

WIRRAL COUNCIL

CABINET

12 APRIL 2012

SUBJECT:	FINDINGS OF THE WIRRAL VISITOR RESEARCH STUDY CONDUCTED IN 2011 TO SUPPORT WIRRAL'S TOURISM BUSINESSES
WARD/S AFFECTED:	ALL
REPORT OF:	CHIEF EXECUTIVE
RESPONSIBLE PORTFOLIO HOLDER:	COUNILLOR LESLEY RENNIE, CABINET MEMBER FOR CULTURE, TOURISM AND LEISURE
KEY DECISION:	YES

1.0 EXECUTIVE SUMMARY

- 1.1 This report summarises the key findings of both current and potential visitors' perceptions of Wirral, and highlights feedback from the Wirral Tourism Business Network, regarding the Council's Destination Marketing team's ongoing support and current performance. It also recommends future activity based on these findings, to help achieve visitor growth, generate spend and encourage long-term economic sustainability.

2.0 BACKGROUND AND KEY ISSUES

- 2.1 In 2006, due to the lack of market intelligence available specifically for Wirral, a Visitor Research Study was conducted to evaluate current attendance at a selection of Wirral's key attractions/locations, and the perception of potential visitors to the Borough. The findings led to the development of the Wirral Tourism Business Network; the creation of the "Wirral Peninsula" brand, and the annual Play, Eat and Stay in Wirral marketing campaign.
- 2.2 In 2011, the Wirral Visitor Research Study was repeated, to monitor and evaluate performance over the past five years since the previous study, of both the industry and work of the Council's tourism marketing team. European funds were secured, via the Partners for Tourism Growth project in association with The Mersey Partnership, and Ipsos MORI were contracted. This followed initial expressions of interest from three national research companies; in line with the Council's procurement procedure, formal presentations and interviews, and a full evaluation process to achieve Best Value and Best Practice. A range of private, public and community sector stakeholders and partners, from the Wirral Tourism Business Network, were also consulted throughout the process.

- 2.3 The Research Study included stakeholder interviews, existing and potential visitor research, focus group feedback and web research.

3.0 RATIONALE

3.1 Stakeholder Interviews

- 3.1.1 To ensure that the research captured all the relevant information, to develop and inform marketing decisions and policy going forward, in-depth interviews were conducted with key Wirral tourism stakeholders from the Business Network.

3.2 Existing Visitor Survey

- 3.2.1 This quantitative research was carried out in three phases during 2011 (ie spring, summer and autumn), and at 12 high footfall visitor locations, and a total of 672 adults were interviewed. Detailed questionnaires and qualified interviewers were used over the three phases. The locations were the Floral Pavilion Theatre and Conference Centre and promenade in New Brighton, The U-boat Story, Woodside ferry terminal and Home cafe, Port Sunlight Museum, Lady Lever Art Gallery, Wirral Country Park and Visitor Centre at Thurstaston, Spaceport, Seacombe ferry terminal, Birkenhead Market, Hoylake town centre, West Kirby Marine Lake and promenade, and Brimstage Craft Centre.

- 3.2.2 The Survey analysed the frequency and length of visits, group composition, reasons for visiting, distance travelled, preferences, satisfaction, gender, age, spend, marketing evaluation (eg how they found the attraction/location, etc), and socio-economic grouping.

3.3 Potential Visitor Telephone Survey

- 3.3.1 Using Random Digit Dialling, a total of 501 adults took part in a Potential Visitor Telephone Survey. This quantitative survey was conducted using Computer Aided Telephone Interviewing. The interviews were conducted with adults living within a two-hour drive time of Wirral at six key locations (ie Liverpool, Chester, Wrexham, Manchester, Birmingham and Lancaster), and quotas were set for these areas as well as for age, gender and work status.

3.4 Focus Group Feedback (including Web Research)

- 3.4.1 A crucial element of the research was to assess the tourism marketing and communications mix that Wirral offers to visitors. This additional and more detailed qualitative work was carried out in locations within a 90 minute drive time of Wirral (ie Chester, Manchester and Birmingham). Each Group contained a maximum of 10 people, and they were questioned against set criteria, to evaluate how people search for short and day breaks; how they assess Wirral's current tourism literature, as well as competitor offerings. Competitor websites

were also reviewed as part of the Study. The work helped to evaluate and secure a profile of views including motivation, frequency and length of visits, perception of the Borough, and the quality of existing marketing material.

- 3.4.2 The research in 2006 found that over half of all respondents research short breaks on the internet. This led to the enhanced, dedicated website specifically for tourism visitors to Wirral, www.visitwirral.com. To measure its effectiveness, particularly in light of the continuing developments in social networking, qualitative depth interviews of web usage was undertaken, to fully understand how people navigate the internet when looking for visitor information.

4.0 KEY FINDINGS

4.1 Stakeholder Interview Results

- 4.1.1 All of the Network stakeholders who were interviewed; echoed the three themes of Coast and Countryside, Cuisine and Culture, as the key “attractions” for Wirral. This reassuring recommendation, reinforces the work of the Council’s Destination Marketing team, and is reflected by the results of the Wirral Year of Food in 2010, and bodes well for this year’s Wirral Year of Coast and Countryside.
- 4.1.2 All stakeholders valued their relationship with the Council, highlighting that their impact is greater when working together, rather than independently. They acknowledged that Wirral’s position as a tourist destination had been enhanced over the past five years, because of the work of the Council’s tourism marketing team, and praised the amount of tourism media and press coverage that had been generated nationally and regionally for the Borough.
- 4.1.3 Golf was an area highlighted as important for Wirral’s potential tourism development, with a broad range of visitors already coming to the Borough, including those for the newly developed Wirral Golf Classic. Both the Ricoh Women’s British Open this September, and The Open Championship in 2014, will have a major impact for Wirral’s tourism businesses.
- 4.1.4 Stakeholders also suggested a number of areas to be improved or continued. These included better signage to Wirral from outside of the Borough; continued marketing regionally and nationally, and developing a closer relationship with Marketing Cheshire as well as The Mersey Partnership.

4.2 Existing Visitor Findings

- 4.2.1 Overwhelmingly, visitors see the Wirral as a beautiful place to relax, having something for all the family, and a substantial 90% of current visitors would recommend the Borough as a place to visit.

- 4.2.2 There has been a significant increase in the proportion of visitors who are satisfied with their visit to Wirral (ie 95% in 2011), and two-thirds are now very satisfied (ie 66% compared to 55% in 2006).
- 4.2.3 Over 80% of existing visitors believe that Wirral is a better tourism location, than other places they have visited in the last 12 months, which is a significant increase from 50%, when the research was conducted in 2006.
- 4.2.4 There have been more first time visitors in 2011 than in 2006 (ie 40% compared to 30%), and the proportion of “first-timers” from outside the North West is significantly higher (ie 59% from outside the North West 24% actually from the region), which is a important reflection of Wirral’s increasing tourism offer, reputation and marketing activity delivered over the past 5 years.
- 4.2.5 Existing visitors are of a similar age (ie 57% are 55 plus), gender profile (ie 58% women and 42% men) and social grade to those in 2006 (ie the more affluent group of ABC1s increased slightly from 62% to 65% in 2011, however this compares with 51% of the national population profile of ABC1s)
- 4.2.6 Those taking short breaks in Wirral have increased from 20% to 26% and 41% of these “overnighters” stay in hotels. This again reflects the increasing tourism offer, including the range of hotels and guesthouses in the Borough, and Wirral’s reputation as a place to play, eat and stay.
- 4.2.7 Visitors come to Wirral for a great day out (50%), to use Wirral’s restaurants, tearooms and cafes (26%), and to see specific attractions (24%).
- 4.2.8 87% of existing visitors agree that Wirral has an excellent coast and countryside offer, and 68% highlighted the Borough’s natural assets as the reason they viewed Wirral as a better than average location. The Wirral Year of Coast and Countryside, and the launch of the Wirral Circular Trail have been developed to take advantage of this interest, in order to attract even more visitors.
- 4.2.9 More than half of existing visitors are interested in the Wirral Food and Drink Festival in Bebington and the Christmas Food Fayre in Port Sunlight. Events such as these, developed by the Destination Marketing team over the past five years with European funds, are a key tool to attract visitors and spend. The economic impact of events in 2011 was over £5 million and includes the Mersey Pirate Muster in New Brighton, the Birkenhead Park Festival of Transport and the Wirral Golf Classic.
- 4.2.10 In addition, Port Sunlight Museum, Spaceport at Seacombe and The U-boat Story at Woodside attracted the most first time visitors.

4.3 Potential Visitor Findings

- 4.3.1 Coast/Countryside and Quality Food continue to be the most important considerations for planning short breaks (ie both at 84%), which not only mirrors the research done in 2006, but also reinforces the key themes chosen by the Destination Marketing team to promote Wirral's tourism offer (ie Year of Food in 2010 and Year of Coast and Countryside in 2012). The third highest consideration was Culture at 78%, which will now inform any future themed activity (ie Year of Culture in 2014).
- 4.3.2 Websites are a key influencer for short breaks (ie increasing to 64% in 2011 from 52% in 2006), however word of mouth continues to be the highest at 83%.
- 4.3.3 Websites also made a substantial increase for those interested day trips (ie 31% in 2011 from 19% in 2006), however word of mouth again continues to be the highest influence at 57%.
- 4.3.4 There was significant interest in Wirral's events by potential visitors, and in particular the Port Sunlight Christmas Food Fayre (40%) and Wirral Food & Drink Festival (38%), were mentioned by interviewees. However, there is still some work to be done, to further increase awareness of the full annual events programme to potential visitors.

4.4 Focus Group Results (including Web)

- 4.4.1 The groups examined the 2010/11 Wirral Visitor Guide, the 2011/12 Food and Drink Guide, and the suggested tourism visuals for the Play, Eat and Stay in Wirral campaign in 2012.
- 4.4.2 Both the Visitor, and Food and Drink, guides were praised as giving a good impression of Wirral, and would encourage people to visit the Borough.
- 4.4.3 They were impressed with the design; the A5 format and quality finish of both publications.
- 4.4.4 They were also very impressed with the quality of the imagery; however they thought both the front cover images did not reflect the quality of images inside the literature. This feedback has now been utilised to immediately inform the new Wirral Visitor Guide and will also inform the development of the next Food and Drink Guide in 2013.
- 4.4.5 The Play, Eat and Stay in Wirral campaign, was praised for the striking image of New Brighton lighthouse, and it was also felt that Wirral would be a good area for walking. This again reinforces the current Coast and Countryside themed year of activity, including the launch of the new 35-mile Wirral Circular Trail for walkers and cyclists, developed by Technical Services and Cultural Services.

4.4.6 Wirral's dedicated tourism website (www.visitwirral.com) was positively received, particularly in relation to its feel and tone, and it was highlighted that the brand colours fitted the respondents' impression of Wirral. They remarked on the professional look, informative content and were impressed with the images used.

4.4.7 Suggested amendments were put forward to enhance and improve the site, including the sequence of "tabs" at the top; making the itinerary planner clearer; adding more images in parts of the site to further inspire potential visitors, and limiting the amount of scrolling the viewer needs to do. The suggestions are now being considered and implemented by the Destination Marketing team.

5.0 CONCLUSIONS

The following conclusions are drawn from the results of the Wirral Visitor Research Study conducted in 2011; compared against the results of the market intelligence gathered in 2006, with a view to developing and implementing the future Wirral Tourism Marketing Strategy to support Wirral's tourism businesses:

- Wirral's tourism business stakeholders value their relationship with the Council and in particular the work of the Destination Marketing team. This includes the support to the Wirral Tourism Business Network and six sector partners, and the national/regional marketing campaign activity. However, a closer working relationship with both the Cheshire and Merseyside tourism boards was suggested for the future. Better signage to the Borough was also recommended where possible.
- There has been a significant increase in the proportion of visitors who are satisfied with their visit to Wirral over the past five years (ie 95% in 2011), and those that believe it is a more attractive place, than other locations they have visited.
- More visitors are coming to Wirral for the very first time than ever before, and more of those "first-timers" are coming from outside the North West of England, reflecting the positive impact of Wirral's marketing activity to visitors over the past five years. This also highlights the Borough's increasing tourism offer (eg accommodation, attractions, food and drink outlets, etc).
- People clearly have different motivations for visiting places, however visitors are particularly interested in Wirral's coast and countryside, quality food and cultural offers, and this has already informed Wirral's tourism themed years.
- Wirral's tourism dedicated website (www.visitwirral.com), is an essential tool for Wirral's tourism businesses to attract both day and short break visitors, and a number of improvements will be implemented to improve efficiency (eg sequence of "tabs" to search sectors, more images, etc).
- The range and quality of the Borough's high profile events, which currently has an economic impact of over £5 million, are vital to attracting new and existing visitors.

- Wirral's marketing literature and campaign/press coverage were highly praised for their quality, imagery and effectiveness.

Finally, Wirral's tourism marketing in general was seen as essential to market the Borough to attract both new and repeat visitors; however a "one size fits all" approach should be avoided. It was felt using a range of resources (eg Visitor Guide, Food and Drink Guide, Wirral Circular Trail, Events leaflet, Attractions leaflet, etc) as well as excellent events, www.visitwirral.com and press activity will have the most efficient and effective result in the future.

6.0 RELEVANT RISKS

6.1 There are no risks to be considered.

7.0 OTHER OPTIONS CONSIDERED

7.1 There are no other options to be considered.

8.0 CONSULTATION

8.1 The findings from the Wirral Visitor Survey have already been presented to the sector-led Wirral Tourism Business Network, and their positive response will inform the development of the Council's future tourism plan and activities.

9.0 IMPLICATIONS FOR VOLUNTARY, COMMUNITY AND FAITH GROUPS

9.1 The benefits, resulting from the recommendations of this report, will have a positive impact for Wirral's business community, tourism economy and Borough as a whole.

10.0 RESOURCE IMPLICATIONS: FINANCIAL; IT; STAFFING; AND ASSETS

10.1 There are no additional IT, staffing or asset implications.

11.0 LEGAL IMPLICATIONS

11.1 There are no additional legal implications.

12.0 EQUALITIES IMPLICATIONS

Has the potential impact of your proposal(s) been reviewed with regard to equality?

No because there is no relevance to equality.

An Equality Impact Assessment will not be required; however the Wirral Visitor Research Study was conducted equitably, the events highlighted will be promoted as totally inclusive, and there are no adverse human rights implications.

13.0 CARBON REDUCTION IMPLICATIONS

13.1 A new Wirral Group Travel Partnership, strategy and implementation plan is currently being developed, to encourage more group/coach visitors, to Wirral as a tourism destination. Environmentally sustainable use of public transport and recycling are also promoted at all events where possible, with partners including Merseytravel, so carbon production is reduced to a minimum.

14.0 PLANNING AND COMMUNITY SAFETY IMPLICATIONS

14.1 There are no planning or additional community safety implications.

15.0 RECOMMENDATION/S

15.1 Cabinet is requested to note the findings and conclusions of the Wirral Visitor Research Study, and support the development of the future Wirral Tourism Marketing Strategy, and annual Implementation Plan. The strategy's objectives will reflect the Study's conclusions to help increase the numbers of visitors to the Borough, encourage visitor spend and support the needs of Wirral's growing tourism businesses.

16.0 REASON/S FOR RECOMMENDATION/S

16.1 Tourism is currently worth over £265 million to Wirral's economy, employs over 4,000 full time equivalent jobs and has increased by a substantial 15% over the past five years (as verified by Merseyside's current tourism board, The Mersey Partnership). This highlights the value of the work of the Council's Destination Marketing team, and potential of attracting new and repeat visitors to the Borough, particularly in light of Wirral's increasing tourism offer over the coming years. These include the recently opened Marine Point leisure development in New Brighton by HRH The Queen; events such as the Ricoh Women's British Open this September for the first time in Hoylake; the welcome return of The Open Championship in 2014, and themed activity such as the Wirral Year of Coast and Countryside this year. The new tourism marketing strategy and annual delivery plan will not only maximise all of these opportunities efficiently and effectively, to help sustain and grow Wirral's tourism and leisure economy, but help plan and attract other high economic impact tourism projects to the Borough.

16.2 Putting the visitor economy into a national context, tourism is one of the six largest industries in the United Kingdom; with an annual direct spend of £90 billion per year, and employing 4.4% of the nation's total jobs. However, Britons currently take fewer "staycations" than other European countries and the industry continues to be very dependent on public sector funds for marketing activity.

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APPENDICES

Not applicable.

REFERENCE MATERIAL

The previous Cabinet report mentioned is detailed in the subject history below.

SUBJECT HISTORY (last 3 years)

Council Meeting	Date
Findings of the Existing and Potential Visitor Research Study in 2006	January 2007