object of study: the Liverpool ECoC. The recommendations of the report were as follows:

- That an Input-Output model be developed based on the findings of the literature review, to provide statistically legitimate estimates of multipliers, which take into account the full impact of investment in cultural and related initiatives.
- That this model be supported by a range of data to be gathered from a variety of sources, including surveys of institutions, consumers, and from central sources of statistics.
- That the economic impact assessment should take part alongside other measures of impact as part of a full evaluation, in order to support the valuation of 'intangible benefits'.

[10] The Mersey Partnership is the City Region's Sub Regional Partnership, with responsibilities across the six local authority areas of Liverpool, Wirral, Sefton, St Helens, Knowsley and Halton for supporting economic development, inward investment and tourism.
[11] The results of this tracking of benchmark indicators are available in Impacts 08 (2007) *Impacts 08 Baseline Findings 2006-2007,* Impacts 08 (2008) *Impacts 08 Benchmark Indicators* and Impacts 08 (2010) *Creating an impact: Liverpool's experience as European Capital of Culture*.
[12] The events assessed in this study were: the 2008 Opening Event (both the 'People's Opening' and 'Liverpool the Musical', events on two consecutive nights); the one-night performance and world premiere of John Tavener's *Requiem*; the European Union Youth Orchestra, conducted by Vladimir Ashkenazy, for a single performance; the 'Liverpool Sound' concert, headlined by Sir Paul McCartney for one night at Anfield football stadium; the finish of the Clipper Race (all-day event); the start of the Tall Ships race (weekend event); the Go Superlambananas event, with 125 replicas of an established public art piece, decorated by artists and communities and placed throughout the city (and further afield) for almost two and a half months; 'Imagine' festival for children and young people, for ten days; the World Firefighter Games, taking place over 11 days; the Mathew Street Festival, an annual event in Liverpool which takes places over the bank holiday weekend in August; the one-night visit and performance of the Berliner Philharmoniker with Sir Simon Rattle; *La Princesse*, a50-ft mechanical spider which toured the city for five days; the MTV European Music Awards, a single evening event; and the closing 'Transition' event, a single evening event.
[13] The Liverpool 08 programme refers to the programme of events, exhibitions and other activities which were explicitly branded as being part of the Liverpool ECoC activity.
[14] This report, Phythian-Adams et al (2008) *Considering the Economic Impacts of the Liverpool ECoC: a review on the literature concerning 'economic multiplier' effects,* is available at www.impacts08.net/Publications/literaturereviewsandmethodologies.htm.

Whilst the validity of these recommendations stands, the Impacts 08 team chose to focus its available investment on primary data collection, bringing this together with secondary data from a range of sources to provide the most comprehensive picture of direct visitor spend and behaviour in 2008.
It is important to understand the approach to this assessment of economic impact in the context of the broader Impacts 08 framework. Economic impact assessments of high profile public investments are necessarily sensitive, attracting a range of stakeholders. In addition, there has been substantial development and use of often competing and contrasting methodological approaches in the last few years, particularly in the context of the use of such findings for advocational purposes and as part of return on investment models utilised in a range of public agencies.

Within the Impacts 08 programme, more emphasis and resources could have been placed on economic impact assessment, supporting a broader study – looking beyond the tourism economy in detail – and/or a more in-depth study specifically looking at the tourism economy. In this context, it may have been possible to push methodological boundaries further, and to explore indirect and induced impacts, and issues around displacement and the costs of tourism as well as the benefits. However, the Impacts 08 framework is an approach which seeks to understand a broad range of potential impacts, both positive and negative. Whilst more investment in economic impact would have strengthened this area, both in terms of methodological validity and contribution, and in terms of findings, it would have been at the expense of some other area of focus.

There were, therefore, two significant strands of work undertaken as part of this project:

1) A substantial visitor survey, constituting 2,017 on-street interviews over the course of 2008, and across a range of locations, to determine the motivations and behaviour of visitors to Liverpool in 2008 and, in particular, to determine the profile of those visits which could be directly attributed to the Liverpool ECoC.
2) Bringing together the results of the visitor survey and a range of other data, including the economic impact assessments of events which had been commissioned by Liverpool Culture Company, Destination Benchmarking studies (700 interviews) and a North West visitor survey (400 interviews, commissioned by NWDA, with a specific ECoC-related question inserted), to establish the economic impact of those visits which could be directly attributed to the Liverpool ECoC.

Throughout the duration of the programme, Impacts 08 has specifically sought to ensure that it can be part of a genuine and meaningful dialogue with local policy-makers and deliverers, across different agencies and sectors. The methodological approach used in this assessment of the Liverpool ECoC's impacts on the visitor economy reflects not only some of the lessons learnt from the literature reviews, but also the need to engage directly with local policy-makers connected to the visitor economy. Officers from the Northwest Regional Development Agency, Liverpool City Council, Liverpool Culture Company, the Northwest Culture Observatory and ENWRS formed a steering group for this study, which met with researchers from the Impacts 08 team regularly throughout 2008 and 2009.

The aim of the steering group was to ensure that the methods used and findings emerging from the work would have some degree of comparability to existing data about the visitor economy, thus supporting an understanding of the impacts of the Liverpool ECoC which could transfer easily from a research to a policy-making or delivery context. In addition, it was hoped that the range of data gathered from the visitor surveys would go beyond just informing an assessment of economic impact, and provide some understanding of the way in which visitors behaved during 2008, and their responses to the city.

This report outlines the methodologies used for the visitor survey and the model which brought together data to assess the direct economic impact, and presents the findings from both stages of work.

2. Methodology

2.1. Visitor survey

Impacts 08 commissioned a survey of visitors to Liverpool in 2008. In total some 2,017 on-street interviews were conducted in Liverpool City Centre over the calendar year. To ensure an adequate representation of visitors to the city, the visitor survey was conducted across a wide range of locations, including the following groups:

- Albert Dock/the waterfront.
- Mathew Street/the '08 Place.[15]
- Church Street (and Liverpool ONE when opened).[16]
- The two cathedrals and Hope Street.
- Outside the World Museum Liverpool, Walker Gallery, Central Library and St George's Hall, along William Brown Street (opposite Liverpool Lime Street railway station).

The focus of this research was on gaining a basic profile of visitors, together with their trip-spend and the level of influence of the European Capital of Culture on their visit. (More analysis was also available from other surveys conducted during this period, including Destination Benchmarking.) Accordingly, a short questionnaire was used with typical completion time being four minutes.

After excluding those who were residents of Liverpool and those who were on a visit that was not a valid reason for inclusion in the analysis (i.e. those who were not a 'visitor' in the definition of tourism as adopted by the World Tourism Organisation[17]) this produced the following sample by period:

Jan-Feb	290
Mar-Apr	334
May-Jun	262
Jul-Aug	293
Sep-Oct	220
Nov-Dec	178

A key concern was to ensure that the sample was as accurate a representation of the visitors to the city as possible. Above the issues of location and purpose are addressed; in order to ensure reliability from a temporal aspect, the monthly analysis of visitor numbers indicated by STEAM is used.[18] The chart below shows the distribution against that of valid interviews achieved in this survey.

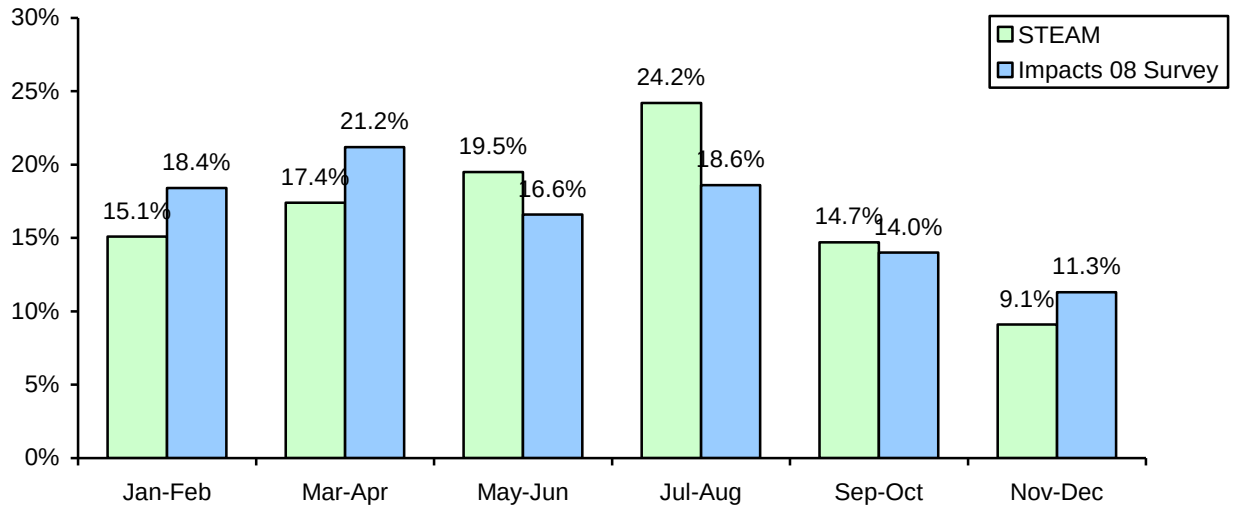
[15] The '08 Place was set up as the main tourist information centre for information on the Liverpool ECoC during 2008, and also sold a range of Liverpool ECoC merchandising. It is still in operation at the time of writing, and is the main tourist information centre in the city centre area.

[16] Liverpool ONE, a £1billion retail and leisure complex which redeveloped a large area of Liverpool city centre, opened its first phase in late May 2008.

[17] The definition of tourism referred to here is as follows: 'The activities of persons travelling to/staying in places outside their usual environment for leisure, business and other purposes', from the 1991 Ottowa Conference on Travel and Tourism Statistics.

[18] STEAM (Scarborough Tourism Economic Activity Monitor) is a model utilised by a number of tourist boards and agencies, including The Mersey Partnership, the tourist board for the Liverpool City Region, and the Northwest Regional Development Agency (NWDA), to measure the volume (i.e. the number of visitors) and value of tourism (how much visitors spend) in a given area. STEAM is widely used by official tourist boards across the UK, as well as internationally, allowing for comparisons to be made.
STEAM is owned and operated by Global Tourism Solutions. It measures a number of aspects of tourism, including day visitors, visitors who stay in serviced and non-serviced accommodation, and those who stay with friends or relatives (SFR).
Day visitors include those who visit for non-routine shopping. STEAM is not designed to provide a precise and accurate measurement of tourism in an area, although it does provide indicative volumes and values as a base for monitoring trends.

Figure 1: Percentage of visitors surveyed compared with STEAM visitors, profiled by bi-monthly period



Although, as can be seen, the differential between the two data sets is below 5% at all points (excluding the 'summer peak'), in the interests of accuracy, within this report the data has been weighted to match that of STEAM.

The questions used within the survey are included in Appendix 7.1 of this report. The verbatim responses are also included at Appendix 7.1 (coded versions of these are included within the main commentary).

2.1.1. Confidence interval in the visitor profile data

The confidence interval is the statistical difference between the results returned by the sample and what might reliably be assumed to have been the response had the entire population under study responded to the survey. This is usually expressed as a plus or minus % value. The table below shows the confidence intervals for different % responses, based on the total sample of 2,017 from an estimated visitor population of 27,673,000 (as indicated by STEAM) and assuming as standard 95% confidence in our data.[19]

Figure 2: Confidence interval

% Response returned	Confidence interval (+/-)
95 or 5	0.85
90 or 10	1.18
85 or 15	1.40
80 or 20	1.57
75 or 25	1.70
70 or 30	1.80
65 or 35	1.87
60 or 40	1.92
55 or 45	1.95
50	1.96

[19] An example of this is: assuming that 30.0% of respondents stated they were on their first visit to Liverpool and were influenced to make the trip by ECoC; with a confidence interval of 1.8% we could say that we would expect the entire visitor population to range between 28.2% and 31.8% being on their first visit to Liverpool and influenced by the ECoC.

2.2. Economic impact assessment

2.2.1. Approach

The assessment sought to ascertain three measures at local, [20] city region[21] and regional levels:[22]

1) The number of additional visits created by the Liverpool ECoC.
2) The estimated spend from these visits.
3) The jobs created or supported by this additional tourism activity.

In constructing the model, the following basic premises at all times were adopted:

- That the model should follow best practice.
- That the methodology should be as transparent as possible.
- That clarification of the limits of reliability of external data sources to be explicit.
- That the methods used should be capable of replication for measuring the impact of other similar large-scale cultural interventions.

The model combines two broad core elements to provide the assessment:

- Publicly available datasets to present the overall volume of visits to the Liverpool city region.
- Primary survey work to gain the profile of visitors, including the extent to which their visit was influenced by the Liverpool ECoC.

Other approaches were examined, including basing data on alternate sources; but, in order to provide the most accurate measures covering an analysis of full visitor behaviour and providing a replicable mechanism, the approach outlined here was felt to be optimal.

2.2.2. Data sources

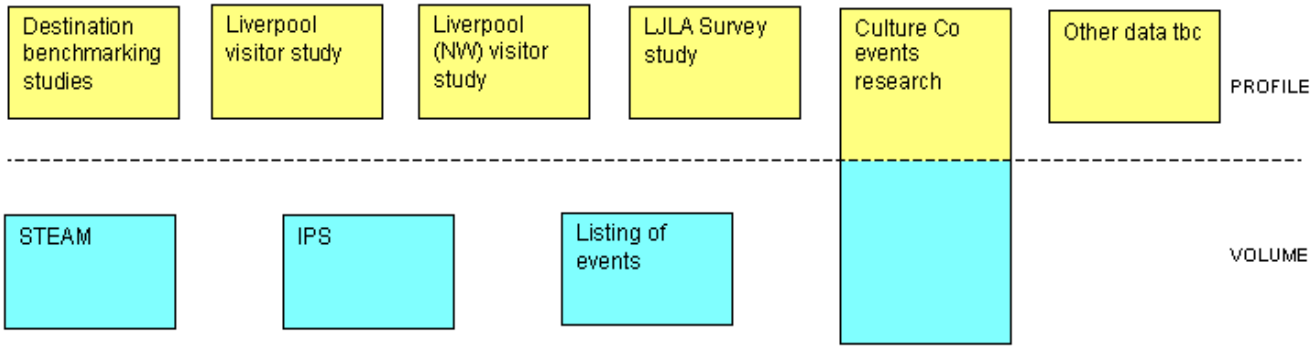
The study is supported by primary data, collected as part of Impacts 08 commissioned visitor survey throughout 2008. In addition, data from the following sources was utilised to present as full as picture as possible:

- The economic impact of Liverpool 08 events research, commissioned by Liverpool Culture Company, which provides a robust profile of visitors to events and their typical economic impact.
- Liverpool Destination Benchmarking was conducted by The Mersey Partnership and supported by Liverpool City Council in 2008; this provides a more detailed visitor profile than the Impacts 08 survey – albeit with a lower data reliability, with work being concentrated within the June to September period.
- It was a particular concern of the Northwest Regional Development Agency (NWDA) to obtain a more accurate input into what the impact was of the Liverpool ECoC beyond the immediate Merseyside area. Accordingly, additional interviews were conducted with visitors to Liverpool who were staying elsewhere in the North West, focussing more on spend and activity outside Liverpool.
- During 2008, a survey was conducted with passengers through Liverpool John Lennon Airport; although not primarily focussed on the gauging the impact of the Liverpool ECoC, NWDA took the opportunity to ensure questions comparable to the main Impacts 08 survey were incorporated.

[20] Throughout this report, references to Liverpool encompass the local authority area administered by Liverpool City Council.
[21] Throughout this report references to the Liverpool city region, or city region, constitutes the local authority areas of Liverpool, Halton, Knowsley, Sefton, St Helens and Wirral.
[22] Throughout this report, references to the North West region, or region, comprises the area covered by the Northwest Development Agency: Merseyside, Cheshire, Cumbria, Greater Manchester and Lancashire.

The diagram below presents the key data sources being used in the model, whether primary or secondary. Note that this diagram is essentially a listing of the sources of data, to give an idea of the breadth, and is not to be considered as representing a hierarchy or relationship between the components.

Figure 3: Key sources of information used within the model[23]



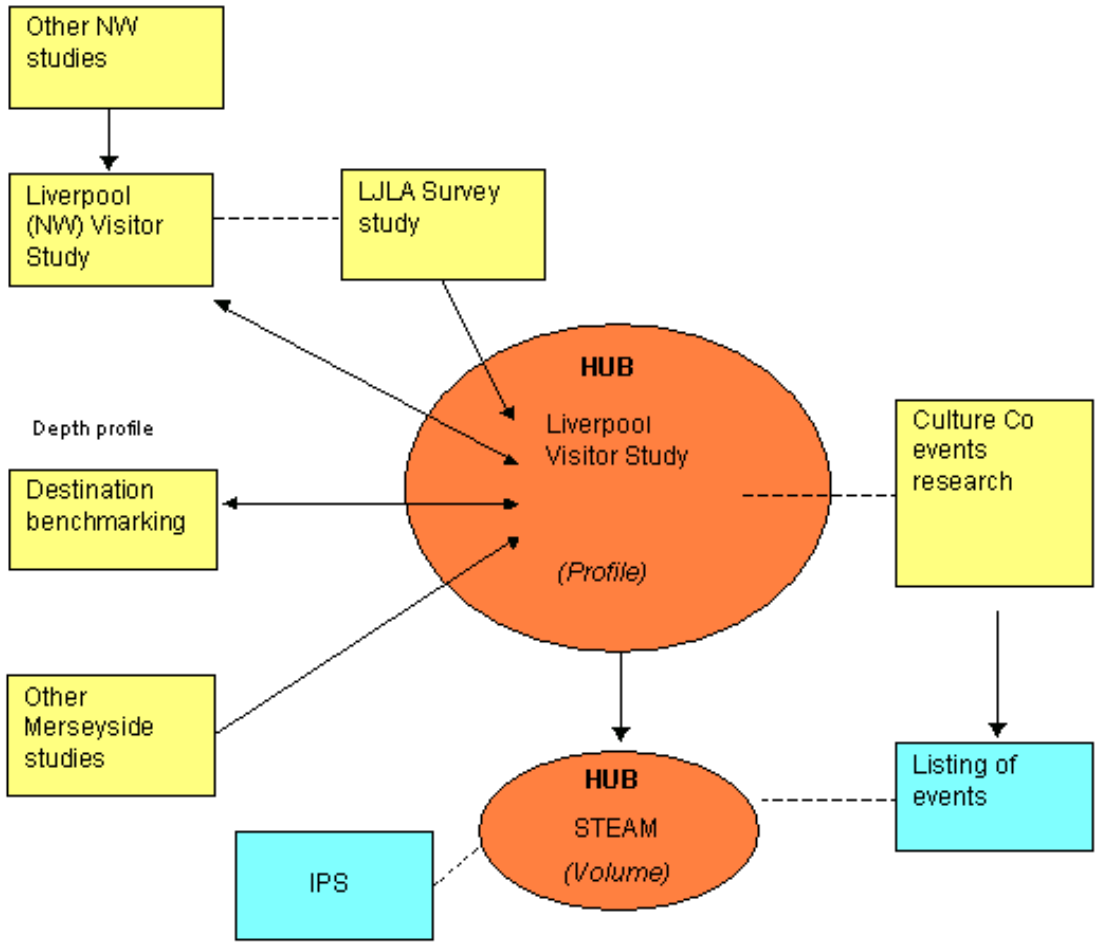
Destination Benchmarking 700 interviews Conducted in Liverpool city centre, providing a detailed profile of all visitors to the city centre, including influence of Capital of Culture	Liverpool visitor study 2,100 interviews Conducted across Liverpool city centre throughout 2008, providing a summary profile of all visitors to the city centre, but concentrating on the influence of Capital of Culture	North West visitor study 400 interviews Similar to the *Liverpool Visitor Study*, but targeting solely visitors staying outside the Liverpool city region, an area of interest for the NWDA.
LJLA Survey Survey data conducted by the CAA was amended to include a question on Capital of Culture.	Liverpool Culture Company events research The Liverpool Culture Company conducted a range of evaluations into selected events taking place during the year. This aimed to establish the economic impact of the major events of the year.	Other data sets Other surveys which fell within the ambit of the Liverpool city region also had questions relating to the influence of Capital of Culture added to them, and these are referenced where appropriate within the text.
STEAM (Scarborough Tourism Economic Activity Monitor) A tool used by many tourist boards and regional development agencies to measure the value and volume of tourism. STEAM is driven by local data inputs such as hotel occupancy and visits to attractions.	IPS (International Passenger Survey) Conducted by the Statistics Agency on behalf of VisitBritain and other agencies, interviewing visitors from overseas at key gateways to measure inbound tourism volume, outbound tourism volume and migration	Events listing As a key part of the year was the events programme, one of the key sets of data is to obtain a listing of the events taking place.

[23] LJLA is Liverpool John Lennon Airport.

2.2.3. Model of data interaction

Figure 4 represents the relational aspects of these different data sources.

Figure 4: Model of data interaction



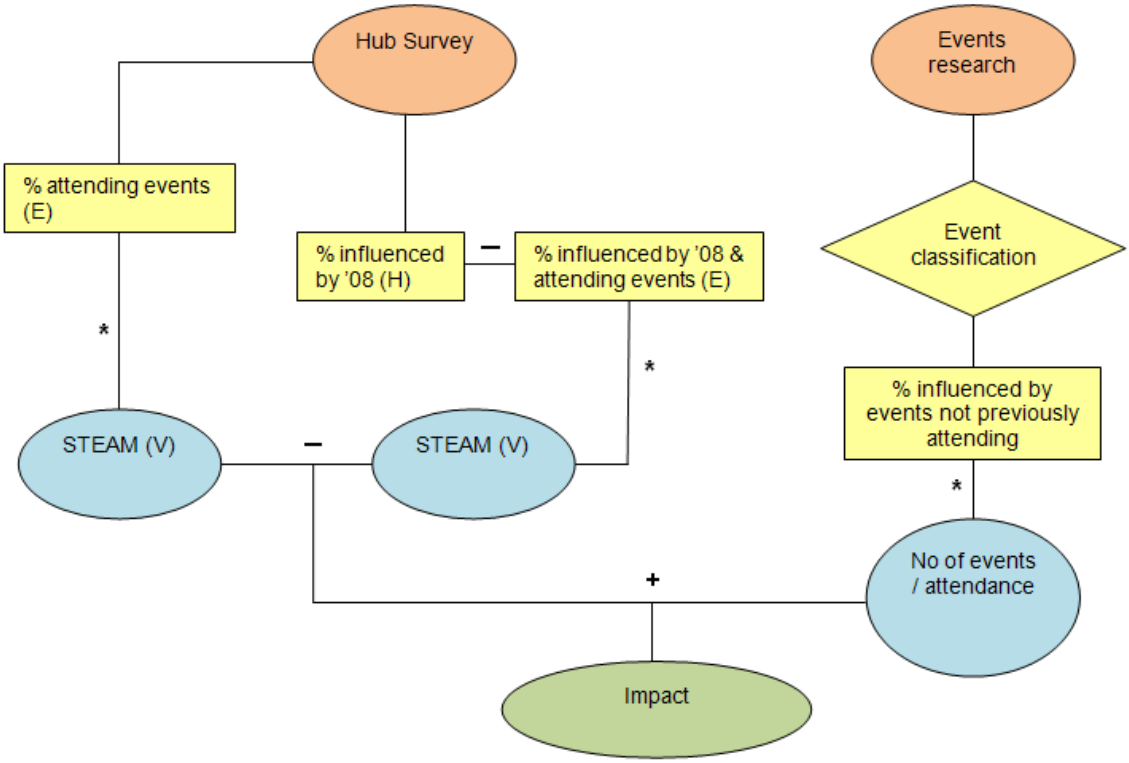
Essentially, the model revolves around two *hubs* of data: STEAM – providing the 'volume'; and the Liverpool visitor study – providing the 'proportion' of visitors influenced by the Liverpool ECoC. This is mapped alongside the impact of visits to events, as drawn from events research commissioned by the Liverpool Culture Company.

2.2.4. Calculations using the datasets

Following the commissioning by Liverpool Culture Company of economic impact assessment of individual events within the Liverpool 08 programme, a concern of this study was to ensure that this model worked together with these assessments: hence, the events data in fact ends up being treated as its own 'hub and spoke' data.

Figure 5 shows how the events and other data fit together. It also shows an overview of the calculations used in order to assess economic impacts.

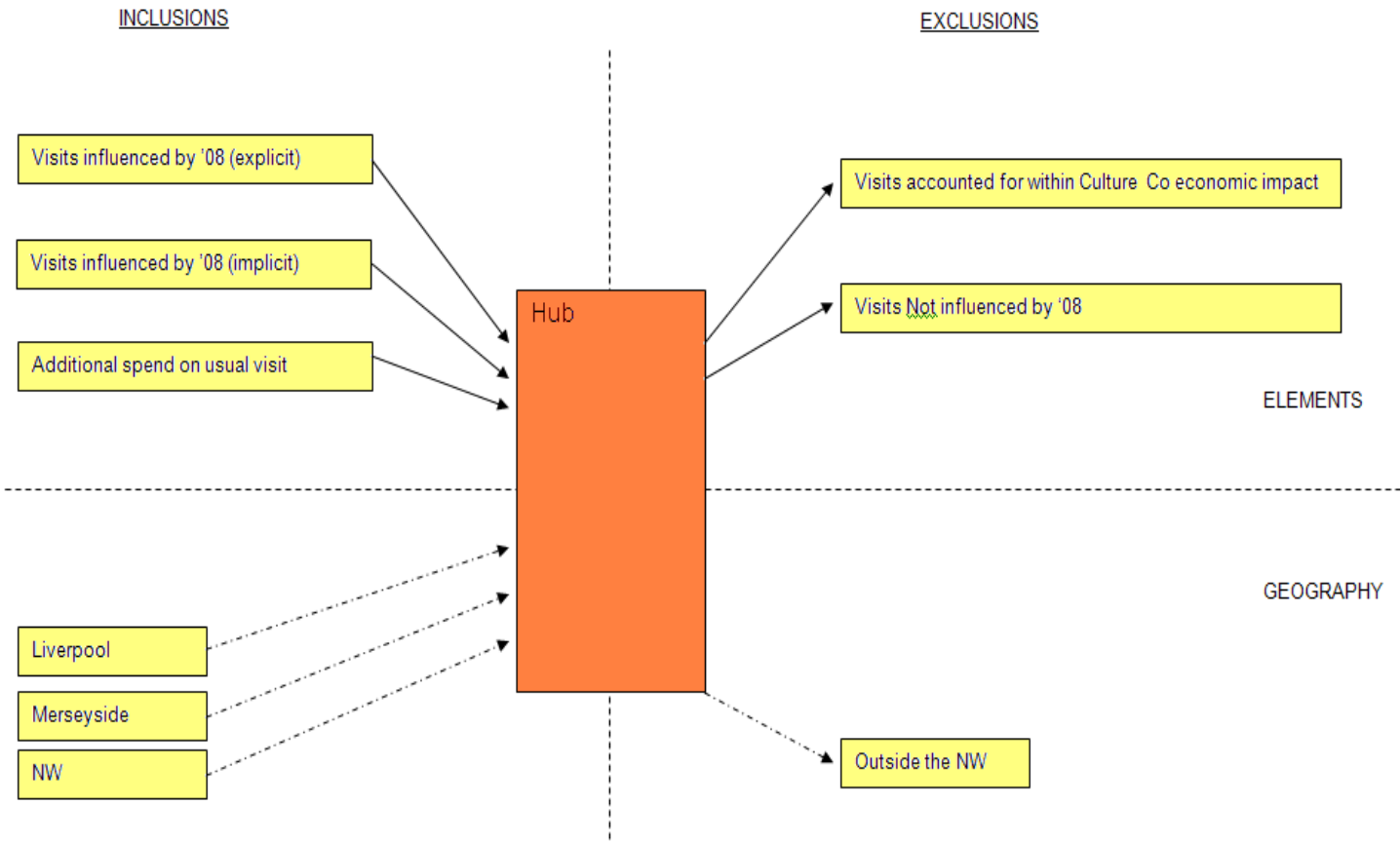
Figure 5: Overlaying events impact and 'other' visitor impact



2.2.5. *Inclusions and exclusions*

A core concern in strengthening the validity of the model is to ensure not just that a reliable level of the impact is gauged but also that there is no potential for double counting. This might involve, for example, not including someone who has visited an event due to the Liverpool ECoC if they have already been counted within the overall visitor profiling study.

Figure 6: Inclusions and exclusions from the model



As is outlined above, the methodological approach uses primary survey data to overlay onto the STEAM estimates of visitor volume. Note that the model does *not* use STEAM's "value" data, relying on the survey work to provide estimates of visitor spend.

Just as for the *proportion* of visitors, so within this report the visitor spend has been segmented to provide (for example):

- Spend by those influenced to visit.
- Spend by location.
- Spend abstracted.
- Spend by type of visitor.

2.2.6. Calculating value and related impacts

The model outlined above supplies only an assessment of the direct spend associated with additional visits; what it does not present is indirect spend. There are a number of items that need to be included in an assessment of indirect spend.

- Tourism jobs directly supported by tourism spend.
- Indirect tourism spend.
- Indirect spend through local linkages (goods and services).
- Indirect jobs supported.

To arrive at the values for these figures, two approaches were considered within this study. One option was to use the figures in STEAM, which indicate a ratio to give jobs supported (direct and indirect spend) and the indirect spend generated for each £ spent by visitors.

The other option was to use the Cambridge Model's multipliers.[24] The Cambridge Model provides a breakdown in terms of £ to create to jobs by sector and £ create indirect and local linkages spend in the economy; this calculation is undertaken by using a series of multipliers. These multipliers differ substantially according to sub-sector - namely:

- Accommodation.
- Attractions.
- Food & drink.
- Retail.
- Transport.

Typically, the model shows that the multiplier effect is high for every £ spent on accommodation providers and low for every £ spent on transport. It should be noted that the model was applied to Liverpool in 2003, and hence the financial assumptions on which it is based needed updating. ASHE was utilised to update the estimates of wages per job to 2008 levels.[25]

The Cambridge Model was built largely upon local survey data, which in turn created multipliers. The Cambridge Model was opted for in this study, in preference to STEAM, because it provided greater detail in terms of indirect spend, enabling calculations to be understood by the sector of spend, rather than just by total spend.

3. Findings from the Visitor Survey

3.1. How the findings are presented

Typically, within each sub-section of these findings – and where applicable – data is presented in two strands:

1) Overall, in terms of the Liverpool visitor market in 2008;
2) *Just* those who were influenced to visit by the city's European Capital of Culture status.

This approach has been taken to aid understanding of how the profile of the Liverpool ECOC influenced visitors differs from that of 'all visitors'. Where relevant additional detail has been included, such as the profile of those first-time visitors who were influenced to make the visit by the Liverpool ECoC.

3.2. The influence of the Liverpool ECoC

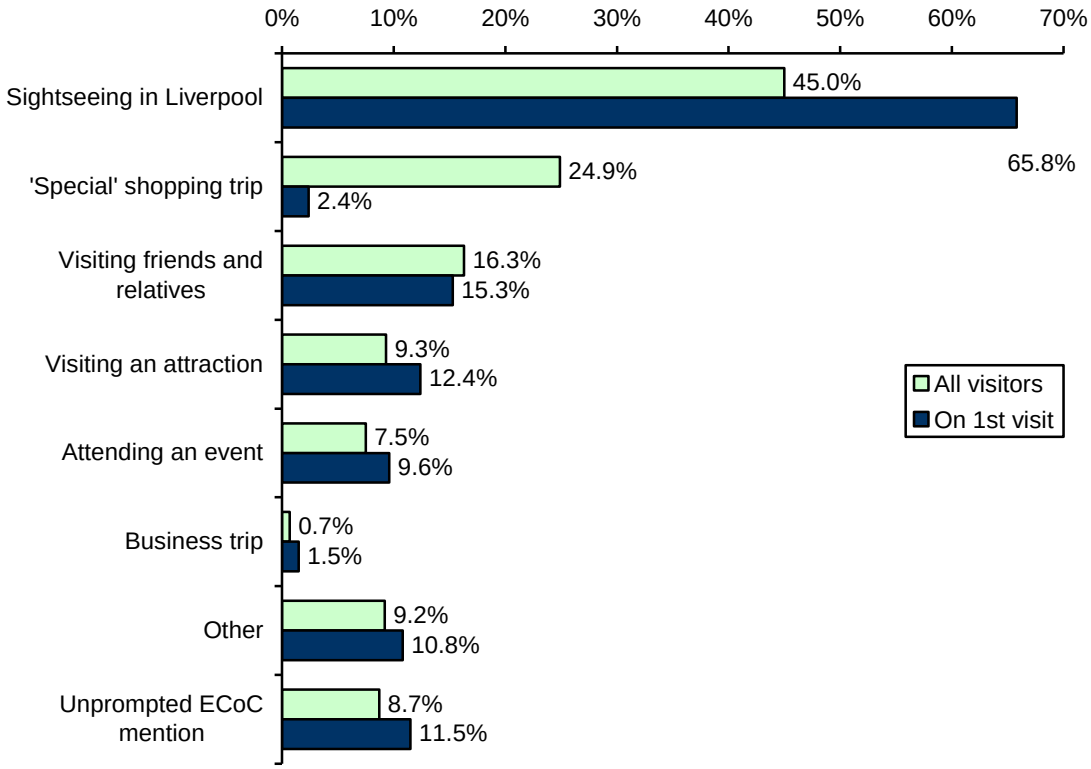
The first consideration is to look at the level of influence the Liverpool ECoC has had on visitors during 2008.

3.2.1. Reasons for visiting Liverpool - unprompted

The first part of the questionnaire asked respondents to indicate their reason for visiting Liverpool. This was based on a showcard of typical visitor reasons; at this stage the Liverpool ECoC was not mentioned – although there was a category for interviewers to tick if at this stage in the survey any respondents mentioned this unprompted, as a verbatim comment.

[24] The Cambridge model is the predecessor of STEAM in the Liverpool city region.
[25] Annual Survey of Hours and Earnings – a survey run by ONS, with data available by broad industry sectors and to NUTS3 geographic level.

Figure 7: Responses of all visitors to the question 'what are your reasons for visiting Liverpool?'



Looking at the responses of all visitors, visitors were *most* likely to mention a sightseeing visit (45%), a 'special' shopping trip (25%),[26] or visiting friends or relatives (16%). At this stage in the survey, some 9% of all visitors gave an unprompted mention of the Liverpool ECoC.

In figure 7 the reasons for visitation by first-time visitors to the city are also shown separately. The results show that first-time visitors were:

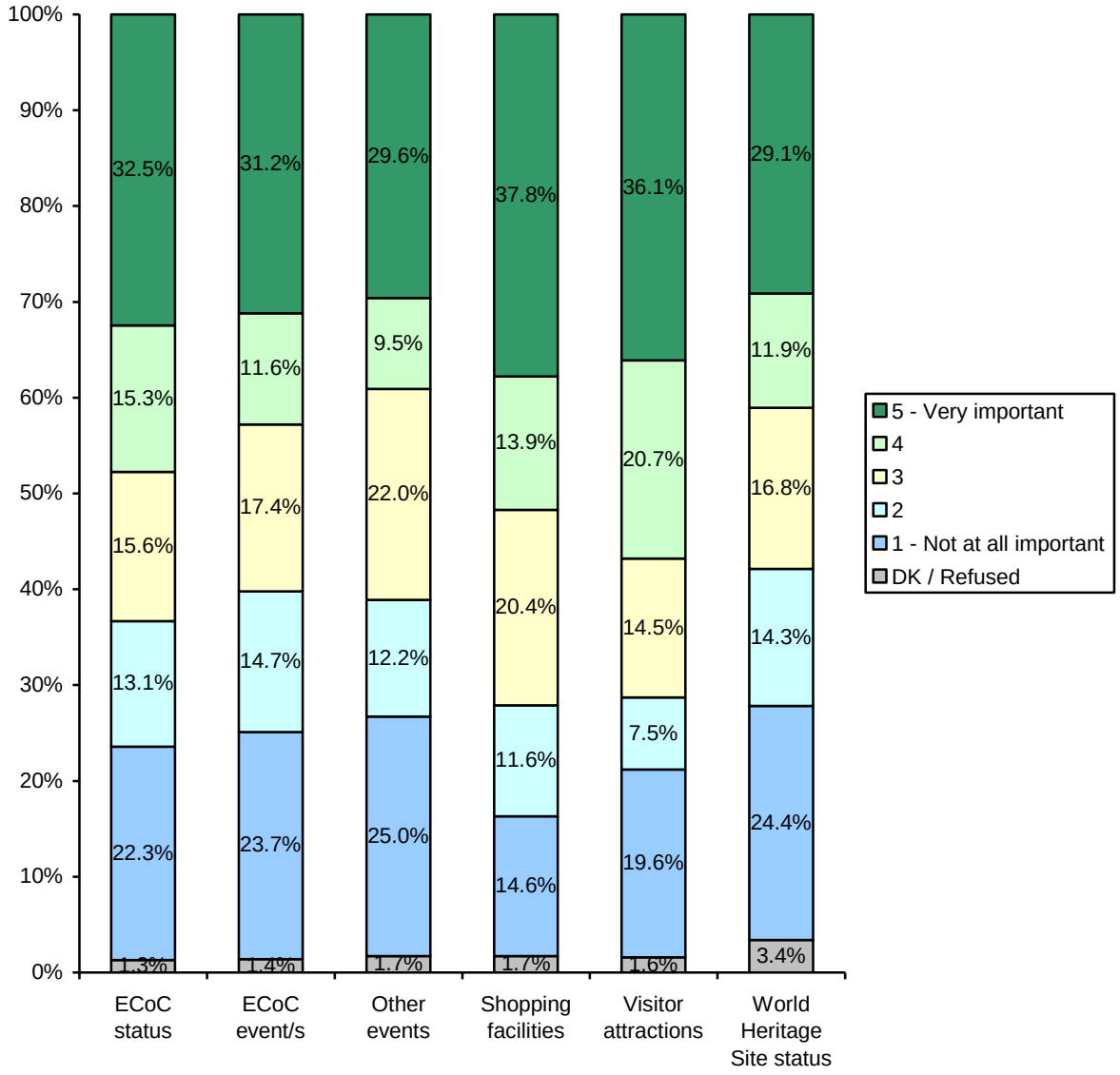
- Slightly more likely to mention the Liverpool ECoC spontaneously (12%).
- Significantly more likely to mention a sightseeing visit (66%) or one of the city's attractions (12%).

3.2.2. Reasons for visiting Liverpool - prompted

To gain more insight into potential reasons for visiting during 2008, respondents were asked how *important* a number of factors were in influencing their visit. This included the Liverpool ECoC, as well as other reasons common to a key tourism destination.

[26] Phase one of the large-scale Liverpool ONE retail and leisure development opened in May 2008, which may have been partially responsible for the high volume of respondents identifying a 'special shopping trip' as a reason for their visit.

Figure 8: Responses to the question 'how important were the following factors in influencing your visit to Liverpool?' – all visitors



Almost half of all visitors surveyed in 2008 (48%) indicated that the Liverpool ECoC had been of some importance in making the visit, although it is clear from the responses of interviewees that multiple factors were at work in driving the visit. Some variation might be expected here depending on the origin of the respondent, and this is considered in a later section of these findings.

Crossover is demonstrated between many of these reasons for visiting. For example, of those who indicated that the Liverpool ECoC status was important in influencing the visit, the following were *also* important factors:

- Liverpool 08 events (83%) - suggesting that even if people had not been directly attending or engaging in these events, the media or other coverage of events had encouraged the visit (compare this with the numbers from Figure 7 showing 7.5% of all visitors were attending an event as part of their visit).
- Other events (59%).
- Shopping facilities (51%).
- Visitor attractions (90%).

- World Heritage Site status (74%).

Figure 9: Responses to the question 'how important were the following factors in influencing your visit to Liverpool?' – first-time visitors only

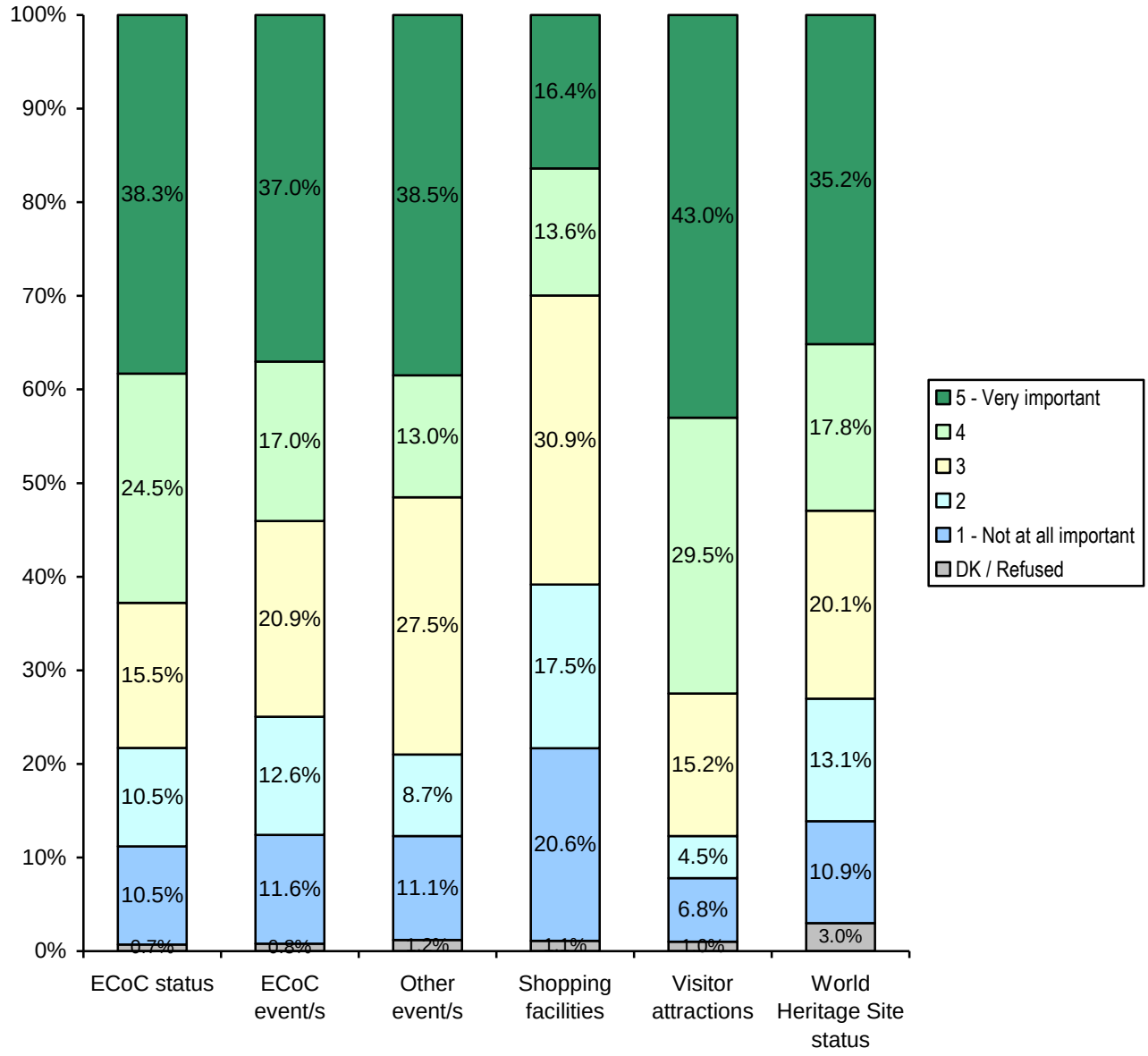


Figure 9 displays the responses of first-time visitors only, to see if their drivers showed significant variation from the overall visitor market. The results show that first-time visitors were significantly *more* likely to rate the Liverpool ECoC as being an important factor behind their visit – but they were also more likely to rate all aspects of the Liverpool visitor offering as being of greater importance. The only exception to this was 'shopping facilities', perhaps reflecting the greater emphasis on leisure activities by first-time visitors.

Figure 10 shows the proportion of first-time visitors who rated each element as being important or very important, against the responses given by all visitors:

Figure 10: Proportion of first-time visitors against all visitors in rating the importance of elements of influence

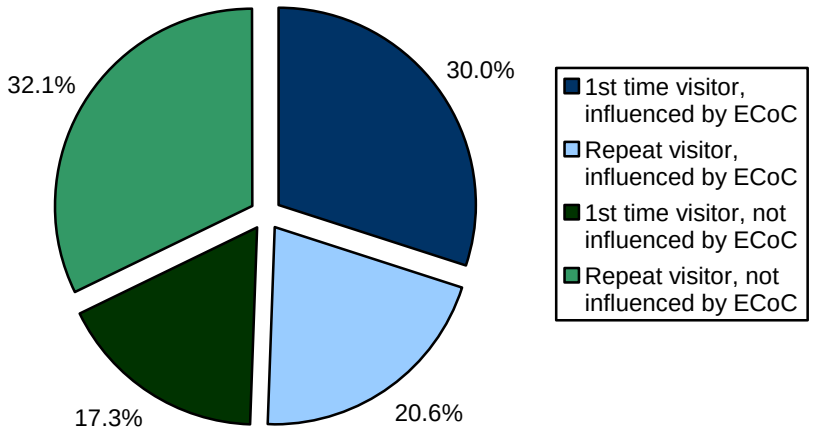
% rating as 'important' or 'very important'	ECoC status	ECoC event/s	Other events	Shopping facilities	Visitor attractions	World Heritage Site status
First-time visitors	62.8%	54.0%	51.5%	29.9%	72.5%	53.0%
All visitors	47.8%	42.8%	39.1%	51.7%	56.7%	41.1%

.

3.2.3. The overall influence of the Liverpool ECoC

Drawing together these two questions, together with any other verbatim mentions, it is possible to estimate that just over half of all survey participants were influenced in their visit to Liverpool by the Liverpool ECoC (51%), rising to 63% amongst those on their first visit. Figure 11 shows this broken down in terms of four key visitor components.

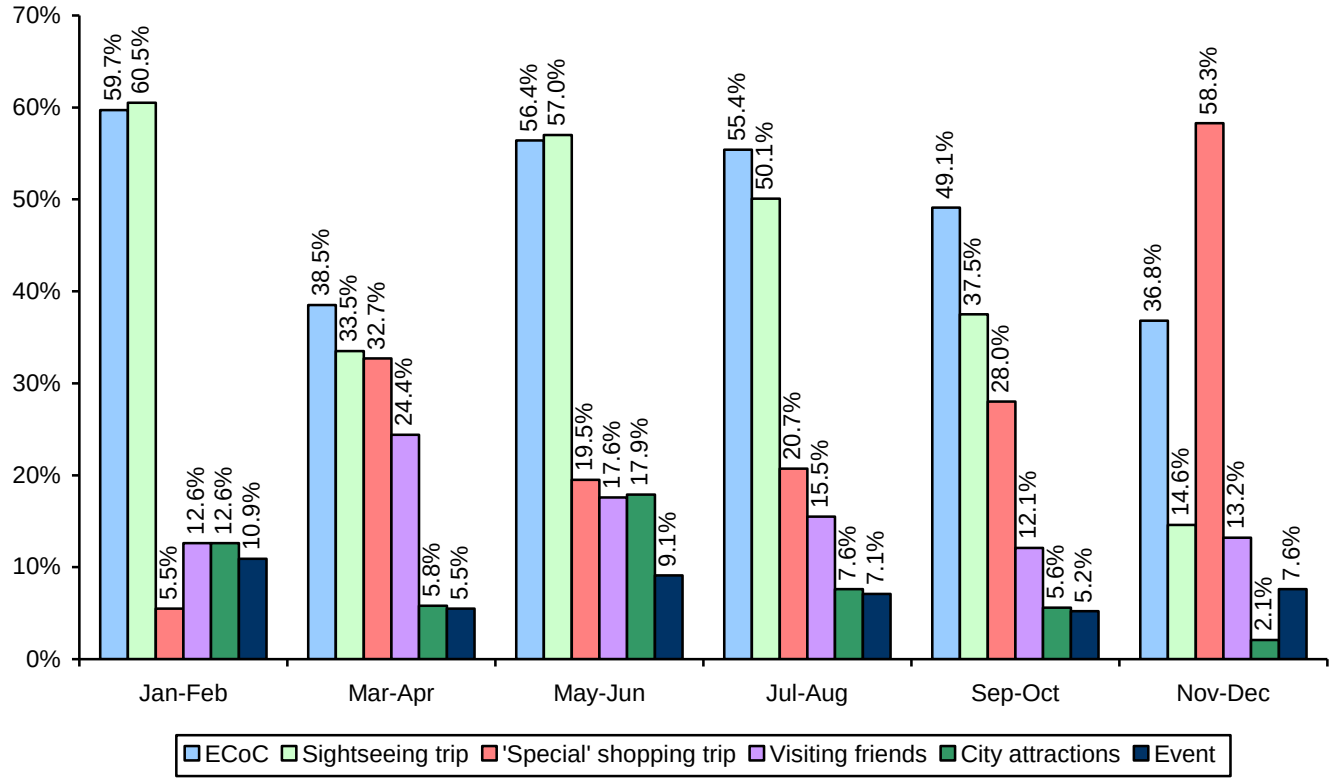
Figure 11: Key segments showing the Liverpool ECoC influence



3.2.4. Influence variance throughout 2008

Across the course of the year, the level of influence of the different components might be expected to change, and the chart below is a projection as to what this means for key visitor motivations for visiting the city across 2008.

Figure 12: Reasons for visiting Liverpool, shown by month of visit



Notice that the percentages represent the proportion of visitors surveyed during each bi-monthly period; for any change in actual numbers of visits, this data has to be overlayed onto STEAM volume results for 2008 (see Figure 13).

It should be noted that these categories of response are *not* mutually exclusive.

Figure 13: Reasons for visiting Liverpool, shown by month of visit – overlayed on STEAM volume[27]

	Number of Visits by bi-monthly period					
	Jan-Feb	Mar-Apr	May-Jun	Jul-Aug	Sep-Oct	Nov-Dec
EcoC	2,498,000	1,854,000	3,037,000	3,708,000	1,995,000	930,000
Sightseeing trip	2,533,000	1,617,000	3,072,000	3,346,000	1,531,000	368,000
Special' shopping trip	229,000	1,582,000	1,053,000	1,384,000	1,144,000	1,474,000
Visiting friends	528,000	1,177,000	948,000	1,034,000	493,000	333,000
City attractions	528,000	281,000	965,000	508,000	229,000	53,000

[27] Please note that in order to prevent the misrepresentation of data, all except the STEAM totals have been rounded to the nearest 100.

Event	457,000	264,000	491,000	473,000	211,000	193,000
STEAM totals	**4,186,833**	**4,815,151**	**5,388,610**	**6,692,302**	**4,063,914**	**2,526,482**

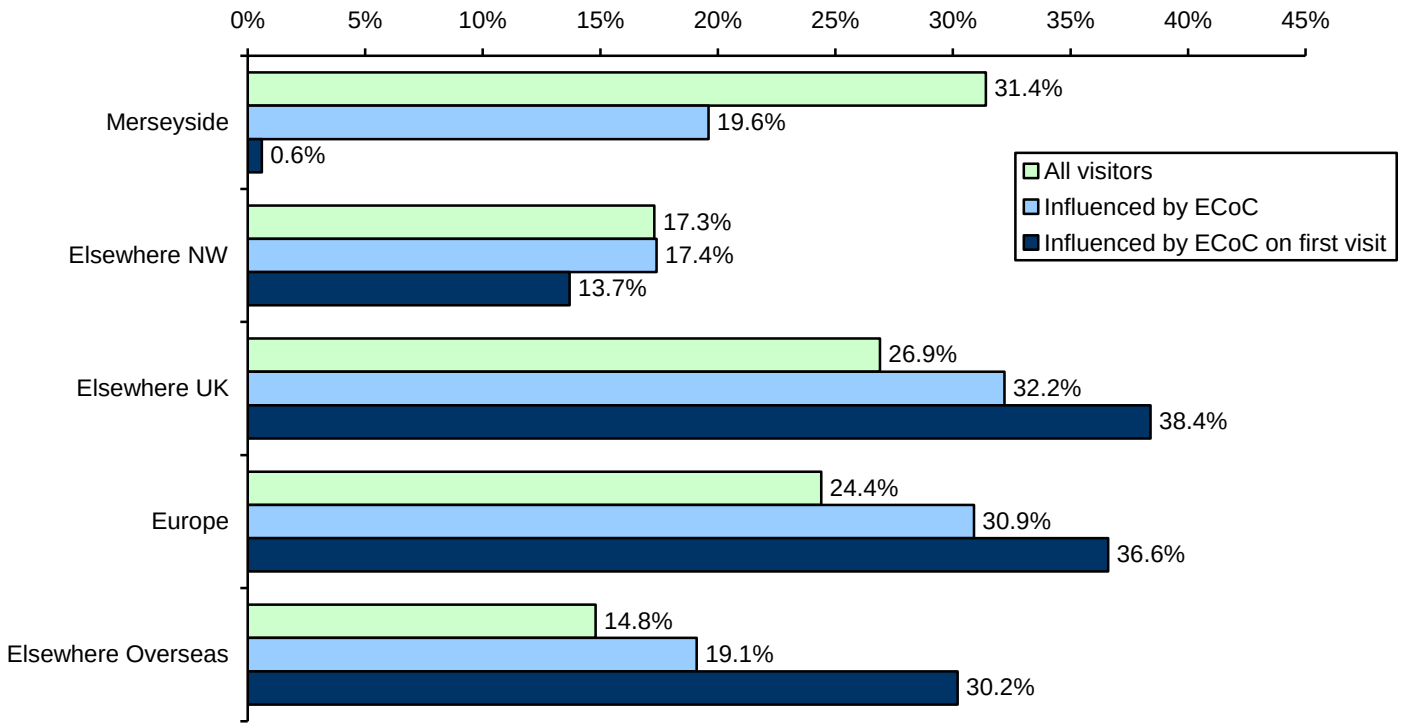
This suggests that – other than a dip in the Easter period – the Liverpool ECoC remained a dominant influence for visits throughout the year, albeit with a noticeable fall-off towards the latter period, this perhaps being a strong indicator of the changing economic climate.

By contrast 'special shopping trips' were growing as an influence throughout the year. Besides the growth towards the Christmas retail period, this is also expected to be as a result of the phased opening of the Liverpool ONE retail and leisure development.

3.3. Overall visitor profile

3.3.1. Where do visitors come from?

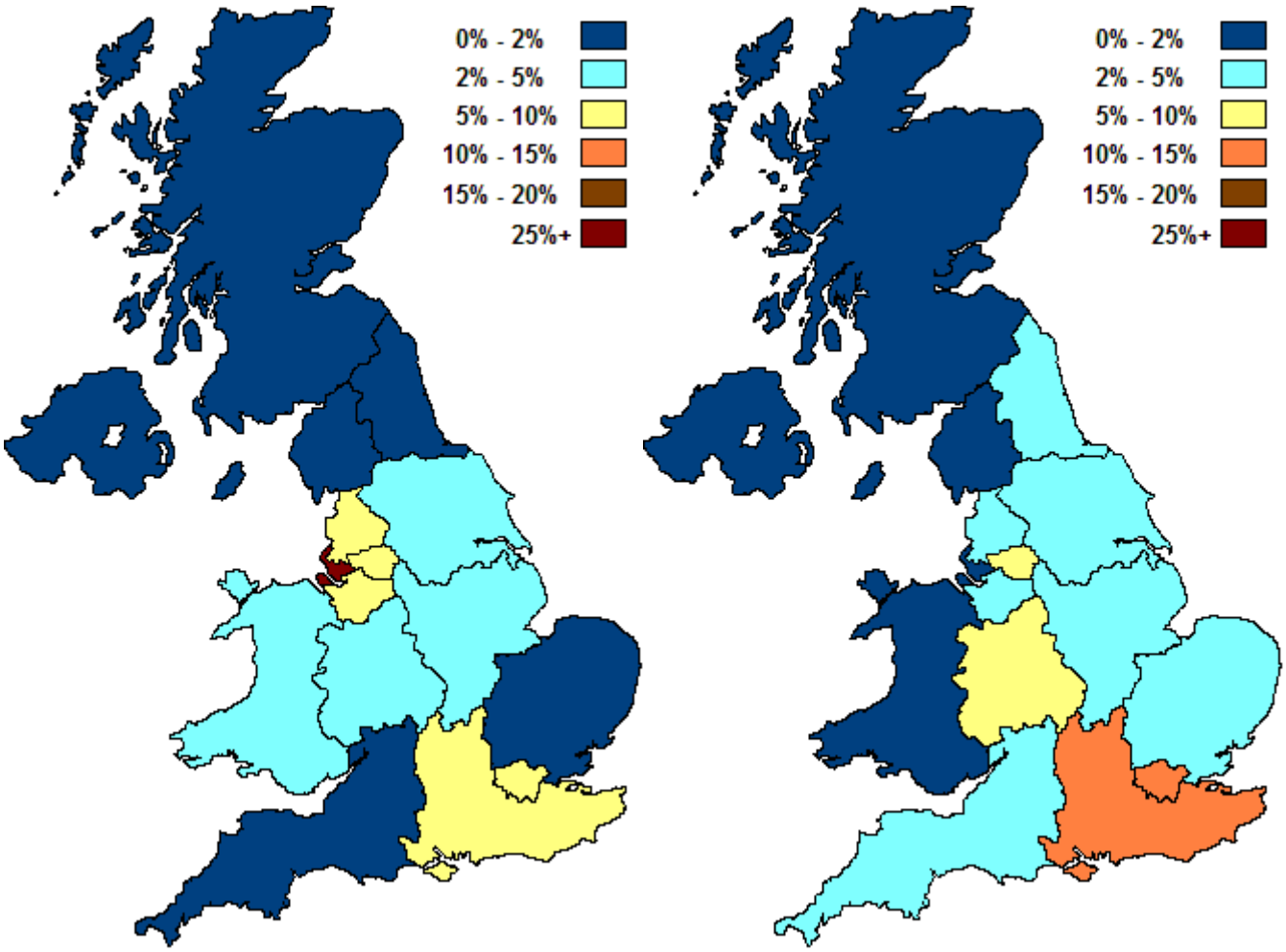
Figure 14: Origin of visitors by key segments



At first glance, the data in Figure 14 shows a wide geographic reach in terms of visitors to Liverpool during 2008. 20% of ECoC influenced visitors were local to the city region (compared to the total visitor market of 31%), whilst 50% of all ECoC influenced visitors were from outside the UK (against 24% of the total visitor market). Indeed, the data suggest the overseas market was stronger than the UK domestic market for the city.

This is accentuated even further amongst first-time visitors who were influenced by the Liverpool ECoC.

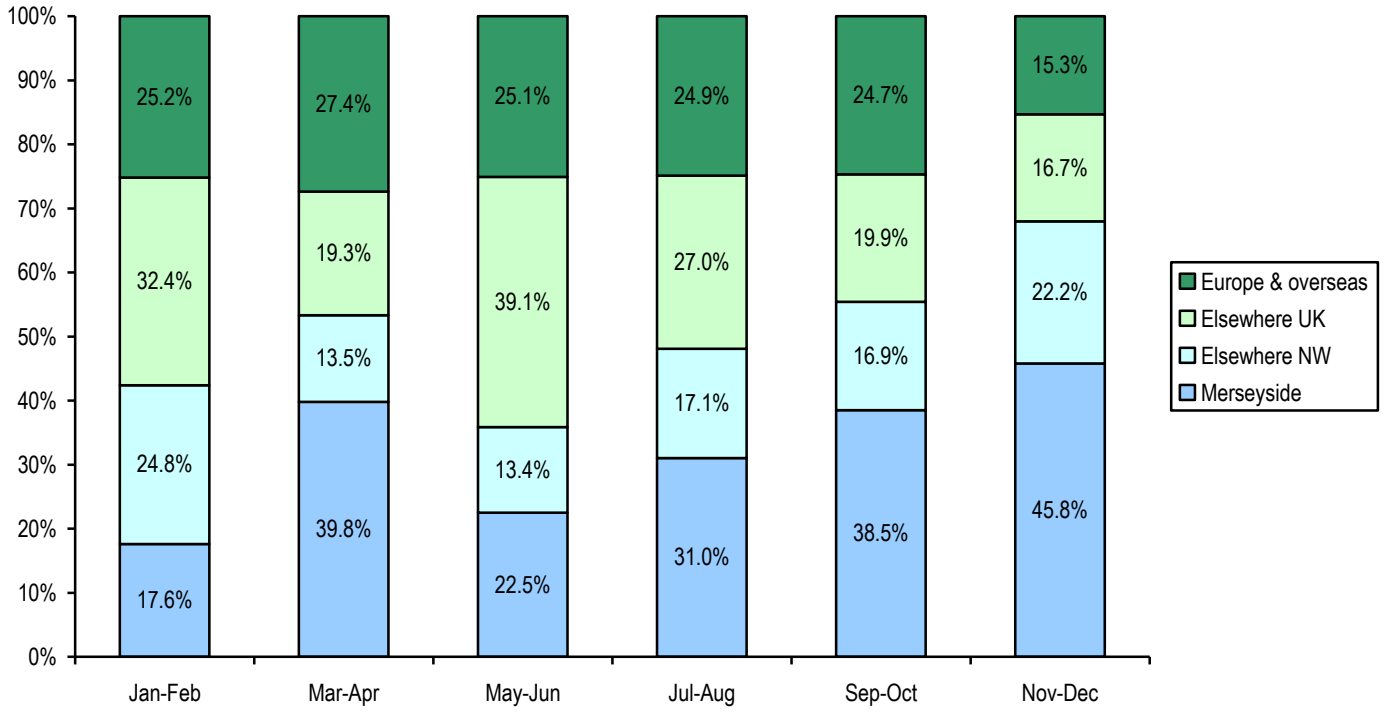
Figure 15: Comparison of origin of all visitors (left) with origin of first-time visitors (right), influenced by the Liverpool ECoC



Within the UK (other than the local geographies), a significant number of visits originated from London and the South East of England. This market may have been buoyed in this year not just by the Liverpool ECoC but also by improved rail links with London (although it was not until late in the year that the faster 'West Coast' service was launched by Virgin Trains).

One factor which should be kept in mind is that the profile of visits may reflect both traditional seasonal patterns but also the changing global and national economic situation, including direct impacts on consumables and services (which, in part, support tourism). This is particularly salient later in 2008, when fuel prices rose and a number of airline companies went 'bust'.

Figure 16: Origin of all visitors by month

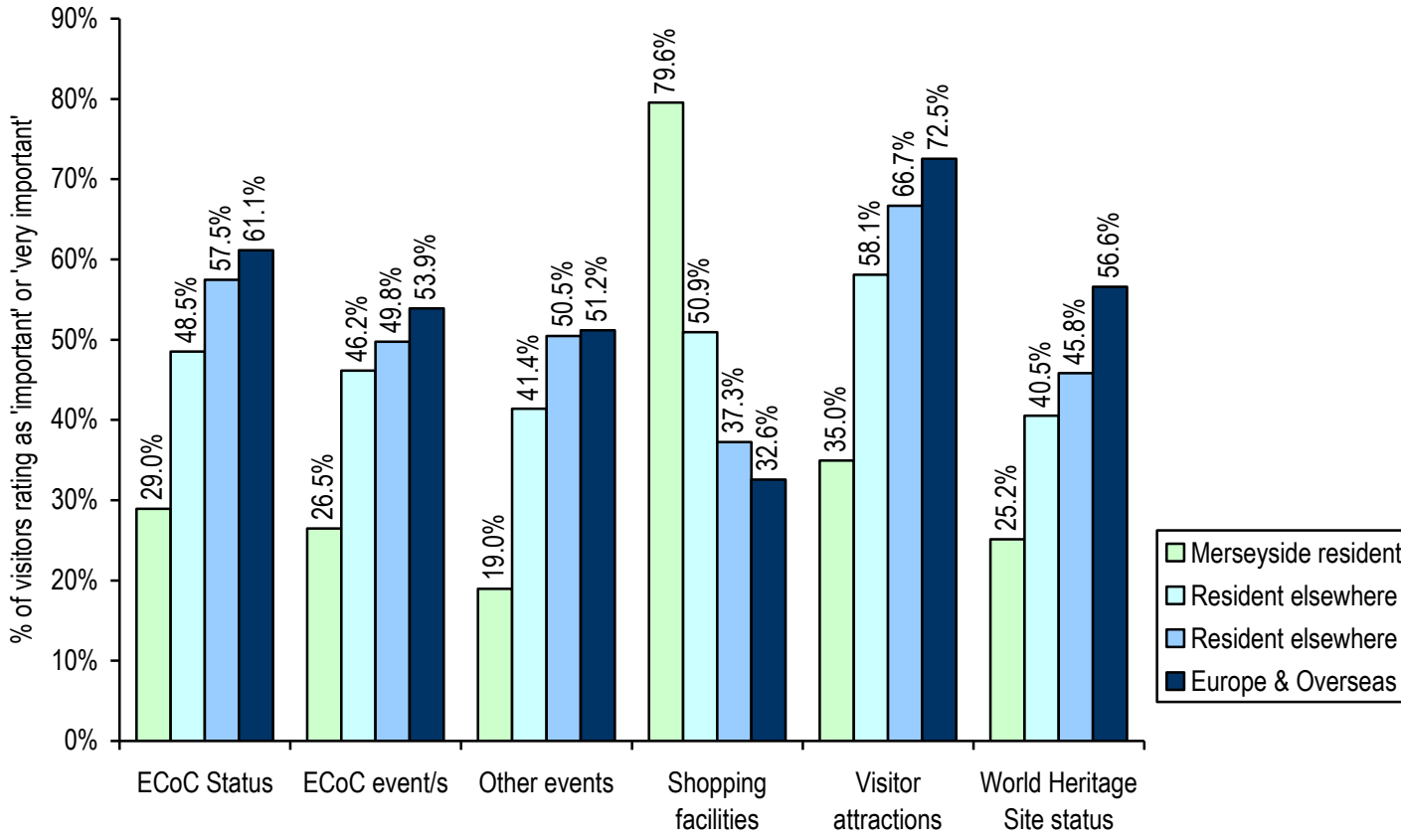


The pattern shown in Figure 16 is suggestive of increased local visits across the course of the year, although, barring the final quarter, overseas visitors appeared to consistently account for a quarter of all visits. Again, it is *possible* that this last quarter is a reflection of the economic mood.

3.3.2. Visitor motivations by origin

It might be expected that visitors from further afield would have levels of expectation and motivations that would be different from the more local visitors. Figure 17 presents the proportion of visitors who indicated that particular key drivers were of some importance in the decision to make a visit to Liverpool.

Figure 17: Influence of different factors, segmented by origin of visitor



As can be seen, the Liverpool ECoC was seen as far more of a factor driving visits to Liverpool amongst those from further afield than with local visitors – it was mentioned by 58% of UK visitors and 61% of those from overseas, but by just 29% of Merseyside residents.

For those visitors travelling some distance, the city's attractions recorded the highest level of mentions as being an 'important' or 'very important' factor behind the visit. Of course, this should be viewed in the light not just of the range of attractions Liverpool offers, but also the wide range of special events being held within venues and public spaces during 2008.

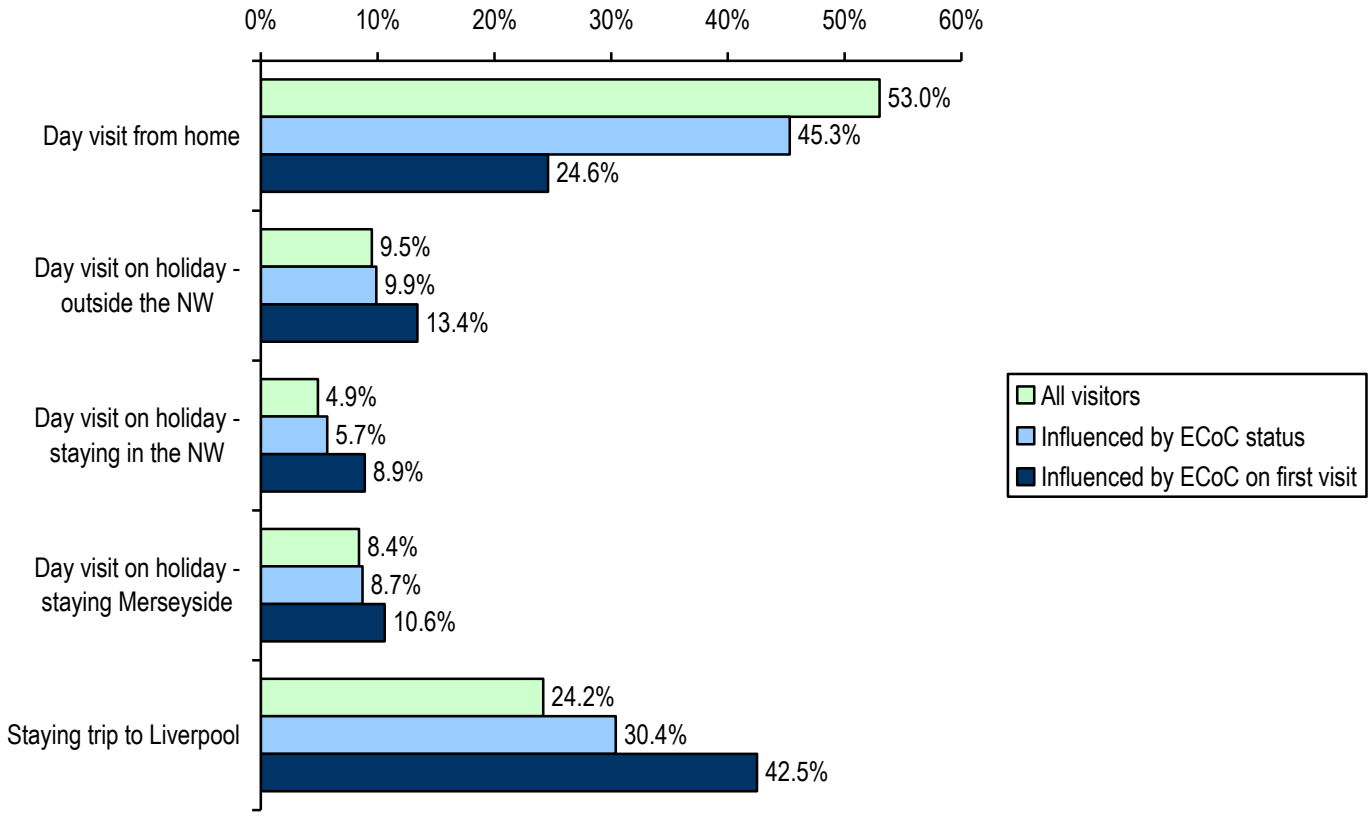
For local visitors the shopping facilities were a dominant factor in driving visits, being indicated by 79% of this entire group.

Overseas visitors appeared to place a much higher value on the city's Wold Heritage Site status than any other group; this was mentioned by 57% of this group.

3.3.3. What was the nature of the visit?

As part of the visitor survey, visitors were asked what *type* of visit they were on.

Figure 18: Responses to the question 'which of the following best describes your visit?' profiled by key segments



In general, visitors influenced by the Liverpool ECoC tended to have a higher propensity to be staying visitors than that of all visitors to the city during this period; 39% of such visitors were on a staying visit in the city region, compared to 33% of all visitors.

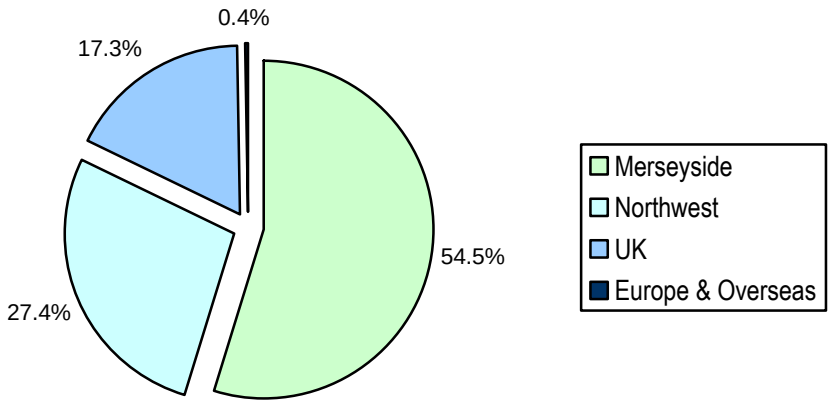
It should be noted that those who were both influenced by the Liverpool ECoC and were on their first visit were *significantly* more likely to be staying visitors than those who had visited before (53%).

Again using the 2008 STEAM data and these raw proportions from Figure 18, the following would be the estimated number of visits influenced by the Liverpool ECoC which fell into each of the visit categories.

- Day visits from home 6,351,000
- Day visits from those staying outside the North West 1,394,000
- Day visits from those staying within the North West 794,000
- Day visits from those staying elsewhere in Merseyside 1,217,000
- Staying visits in Liverpool 4,269,000

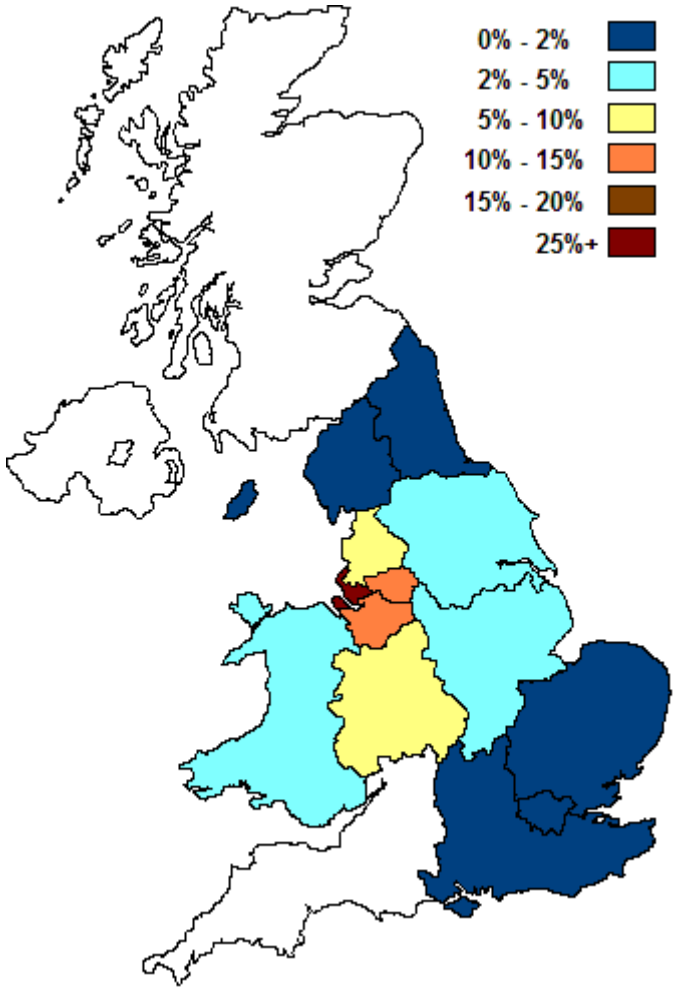
3.3.4. Day visits

Figure 19: The origin of day visitors



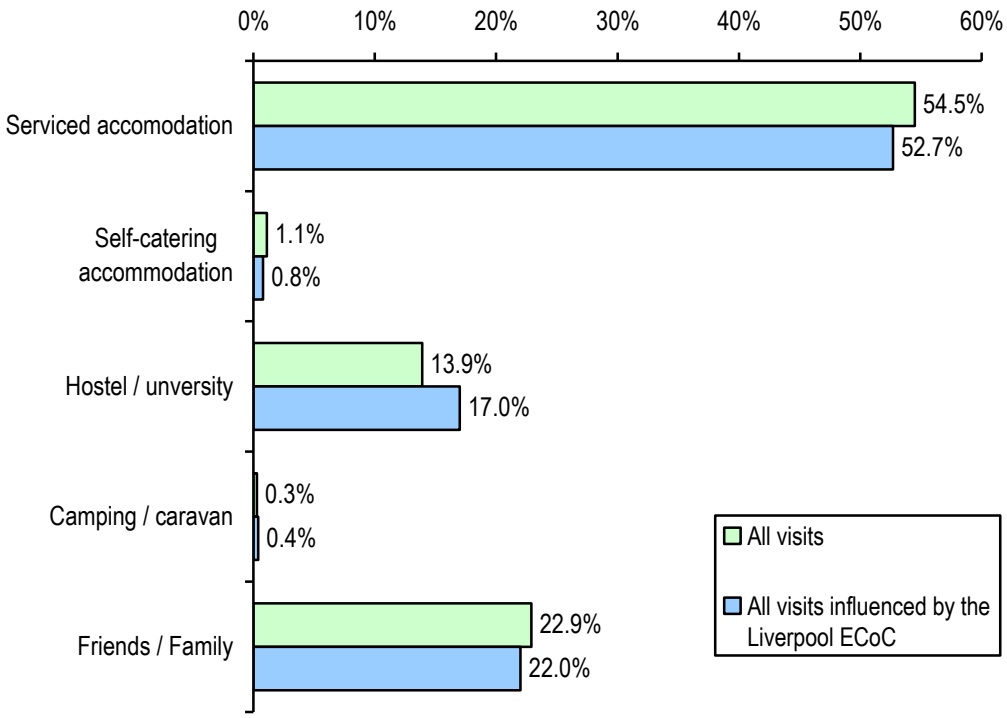
The day visitor market, as might be expected, is dominated by those from nearby locations, with some two thirds being from Merseyside districts into Liverpool (see Figures 19 and 20).

Figure 20: The origin of day visitors – UK breakdown



3.3.5. Staying visits in Liverpool

Figure 21: Accommodation type used by those staying in Liverpool



The average length of stay by these visitors was **3.8 nights** for all visits, but slightly shorter at 3.5 nights for those influenced to visit by the Liverpool ECoC.

Figure 22: Origin of staying visits in Liverpool

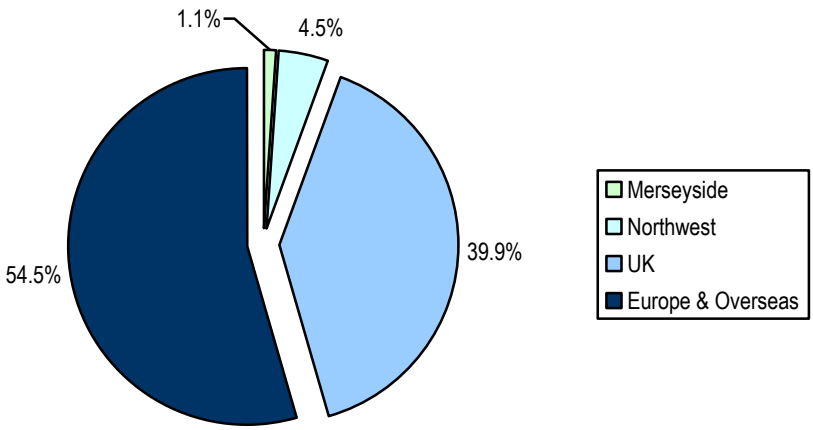
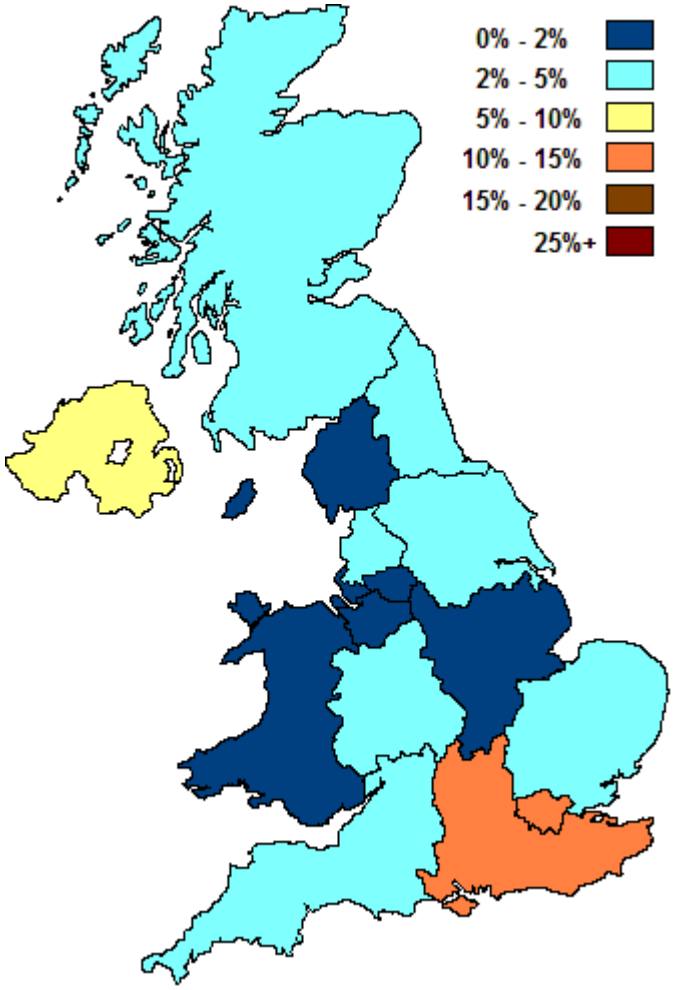
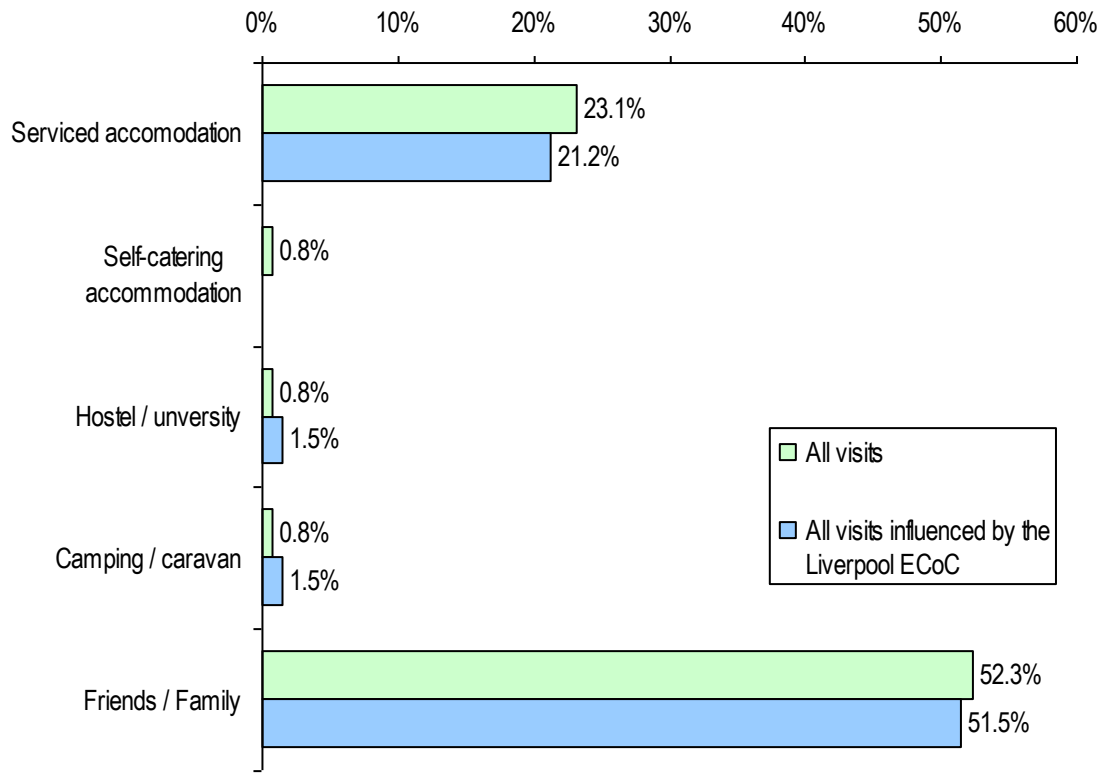


Figure 23: Origin of staying visits in Liverpool – UK breakdown



3.3.6. Staying visits in Merseyside

Figure 24: Accommodation type used by those staying in Merseyside (not including Liverpool)



Location of accommodation:

- Halton 3%
- Knowsley 9%
- Sefton 58%
- St.Helens 8%
- Wirral 22%

The majority of these visits appeared to be staying in Sefton (58% - split between those staying in paid accommodation in Southport and those with friends/family elsewhere) and the Wirral (22%). The average length of stay by these visitors was **5.9 nights** – although this was slightly shorter at 5.4 nights for those who were influenced to visit by the Liverpool ECoC.

Average length of stay by district:

- Halton 6.0
- Knowsley 5.0
- Sefton 6.5
- St.Helens 5.9
- Wirral 5.3

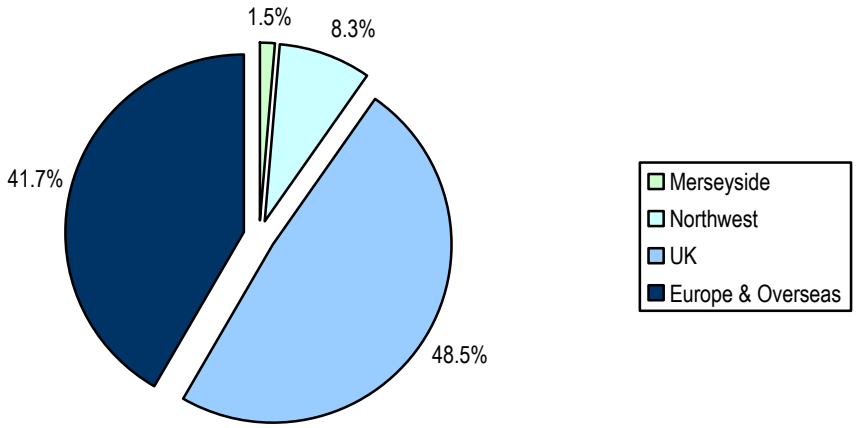
This would give the following number of staying nights generated in each district and associated staying nights in serviced accommodation:[28]

Figure 25: Staying nights generated, by district

District	Visits generated	Nights generated	Nights in serviced accommodation
Halton	30,859	166,640	35,328
Knowsley	110,146	594,788	126,095
Sefton	704,222	3,802,796	806,193
St.Helens	101,815	549,801	116,558
Wirral	270,275	1,459,483	309,410

Thus, when we look at the impact on the wider city region, ECoC generated some 704,222 visits for Sefton and 270,275 visits for Wirral, with other districts recording a significantly lower level of impact. For these two areas, this equated to 3.8m and 1.5m actual staying visitor nights respectively.

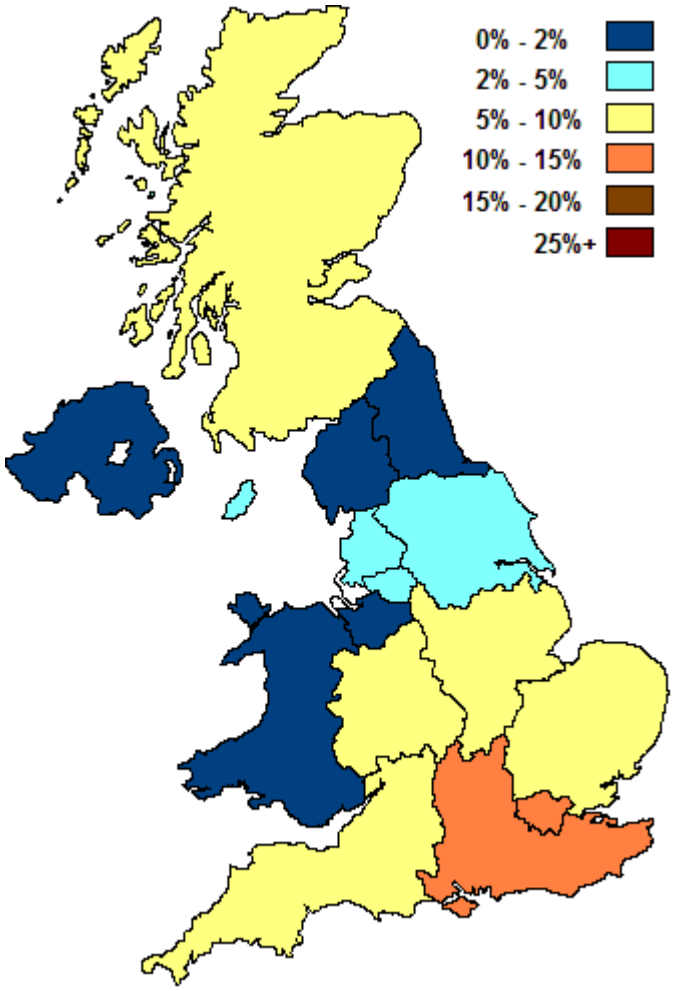
Figure 26: Origin of visitors influenced by the Liverpool ECoC staying in Merseyside (excluding Liverpool)



A higher proportion of visits from those staying elsewhere in Merseyside were from 'Other UK visitors' - 49% (see Figure 26), compared to 40% of those staying in Liverpool itself (see Figure 22).

[28] Please note due to lower levels of confidence with some of the subsamples involved, the proportion of serviced accommodation used at district level is applied as a constant.

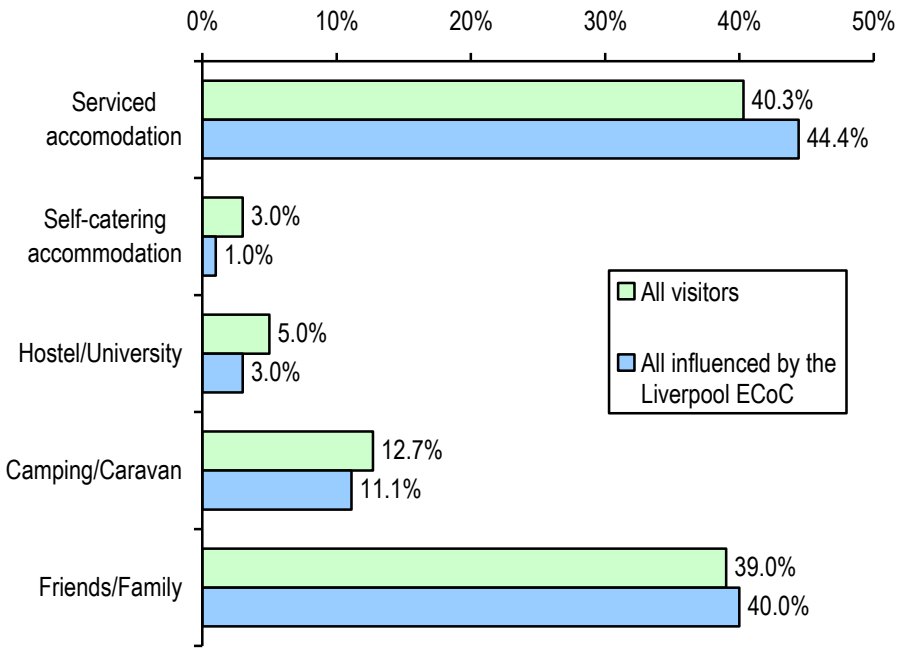
Figure 27: Origin of visitors staying elsewhere in Merseyside



3.3.7. Staying visits in the North West

Although the core visitor survey data is used to provide the *proportions* of visitors who were staying elsewhere in the North West, greater detail is supplied through the survey which was undertaken by the Northwest Regional Development Agency (NWDA).

Figure 28: Accommodation type used by those staying elsewhere in the North West



The location of accommodation used by those influenced to visit the North West by the Liverpool ECoC, and staying within the North West, was as follows:

- Cheshire 33%
- Cumbria 5%
- Greater Manchester 29%
- Lancashire 34%

The average length of stay by these visitors in each sub-region showed significant variation and is shown below:

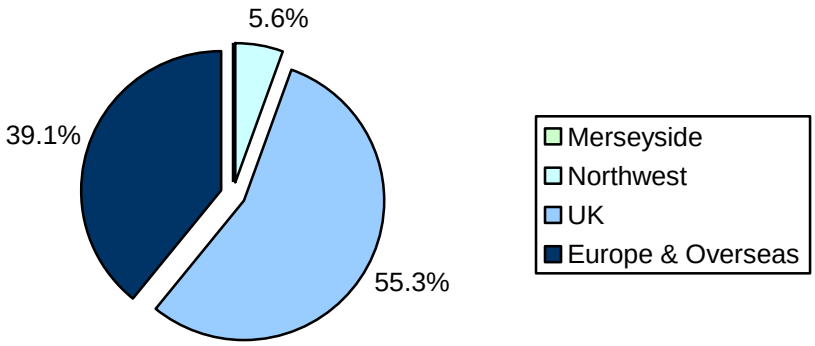
- Cheshire 4.8 nights
- Cumbria 6.5 nights
- Greater Manchester 6.0 nights
- Lancashire 8.4 nights

This would give numbers of staying nights generated in each district and of associated staying nights in serviced accommodation, as shown in Figure 29.

Figure 29: Visits, nights and nights in serviced accommodation generated, profiled by area in which staying nights are generated

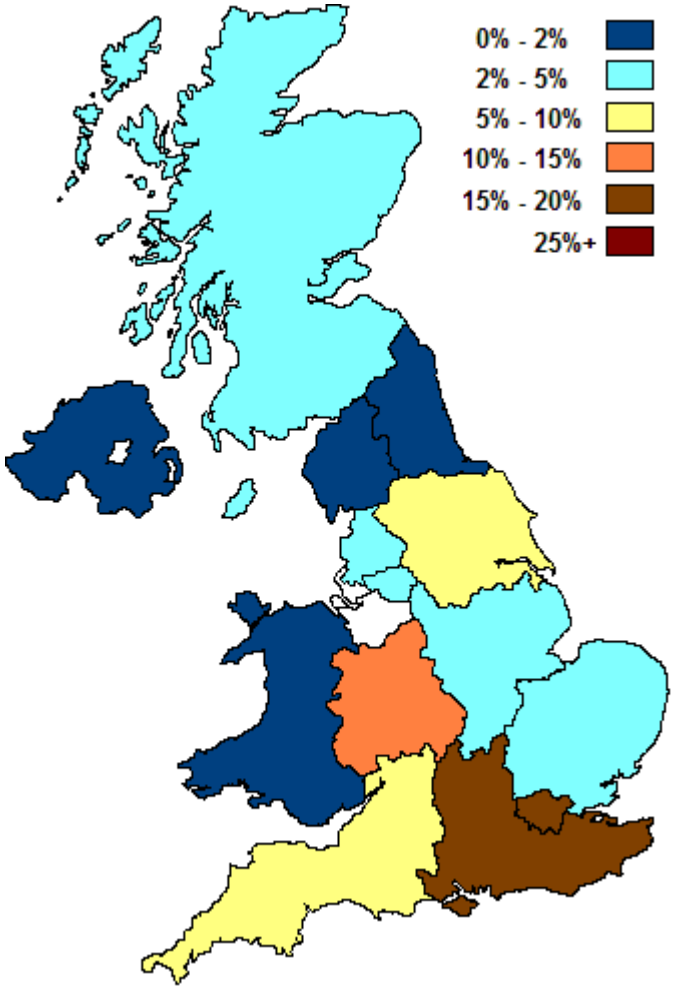
Sub-region	Visits generated	Nights generated	Nights in serviced accommodation
Cheshire	261,988	1,257,541	558,348
Cumbria	39,695	258,018	114,560
Greater Manchester	230,232	1,381,389	613,337
Lancashire	269,927	2,267,384	1,006,719

Figure 30: Origin of visitors staying in North West England (excluding Merseyside) influenced by the Liverpool ECoC



A large proportion of the visits from those staying elsewhere in the North West came from 'other locations in the UK' (55%) (see Figure 30), a significant number of these visitors coming from locations in London and the South East of England (see Figure 31).

Figure 31: Visitors staying in North West England (excluding Merseyside) influenced by the Liverpool ECoC, profiled by area of UK origin (as a percentage of all origins)



It is important to remember that, in addition to the origin concentrations shown in Figure 31, 39% of visitors influenced by the Liverpool ECoC and staying in North West England, but outside Merseyside, originated from outside the UK, as indicated in Figure 30.

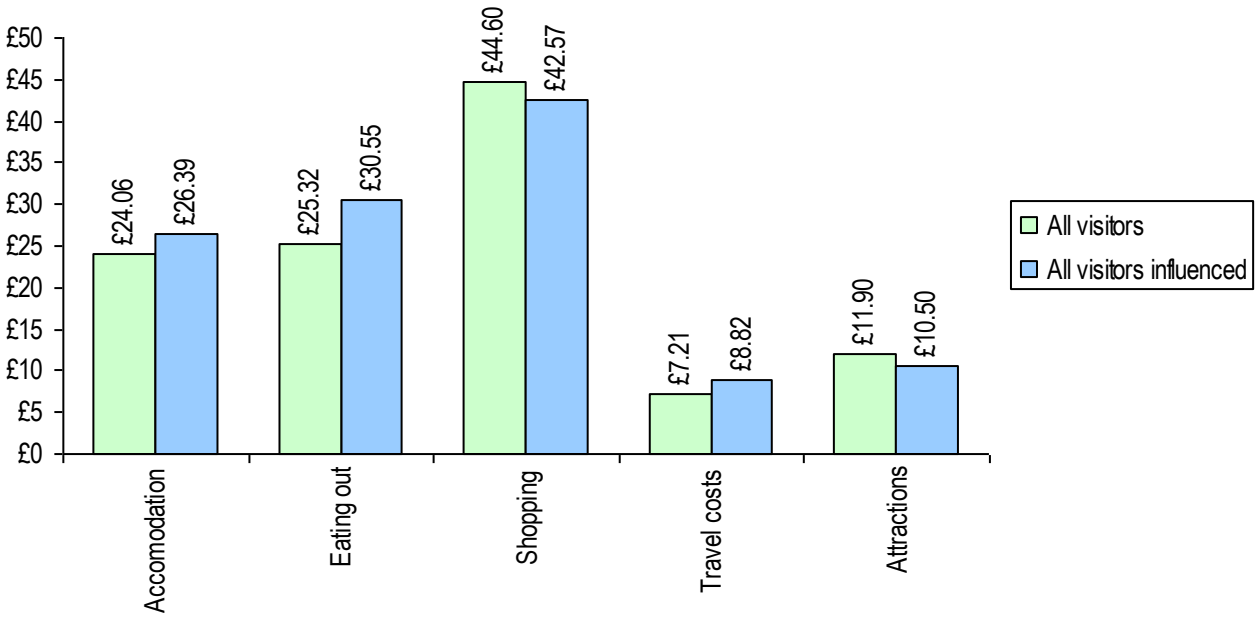
3.4. Visitor spend

The visitor spend data here is presented as it emerged from the visitor survey, without adjustment except for the removal of 'extreme outliers'.

3.4.1. Overall patterns of spend

The chart below displays the spend levels by key visitor categories.

Figure 32: Responses to the question 'how much did you spend in the course of this visit (per person)?'



It would appear that there was a small difference, in terms of spend, between those who were influenced and those who were not influenced by the Liverpool ECoC. As an overview:

- All visitors to Liverpool spent £113.66 per person in the course of their visit.
- Those who were influenced by the Liverpool ECoC spent £118.98 per person, and had a slightly higher spend on accommodation and eating out.

What may be more relevant is to analyse the spend of those influenced to visit Liverpool by the ECoC according to the type of visitor that they were. Figures 33 and 34 show this.

Figure 33: Spend per person of Liverpool ECoC-influenced visits, by type of spend and type of visit[29]

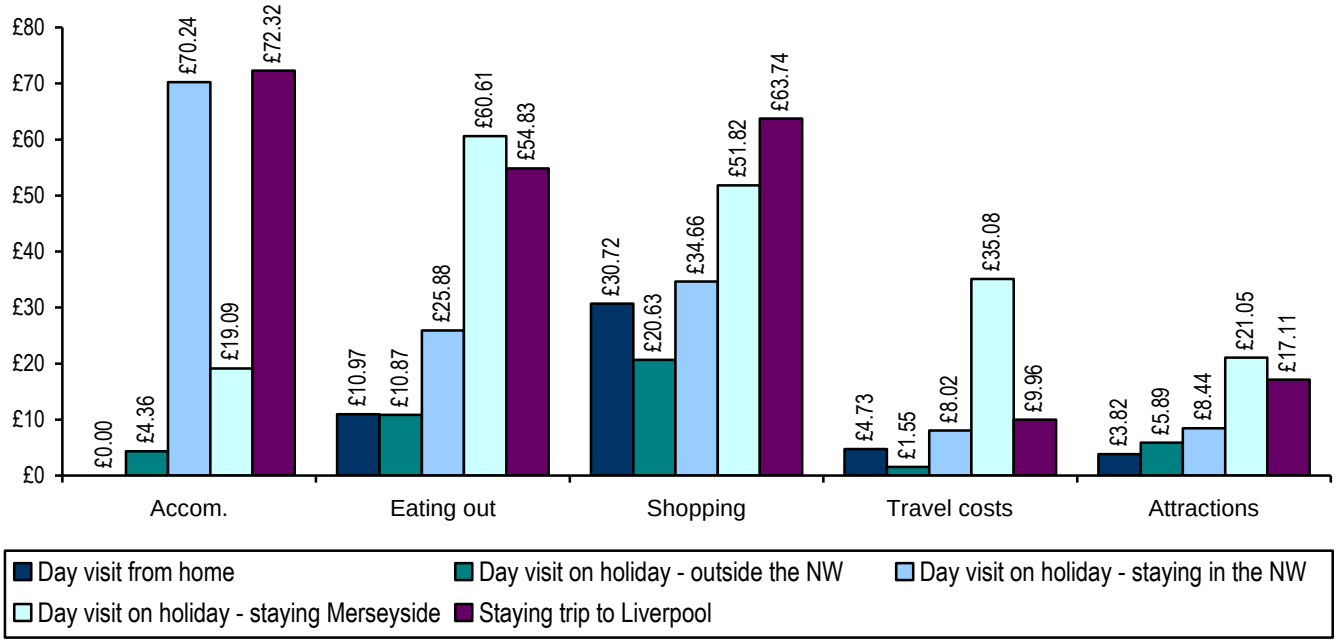


Figure 34: Spend per person of Liverpool ECoC-influenced visits, by type of visit

Type of visit (all those influenced by the Liverpool EcoC)	Per person spend
Day visit from home	£50.24
Day visit on holiday - outside the NW	£43.30
Day visit on holiday - staying in the NW	£147.24
Day visit on holiday - staying in Merseyside	£187.65
Staying trip to Liverpool	£217.96

[29] Please note that the data for the 'Staying in the Northwest' spend comes from the North West visitor survey.

4. Tourism in the Liverpool City Region in 2008

The data for STEAM 2008 for the Liverpool city region was released in mid-January 2010, enabling final analysis of this study to be completed.

4.1. About STEAM

To estimate the volume and value of tourism, the North West region uses the STEAM model. The model is widely, thought not universally, used across the UK.

STEAM relies on local-level data to drive the estimates, principally:[30]

- Accommodation stock.
- Local occupancy surveys.
- Visits to attractions/events.
- Visits to tourist information centres.
- Hotel occupancy on Merseyside.
- Conferences on Merseyside.

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 three 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 contains a certain amount of intra-city region tourism.

A particular accuracy with 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 the North West, the Northwest Regional Development Agency has been working with Global Tourism Solutions UK (who own and operate the STEAM model) to improve the reliability and accuracy of the data.

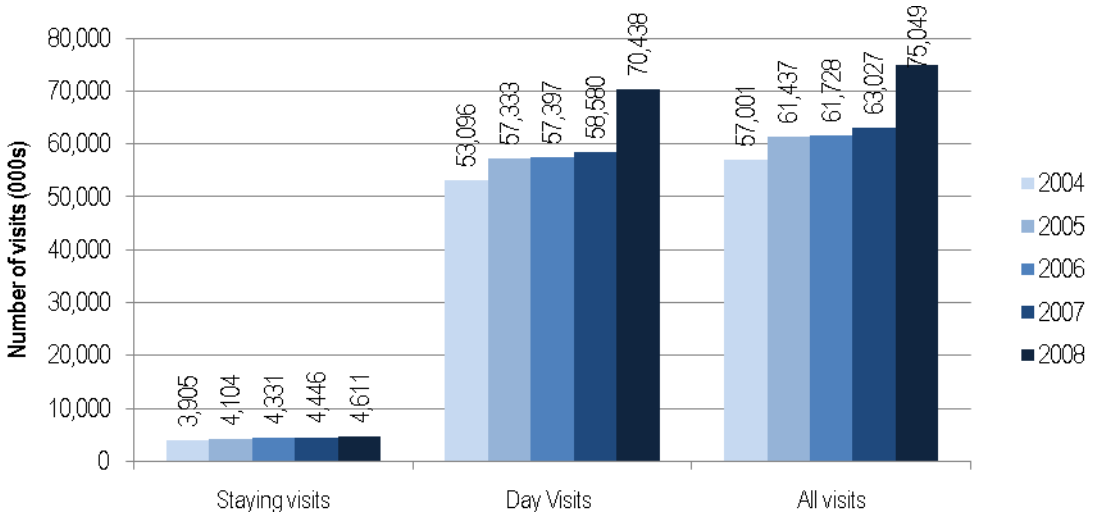
Although there is reasonable accuracy surrounding the number of Staying Visitors as provided by STEAM (which can be verified by local hotel occupancy data) there is lower certainty around Day Visitor volume, much of the basis for which currently comes from non-local modelling. The 2007 Northwest Day Visitor Survey went some distance towards improving the understanding in this regards; however although it was able to provide estimates of those on a day visit from home, it did not enable analysis of the numbers of those on a day visit from a holiday base. This will be rectified by the 2009 Northwest Day and Staying Visitors Survey which will report its results during 2010, improving the accuracy of the 2009 STEAM results and allowing potential reverse modelling of STEAM results for earlier years.

4.2. STEAM results from 2004 to 2008

Figure 35 shows figures for the Liverpool city region area and plots what changes have occurred on a yearly basis. At this stage it is not possible to say that the growth in volume between 2007 and 2008 is due to the Liverpool ECoC. What is shown is merely the total estimated numbers of tourism visits within the city region which will be used as a base for further calculations.

[30] Notice that STEAM uses a further range of inputs, although the components which influence the model most are listed here.

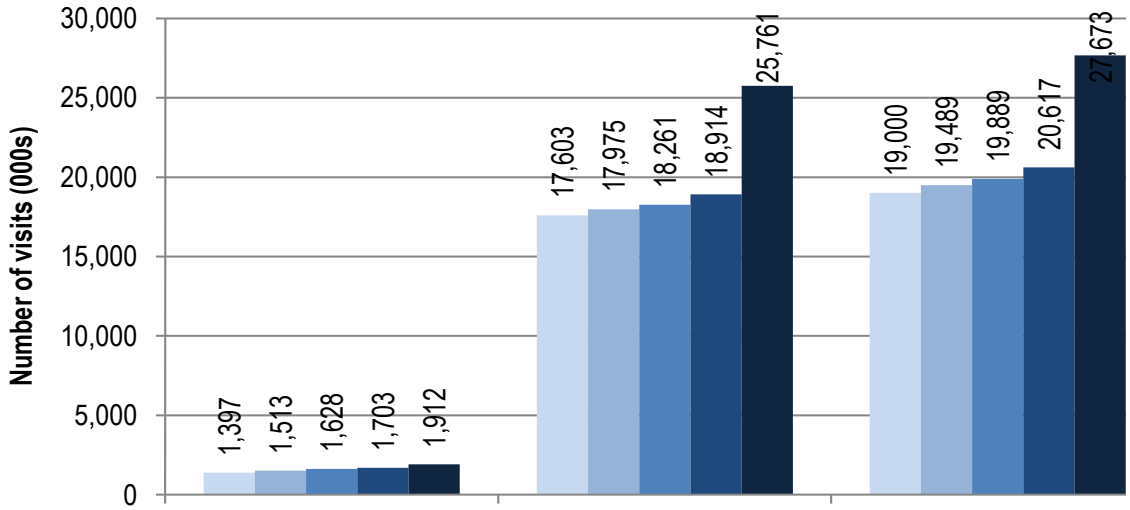
Figure 35: Liverpool city region STEAM data – volume of visits



From 2007 to 2008 in the Liverpool city region:

- The total number of visits grew by 19%.
- The number of day visits grew by 20%.
- The number of staying visits grew by 4%.
- The number of visits which involved visitors staying in hotels grew by 7%.

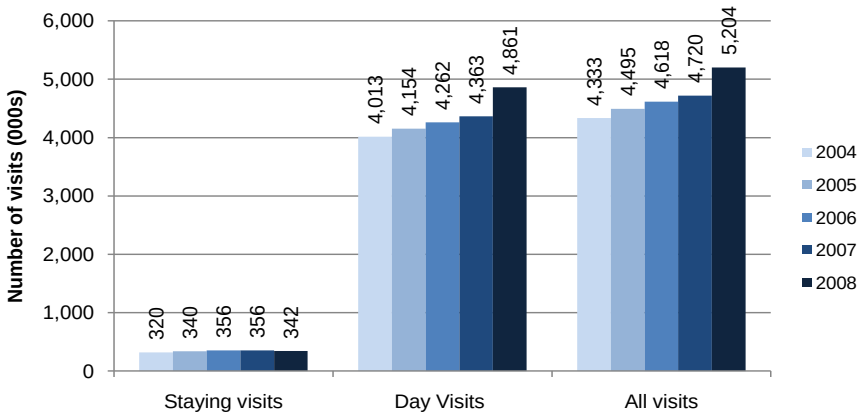
Figure 36: Liverpool STEAM data – volume of visits



From 2007 to 2008, in Liverpool itself:

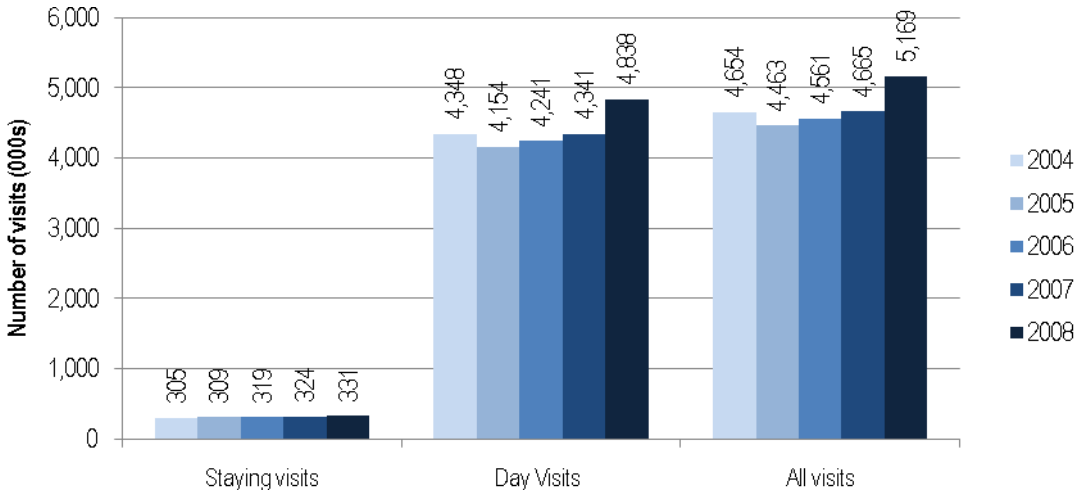
- The total number of visits grew by 34%.
- The number of day visits grew by 36%.
- The number of staying visits grew by 12%.
- The number of visits which involved visitors staying in hotels grew by 16%.

Figure 37: Halton STEAM data – volume of visits



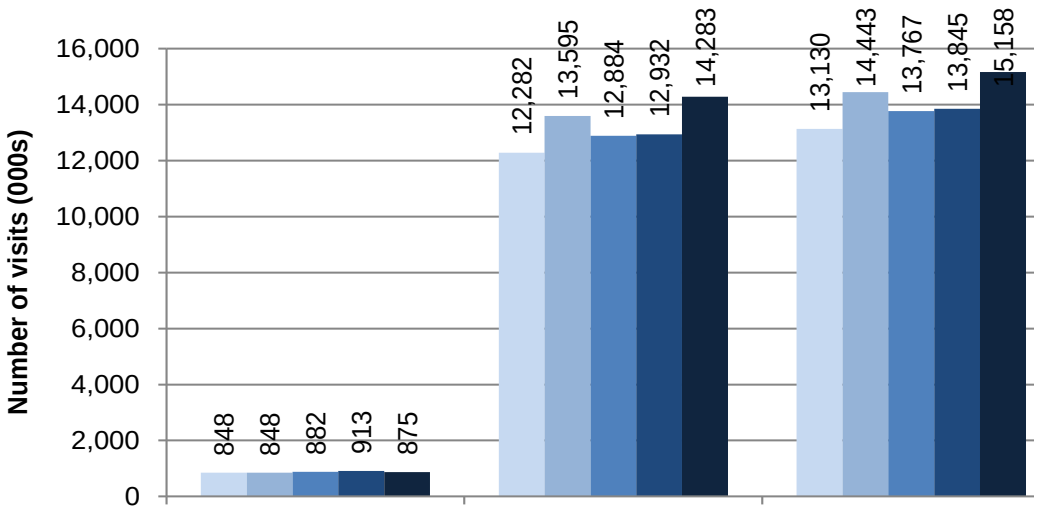
From 2007 to 2008 in Halton, total visit numbers grew by 10%.

Figure 38: Knowsley STEAM data – volume of visits



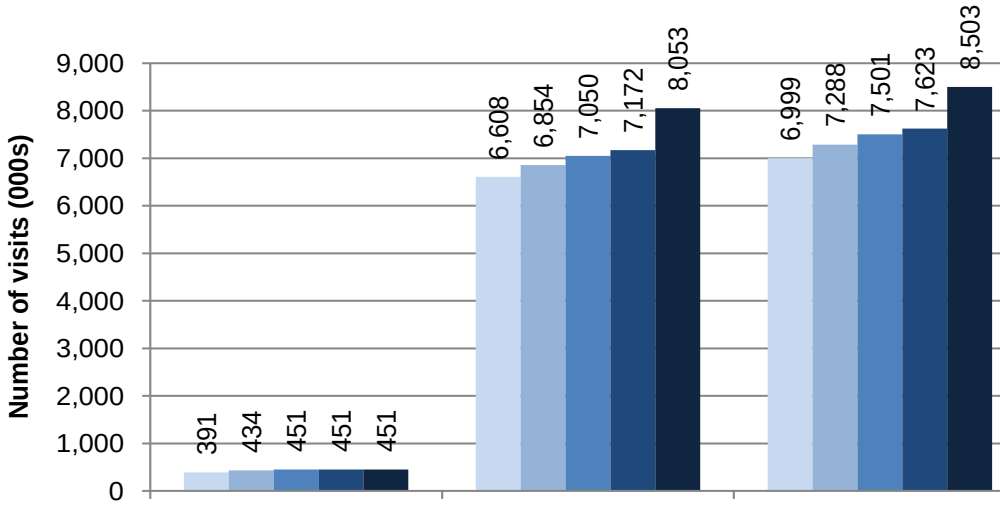
From 2007 to 2008 in Knowsley, total visit numbers grew by 11%.

Figure 39: Sefton STEAM data – volume of visits



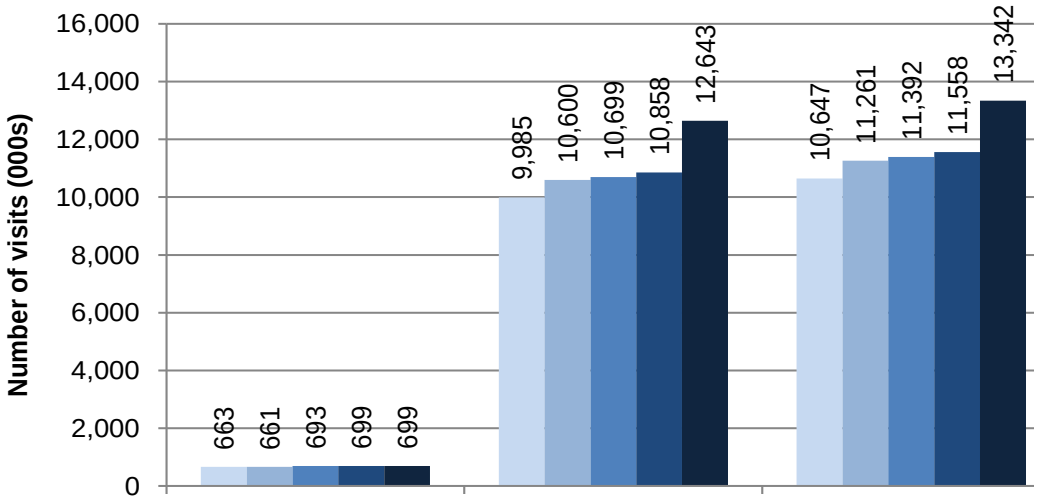
From 2007 to 2008 in Sefton, total visit numbers grew by 10%.

Figure 40: St Helens STEAM data – volume of visits



From 2007 to 2008 in St.Helens, total visit numbers grew by 12%.

Figure 41: Wirral STEAM data – volume of visits



From 2007 to 2008 in Wirral, total visit numbers grew by 15%.

In figures 36 to 41 it can be seen that there is a specific increase in numbers of visits during 2008. However, two factors should be noted regarding the viewing of these datasets in relation to the Liverpool ECoC:

- There has been a background 'organic' growth in tourism in most of the districts.
- During 2008, rising fuel costs were expected to impact on travel patterns (both outbound and inbound tourism), and, during the latter part of the year, the early stages of the recession were beginning to be felt.

Figure 42: North West STEAM data – volume of visits

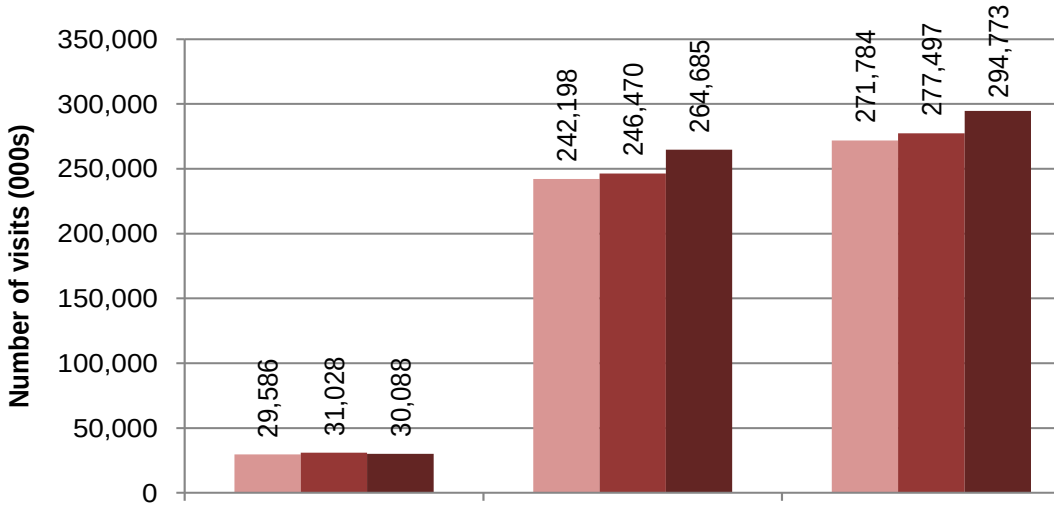


Figure 42 shows STEAM data for the North West region as a whole (including the Liverpool city region). It should be noted that although the number of day visits grew here by some 7%, those for staying visitors fell by 6%. Figures 43 and 44 break this down for each of the five sub-regions. This clearly indicates that not only was the Liverpool city region the area with the most positive growth, in all other areas the rate of growth for staying visitors was either negligible or in decline. Day visits showed some

measure of growth across all areas, possibly as a result of the anticipated 'staycationers' (as the term is used by VisitBritain).[31]

Figure 43: Percentage change between 2007 and 2008 in North West day visits, by area

Area	% change 2007-2008
Liverpool City Region	+20%
Cheshire	+4%
Lancashire	+4%
Greater Manchester	+2%
Cumbria	+1%

Figure 44: Percentage change between 2007 and 2008 in North West staying visits, by area

Area	% change 2007-2008
Liverpool City Region	+4%
Cheshire	+1%
Lancashire	-1%
Greater Manchester	-2%
Cumbria	-7%

Looking at figures 43 and 44, it seems possible that the Liverpool ECoC was not only potentially responsible for some of the growth evidenced in the STEAM figures for the city region, but that, in a difficult economic period, Liverpool may have faced a decline in tourism without it.

4.3. Results from the International Passenger Survey

The data for the International Passenger Survey (IPS) 2008 was released mid-way through 2009.

4.3.1. About the IPS

The International Passenger Survey (IPS) is a survey of a random sample of passengers entering and leaving the UK by air, sea or the Channel Tunnel. Over a quarter of million face-to-face interviews are carried out each year at the UK's major gateways, including key ports and airports and the Channel Tunnel. Sampling is supposed to target 1/500 passengers.[32]

Data from the survey is used by VisitBritain to measure inbound[33] and outbound[34] tourism, and by the Home Office to assist in migration statistics, as well as by other agencies.

[31] Whilst the neologism 'staycation' is an amalgamation of 'stay-at-home' and 'vacation', it was has been widely used to refer to vacations within the home country as opposed to the home.
[32] www.statistics.gov.uk/ssd/surveys/international_passenger_survey.asp
[33] 'Inbound' tourists are defined as those from overseas visiting the UK.
[34] 'Outbound' tourists are defined as UK residents travelling overseas for tourism purposes.

Key questions asked on the survey include home country, purpose of visit, anticipated expenditure, and the locations of planned visits. However, the survey being conducted at key gateways. This means that 'destinations visiting' data can be heavily biased towards the physical place of interview. The Office of National Statistics has recently undertaken work to increase the spatial coverage and to weight data, in order to improve the quality of output. It should also be noted that as the geographic focus becomes smaller, so the potential errors associated with the data increase significantly.

4.3.2. IPS, 2004-2008[35]

Figure 45: IPS data for Liverpool city region

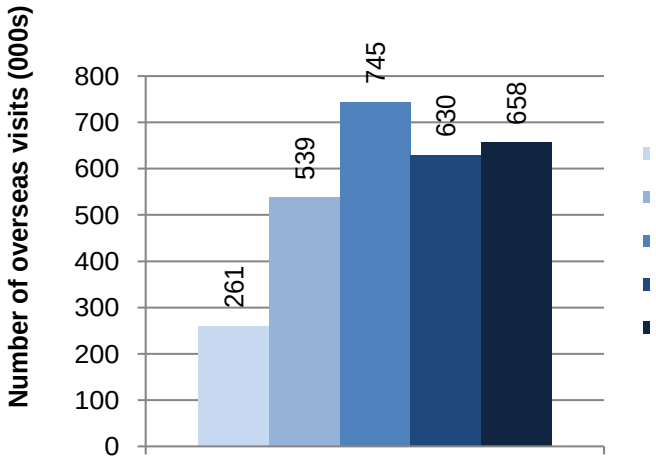
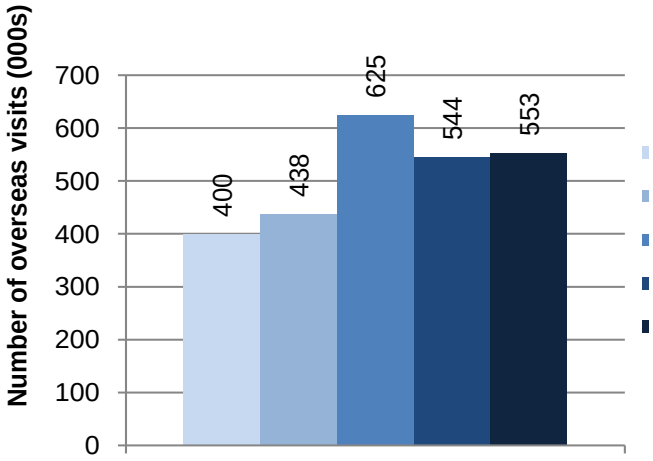


Figure 45 shows a 4% increase in visits to the Liverpool city region as a whole during 2008 by overseas visitors.

Figure 46: IPS data for Liverpool



[35] Full interviewing at Liverpool John Lennon Airport commenced in 2004.

Figure 47: IPS data for Liverpool John Lennon Airport

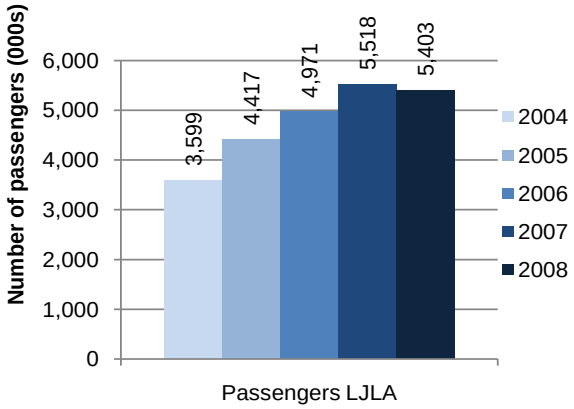
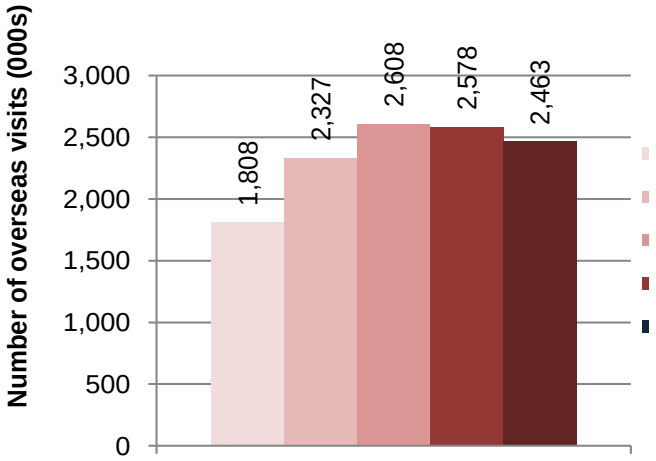


Figure 46, with data for the Liverpool area alone, shows just a 2% increase recorded in overseas visits, according to the International Passenger Survey. This may be partially a reflection on the potential of sampling errors referred to earlier, although it should be compared against the loss experienced by the region overall (below). Figure 47 shows the numbers of passengers through Liverpool John Lennon Airport – although this does not differentiate between inbound and outbound passengers - which saw a fall in total passengers of 2% from 2007 to 2008.

Figure 48: IPS data for the North West



It is worth noting that – again, to some extent reflecting on the patterns observed in the STEAM data – overseas visits to the North West region declined by some 5% from 2007 to 2008.

5. Economic Impact

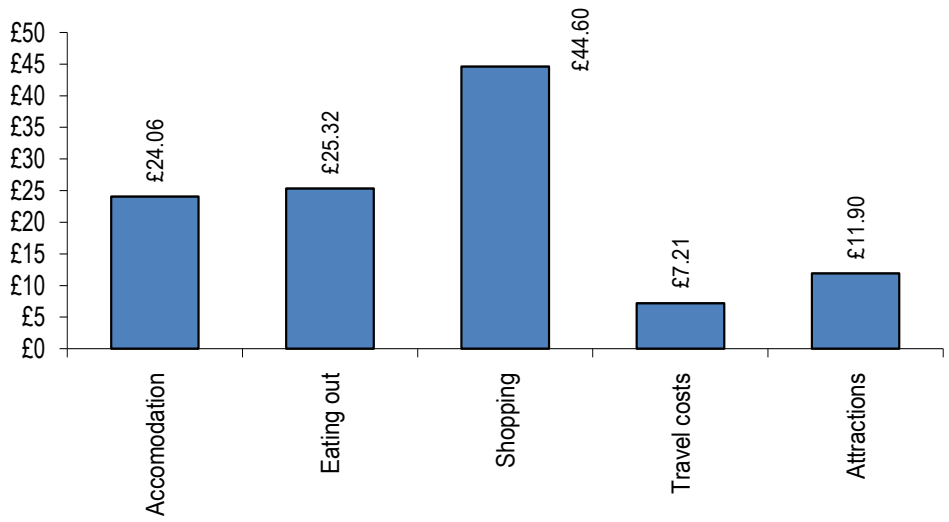
5.1. Spend and frequency of visitors

Section 3 of this report discusses a range of detailed profile of visitors and visits data, primarily from the Liverpool visitor survey (the primary data set commissioned by Impacts 08). What follows here is further detail on the spending patterns of those visitors, and consideration of the frequency of visits.

5.1.1. Visitor spend

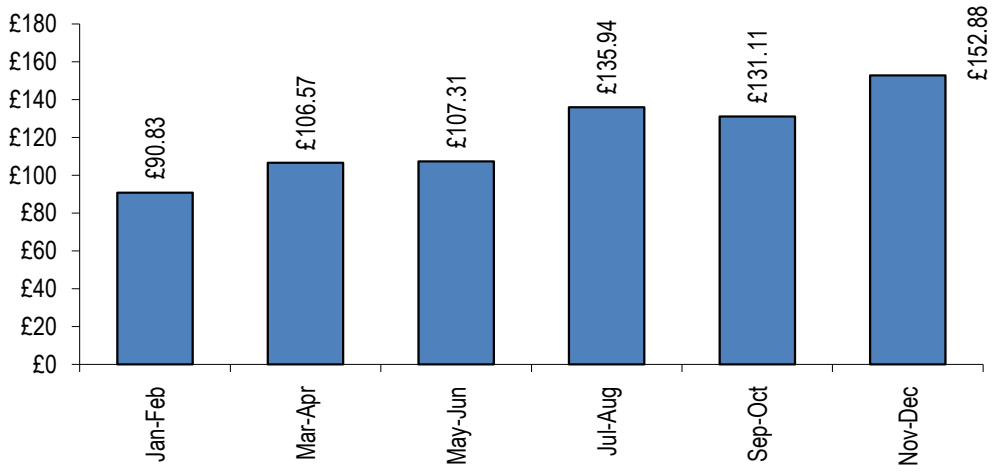
As part of the Liverpool visitor study, all visitors were asked how much they had spent or expected to spend in the course of their visit; this was divided by the number of people in the group they were with (i.e. co-visitors), to obtain a mean spend per person per visit.

Figure 49: Mean spend per person, per visit



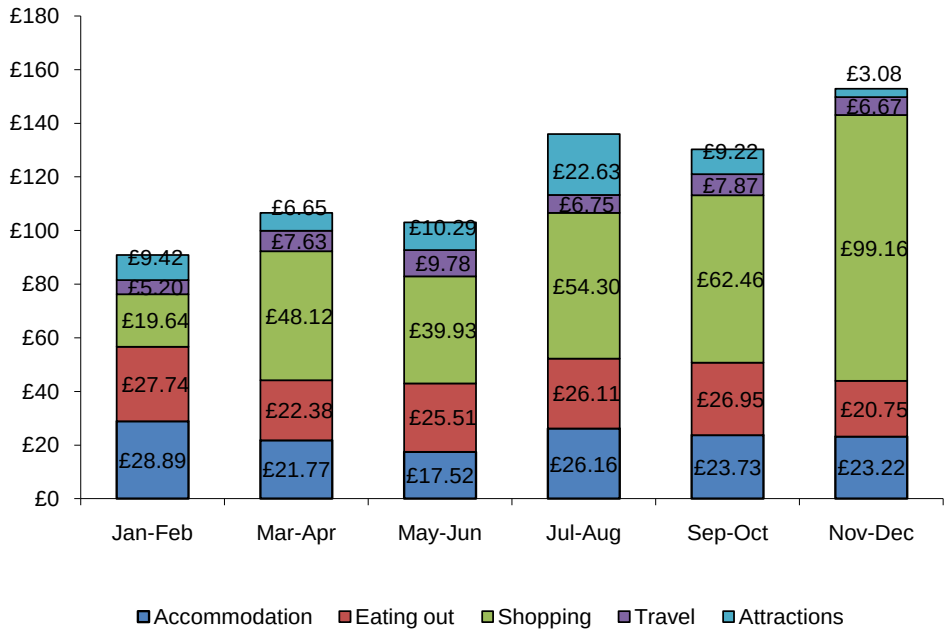
On average, visitors to Liverpool spent £113.66 per person on their visit. It cannot be assumed that this figure is applicable to all visitors – as much to those influenced to visit by the Liverpool ECoC as by other reasons – and later in this report the different spend amounts by those groups is explored.

Figure 50: Mean spend per person, per visit, profiled by bi-monthly period



Although the data has been weighted so that the mean totals are representative of the spend across the whole year, it may be useful to consider how this spend varies. Figure 50 seems to show a trend towards increasing spend as the year progresses – although this may be, to some extent, distorted by what is the seasonal pattern of 'Christmas shopping' spend, particularly in the November to December period. Figure 51 shows that spending on attractions and entertainment was at its peak in the July-August period.

Figure 51: Mean spend per person, per visit, profiled by bi-monthly period and spend type



5.1.2. Frequency of visiting Liverpool

A particularly important part of the profiling of visitors was to understand the *frequency* with which visitors came to the city.

Figure 52: Percentage of visitors indicating different levels of visiting frequency

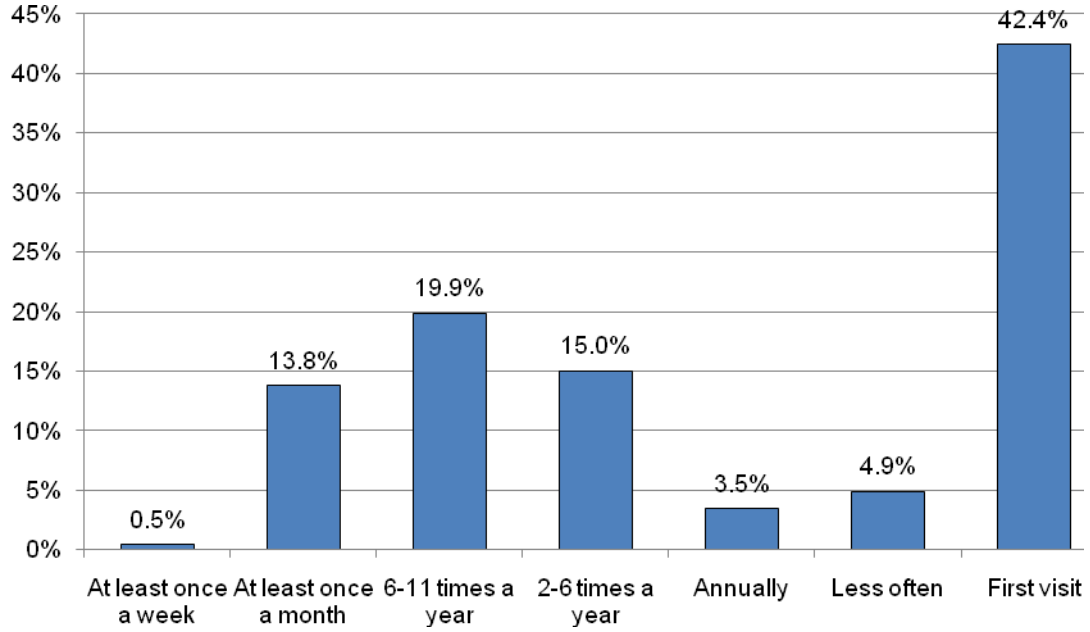


Figure 52 shows a comparatively high proportion of visitors surveyed were on their first-time visit to Liverpool. A key driver behind visit frequency of course is geographic location; Figure 53 shows the frequency of visits against visitor origin. Note that the percentages displayed are as a percentage of *all* respondents. It is also important to remember that at this stage what is being considered is the behaviour of all visitors to the city, rather than just those influenced by the Liverpool ECoC.

Figure 53: Percentage of visitors indicating different levels of visiting frequency, by visitor origin

	Merseyside	NW	Elsewhere UK	Europe	Elsewhere overseas
At least once a week	0.4%	0.2%	-	-	-
At least once a month	12.5%	1.1%	0.5%	-	-
6 – 11 times a year	11.4%	2.7%	0.9%	0.1%	-
2 – 6 times a year	1.3%	0.7%	1.1%	0.3%	0.3%
Annually	5.7%	6.2%	6.4%	1.3%	0.6%
Less often	0.1%	0.8%	2.2%	0.6%	1.1%
On my first visit	0.6%	5.5%	15.3%	7.4%	12.8%

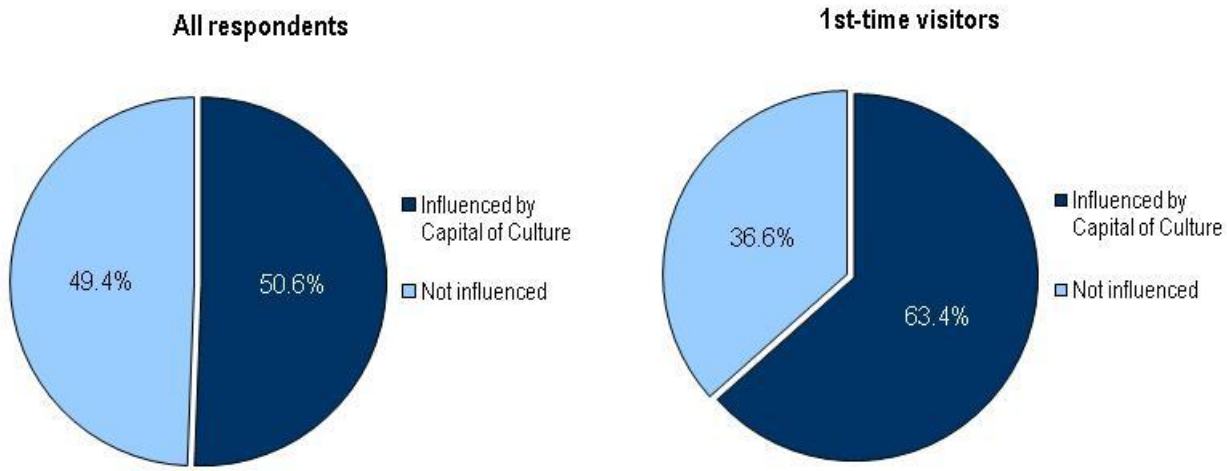
5.2. Influence of the Liverpool ECoC

In order to estimate the proportion of visitors who were influenced by the Liverpool ECoC, no single question on the Liverpool visitor study could operate as a sole indicator. Instead, a visitor was deemed to be a visitor influenced by the Liverpool ECoC if they:

- Stated the ECoC status was an important or very important reason for the visit.
- Stated that the ECoC events were an important or very important reason for the visit.
- Made any verbatim mention of ECoC as the reason for their visit.

Putting these sets of data together, the responses indicate that approximately *half* of respondents were influenced by ECoC (see 54); this rose to almost two thirds for those who were on their first visit to the city.

Figure 54: Percentage of visitors influenced – or not – by the Liverpool ECoC



5.2.1. Origin of visitors influenced by the Liverpool ECoC

Figure 55: Origin of visitors influenced by the Liverpool ECoC

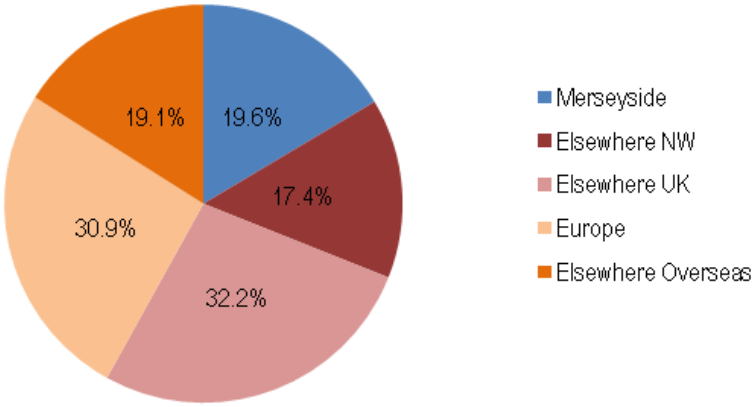


Figure 56 compares those influenced to visit by the Liverpool ECoC against the generic visitor market.

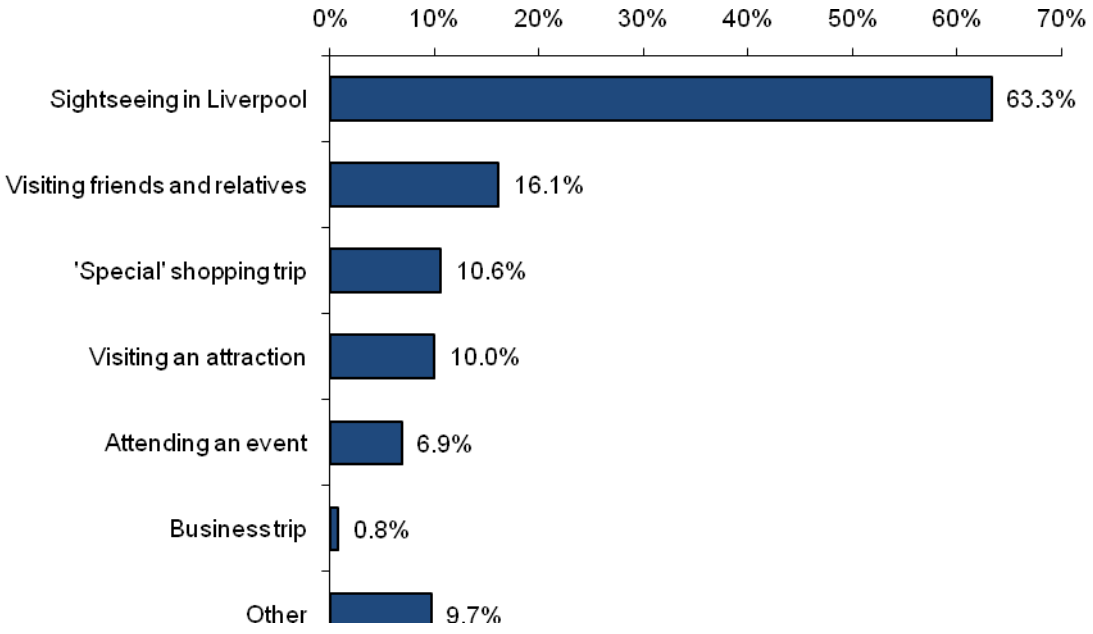
Figure 56: Percentage difference between ECoC influenced visitors and all visitors, by origin

	Difference: ECoC influenced visitors/all visitors
Merseyside residents	-11.8%
NW Visitors	+0.1%
UK Visitors	+5.3%
Europe visitors	+6.5%
Overseas visitors	+4.3%

The draw thus appears to have been greater amongst visitors from further afield, with the local influence weaker, as demonstrated in detail in section 3.3.1.

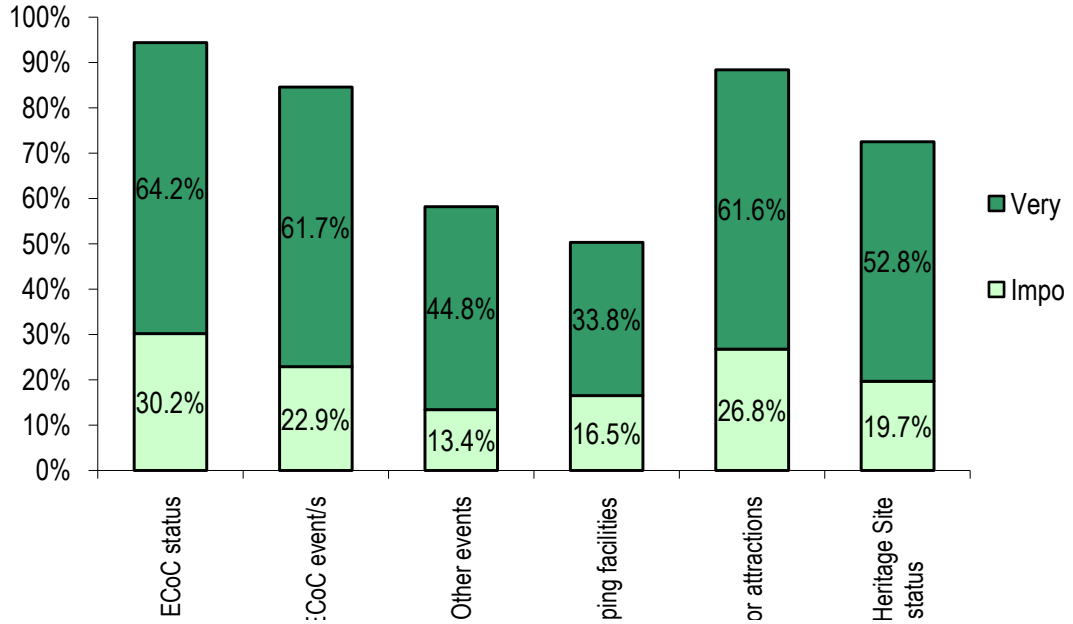
5.2.2. Purpose of visit

Figure 57: Percentage of Liverpool ECoC influenced visitors identifying the different key reasons behind their visit



It would seem that visitors drawn by the Liverpool ECoC were most likely to indicate 'sightseeing' as their main reason (see Figure 57). However, it should be noted that multiple motivations can exist for driving visits. For this group, the factors as displayed in Figure 58 were also regarded as being of importance.

Figure 58: The importance of different reasons behind the visit, by percentage of all Liverpool ECoC influenced visitors



It is important to note that, even where visitors did not indicate an event as being the main reason for their visit to Liverpool (see the 6.9% indicated in Figure 57), events were still seen as being important factors in the decision to visit the city, with almost 62% identifying these as being a 'very important' factor. The visitor attractions were also clearly a key driver in visitors' decisions to make a visit to the city.

5.2.3. Profile of visit

Figure 59: Percentage of Liverpool ECoC influenced visitors, profiled by type of visit

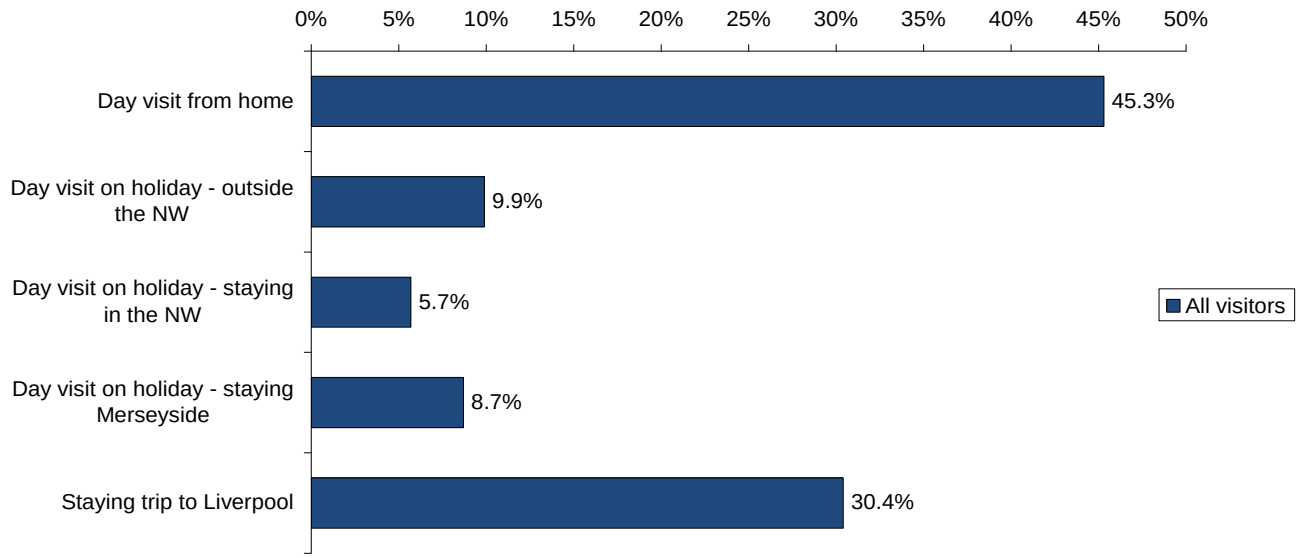


Figure 59 seems to show that at one end of the scale, visitors influenced to visit by the Liverpool ECoC were likely to be day visitors; at the other end of the scale, a third were staying in the city itself. Visitors influenced to visit Liverpool by ECoC were significantly more likely to be staying in the city than were 'all visitors' (see Figure 60).

Figure 60: Percentage difference between ECoC influenced visitors and all visitors, by type of visit

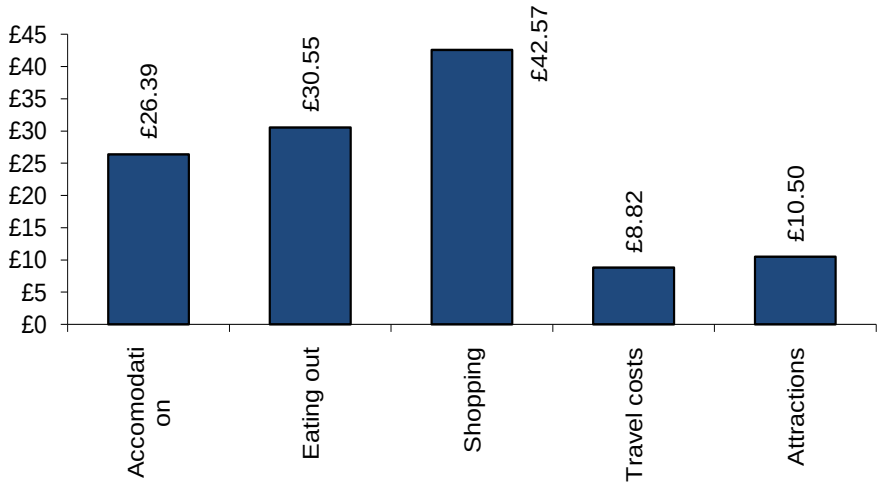
	Difference: ECoC-influenced Visitors / All Visitors
Day visitors from home	-7.7%
Day visit whilst staying on holiday outside the NW	+0.4%
Day visit whilst staying on holiday in the NW	+0.8%
Day visit whilst staying on holiday in Merseyside	+0.3%
Staying trip in Liverpool	+6.2%

This shows that visitors influenced to visit Liverpool by ECoC were significantly more likely to be on a staying visit than when the results are viewed for the whole visitor market (c. 6% more – as Figure 59 shows, some 30% of all those interviewed visiting Liverpool due to ECoC were staying in the city; but 'just' 24% of all visitors were staying in the city).

5.2.4. Spend on visit

The average spend of visitors influenced to come to Liverpool due to the ECoC status was £118.98 per person per trip (£5.32 higher than the average visitor to the city.) Specifically, Liverpool ECoC influenced visitors tended to have a higher per person spend on eating out and accommodation (see Figure 61).

Figure 61: Mean spend of ECoC influenced visitors, profiled by spend type



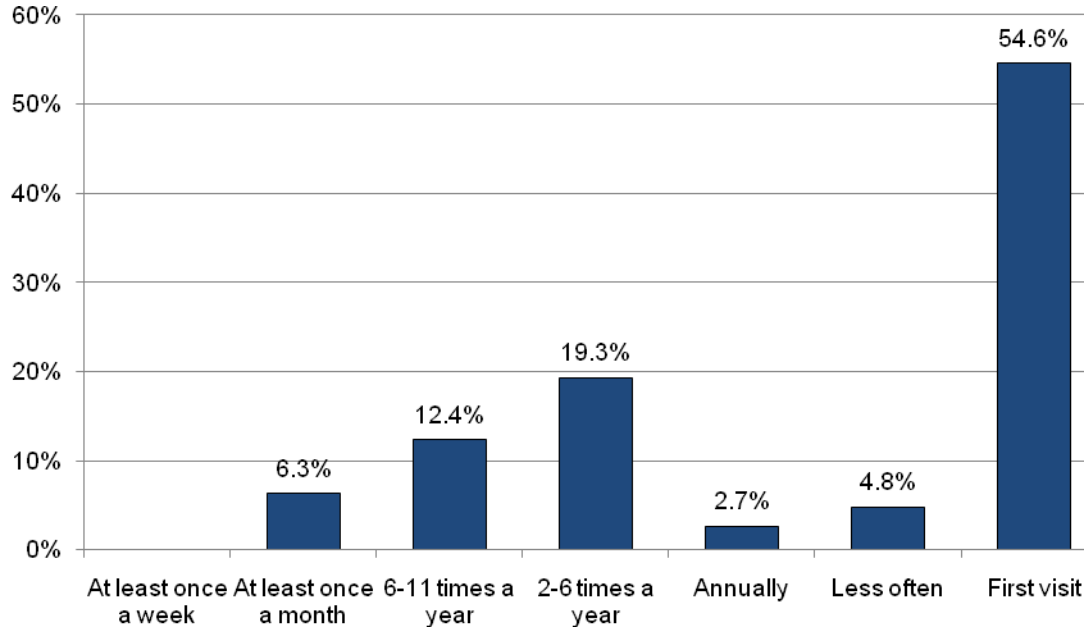
Naturally, the type of visit will have a significant bearing on the level of spend, and this is provided in the table beneath. The two are combined in Figure 62.

Figure 62: Mean spend of ECoC influenced visitors, profiled by visit type

Type of visit (all influenced by Liverpool ECoC)	Per person spend
Day visitors from home	£52.08
Day visit whilst staying on holiday outside the NW	£56.11
Day visit whilst staying on holiday in the NW	£129.35
Day visit whilst staying on holiday in Merseyside	£120.62
Staying trip in Liverpool	£176.46

5.2.5. Frequency of visits

Figure 63: Percentage of ECoC influenced visitors indicating different levels of visiting frequency



Returning to how *often* visitors typically came to Liverpool, those influenced to visit by the Liverpool ECoC had a lower frequency of visitation and a higher likelihood of being on a first visit (see Figure 63).

Again, to provide a greater understanding of the nature of Liverpool ECoC influenced visitors, this is analysed against visitor origin. It is important to note that the percentages in Figure 64 are of *all* visitors influenced to visit by the Liverpool ECoC, with the whole table constituting 100%.

Figure 64: Percentage of ECoC influenced visitors indicating different levels of visiting frequency, profiled by origin

	Merseyside	NW	Elsewhere UK	Europe	Elsewhere overseas
At least once a week	0.4%	0.2%	-	-	-
At least once a month	12.5%	1.1%	0.5%	-	-
6 – 11 times a year	11.4%	2.7%	0.9%	0.1%	-
2 – 6 times a year	1.3%	0.7%	1.1%	0.3%	0.3%
Annually	5.7%	6.2%	6.4%	1.3%	0.6%
Less often	0.1%	0.8%	2.2%	0.6%	1.1%
On my first visit	0.6%	5.5%	15.3%	7.4%	12.8%

The STEAM figures that are used as the baseline record *visits* not *visitors*; in order to provide an accurate estimate of the economic impact, calculations need to be based just on the *additional* visits

created by the Liverpool ECoC, rather than on visits which respondents would have expected to be make anyway.

The process of disaggregating the two is achieved by comparing the 'typical' frequency of the different visitor categories against the number of times respondents stated that they would be visiting in 2008 (see Figure 65).

Figure 65: Comparison of typical frequency with expected frequency in 2008, profiled by visit type

Frequencies: by visit type	Day visit from home	Day visit on holiday - outside the NW	Day visit on holiday - staying in the NW	Day visit on holiday - staying Merseyside	Staying trip to Liverpool
Typical Frequency	4.86	0.49	0.23	2.12	1.3
Expected Frequency 2008	10.94	1.34	1.62	5.67	1.64

Thus, there is a need to convert the data from the survey of visitors into visits based on the appropriate frequencies.

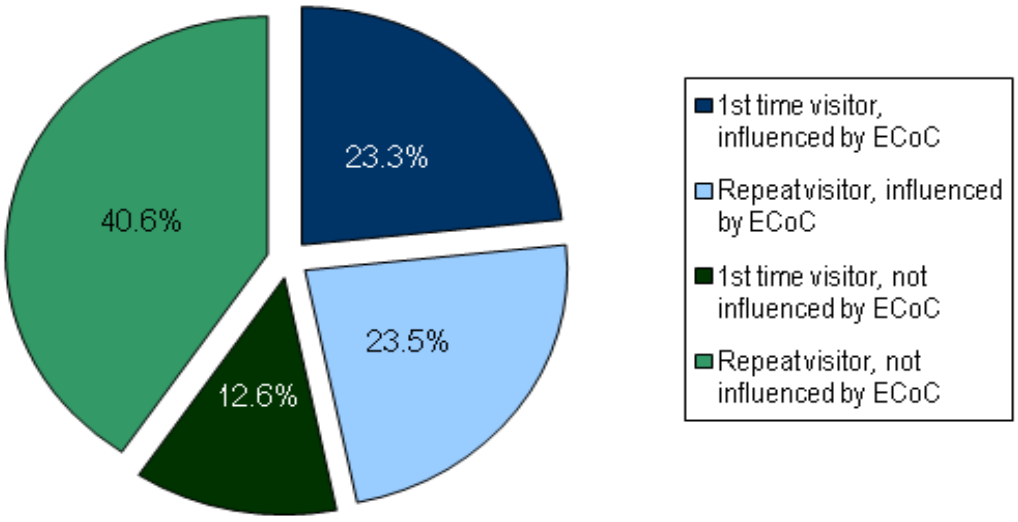
5.3. Applying visitor survey data to STEAM

This section summarises the calculations used to measure the economic impact of additional visits influenced by the Liverpool ECoC. All data within this section is treated separately for day and staying visits, to make use of the relevant STEAM proportions for these two types of visit.

5.3.1. Raw numbers influenced

Using the *raw* percentages, the data shows proportions of visitors as demonstrated in Figure 66.

Figure 66: Percentage of all visits in 2008, profiled by influence and frequency



As has already been indicated, this application does not allow for the 'typical' level of repeat visits as well as those repeat visits which were influenced by the Liverpool ECoC; to apply these raw percentages to the STEAM data might potentially overstate the impact. Hence, a more cautionary approach is to adjust the above figures to show the estimated proportion of respondents and visits throughout the year generated by the Liverpool ECoC, taking into account typical visit levels.

In the following series of tables, we show how these levels were resolved. Notice that the results are carefully treated separately for day and staying visitors.

Figure 67: Raw frequencies of different visitor categories

	Mean annual frequency		Number of visits as calculated		
How often do you typically visit Liverpool?	**Day Visitor**	**Staying Visitor**	**Day Visitor**	**Staying Visitor**	**All Visits**
Influenced and on first visit	0.0	0.0	5,871,468	574,481	6,445,948
Influenced and on repeat visit	7.2	7.4	6,109,793	395,184	6,504,977
Not influenced and on repeat visit	7.5	5.6	10,572,975	662,299	11,235,275
Not influenced and on first visit	0.0	0.0	3,206,558	280,532	3,487,090

Firstly, the visits based on visitor numbers and current frequencies are shown (see Figure 67).

Figure 68:Adjusted frequencies of different visitor categories

How often do you expect to visit Liverpool in 2008?	Expected frequency Day Visitor	Expected frequency Staying Visitor	Frequency diff. Day Visitor	Frequency diff. Staying Visitor
Influenced and on first visit	1.6	1.3	100%	98%
Influenced and on repeat visit	15.1	8.6	53%	15%
Not influenced and on repeat visit	21.6	3.8	65%	-47%
Not influenced and on first visit	2.4	1.8	100%	100%

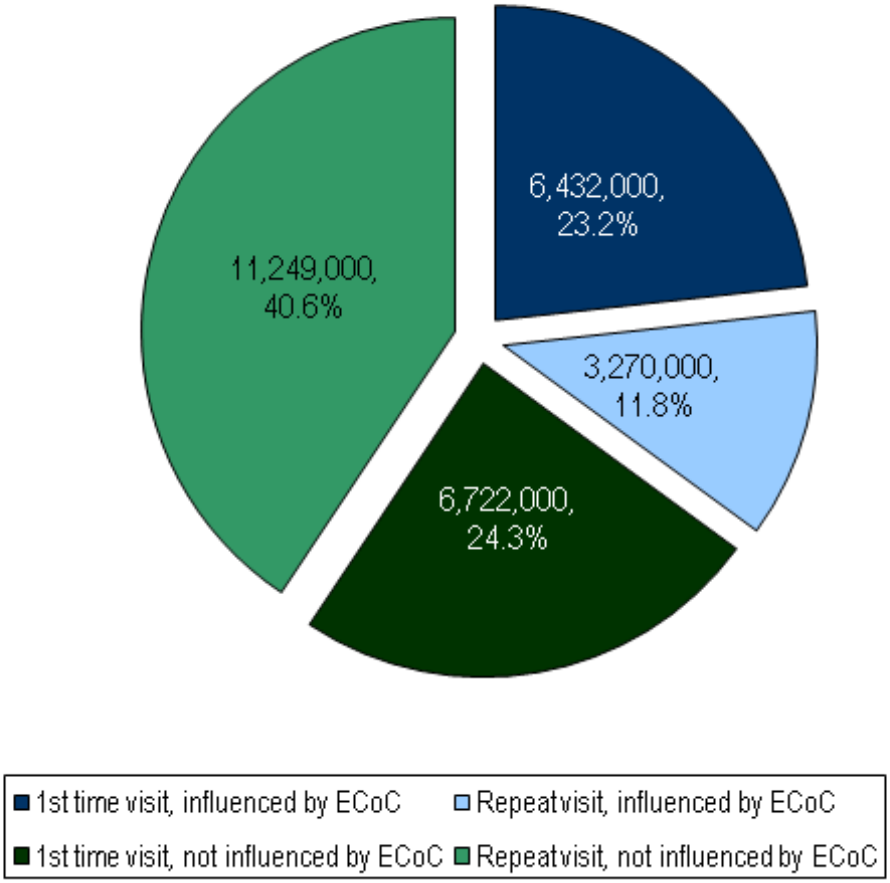
Then, the expected frequency in 2008 and how this differs from a typical year are shown (see Figure 68).

Figure 69: Adjusted numbers of visits, across different visitor categories

Expected visits after correction	Frequency difference as numbers Day Visitor	Frequency difference as numbers Staying Visitor	Numbers corrected Day Visitor	Numbers corrected Staying Visitor	All Visits
Influenced and on first visit	5,871,468	560,803	5,871,468	560,803	6,432,270
Influenced and on repeat visit	3,211,903	57,784	3,211,903	57,784	3,269,687
			10,572,97		11,248,95
Not influenced and on repeat visit	6,901,995	-311,763	5	675,978	3
Not influenced and on first visit	3,206,558	280,532	6,104,448	617,932	6,722,381

Finally, the two data columns on the left show the differences this results in, as absolute numbers (see Figure 69); the two columns on the right after the visits which would have been *expected* by those influenced by ECoC are shared in survey proportion between the "Not influenced" first-time and repeat visitors.

Figure 70: Percentage of all visits in 2008, profiled by influence and frequency



Based on the STEAM figures for 2008 of 27.7m visits to Liverpool and 35% of visits being influenced by the city's ECoC status, it is estimated that this equated in raw numbers to **9.7m visits generated by the Liverpool ECoC**. This includes both new visitors to Liverpool (some **6.4m first-time visitors** to the city), and visits from those who had already visited the city. .

An interesting conjecture at this stage might be to pose a question as to what tourism levels might have been expected to reach had Liverpool *not* hosted the Liverpool ECoC. Although this should be the subject for further, depth, analysis of the data, if the first-time visitors influenced to visit by the ECoC status are removed from the STEAM totals, this would give a level of visits of 18m (1.2m staying visitors and 16.7m day visitors) in the city – a 13% drop on 2007 and bringing Liverpool more in line with the North West experience in 2008 as suggested by STEAM and IPS data.

The significant draw of the Liverpool ECoC, with its specific influence on those travelling to the city from further afield has been demonstrated previously in this report. In Figure 71, visitor geographic origin is overlaid on the numbers from Figure 70. It is possible to see here how much of a draw the year seemed to have on visitors from elsewhere in the UK, drawing in 3.0m visitors – 2.6m of whom were on their first visit to Liverpool.

Figure 71: Liverpool ECoC influenced visitors, profiled by geographic origin

	All visits influenced	All first-time visits influenced
Merseyside	2,212,000	184,000
North West	1,952,000	1,241,000
Elsewhere UK	2,972,000	2,558,000
Europe	987,000	947,000
Overseas	1,579,000	1,538,000

One fact that it is particularly worthwhile to single out is that amongst the ECoC influenced visitors, 97% of the European and overseas visitors were first-time visitors to the city.

5.3.2. Numbers of visitors by period

As has been mentioned before, there would be expected to be significant variations throughout the year in terms of visitor patterns. Figure 72 shows the numbers of visits being made to the city for differing reasons, based both on the STEAM figures and on the main reason given for being in Liverpool by participants in the visitor survey (this includes those visits which were not influenced by the Liverpool ECoC).

Figure 72: All visits to Liverpool, profiled by reason for visit and by bi-monthly period[36]

	Jan-Feb 000s	Mar-Apr 000s	May-Jun 000s	Jul-Aug 000s	Sep-Oct 000s	Nov-Dec 000s
Liverpool EcoC	2,493	1,853	3,032	3,701	1,994	927
Sightseeing trip	2,528	1,608	3,067	3,350	1,522	367
'Special' shopping trip	228	1,573	1,052	1,386	1,137	1,470
Visiting friends	527	1,171	946	1,035	490	332
City attractions	527	280	964	509	227	52
Event	457	262	491	474	210	192
STEAM Totals	**4,179**	**4,807**	**5,381**	**6,683**	**4,058**	**2,520**

The important thing to note in Figure 72 is how the influence of the Liverpool ECoC waned through the latter stages of 2008.

5.3.3. Numbers of visitors by type of visitor

Figure 73 overlays the STEAM data onto the different visit types, showing those visits influenced by the Liverpool ECoC in comparison to all visits.

[36] The detail in Figure 72 is useful for illustrative purposes, but it is worth noting that the five non-Liverpool ECoC influences are tracked through a single question in the survey questionnaire, whilst visitors identified as being ECoC influenced are a composite group from multiple questions posted in the survey. Hence, if these other five non-ECoC influences were treated as absolute, there would be the potential risk of double counting of some groups and underestimation of others. Nevertheless, the two-month by two-month profile shown here is useful to indicate a broad trend, even if it is limited in its validity in absolute terms for any given period.

Figure 73: All visits to Liverpool in comparison to visits influenced by the Liverpool ECoC, profiled by type of visit

Type of visitor	Number of visits	Number of visits generated by the ECoC
Day visitors from home	18,033,000	6,358,000
Day visit whilst staying on holiday outside the NW	3,194,000	1,126,000
Day visit whilst staying on holiday in the NW	1,674,000	590,000
Day visit whilst staying on holiday in Merseyside	2,859,000	1,008,000
Staying trip in Liverpool	1,912,000	619,000

By using profile data from the Liverpool visitor study, Destination Benchmarking Study and Liverpool (NW) visitor study, detail further to that shown in Figure 73 can be added to the picture about visits generated by the Liverpool ECoC.

Figure 74: Liverpool ECoC influenced staying visits, visitor nights and nights in serviced accommodation, profiled by local authority area

	Staying Visits	Staying Visitor Nights	Staying Visitor Nights in Serviced Accommodation
Liverpool	619,000	2,165,000	1,141,000
Merseyside	*1,226,000*		
Halton	29,000	155,000	32,000
Knowsley	102,000	551,000	117,000
Sefton	652,000	3,520,000	746,000
St Helens	94,000	509,000	108,000
Wirral	250,000	1,350,000	286,000
North West	*590,000*		
Cheshire	195,000	935,000	415,000
Cumbria	30,000	192,000	86,000
Greater Manchester	171,000	1,027,000	456,000
Lancashire	201,000	1,686,000	749,000

Appendix 7.2 shows this in fuller detail.

Figure 75: Liverpool ECoC influenced staying visits, visitor nights and nights in serviced accommodation, profiled at city, city region and regional levels

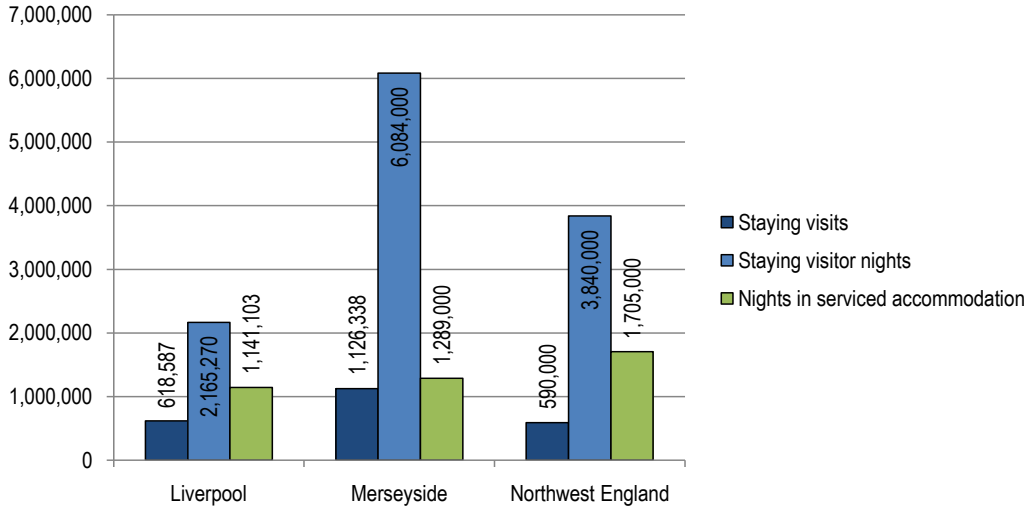


Figure 75 summarises the data, indicating the sizeable impact the year appears to have had, not just in Liverpool itself but in the wider area, generating 6.1m staying visitor nights in other Merseyside locations and 3.8m staying visitor nights elsewhere in North West England.

5.4. Numbers of visitors: Events

As has been explained, an important component of Liverpool's year as European Capital of Culture was the events programme, with numerous events (paid and free, indoors and outdoors) aimed at drawing in visitors.

The Appendix 7.3 contains details of the event evaluation programme. This section concentrates on disaggregating the *events* visitors from those drawn by the generic ECoC designation itself.

The Liverpool Culture Company's evaluation of the events programme, covering 13 events with an attendance of 1.2m people, identified that 740,000 attendees were non-residents.

We have seen above that 9.7m visitors were drawn to the city in total by the Liverpool ECoC. This covered not just those who mentioned that the ECoC status was important or the reason for the visit, but also those who indicated that an *event*[37] was the main reason for their being in the city. Based on the 6.9% indicating the event as the driving factor, it is possible to estimate not just that there were 966,000 event attendees from outside Liverpool, but also that for this group the event was the main reason for their visit. As some of these visits included staying visitors attending more than one event across their stay, as well as those for whom only one actual event was the main driver for the visit, this becomes 606,000 visits not elsewhere counted.

[37] Defined as being one of the Liverpool 08 branded events.

It is important to note, however, that even if respondents were not attending an event, the events programme and associated profile still appears to have partially been responsible for drawing them to the city.

5.5. Spend created by additional visits

In order to calculate the economic impact for the model, the spend per person needs to be applied to the numbers of visits; this needs to be done separately for both events and non-events visitors.

5.5.1. Spend by Liverpool ECoC influenced visitor

Figure 76 shows the response levels by visitor type, displaying the proportions clearly, both for those attending events and those *not* attending events. Note that the percentages below relate to *all* ECoC visitors – 2.6% of all those influenced to visit by ECoC were attending an event and on a staying trip in the city.

Figure 76: % visitor type of all visits influenced by ECoC, showing breakdown between event attendees and non event attendees.

	Not attending event	Attending an event
A day trip from home	42.9%	2.4%
A day trip whilst on holiday	8.9%	1.0%
A day trip whilst on holiday – staying NW	5.4%	0.3%
A day trip whilst on holiday – staying Merseyside	7.9%	0.6%
A staying trip in Liverpool	27.9%	2.6%

The percentages shown, together with the mean spend indicated in section 3.4.1, are used to calculate the spend generated by visitors to the city (see Figure 77). It is important to note that this *excludes* event visitors.

Figure 77: Calculation of total visitor spend, profiled by visit type (excluding event attendees).

	No. of visits influenced by ECoC	Per person spend	Total spend
Day visit from home	6,021,000	£52.08	£313,599,000
Day visit on holiday - outside the NW	1,013,000	£56.11	£56,815,000
Day visit on holiday - staying in the NW	559,000	£129.35	£72,351,000
Day visit on holiday - staying Merseyside	937,000	£120.62	£113,031,000
Staying trip to Liverpool	566,000	£176.46	£99,851,000
Total	**9,096,000**		**£655,647,000**

One issue with this is that not all of the spend will have occurred within the Liverpool area. Hence, the economic impact data is regarded as applying not just to the city of Liverpool but reflecting the wider benefit to the city region and North West England itself. In Figure 78, using patterns of spend from the Destination Benchmarking and NW Impacts survey, is shown what this might mean by area, by different visitor types. (Please note that, due to the micro level of some of these calculations, where total

generated spend estimates are at such a low level as to be potentially unreliable, these have been indicated as 'Neg.', for negligible).

Figure 78: Location of spend, by visitor types

Visitor Type	Liverpool City	Elsewhere City Region	Elsewhere North West	Outside North West England
Day visit from home	£295,724,000	£17,875,000	Neg.	Neg.
Day visit on holiday – outside the NW	£4,955,000	Neg.	Neg.	£51,860,000
Day visit on holiday – staying in the NW	£25,640,000	Neg.	£46,711,000	Neg.
Day visit on holiday – staying Merseyside	£20,162,000	£92,869,000	Neg.	Neg.
Staying trip to Liverpool	£83,573,000	£15,239,000	£693,000	£346,000
Total	**£430,053,000**	**£125,984,000**	**£47,404,000**	**£52,206,000**

Thus, of the total direct spend, some 66% occurred in the city of Liverpool with 19% being dispersed to other areas of the city region. 7% of the total occurred elsewhere in the North West, with just 8% estimated as occurring outside the region.

5.5.2. The indirect impact of Liverpool ECoC influenced visits

As indicated in the methodology, this study also seeks to quantify the jobs and indirect spend supported as a result of the Liverpool ECoC. Due to some continuing uncertainty and lack of detail with the STEAM model, the Cambridge Model is used here. Constructed in 2001 for The Mersey Partnership, the coefficients are used from this model to construct indirect spend figures and jobs supported. Local business surveys were originally used to develop these coefficients, providing reasonable confidence in the data; wages estimates have been updated using the increase shown from ASHE (Annual Survey of Hours and Earnings) over this same period (see Figures 79 and 80).

Figure 79: Calculation of direct and indirect spend, by sector

Sector of spend	Direct spend	Indirect spend	Total	Jobs supported by direct spend (FTE)	Jobs supported by indirect spend (FTE)
Retail	£295,668,000	£62,093,000	£357,761,000	2,827	1,585
Catering	£158,091,000	£47,414,000	£205,505,000	2,595	1,276
Attractions	£53,517,000	£17,126,000	£70,643,000	791	568
Transport	£43,405,000	£10,847,000	£54,253,000	430	265
Accommodation	£74,440,000	£24,559,000	£98,998,000	1,197	639
Total	**£655,647,000**	**£168,041,000**	**823,688,000**	**8,608**	**4,719**

Figure 80: Calculation of direct and indirect spend, profiled by spend impact area

Non-event Visitor impacts	Liverpool City	Elsewhere City Region	Elsewhere North West	Outside North West England
Direct spend	£430,053,000	£125,984,000	£47,404,000	£52,206,000
Indirect spend	£110,222,000	£32,289,000	£12,150,000	£13,380,000
Total	£540,275,000	£158,273,000	£59,554,000	£65,586,000
Jobs supported by direct spend (FTE)	5,646	1,654	622	685
Jobs supported by indirect spend (FTE)	3,095	907	341	376

It is important to note, for the purposes of this analysis, that the Cambridge Model is very much driven by sector spend. Thus, a different coefficient exists for calculating the indirect spend in 'Transport' compared to the indirect spend in 'Retail'. Whilst a more accurate method of assessing indirect expenditure than some of the other available tools, this does mean that any spend a respondent has not been able to assign to a specific category (usually indicated in reports as "Other spend") cannot have its indirect impacts effectively calculated. Therefore, in this study, whilst spend in 'other categories' is included in the total spend, it does not have an indirect impact.

5.5.3. Events visitors spend

As detailed in 5.4, a total of 966,000 event visits were generated by the Liverpool ECoC (606,000 not being counted elsewhere).

- At an average per person spend of £101.67, this would indicate £98.2m was generated by the 2008 events programme in direct visitor spend.
- An estimated further 33m was generated in indirect spend.
- Based on these figures, the events programme supported 1,586 jobs.

Figure 81 indicates how we would estimate this is apportioned across the differing geographies.

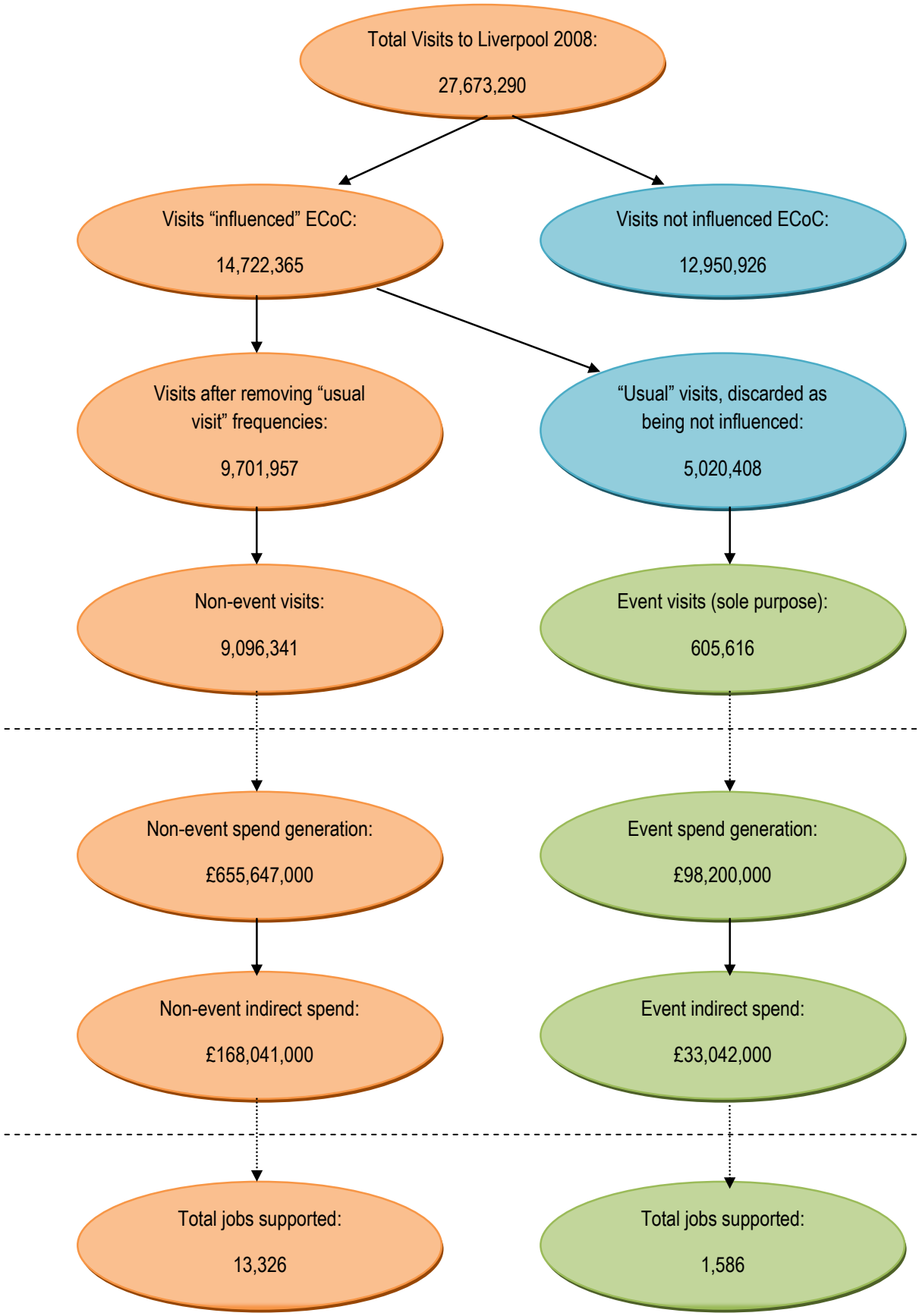
Figure 81: Calculation of direct and indirect spend, profiled by spend impact area

Event visitor impacts	Liverpool City	Elsewhere City Region	Elsewhere North West	Outside North West England
Direct spend	£91,577,000	£4,582,000	£1,709,000	£332,000
Indirect spend	£31,161,000	£1,308,000	£549,000	£23,000
Total	£122,739,000	£5,889,000	£2,258,000	£355,000
Jobs supported (FTE)	1,483	71	27	4

Fuller details are contained in Appendix 7.2.

5.6. Total economic impact of additional visits generated by the Liverpool ECoC

Figure 82: Steps for calculation of economic impact



In total, Liverpool's year as ECoC generated 9.7 m visits for not just the city but the wider region (see Figure 82).

- These visits generated some £753.8m in direct visitor spend.
- Some £201.1m was generated in indirect spend.
- This provides a total economic impact figure of £954.9m for the North West region as a whole, supporting 14,912 jobs.

See also Figure 83.

Figure 83: All visitor spend, profiled by spend impact area

Visitor Type	Liverpool City	Elsewhere City Region	Elsewhere North West	Outside North West England
Direct spend	£521,630,000	£130,566,000	£49,113,000	£52,538,000
Indirect spend	£141,383,000	£33,597,000	£12,699,000	£13,403,000
Total	£663,013,000	£164,163,000	£61,812,000	£65,942,000
Jobs supported (FTE)	10,225	2,632	991	1,065

6. Conclusion

This study raised a range of methodological challenges, particularly around the use of STEAM as a measure for the volume of tourism in 2008. However, the approach used by Impacts 08 and England's Northwest Research Service has identified the importance of considering behaviour and motivations of visitor, rather than just those who explicitly aim to attend events or visit attractions. It is difficult at this point to identify whether the effect which can be seen in Liverpool's experience as European Capital of Culture is a particular result of the destination marketing and branding undertaken in relation to promoting Liverpool, and particularly 2008, or whether this effect is one which is apparent in relation to other large-scale event-led interventions.

Liverpool's challenge for the future will be whether it can convert the wealth of first-time visitors it attracted through the ECoC title back to the city again, and whether it can continue to maintain some of the high profile which its Liverpool 08 events programme garnered, to raise the perceived 'offer' of the city to potential visitors. It is not possible to make predictions at this stage, although the results of the visitor survey indicate that many visitors enjoyed their stay and reflected on multiple aspects of the city and the visitor offer favourably.

7. Appendices

7.1. Responses to the visitor survey

Origin

Elsewhere	All visits	Other influence	ECoC influence
UK	26.2%	21.1%	31.4%
Europe	10.2%	8.2%	12.2%
Merseyside	31.8%	43.4%	20.0%
North West	17.6%	17.5%	17.7%
Overseas	14.2%	9.8%	18.6%

Social grade

	All visits	Other influence	ECoC influence
1. A/B	34.8%	34.8%	34.8%
2. C1	37.6%	39.1%	36.1%
3. C2	9.5%	9.6%	9.4%
4. D/E	10.7%	10.0%	11.4%
Refused	7.4%	6.6%	8.2%

Reasons for visiting

	All visits	Other influence	ECoC influence
Attending an event	7.6%	9.0%	6.3%
Visiting an attraction	9.0%	8.1%	9.9%
Special shopping trip	25.5%	39.8%	11.0%
Visting friends and relatives	16.4%	17.0%	15.8%
Sightseeing in Liverpool	43.9%	25.3%	62.6%
Business trip	0.8%	0.6%	0.9%
Other	9.0%	8.3%	9.7%
Spontaneous mention of ECoC	9.1%	0.0%	18.2%

Abstraction: What else would you have done today?

	All visits	Other influence	ECoC influence
1. Stayed at home or gone to work	62.9%	62.2%	63.6%

2. Done something else in Liverpool	0.1%	0.0%	0.1%
3.Visited elsewhere in Merseyside	0.1%	0.1%	0.0%
4. Visited elsewhere in the North West	31.0%	32.3%	29.7%
5. Visited somewhere outside the NW	5.9%	5.3%	6.6%

Influences on visiting

	All visits	Other influence	ECoC influence
Seeing / hearing advert for Liverpool	13.6%	9.7%	17.6%
Seeing / hearing advert for an advert	2.2%	1.9%	2.4%
Other advertising	1.6%	1.1%	2.0%
Article in paper	3.9%	2.6%	5.2%
Recommended by friend	25.1%	20.1%	30.2%
Been before	44.8%	56.0%	33.5%
www.visitliverpool.com	5.8%	2.8%	8.8%
www.liverpool08.com	8.4%	1.9%	15.1%
Other website	3.4%	2.3%	4.6%

How often do you visit Liverpool?

	All visits	Other influence	ECoC influence
1. At least once a week	0.8%	1.4%	0.0%
2. At least once a month	17.2%	26.4%	5.7%
3. 6-11 times a year	18.0%	20.8%	14.5%
4. 2-6 times a year	27.1%	25.5%	29.1%
5. Annually	4.8%	5.5%	4.0%
6. Less often	6.6%	6.1%	7.4%
7. First visit	25.5%	14.3%	39.4%

Influences on visiting: ECoC status

	All visits	Other influence	ECoC influence
Refused	1.2%	2.3%	0.1%
Not at all important (1)	22.8%	44.1%	1.1%
2	13.5%	25.6%	1.3%
3	15.7%	28.0%	3.3%
4	15.2%	0.0%	30.6%
Very important (5)	31.6%	0.0%	63.5%
Mean score	*3.2*	*1.83*	*4.54*

Influences on visiting: ECoC event

	All visits	Other influence	ECoC influence
Refused	1.3%	2.5%	0.1%

Not at all important (1)	24.4%	45.5%	2.9%
2	15.2%	27.6%	2.6%
3	17.5%	24.3%	10.6%
4	11.5%	0.0%	23.1%
Very important (5)	30.2%	0.0%	60.7%
Mean score	*3.08*	*1.78*	*4.36*

Influences on visiting: Other events

	All visits	Other influence	ECoC influence
Refused	1.7%	2.5%	0.9%
Not at all important (1)	25.7%	41.0%	10.2%
2	12.8%	19.7%	5.9%
3	21.9%	17.7%	26.1%
4	9.4%	5.2%	13.8%
Very important (5)	28.5%	14.0%	43.1%
Mean score	*3.02*	*2.3*	*3.74*

Influences on visiting: Shopping facilities

	All visits	Other influence	ECoC influence
Refused	1.7%	2.9%	0.5%
Not at all important (1)	15.0%	13.5%	16.6%
2	11.5%	13.6%	9.4%
3	20.5%	17.3%	23.9%
4	14.1%	11.3%	17.0%
Very important (5)	37.0%	41.4%	32.7%
Mean score	*3.47*	*3.55*	*3.4*

Influences on visiting: Visitor attractions

	All visits	Other influence	ECoC influence
Refused	1.6%	2.6%	0.5%
Not at all important (1)	20.1%	38.2%	1.8%
2	7.9%	14.2%	1.5%
3	14.5%	20.4%	8.4%
4	20.9%	14.6%	27.3%
Very important (5)	35.0%	9.8%	60.5%
Mean score	*3.43*	*2.42*	*4.44*

Influences on visiting: World Heritage Site

	All visits	Other influence	ECoC influence

Refused	3.2%	3.7%	2.7%
Not at all important (1)	24.9%	44.3%	5.4%
2	14.5%	22.6%	6.4%
3	17.1%	20.6%	13.6%
4	11.9%	3.9%	19.9%
Very important (5)	28.3%	4.9%	52.0%
Mean score	*3.04*	*1.99*	*4.1*

Type of visit

	All visits	Other influence	ECoC influence
A day trip from elsewhere	56.8%	65.8%	47.6%
A staying trip in NW	9.7%	6.8%	12.6%
A staying trip in Merseyside	9.6%	9.7%	9.6%
A staying trip in Liverpool	23.9%	17.7%	30.2%

Type of group with

	All visits	Other influence	ECoC influence
On my Own	33.2%	40.9%	25.5%
With Partner / Spouse	28.2%	21.7%	34.8%
With children	6.2%	6.7%	5.7%
With family	11.9%	11.1%	12.8%
With family	20.0%	20.3%	19.8%
Organised trip	2.4%	1.5%	3.3%

Average number of nights staying

	All visits	Other influence	ECoC influence
Average number of nights staying	4.39	4.06	4.62

Accommodation using

	All visits	Other influence	ECoC influence
Camping/caravanning	0.3%	0.0%	0.6%
Friend/Relative's house	32.7%	34.3%	31.6%
Guesthouse/B&B	2.2%	1.7%	2.6%
Holiday camp	0.2%	0.0%	0.3%
Hotel	44.4%	45.5%	43.6%
Refused	10.3%	12.0%	9.1%
Self-catering	1.0%	1.2%	0.9%
University accommodation	1.0%	0.8%	1.1%
Youth Hostel	7.9%	4.5%	10.3%

Location of accommodation

	All visits	Other influence	ECoC influence
Liverpool	**63.6%**	**57.9%**	**67.5%**
Halton	0.7%	1.2%	0.3%
Knowsley	2.0%	4.1%	0.6%
Sefton	12.1%	12.8%	11.7%
St.Helens	1.5%	1.2%	1.7%
Wirral	4.7%	6.2%	3.7%
Cheshire	*5.7%*	*5.0%*	*6.3%*
Greater Manchester	*3.2%*	*3.3%*	*3.1%*
Lancashire	*1.3%*	*2.5%*	*0.6%*
Outside the North West	*1.9%*	*1.2%*	*2.3%*
Refused	*3.2%*	*4.5%*	*2.3%*

Mode of travel

	All visits	Other influence	ECoC influence
Car	42.0%	36.4%	47.7%
Train	24.0%	28.4%	19.6%
Bus	15.3%	20.8%	9.8%
Ferry	1.9%	1.5%	2.3%
Plane	3.4%	3.3%	3.6%
Other	17.1%	13.5%	20.8%

People in group

	All visits	Other influence	ECoC influence
Adults	2.35	2.14	2.56
Children	0.21	0.23	0.19
Total	2.56	2.37	2.75

Likelihood of repeat visit

	All visits	Other influence	ECoC influence
Refused	2.2%	2.9%	1.4%
Not at all important (1)	3.4%	3.3%	3.6%
2	3.2%	2.6%	3.7%
3	7.9%	5.8%	10.1%
4	9.3%	7.1%	11.5%
Very important (5)	74.1%	78.3%	69.8%
Mean score	*4.51*	*4.59*	*4.42*

Mean no. of visits expected in 2008

	All visits	Other influence	ECoC influence
Total visits	11.07	14.94	6.2
Merseyside residents	*25.53*	*26.94*	*22.52*
North West residents	*7.6*	*10.12*	*5.2*
Elsewhere UK residents	*3.01*	*4.17*	*2.17*
Overseas visitors	*1.22*	*1.18*	*1.25*

Transport to Liverpool

	All visits	Other influence	ECoC influence
Refused	14.3%	12.2%	16.5%
Very poor (1)	0.4%	0.3%	0.6%
2	0.5%	0.9%	0.1%
3	8.0%	8.6%	7.4%
4	17.8%	18.9%	16.7%
Very good (5)	58.3%	58.1%	58.5%
Mean score	*4.56*	*4.54*	*4.59*

Retail offering in Liverpool

	All visits	Other influence	ECoC influence
Refused	5.2%	6.1%	4.3%
Very poor (1)	0.8%	0.5%	1.0%
2	1.1%	1.8%	0.5%
3	8.8%	8.7%	8.9%
4	21.8%	21.7%	21.8%
Very good (5)	62.3%	61.3%	63.4%
Mean score	*4.52*	*4.51*	*4.53*

Visitor attractions in Liverpool

	All visits	Other influence	ECoC influence
Refused	3.1%	5.0%	1.1%
Very poor (1)	0.3%	0.4%	0.1%
2	0.5%	0.5%	0.5%
3	4.8%	6.2%	3.4%
4	19.6%	22.3%	16.8%
Very good (5)	71.7%	65.6%	77.9%
Mean score	*4.67*	*4.6*	*4.74*

Outdoor public art in the city

	All visits	Other influence	ECoC influence
Refused	7.7%	10.7%	4.7%
Very poor (1)	4.2%	2.9%	5.6%
2	3.2%	4.0%	2.4%
3	17.2%	19.3%	15.2%
4	20.5%	20.7%	20.4%
Very good (5)	46.9%	42.4%	51.5%
Mean score	*4.11*	*4.07*	*4.15*

Liverpool overall as EcoC

	All visits	Other influence	ECoC influence
Refused	4.4%	6.4%	2.3%
Very poor (1)	0.3%	0.3%	0.3%
2	1.1%	1.6%	0.6%
3	9.1%	11.2%	6.9%
4	21.4%	22.8%	19.9%
Very good (5)	63.7%	57.5%	69.9%
Mean score	*4.54*	*4.45*	*4.62*

Visitor spend (per person, per trip)

	All visits	Other influence	ECoC influence
Accommodation	£24.10	£21.62	£26.63
Eating out	£25.10	£19.42	£30.80
Shopping	£50.68	£55.97	£45.18
Travel costs	£7.21	£5.47	£8.97
Attractions	£10.65	£10.87	£10.44
Total	£113.93	£105.87	£121.72

7.2. Technical appendix: Economic Impact Calculations

Table 1: STEAM figures for Liverpool 2008 (000s of visitors)

	2008	2007	Change 2007-2008
Serviced Accom	1,058.56	914.17	15.8%
Non-Serviced Accom	100.80	78.62	28.2%
Staying with Friends / Family	753.14	709.88	6.1%
All Staying visitors	1,912.50	1,702.67	12.3%
Day Visitors	25,760.79	18,914.10	36.2%
TOTAL	**27,673.29**	**20,616.77**	**34.2%**

Table 2: Raw responses type of visit

	Day Visitors	Staying Visitors
Influenced and on first visit	22.8%	30.0%
Influenced and on repeat visit	23.7%	20.7%
Not influenced	41.0%	34.6%
Not influenced and on first visit	12.4%	14.7%

Table 3: Raw responses overlaid onto STEAM proportions

	Day Visitors	Staying Visitors	All visitors
Influenced and on first visit	5,871,468	574,481	6,445,948
Influenced and on repeat visit	6,109,793	395,184	6,504,977
Not influenced	10,572,975	662,299	11,235,275
Not influenced and on first visit	3,206,558	280,532	3,487,090

Table 4: Typical Frequency of visit to Liverpool

	Day Visitors	Staying Visitors
Influenced and on first visit	0.0	0.0
Influenced and on repeat visit	7.2	7.4
Not influenced	7.5	5.6
Not influenced and on first visit	0.0	0.0

Table 5: Expected Frequency of visits in 2008

	Day Visitors	Staying Visitors
Influenced and on first visit	1.58	1.26
Influenced and on repeat visit	15.08	8.6
Not influenced	21.61	3.82
Not influenced and on first visit	2.42	1.77

Table 6: Figures adjusted to account for 'expected' visit frequency

	Day Visitors	Staying Visitors	All visitors
Influenced and on first visit	5,871,468	560,803	**6,432,270**
Influenced and on repeat visit	3,211,903	57,784	**3,269,687**
Not influenced	10,572,975	675,978	**11,248,953**

Not influenced and on first visit	6,104,448	617,932	**6,722,381**
Revised STEAM influenced	9,083,370	618,587	**9,701,957**

Table 7: Type of visit – from profile

	Day Visitors	Staying Visitors
A day trip from home	70%	-
A day trip whilst on holiday	12%	-
A day trip whilst on holiday - staying NW	7%	-
A day trip whilst on holiday - staying Merseyside	11%	-
A staying trip in Liverpool	-	100%
Total	100%	100%

Table 8: Type of visit – overlaid onto STEAM numbers

	Day Visitors	Staying Visitors
A day trip from home	6,358,359	-
A day trip whilst on holiday	1,126,338	-
A day trip whilst on holiday - staying NW	590,419	-
A day trip whilst on holiday - staying Merseyside	1,008,254	-
A staying trip in Liverpool	-	618,587
Total	9,083,370	618,587

Table 9: Share of A day trip whilst on holiday - staying Merseyside

	Visits generated	Overlaid onto STEAM numbers	Estimated Nights	Estimated Nights in Serviced accom.
Halton	3%	28,691	154,559	32,393
Knowsley	9%	101,805	550,675	116,613
Sefton	58%	651,555	3,519,690	745,956
St.Helens	8%	94,401	509,027	108,284
Wirral	22%	249,886	1,350,310	285,981

Table 10: Share of A day trip whilst on holiday - staying elsewhere NW

	Visits generated	Overlaid onto STEAM numbers	Estimated Nights	Estimated Nights in Serviced accom.

Cheshire	33%	194,823	935,450	414,929
Cumbria	5%	29,744	191,849	85,514
Greater Manchester	29%	171,028	1,026,913	455,827
Lancashire	34%	200,772	1,685,743	748,806

Table 11: Aggregate Economic numbers

	No. influenced by Capital of Culture	Per person spend	Total spend
Day visit from home	6,021,493	£52.08	£313,599,335
Day visit on holiday - outside the NW	1,012,566	£56.11	£56,815,102
Day visit on holiday - staying in the NW	559,344	£129.35	£72,351,197
Day visit on holiday - staying Merseyside	937,083	£120.62	£113,030,981
Staying trip to Liverpool	565,855	£176.46	£99,850,692
Total	**9,096,341**		**£655,647,307**

Table 12a & 12b: Variance of influence by period

Day Visitors	Jan-Feb	Mar-Apr	May-Jun	Jul-Aug	Sep-Oct	Nov-Dec
Other influence active	41.4%	66.3%	46.9%	48.5%	56.5%	67.5%
Capital of culture influenced visit	58.6%	33.7%	53.1%	51.5%	43.5%	32.5%

Staying Visitors	Jan-Feb	Mar-Apr	May-Jun	Jul-Aug	Sep-Oct	Nov-Dec
Other influence active	39.0%	46.4%	32.1%	27.8%	34.0%	44.0%
Capital of culture influenced visit	61.0%	53.6%	67.9%	72.2%	66.0%	56.0%

Table 13: Numbers influenced by period

	Jan-Feb	Mar-Apr	May-Jun	Jul-Aug	Sep-Oct	Nov-Dec
Day visitors (STEAM)	3,901,707	4,519,847	5,048,742	6,294,259	3,762,778	2,233,462
Staying visitors (STEAM)	285,126	295,304	339,867	398,043	301,137	293,020
Day visits influenced ECoC	1,557,618	1,131,322	1,967,517	2,524,980	1,262,490	639,443
Staying visits influenced ECoC	119,644	94,188	134,918	145,101	89,097	35,639
Total Visits influenced by ECoC	**1,677,262**	**1,225,510**	**2,102,435**	**2,670,081**	**1,351,587**	**675,082**

Table 14: Visitor spend data

Sectors	Day	Stay	Day	Stay	Visitors all
Retail	£31.71	£44.45	£270,516,584	£25,151,632	**£295,668,216**

Catering	£15.03	£52.81	£128,207,049	£29,883,765	**£158,090,814**
Attractions	£5.17	£16.66	£44,091,166	£9,426,013	**£53,517,179**
Transport	£4.61	£7.25	£39,302,190	£4,103,184	**£43,405,375**
Accom	£4.52	£63.42	£38,553,220	£35,886,354	**£74,439,574**
Total	**£65.15**	**£176.46**	**£555,792,076**	**£99,850,773**	**£655,642,849**

Table 15: Indirect effects from visitor spend

Cambridge Estimates	**Local linkages spend**	**Economic Impact incl. Multiplier**	**Total Jobs**
Retail	£62,093,153	£357,761,369	**4,412.1**
Catering	£47,414,030	£205,504,844	**3,871.1**
Attractions	£17,126,288	£70,643,467	**1,358.8**
Transport	£10,847,433	£54,252,808	**694.5**
Accom	£24,558,812	£98,998,386	**1,835.8**
Total	**£176,245,405**	**831,888,255**	**13,326.3**

7.3. Overview of economic impact of events evaluations

	Event				
	Opening Event – The People's Opening	**Opening Event – Liverpool The Musical**	**John Tavener Requiem**	**Vladimir Ashkenazy Conducts European Youth Orchestra**	**Liverpool Sound**
Event Attendance	38,500	8,774	1,521	1,512	36,000
Profile of Visitors	44% from C1 group and 34% 16-24.	40% from AB group and 68% aged 35-64	83% aged 45+ and 53% from AB groups.	70% aged 55+ with 54% from AB groups.	45% from AB group and 52% aged 45-64.
Type of Visitor	66% residents, 27% on a day trip from home and 7% staying away from home.	74% residents, 18% on a day trip from home and 8% staying away from home.	64% residents, 31% on a day trip from home and 5% staying away from home.	57% residents with 37% on day trip from home and 5% staying away from home.	36% residents with 44% on a day trip from home and 19% staying away from home.
Motivations to Visit	87% came to Liverpool to attend the event with 34% deciding to attend on the day.	93% came to Liverpool to attend the event with 69% deciding to attend 2-3 months in advance.	81% have heard RLPO perform more than 3 times. 97% decided to attend more than 2 months in advance.	86% were listening to the Orchestra for the first time while 19% had seen Vladimir Ashkenazy conduct more than 3 times. 64% decided to visit up to 3 months in advance.	46% had seen Paul McCartney perform before with 99% visiting Liverpool because of the concert. 56% decided to visit more than 3 months in advance.
Marketing Influences	39% mentioned PR as the main influence with 41% mentioning advertising as having had some influence.	Internet was the main influence (61%) on decisions to visit.	Internet (43%) and Advertising (34%) were the main influences on decisions to visit.	Internet was the main influence (53%) on decisions to visit.	Internet was the main influence for 64% with 74% stating it had some influence on decisions to visit.
Event Satisfaction	Overall satisfaction of 4.4 out of 5.0.	Overall satisfaction of 4.1 out of 5.0.	Overall satisfaction of 4.0 out of 5.0.	Overall satisfaction of 4.2 out of 5.0.	Overall satisfaction of 3.9 out of 5.0.
Additional Economic Impact (Audience)	£873,665 for the Liverpool economy with £16,252 for the rest of Merseyside and £31,395 for rest of NW England and further afield. 18.9 FTE supported.	£376,665 for the Liverpool economy with £11,018 for the rest of Merseyside and £14,738 for the rest of NW England and further afield. 8.5 FTE supported.	£57,561 for the Liverpool economy with £1,191 for the rest of Merseyside and £315 for the rest of NW England and further afield. 1.3 FTE supported.	£61,615 for the Liverpool economy with £1,145 for the rest of Merseyside and £1,439 for the rest of NW England and further afield. 1.3 FTE supported.	£5,022,520 for the Liverpool economy with £63,284 for the rest of Merseyside and £28,210 for the rest of NW England and further afield. 103.4 FTE supported.
Additional	£1,520,000 in Liverpool and £220,000 further afield.		£17,024 in Liverpool (in	£17,024 all in Liverpool (in	£2,100,570 all in Liverpool

Economic Impact (Businesses)	17.5 FTE supported.		combination with Ashkenazy and Rattle)	combination with Tavener and Rattle)	and 25.1 FTE supported.
	Event				
	Clipper Race Finish	**Tall Ships Races**	**Go Superlambananas**	**Imagine**	**World Firefighters Games**
Event Attendance	15,000	325,000	570,000 unique visitors	63,750	18,000
Profile of Visitors	37% were from AB group with 35% aged 45-64.	44% aged 45-64 with 20% aged 65+. 30% from AB group with 23% from DE group.	32% aged 35-44 with 36% from C1 social group and 53% with families/ children.	35% were from DE groups. 49% were aged 25-44 and 45% were with children	43% were aged 25-44 with 20% aged 55-64. 29% were from the C1 group.
Type of Visitor	32% residents, 47% on a day visit from home with 26% staying away from home.	26% residents, 60% on a day visit from home with 14% staying away from home.	45% residents, 36% on a day trip from home and 17% staying overnight.	76% residents, 18% on a day trip from home.	41% residents with 29% staying visitors and 28% on a day trip from home.
Motivations to Visit	57% came to Liverpool to attend the event with 51% deciding in the week of the event to attend.	40% had attended previous Tall Ships Race. 86% came to Liverpool to visit the event with 68% deciding to visit in the week beforehand.	34% came to see the Superlambananas with 48% making multiple visits and 92% deciding to visit up to a week beforehand.	73% came to Liverpool to attend the event with 85% deciding to visit within 7 days of the event.	49% came to attend the events as a spectator with 32% being participants. 26% planned to visit more than 2 months in advance.
Marketing Influences	Word of mouth was the main influence (31%) with PR (20%) also being influential.	TV news stories (27%) and word of mouth (20%) were the main influences on decisions to visit. PR (54%) and advertising (24%) had some influence.	Word of mouth (34%) was the main influence with TV news items (18%), having seen the Superlambananas (16%) also being main influences.	Word of mouth (25%) was the main influence with leaflets (15%), liverpool08.com (9%) and radio advertising (9%) also being important.	Word of mouth was the main influence for 45% with PR (18%) and advertising (17%) also having had some influence.
Event Satisfaction	Overall satisfaction of 4.5 out of 5.0.	Overall satisfaction of 4.4 out of 5.0 ranging from 4.0 on Friday to 4.6 on Monday.	Overall satisfaction of 4.2 out of 5.0.	Overall satisfaction of 4.4 out of 5.0.	Overall satisfaction of 4.2 out of 5.0.
Additional Economic Impact (Audience)	£584,732 for the Liverpool economy with £30,381 for the rest of Merseyside and £33,516 for rest of NW England and further afield. 13.1 FTE supported.	£8,279,646 for the Liverpool economy with £656,941 for the rest of Merseyside and £584,704 for rest of NW England and further afield. 192.8 FTE supported.	£9,632,345 for the Liverpool economy with £662,777 for the rest of Merseyside and £222,498 for rest of NW England and further afield. 225.3 FTE supported.	£914,545 for the Liverpool economy with £18,431 for the rest of Merseyside and £60,678 for rest of NW England and further afield. 20.3 FTE supported.	£1,660,858 for the Liverpool economy with £106,391 for the rest of Merseyside and £75,064 for rest of NW England and further afield. 37.5 FTE supported.

Additional Economic Impact (Businesses)	£537,759 all in Liverpool. 4.1 FTE supported.	£3,352,510 all in Liverpool. 3.2 FTE supported.	£563,962 all in Liverpool. 0.4 FTE supported.	£1,596,137 all in Liverpool. 3.9 FTE supported.	£207,900 all in Liverpool. Method employed did not allow estimate of FTE.

	Event				
	Mathew Street Festival	**Sir Simon Rattle conducts Berliner Philharmoniker**	**La Machine**	**MTV EMA**	**Transition Event**
Event Attendance	185,000	1,653	200,000	4,250 excluding VIPs	50,000
Profile of Visitors	24% were aged 16-24 and 25% aged 35-44. 32% from C1 group and 25% from DE group.	42% were aged 65+ and 33% aged 44-64. 46% from AB and 30% from DE group.	53% were aged 25-44 and 30% were 45-64. 33% are from C1 group with 24% from DE group.	All aged under 45 with 52% aged 16-24. 38% from AB group with 33% from C1.	An evenly distributed audience with 22% aged 16-24 and 22% aged 45-54. 36% from AB group with 33% from C1.
Type of Visitor	48% were day visits from home with 34% residents and 16% staying overnight.	60% were residents with 33% on day visits from home and 5% staying overnight.	51% were making a day trip from home with 46% being residents.	55% were residents with 23% staying overnight and 16% on day trips from home.	59% were residents with 33% on a day trip from home.
Motivations to Visit	80% came to attend the event with 58% deciding to attend the event in the week beforehand.	95% came to attend the event with 72% deciding to attend more than 3 months ago.	85% came to attend the event with 92% deciding in the week beforehand to attend.	84% came to Liverpool to attend the event.	67% came to attend the event with 54% planning to attend in the week beforehand and 28% deciding on the day to attend.
Marketing Influences	Word of mouth was the main influence (39%) with PR having some influence (23%).	Direct mail from RLP was the main influence (33%) with websites having some influence (30%)	TV was the main influence (42%) with advertising having some influence (27%).	Word of Mouth was the main influence (18%) with TV news items having some influence (25%).	Word of Mouth was the main influence (31%) with TV news items (34%) having some influence.
Event Satisfaction	Overall satisfaction of 4.7 out of 5.0.	Overall satisfaction of 4.2 out of 5.0.	Overall satisfaction of 4.1 out of 5.0.	Overall satisfaction of 4.2 out of 5.0.	Overall satisfaction of 4.3 out of 5.0.
Additional Economic Impact (Audience)	£7,155,289 for the Liverpool economy with £341,460 for the rest of Merseyside and £146,108 for rest of NW England and further	£121,440 for the Liverpool economy with £1,177 for the rest of Merseyside and £323 for the rest of NW England and further afield. 2.5 FTE supported.	£2,007,588 for the Liverpool economy with £102,902 for the rest of Merseyside and £38,914 for rest of NW England and further afield. 43.3 FTE supported.	£540,946 for the Liverpool economy with £36,273 for the rest of Merseyside and £31,197 for rest of NW England and further afield. 12.5 FTE supported.	£1,018,178 for the Liverpool economy with £31,578 for the rest of Merseyside and £25,738 for the rest of NW England and further afield. 21.8 FTE supported.

	afield. 153.4 FTE supported.				
Additional Economic Impact (Businesses)	£808,757 all in Liverpool. 0.2 FTE supported.	£17,024 all in Liverpool (in combination with Tavener and Ashkenazy)[38]	£1,950,750 all in Liverpool. 6.2 FTE supported.	£2,701,659 90% in Liverpool 10% in Northwest. Around 10 FTE supported.	£482,336 all in Liverpool. 4.3 FTE supported.

[38] The information available did not allow calculation of an estimate of FTE jobs created.