



WIRRAL PENINSULA

2016 - WIRRAL VISITOR & STAKEHOLDER RESEARCH STUDY

Final Fieldwork Report - Synopsis

1. Introduction

Wirral Council and its partners, including the Wirral Chamber of Commerce & the Wirral Visitor Economy Network (WVEN), continue to drive the peninsula's visitor economy in the borough. This is currently valued at over £385 million; employing over 5,000 FTE jobs and attracts over 8 million day & short break visitors each year. Wirral is now the fastest growing visitor economy in the Liverpool city region.

However, this position must not only be sustained but exceeded, in order to achieve the Wirral Plan for 2020, and in particular the tourism pledge i.e.;

- *To increase jobs & revenue and achieve a total value of £450 million for Wirral's tourism sector by 2020.*

With this in mind, the Wirral Visitor & Stakeholder Research Study was procured & commissioned by the Council in the autumn of 2015, and was conducted throughout 2016. The detailed insight into the perceptions & motivations of visitors, matched to stakeholder feedback and mirrored against the barriers to visit Wirral, will inform the development & delivery of the all-new Wirral Tourism Strategy (2017 to 2021).

This synopsis highlights the key findings of the full report, which involved direct, face-to-face engagement and web surveys with over 1,500 individuals including current & potential visitors and stakeholder feedback. The study was conducted over 3 phases during 2016 (i.e. spring, summer & autumn) and included focus groups to evaluate current marketing activity.

2. Objectives

The key research objectives were;

- To establish the key motivations that increase or have the potential to increase leisure day trips, short breaks & business visits to Wirral.
- To assess the perceptions of Wirral among existing and potential visitors in order to confirm the peninsula's core proposition; the barriers (tangible & non-tangible) that are influencing decision-making among these groups, and how Wirral compares to rival destinations.
- To evaluate Wirral's existing brand positioning, destination offer & marketing strategy with identified target audiences and key stakeholder groups.
- To assess the potential for growing the identified niche markets (group travel, celebration, corporate etc.), based on primary & secondary research findings, and the potential for new tourism development projects.

3. Current Visitors

Fieldwork (i.e. 518 respondents)

Profiles;

- 79% are day visitors: 35% are from the LCR, 39% from the north west of England (NWE), 23% from the rest of the UK and 3% from overseas
- 21% are short breakers: 7% from the LCR, 27% from NWE, 59% from the rest of the UK and 7% from overseas
- Day visitors: 24% came to visit an attraction and 19% to visit friends & family
- Short Breakers: 67% came to visit friends & family and 14% to visit an attraction
- 55% female & 45% male
- 64% of all visitors are from the A,B & C1 NRS classification (i.e. more economically active professionals or financially stable retirees)
- 51% are employed & 38% retired.

Motivations and influences;

- 91% associated Wirral with Coast & Countryside
- 90% highlighted the peninsula was a great base between Liverpool & Chester
- 85% liked Wirral for its Culture & Heritage
- 82% highlighted the borough's Quality Food & Drink
- 52% indicated a Previous Visit was their inspiration to visit
- Almost 32% said Word of Mouth influenced them
- 22% disagreed that Wirral was associated with Business
- Almost 17% said the borough wasn't linked to Weddings (i.e. this maybe a reflection of the dominance of 45+ visitors)
- 13% are induced by the web.

First time visitors and their influences (i.e. 17% of the sample);

- 81% are influenced by Word of Mouth
- 76% by personal experience / previous visit
- 61% found promotional literature from destinations important
- Interestingly, 59% highlighted TICs are important (perhaps reflecting Word of Mouth referral & direct contact being important)
- 47% found www.visitwirral.com key

However,

- 72% of first timers found social media & 70% found email marketing unimportant.

Events visitors would consider;

- Air Show: 34%
- Farm Feast: 33%
- Hoylake RNLI Open Day: 31%
- Sandcastle Festival: 24%.

Visitor frequency;

- Day visitors: 10 per year

- Staying visitors: 3.8 per year.

Visitor travel & transport;

- Day visitors: will travel 2hrs & 10 minutes from home (i.e. 79% use car and 13% use the train or ferry)
- Staying visitors: will travel 2hrs & 20 minutes from home (i.e. 70% use car and 12% use the train or ferry).

Visitor satisfaction;

- 94% rated Wirral better or the same as other UK destinations in the last 12 months (i.e. compared to Liverpool, Blackpool, Nottingham, Snowdonia & York)
- 94% said they enjoyed their visit (i.e. rating the borough “good”)
- 93% would recommend Wirral as a place to visit
- 92% are likely to return to Wirral
- Provision of public toilets scored very low.

Media Choice;

- 31% read the Mail or Mirror & are aged 45+
- 54% listen to Radio 2, Radio 4 & Radio Merseyside (i.e. non-commercial stations & appealing to the 45+ age group).

Average visitor spend;

- Day visitor: £40
- Staying visitor – Wirral: £209 (paid accommodation)
- Staying visitor – Elsewhere: £167 (paid accommodation)

4. Potential Visitors

4.1 Fieldwork (i.e. 653 respondents)

Profiles;

- Female: 53% / Male: 47%
- A, B & C1 classification: 50%
- 70% knew where Wirral was, but over 30% didn't
- 57% are aged 45+ (i.e. only 12% are in the 16 to 24 age group)
- 53% from the north west, but outside of the LCR including Manchester & Warrington

Motivations & Influences;

- 69%: dining out
- 68%: countryside, outdoor & beauty spots
- 65%: coast, beach & seaside resorts
- 61%: parks, gardens & garden centres
- 56%: historic houses, buildings & villages
- 39% had visited before, but 61% hadn't
- 25% stated “no need to go”.

However, almost 69% stated that “they didn't know about Wirral” (i.e. male – 51% & female – 49%)

Those 69% stating “they didn’t know about Wirral” are influenced by;

- 70% dining out
- 69%: coast, beach & seaside resorts
- 67%: countryside, outdoor & beauty spots
- 59%: parks, gardens & garden centres
- 54%: historic houses, buildings & villages

Marketing materials - appealing to all potential visitors;

- 58%: Wirral Visitor Guide
- 54%: Wonders of Wirral campaign & brochure
- 52%: Discover Wirral campaign
- 49%: www.visitwirral.com

Material that would influence a visit to Wirral;

- 39%: Wirral Visitor Guide
- 33%: Wonders of Wirral campaign & brochure
- 33%: Discover Wirral campaign
- 30%: Wirral Food & Drink Guide
- 28%: www.visitwirral.com

Again, those 69% stating “they didn’t know about Wirral”, the following appealed;

- 59%: Wirral Visitor Guide
- 55%: Wonders of Wirral campaign
- 51%: Discover Wirral campaign
- 45%: www.visitwirral.com (i.e. 42% sighted Facebook)
- 41%: Wirral Food & Drink Guide.

And, they would consider visiting Wirral based on;

- 43%: Wirral Visitor Guide
- 41%: Wonders of Wirral campaign
- 39%: Discover Wirral campaign
- 33%: www.visitwirral.com
- 33%: Wirral Food & Drink Guide.

For those 69% who “have not heard about or know nothing about Wirral” the following appealed;

- 59%: Wirral Visitor Guide
- 55%: Wonders of Wirral campaign
- 44%: www.visitwirral.com
- 42%: social media.

However the Wonders of Wirral campaign & Wirral Food & Drink Guide prompted modest recall, and universally there is low awareness of marketing collateral, but high interest once exposed to the material. This reflects the type of marketing & its distribution planning and the results suggest that the marketing collateral is both attractive & functional, but is underexposed to potential markets.

Word of mouth recommendations & personal experiences are key influencers for those who “know nothing”, mirroring the non-visitor sample.

Awareness – those that agree Wirral’s brand values;

- 65%: coast & countryside
- 64%: walks
- 57%: great base between Liverpool & Chester
- 55%: welcoming
- 54%: interesting towns & villages
- 51%: nature/wildlife.

Potential events they would consider attending;

- 36%: Air Show
- 26%: Farm Feast
- 21%: Sandcastle Festival.

Number of visits taken each year;

- Day trips: 6.5
- Short breaks: 2.2.

Would consider Wirral as a;

- Day trip: 60% travelling 1 hour 48 minutes
- Short break: 44% travelling 3 hours

Competition within this latter radius includes the Lake District, Yorkshire, North to Mid-Wales, Nottingham & Warwickshire.

Wirral compared to others destinations;

- 53%: highlighted it was better or the same compared to Liverpool, Chester, Wales, Amsterdam, London & Newcastle.

Potential new developments of interest;

- 62%: Wirral tower with views of the Liverpool skyline
- 43%: Rejuvenated Birkenhead and making more of the waterfront & retail offer
- 36%: Cammell Laird waterfront museum
- 27%: New golf resort
- 25%: Enhancing Port Sunlight Museum.

4.2 Online (i.e. 114 respondents)

Visited Wirral in the past 10 years;

- 65%: past 10 years
- 20%: never (i.e. 86% highlighting they didn’t know anything about Wirral)
- 11%: more than 10 years.

Gender / age / location;

- 56% Female / 44% male
- 46%: age 45+

- 41%: from greater Manchester.

The following are the most important factors to potential visitors;

- 96%: safe & secure environment
- 96% : quality accommodation
- 95%: quality food & drink
- 77%: car parking facilities

The following % consider Wirral as a destination for;

- 86%: day trips
- 82%: short breaks.

Also, it should be noted that the online respondents are prepared to travel further than face to face potential visitors (i.e. 2 hours for a day trip and almost 4 hours for a short break).

Those that agree the following brand values are associated with Wirral;

- 91%: weddings (conflicting with the face-to-face interviews & perhaps a reflection of age and digital usage –the highest being Facebook & TripAdvisor)
- 73%: great base between Liverpool & Chester
- 64%: coast & countryside

5. Stakeholders

- 94%: think the WVEN membership is value for money (i.e. 18% highlighting marketing as most important then followed by networking at 15%)
- 93%: use www.visitwirral.com to generate business - equal to the other highest % (i.e. their own website)
- 93%: satisfied with their WVEN membership
- 69%: use the Council's tourism literature to generate business
- 69%: think collaborative marketing is working (outside of Wirral)
- 60%: use local visitor intelligence for business planning
- 56%: think collaborative marketing is working (within Wirral)
- 33%: want to attract more staying visitors.

6. Wirral Visitor Marketing Campaigns – Competition Entrants Survey

A survey was sent out to previous Visit Wirral competition entrants to see if they had been inspired to come to Wirral.

The following highlights the results from 567 responses;

- 67%: had visited Wirral (i.e. 38% were on a staying trip)
- 81%: planning to visit in Wirral (i.e. 69% planning to stay)
- 84%: inspired to visit Wirral
- Almost 100%: satisfied with their visited when they came (i.e. 80% were very satisfied).

7. Focus Groups

These were undertaken in Birmingham, Chester & Liverpool to generate detailed insight into a range of print & digital marketing collateral – the results will be available in the final report.

The following shows examples of the feedback from these sessions;

Wirral Visitor Guide:

“It looks really inviting...activities for all the family...sports, walking, parks, beaches...you could spend a weekend there...it’s only about 40 minutes away”

(60+ year-old, female, Manchester)

Wirral Circular Trail;

“Great guide to use as a reference when you are out walking for the day”

(35 to 60 year-old male, Chester)

Wonders of Wirral brochure;

“The first four or five pages were garden centres...is a garden centre a wonder...Birkenhead Market?”

(60+ year- old female, Manchester)

www.visitwirral.com;

“The website gives you the impression there’s a lot more to see and do than you originally may have thought”

(35+ year-old female, Midlands)

Juggy Landay
Visitor Economy Manager
Strategic Hub
Wirral Council

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