

# **LCR Destination Management Plan**

**2025 -2030**

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## Foreword

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### **By Lord Tony Hall, Baron Hall of Birkenhead, Chair of Liverpool City Region Local Visitor Economy Partnership**

The Liverpool City Region’s Visitor Economy is one of the keys to creating greater growth, more jobs and prosperity. This is a pivotal moment in the region’s development and the opportunity to elevate and enhance our reputation on a domestic, national, and international stage has never been greater.

Our ambition is to showcase to the world what we already know—Liverpool City Region is the best place to visit and stay - whether for the day, a week, or a lifetime.

In 2023, our visitor economy generated over £6.25bn, welcoming more than 60 million visitors and supporting over 58,000 jobs. This sector is not just an economic engine; it embodies the very essence of who we are—warm, welcoming, and brimming with innovation, creativity, and culture. Tourism highlights the unique strengths of our city region as a place to live, invest, visit, and study.

But we must not be complacent. The challenges facing the sector, from macroeconomic pressures to global shifts in travel behaviour, require us to act boldly and creatively. Our vision for the future of tourism in Liverpool City Region can only be realised through collaboration—working together with the private sector, our universities, industry bodies, third-sector organisations and all stakeholders invested in the visitor economy across the region. Through partnership working we will create a thriving, accessible and inclusive visitor economy that serves as a catalyst for economic, social, and environmental regeneration.

This framework sets out a clear and ambitious roadmap for our shared journey. It aligns local strategies with national aspirations, ensuring a coordinated approach to managing and growing the visitor economy in Liverpool City Region. We will build on the unique elements that make our region extraordinary—stunning coastlines, rich cultural heritage, vibrant nightlife, world-class gastronomy, and historic charm. By developing transformational experiences and fostering collaboration, we will grow the sector responsibly, ensuring tourism enriches both our visitors and our residents.

Together, we will preserve the authenticity of Liverpool City Region’s identity while enhancing the well-being of our communities, creating a destination that will continue to thrive for generations to come. The future of our visitor economy is bright, and it is a future we will shape—together.



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# 1 Introducing the Liverpool City Region DMP

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This Destination Management Plan (DMP) for Liverpool City Region (LCR) - covering Halton, Knowsley, Liverpool, St Helens, Sefton and Wirral - sets out the shared vision of the newly established LCR Local Visitor Economy Partnership (LVEP) and the steps for partners to ignite and accelerate growth in LCR's visitor economy between 2025 and 2030.

The development of the DMP has provided an exciting and unique opportunity for public and private stakeholders to come together to reflect upon recent successes, creating a step change within the LCR visitor economy that is more ambitious and focuses on priorities which can deliver significant impact in the sector within a new economic and political context.

Significant progress and positive change have been made across the visitor economy since the 2015 LCR DMP and the subsequent LCR Visitor Economy Recovery Strategy for 2021-2023. From being one of the hardest hit sectors during the pandemic, the LCR visitor economy has demonstrated resilience and dynamism and its performance in the main has bounced back but there are areas which are still underperforming such as day visitor numbers. The sector still faces challenging operating circumstances, especially at national policy level, which deserves further attention to secure the sectors foundations and the recent tragic events in Southport, and the following civil unrest over the summer months, illustrates the fragile nature of the sector. As a customer facing industry, events like these have both an immediate impact on businesses, reputation, and consumer confidence. And for Southport, they have a significant longer-term impact, as a community and as a destination, that will need specific recovery support.

There have been several key milestones, including hosting major events such as Eurovision in 2023, the Labour Party conference and The Open golf championships, which provide the opportunity to create economic, social, and environmental value. There have also been recent global and national achievements, with Liverpool becoming the first world's first 'Accelerator City' for climate action, under UN Climate Change's Entertainment and Culture for Climate Action (ECCA) programme and investment in a £6.75 million UK Research and Innovation creative cluster for the music sector called MusicFutures. This will establish LCR as a music research and development (R&D) powerhouse and ecosystem. Both opportunities can break down barriers for inclusion and sustainability.

Combined with the strength and diversity of the City Region's current offer, and its distinct neighbourhoods, this is an exciting time, with lots to celebrate and build upon

over the next five years. Opportunities include accelerating the impact of the region's international assets, events and culturally significant heritage and architecture. Reimagining our towns and long-established seaside resorts and other regional destinations with distinct historic and natural charm blended with ambitious new attractions and developing experiences to ignite the wider city region visitor offer to promote the plethora of products and thematic visitor itineraries. The DMP outlines the strategic direction, and the significant steps and actions required to grow the sector and build resilience, realising tourism's potential to be a key engine room of LCR's economy and as a catalyst for socio-economic and environmental transformation. With innovation at its heart, it will weave in sustainability, inclusivity, and accessibility throughout as underpinning objectives.

The sector also benefits from strong political support and is embedded throughout the strategic framework of the city region's Mayor's priorities and the Combined Authority's recently published Blueprint for Growth – the Corporate Plan for 2024-2028, the 2022 Plan for Prosperity and the LCR Economic Opportunities Framework (EOF) 2023,<sup>1</sup> all of which, recognise the significant role the sector has in creating an exciting, dynamic place to visit, live, work and invest. They also recognise the importance of the sector for growth and as a vehicle for creating social and environmental value. They underpin the role the sector has on the global stage, with its world class culture and creativity, and how this can be a lever for inward investment and future growth.

Continued devolution discussions, the establishment of the LVEP and its powerful leadership board, strong public sector infrastructure and private sector networks all present opportunities to develop innovative ways to manage the sector as the delivery of the DMP is implemented.

## Developing the DMP

An evidence-based approach has been taken to develop the DMP. This has included reviewing the latest data and intelligence on the LCR visitor economy and consulting widely with national and regional stakeholders through a series of interviews and workshops. Key statistics and the findings of the analysis and consultations are compiled in a stand-alone evidence base (technical annex) report that should be read in

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<sup>1</sup> [LCR CA Corporate Plan 2024-28](#) sets out the CA plans for economic growth over the next four years.

[LCR CA Plan for Prosperity 2022](#) is the long-term vision for delivering a fairer, stronger, cleaner Liverpool City Region with no one left behind

[LCR CA Economic Opportunities Framework](#) is a strategic investment document that demonstrates who we are and what we have to offer.

conjunction with the DMP. The list of organisations consulted in the development of the DMP is included as an Appendix at the end of this document.

## 2 Strategic Context

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### National Context

Devolution continues to be at the core of the Government's plan to spread economic growth and opportunities more equally across the UK. The new Government has recently pledged they are committed to deepening devolution settlements for existing Combined Authorities, providing opportunities for LCR to build upon existing agreements which include mayoral power with additional funding, influence, and control in relation to culture and tourism; skills and employment; housing and land; transport and health improvement.

The mission driven Government has long term, ambitious objectives for the nation and the visitor economy has huge potential for future growth and the basis of delivery for national and regional priorities. This presents an opportunity to take advantage of the visitor economy as a vehicle to support the objectives of the Government missions:

- **Kickstart Economic Growth** – The new statutory requirement for Local Growth Plans to produce long term plans, programmes and infrastructure they need for growth sectors to thrive must highlight the role of the sector, and particularly the importance of the business events programme in nurturing inward investment opportunities, promoting the region's global appeal and the wider cultural offering as a place for business, investment and families. Furthermore, the range of events hosted by the region provides an opportunity to work closer with net high worth individuals and to showcase the place and potentially secure investment. The DMP can also demonstrate the importance of the LCR visitor economy as a supporting sector for economic growth and as a significant contributor to GVA (12% in 2023) and employment provider (1 in 10 jobs in the city region are within the visitor economy) in its own right. This sector can act a catalyst to support people into employment (including young and disabled people) and provide quality jobs and fair work.
- **Make Britain a clean energy superpower** – With a combined total of 47 miles of unique coastal environment (between Wirral and Sefton), cleaning up our coasts and protecting our natural assets and waterways will enhance the countryside and coastal offer we have and will further promote the health and wellbeing and the proximity of the city and coastal getaways. The sector's role within this mission area will support the ambition to accelerate to net zero, improve resilience to climate change, protect nature by encouraging responsible access,

developing a sector circular economy, and ensuring our coast and rivers are clean.

- **Take Back Our Streets** – The nighttime economy makes an important contribution to the economic impact, image, and reputation of the region. The nighttime economy needs to be championed for the contribution it makes to the visitor economy and is required to be embedded as part of a broader strategy to create a safer, more resilient, and inclusive sub sector which supports the workers of the nighttime economy, residents, and visitors.
- **Break down barriers to opportunity** - The Government has pledged to implement a creative industries sector plan as part of their Industrial Strategy, creating good jobs and accelerating growth in film, music, gaming, and other creative sectors. They have also committed to delivering international sporting events and harnessing their broader socio-economic impact. LCR already has excellent pedigree in this area; creative industries are a priority cluster area for growth and the region continues to deliver international sporting events at scale. We are in prime place to take advantage of this commitment, working with a range of partners including schools and universities, to maximise impact and highlight the role the sector has in helping to achieve national cross cutting policy areas such as employment, respect and equality for all Diversity, Equity, and Inclusion (DEI).

## Sector Skills

Historically, visitor economy sector skills have been under considerable pressure, with the sector facing tumultuous changes which has impacted the ability to attract, recruit and retain staff. The recent announcement of the establishment of Skills England and the role they will play in supporting people to get better jobs and improve their standard of living, presents the sector with a real opportunity to address these embedded challenges. [The Skills England Report: Driving growth and widening opportunities Sep 2024](#) provided the backdrop to the national challenges the current system faces to be fit for the future. The Government response will identify key priorities, will work to form a coherent national picture of the skills gaps which exist and how they can be addressed, unify the skills landscape by bringing together Mayoral Combined Authorities and other key local partners, large and small businesses, training providers and unions, to shape the solution. It is vital the sector is fully represented in this work.



## Visit Britain and Visit England

Focusing on national priorities for the visitor economy sector, Visit Britain and Visit England are undertaking a review of their national visitor economy strategy to 2030. The Tourism Recovery Plan which was published by Visit Britain in 2021 remains the latest statement of priorities. The Plan sets out a framework for post-pandemic tourism recovery and emphasises all-region support and greater accessibility of the country's tourism offering and international business events. The aim was to recover domestic overnight trip volume and spend to 2019 levels by the end of 2022, and inbound visitor numbers and spend by the end of 2023.

In the short term, the focus of the framework was to drive immediate tourism recovery from the COVID-19 pandemic by swiftly increasing trip volume and visitor spend. Longer term, it focused on supporting the industry to be more 'resilient, sustainable, inclusive and innovative' than ever. The latter remains particularly relevant as we continue to develop as a region and further embed within the LCR DMP.

## International Markets

VisitBritain/VisitEngland has four major regional hubs worldwide: Europe, Asia Pacific, Middle East and Africa, The Americas, China, and Northeast Asia. Visit Britain forecasted 38.7 million inbound visits and £32.5 billion spend in 2024, 95% and 114% of the 2019 levels respectively, although spend would be 92% of 2019 in real terms. Compared to 2023, this would represent growth of 2% in visits and 5% in nominal spend (2% in real spend).

The top inbound markets for UK in 2024 (to date) are USA, France, Germany, Irish Republic, and Spain. The highest potential growth in inbound markets were Canada, Denmark, Netherlands, Poland, and Saudi Arabia. From a regional perspective, the focus for growth, especially during the early delivery of the DMP, will focus on France, Republic of Ireland, Spain, Norway, Sweden, and the USA. Some of these markets are already performing well in terms of inbound numbers but present the opportunity to extend visit and dwell time of visitors and their dispersal around the region. The marketing strategy, which will be picked up as part of the delivery actions within this strategy will detail the emerging markets in much more detail, and the future growth potential, including domestic visitors.

## LCR: Innovating for Growth: Combined Authority Corporate Plan

Delivery of the DMP will directly contribute towards the recently published LCR Combined Authority's [Corporate Plan 2024-28](#) – Innovating for Growth – also referred to as the Mayor's blueprint for growth and will contribute to the Economic Opportunities

Framework and the 2022 Plan for Prosperity and its aim for a ‘*City Region that will build up the resilience and productivity of its economy and unlock its global potential*’. The Plan for Prosperity recognises the importance of sector as a driver for economic growth but also a lever for social inclusion.

Growing the LCR’s economy by investing in people, place and transport and digital infrastructure is at the centre of the plan. The plan highlights the opportunities presented by devolution to turbocharge LCR’s plans, working nationally and regionally to ensure LCR plays a key role in creating a stronger UK Plc.

Under place, the plan sets out a commitment to build on LCR’s strong cultural offer and vibrant visitor economy, by:

- Working in partnership to develop a compelling, unified Place brand, positioning LCR as a place of science, innovation, and creativity.
- Creating a LCR brand and narrative.
- Driving innovation and increasing productivity.
- Supporting, growing, and celebrating LCR’s cultural, heritage and tourist attractions, through a strong LVEP, and developing a new and ambitious DMP. As outlined in this report.
- Developing a Major Events Strategy (currently under development).
- Considering funding options including a tourist levy to support the hosting of major events<sup>2</sup>.

Key priorities from the Corporate Plan relating to branding; cultural, heritage and tourist attractions; and major events are directly captured within the strategic framework and priorities identified within the DMP.

The DMP will sit within the suite of LCR CA strategic documentation and will be part of integrated approaches, taken together, to deliver sustainable and inclusive economic growth across the city region. This strategic framework recognises the importance the visitor economy plays in providing the foundation for wider economic success.

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<sup>2</sup> Mayoral Manifesto pledge Taking Back Our Future 2024.

## The Newly Established LCR Local Visitor Economy Partnership (LVEP)

In April 2023, LCR became one of the first Visit England accredited LVEPs, set up to lead, market and manage the LCR visitor economy, representing the destination at a local and national level with a mission to support and grow the visitor economy.

Established as a response to the 2021 De Bois Review into Destination Management Organisations (DMOs), LVEPs are part of a new national vision for England's tourism management landscape. Having a refreshed DMP which has been developed in consultation with local public and private partners is a core requirement of the LVEP criteria. The recommendation by De Bois acknowledged that for LVEPs to perform at their best, they must work in partnership with public and private sector partners who hold the policy levers and funding needed to achieve the full potential of their local visitor economies. This strategy highlights the importance of this partnership, and the production of this document responds directly to the requirement as part of the LVEP accreditation.

Following approval of LCR's LVEP status, governance structures have been refreshed and implemented including the establishment of a new LCR LVEP Board which comprises public and private sector specialists with the overarching remit to be LCR's leadership group for the visitor economy and to work with regional and national partners to oversee delivery of the region's refreshed DMP.

Key partners that will be involved in the delivery of the DMP include the existing, well established DMO's (Marketing Liverpool, Marketing Southport and Visit Wirral), visitor economy representatives at Halton, Knowsley and St Helens, the Combined Authority, Local Authorities, and the private sector, who will have an influential role in ensuring the successful delivery of the strategy.

## A Distinctly Liverpool City Region Approach

Throughout the strategy, the importance and unique character, history and charm of each local authority will be aligned to the growth ambitions. Recognising the individual borough identities, their sector assets and aspirations is crucial for developing a balanced, inclusive, and resilient development strategy. The diverse identities enrich the visitor experience making it more appealing to wider and more diverse audiences supporting the dispersal of visitors and the attraction of local authority specific investment. The strategy acknowledges the different stages of development of the sector across the region and uses sector goals of **accelerate, reimagine, and ignite** to bring the concepts to life. This approach promotes a more inclusive and collaborative approach to drive success and the dual recognition of region and individual local

authorities, enables a unified approach that respects local uniqueness, drives inclusive growth, and sustains community pride.

### Best Practice

During the development of this strategy, comparator studies were undertaken to identify best practice, the detail of which is contained in the technical annex. The locations chosen were **Melbourne, New York City and Barcelona** and research and analysis focussed on comparator cities' approach across five themes:

- **Inclusivity** including skills and accessibility
- **Connectivity** including sustainable transport
- Capitalising on **cultural and natural assets**
- **Events**, festivals, and business conferences
- **Unique offer** to attract and accelerate growth

### Conclusion and Implications for the LCR DMP

The key lessons from these comparator destinations with potential to enhance LCR's competitiveness and appeal are summarised below:

- Digitisation of information to navigate tourist attractions and transport connectivity of the city region is essential and expected by visitors to maximise experience.
- Provision of an attraction / integrated transport visitor pass enables growth, connectivity across visitor assets and enhances the visitor experience.
- Creation of inclusive tourism experiences communicates and welcomes diversity, including unique storytelling from multiple perspectives such as the cultural heritage of the International Slavery Museum, community driven events and from the perspective of visitors with a disability.
- Collaboration and promotion of a shared calendar of events across the region to showcase the plethora of events and encourage year-round tourism.
- Campaigns to extend business delegate stays into leisure/workcations through the development and promotion of delegate extension packages creates growth.
- Initiatives to enhance the sector's appeal will attract and retain a skilled workforce.

### 3 The LCR Visitor Economy

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Liverpool City Region (LCR) boasts a vibrant and dynamic visitor economy that is integral to its cultural identity. With a rich history, iconic cultural landmarks, and beautiful coastlines and countryside, the region is a prime destination for both domestic and international visitors. LCR's deep connection to music, maritime heritage, world-class sporting venues (in football, golf, horse racing and rugby league), the long-established major seaside destination of Southport and diverse culinary and shopping options make it a popular draw for millions annually. Its extensive variety of attractions, from waterfront areas to heritage sites and natural parks, many of which are accessible by public transport (all within an hour of the city centre), offer a distinctive visitor experience. The warm welcome from residents and tourism employees further enhances the region's appeal, earning LCR multiple accolades for being one of the friendliest places in the UK.

The region has a very strong calendar of events, ranging from internationally recognised festivals to high-profile sporting events like the Grand National and Open Golf Championships, which boosts its attractiveness throughout the year. Events such as Eurovision 2023 highlight LCR's global appeal and reinforce its commitment to the visitor economy. The sector generates £6.25bn annually, with over 60 million visitors, the majority of whom are day-trippers. Over 6 million overnight visitors contribute significantly to the economy, with shopping and dining being the primary areas of expenditure.

LCR's visitor economy plays a vital role in its broader economic structure, accounting for over 10% of local jobs and businesses and contributing 12% to the region's Gross Value Added (GVA). With a strong business events program and opportunities for growth through projects like the Southport Marine Lake Events Centre in 2027, the sector supports key local industries, particularly in retail and hospitality. Over 58,500 people are employed in the visitor economy, with the sector experiencing growth exceeding national levels in recent years.

The region's visitor economy benefits from its strong connectivity, with two international airports, a cruise terminal, and excellent rail links to other parts of the UK. The Merseyrail and bus networks ensure seamless transportation for tourists, and new investments in rail infrastructure promise further improvements in regional access. These developments, such as the new line connecting Liverpool and Manchester Airport, offer exciting prospects for boosting both business and leisure tourism. However, there are challenges with the cross-region connectivity by rail and bus which can force car usage by visitors and investment in projects which cross political boundaries.

The sector also faces challenges related to workforce recruitment and retention, exacerbated by the pandemic and Brexit and the operating business environment. Addressing these issues, particularly in attracting skilled workers and ensuring the stability of seasonal roles, is crucial for future growth. There is also a growing need to improve productivity through technology adoption and skills development. Further background on the sector can be found at Chapter 10 in this strategy and contained within the supporting evidence base evaluation report.

## 4 2030 Visitor Economy Vision for LCR

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### Vision

*By 2030 Liverpool City Region wants to be the best place to visit and stay in the UK for a day, a week, or a lifetime.*

### LCR DMP Strategic Framework

This will be achieved through three mission areas which present a framework for activity and will support interconnected and coordinated actions. Each mission area will have specific priorities, a proposed time framework for completion and identified stakeholders and leads for the activity.

### Mission Areas

#### 1. A Catalyst for Inclusive Growth & Prosperity

- a. Boosting visitor numbers, spend value and its distribution through growing business, sports, leisure, and cultural events & festivals.
- b. Leverage the wider social and economic impact of events. Targeting events of strategic importance to the city region<sup>3</sup>, economic growth and social impact can be maximised.
- c. Maximising city region ambassador programmes, to drive economic growth and social value to the city region<sup>4</sup>.
- d. Igniting emerging growth themes across the region – e.g., food and drink, film, music, natural environment.
- e. Extending dwell time of visitors through packaging of products and enhancing attractions through authentic story telling.
- f. Sustainable destination management, supporting and protecting natural cultural heritage as a cornerstone of the regional offer.

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<sup>3</sup> LCR strategic cluster areas are Advanced Manufacturing, Health & Life Sciences & Digital and Creative sectors

<sup>4</sup>Such as the Club Liverpool Ambassador Programme which is a network of Liverpool City Region academics and professionals who volunteer their time to help bid for conferences to host in the region, showcasing the region's cluster strengths bringing economic growth and social value to Liverpool City Region.



- g. Build alliances with other northwest, regional partners to enrich tourism offer.

## 2. Harnessing LCR global influence and brand distinctiveness

- a. Using global brands for international growth – e.g. golf, football, culture, music.
- b. Building borough brand distinctiveness – promoting the diverse nature of and key tourism assets from across the region.
- c. Enhance the visitor welcome – tourist information and wayfinding.
- d. Creating unique and memorable experiences that are inclusive and accessible to all.
- e. Build on our distinctive cultural heritage to develop more heritage tourism to our region.

## 3. A Thriving & Resilient Visitor Economy

- a. Establish a workforce and skills group to guide the development of a long-term visitor economy workforce and skills strategy to build workforce capacity and capability.
- b. Investing in people, products, and place.
- c. Support to scale up businesses and build resilience, in part, through sustainability and climate adaptation.
- d. Increase productivity including promoting a sector circular economy.
- e. Addressing the climate crisis by supporting businesses to offer more sustainable products and services.
- f. Supporting prosperity of the community through fair work, quality jobs and workplace inclusion.

The strategic priorities identified under each mission will drive activity delivered through the DMP. These are supported by four **enabling priorities – transport, digital, infrastructure and intelligence** – which are recognised as areas of influence where the LVEP and Combined Authority will collaborate with colleagues and partners to influence priorities and delivery in other supporting policy areas. These are critical success factors and underpin the sector performance. This will be a particular area of focus of alignment for the LCR LVEP.

### Local Authority Distinctiveness

The strategy also acknowledges and identifies the unique strengths of the region's local authorities and the specific tourism themes running throughout the city region, and how



these can be packaged and leveraged to deliver growth in the sector. The narrative for this will evolve in due course as the place brand develops. Details of the linkages, reach and influence is highlighted in the deep dive of each mission area and are grouped under the **sector goals** below:

- 1. Accelerating our Global Reach** - Using our established attract brand, Liverpool, we will position LCR as a major destination for international visitors. The accelerate activity will focus on leveraging our global reputation, to entice international audiences and brands across a range of sectors to strengthen our appeal to visitors and maximise our inward investment opportunities.
- 2. Re-Imagine our Towns and Destinations** – Working in partnership with our towns and destinations we will use their distinctive selling points, such as their attractions, natural assets and coastal offerings, historical landmarks, architecture, and culture to create unique itineraries designed to showcase the regional offer. Highlighting the ease of connectivity, transport will be a key component and will underpin this activity.
- 3. Ignite the City Region** - Expanding the tourism economy across the region by building on our successful events programme and developing new experiences through engaging our communities to help transform the region’s fortunes.

### **LCR DMP Principles**

The DMP Principles will be embedded throughout delivery of the DMP and will function as key anchors to the activity, acting as the LVEP guidelines.

**Sustainability** - Reducing the carbon footprint of the LCR visitor economy to contribute towards the net zero ambitions of LCR. Sustainability is embedded within each of the missions, underpinned by a commitment to reduce waste, strive for sustainable growth and to maximise the sustainability of existing activity when delivering DMP actions. Establishing a method to measure progress will be a priority action and will need to be carefully monitored as the number of visitors increase. There are also opportunities to promote sustainable aspects of the LCR visitor economy offer in the destination’s marketing. This will ensure its appeal endures for future generations while delivering a high-quality experience for all who visit. Tourism can also support residents and communities by cultural preservation, social opportunities, environmental improvements, community empowerment and improved quality of life.

**Link to LCR CA Climate Action Plan and driven by LCR's target to achieve Net Zero by 2035 or sooner and the LCR CA Social Value Policy Framework 2022.**

**Inclusivity - Driving inclusion and long-term change through the increased representation of priority groups in the visitor economy workforce, visitor base and sector's promotion.** Within each of its missions, the DMP values the inherent diversity of others regardless of identity, orientation and culture and recognises the value of such diversity to LCR's visitor economy.

**Accessibility - Aiming to become an exemplar destination for accessibility.** Within each of the DMP missions and enabling priorities, maximising the accessibility of LCR's existing and developing visitor economy offer for all its visitors and workforce, including those with physical and hidden disabilities is a key consideration for all actions. Aligned to the Tourism Recovery Plan for the UK to become the most accessible country in Europe.

**Effective Partnership Working - Delivering the DMP through effective partnerships to ensure success across the missions and priorities.** The actions identified within the DMP are based upon a partnership approach to delivery, with shared ownership of actions and outcomes to drive growth and resilience in the LCR visitor economy. The relationship and partnership with the private sector are a critical part of this and partnerships with national, regional, and local stakeholders will be key to its success with the LVEP Board supporting with leadership and oversight. In addition, residents and communities' views must be considered and are part of the key partners groups to ensure the plan and delivery is informed by what residents want for tourism in their city region.

**Maximising Resource (leverage and innovation) - Attracting and securing resources to support the delivery of the DMP, including the development of innovative funding approaches and exploring new mechanisms.** Maximising existing and new opportunities and resources that are available within the public and private sector across LCR and nationally to facilitate the delivery of actions and outcomes. Working alongside the private sector to explore the potential impact of further devolved powers on the sector. Playing a role in advancing sector innovation through accessing regional expertise.

## **Mission Leads**

Each mission area outlines the lead and partners for the delivery of the objectives listed under each activity area. This will be reviewed and developed in line with existing sub

boards and bodies to enable the delivery as the strategy matures. Furthermore, the mission areas and supporting activity will be subsequently aligned to the Sustainable Development Goals as the delivery plans take shape.

## Outcomes

The ambitions of partners which have been collated and consolidated as part of the DMP development have been primarily focussed on inclusive growth, workforce development and sustainability. Increases in visitor numbers and spend, the number employed in the sector, the work quality, increasing productivity of the workforce and enhancing the sustainability credentials of the region<sup>5</sup> were all identified as appropriate ambitions and targets, but they need to be supported by a robust evidence base for evaluation and identification of the resource required to achieve the desired growth and outcomes. Therefore, the quantitative targets for the DMP will be modelled and refined over the first 12 months of this plan and then they can be effectively implemented with evidenced based, factual targets. This will ensure KPIs are realistic and the DMP becomes a living strategy, to be used to guide the appropriate and sustainable growth of the sector and revisited at regular intervals to monitor progress.

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<sup>5</sup> Such as the number of sustainability certified businesses, participation in the GDS index and carbon footprint of the sector

## 5 Mission 1: A Catalyst for Inclusive Growth & Prosperity

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### Mission Overview and Rationale

There is a shared ambition to drive **inclusive growth and prosperity** in LCR's visitor economy. This involves expanding the sector's scale and impact, contributing to the broader regional economy, and serving as a model for economic growth in the North. It is acknowledged that different parts and assets of the region will require differing but complimentary approaches and the pillars of **Accelerate Global Reach, Re-Imagine our Towns & Destinations and Ignite the City Region** will function as a handrail for these actions. New partnerships aim to connect key themes and investments — heritage, music, and film—to attract international and domestic visitors and encourage longer stays and promote the unique history of LCR such as our transatlantic links.

There are clear strengths and opportunities within LCR visitor economy to build upon to drive inclusive growth and prosperity and contribute to UK Plc. The mission primarily aims to **improve and expand the current offerings**, while **developing new products** to attract both international and domestic visitors and maximising the potential of existing schemes (and sharing best practice), such as the Club Liverpool ambassador programme, designed to drive economic growth and social value. The goal is to **encourage longer stays** in Liverpool and other areas of the City Region and promote the cluster strengths supporting supply chains such as skills, R&D, infrastructure, and place. This will be key to **addressing current challenges relating to seasonality**, lower mid-week occupancy levels and a reduction in day visitors (compared to the pre-pandemic peak) and resourcing the development of the business events pipeline with broader city region invest priorities.

### Key Statistics and Evidence

- LCR hosts an impressive calendar of events each year which can be built upon. In 2023, the top 10 most attended events welcomed between 30,000 and 750,000 visitors, and included the Christmas Markets (750K), Eurovision (470K), The Open Golf Championship in Wirral (261K), River of Light (140K) and The Grand National in Sefton (120K).
- The economic impact of events is significant, demonstrating their potential to drive growth and increase the economic value of the sector. For example, The Open Golf Championships in 2023 were estimated to generate economic

benefit of £187m, while the annual Grand National generates £60m and attracts a global TV audience of 800 million.

- Stakeholders across LCR have highlighted untapped opportunities relating to film, sport (including water sports), music tourism (including regional investments such as Salt & Tar and Future Yard), transatlantic links, and fine dining. The varied investment pipeline for LCR visitor economy will also create growth opportunities, if resourced correctly, linked to enhancing and diversifying the offer, for example, at the Waterfront and the Southport Marine Lake Events Centre.
- There is scope to increase occupancy throughout the week / year, with fluctuations in visitor numbers and occupancy levels. While occupancy levels in 2023 were higher overall and slightly more stable than in 2022, there continued to be peaks in summer and dips in winter and weekend occupancy was generally higher than midweek occupancy.
- LCR is home to 50% of the top 20 free tourist attractions in the Northwest - six of which are in the top 10. The top three attractions are located in Liverpool, the most popular being the World Museum Liverpool. However, it is falling behind its regional competitors in terms of paid attraction footfall, home to just four of the top 20 attractions. The top visited paid attraction in LCR was Knowsley Safari, which ranked 4<sup>th</sup>.
- While the value of tourism in LCR in 2023 was 25% higher than pre-pandemic levels (following recovery in 2022), the number of visitors remained lower – equivalent to just 91% of the 2019 peak and index linking the growth reveals that the sector is still underperforming compared to pre-covid economic impact.
- The growth in tourism value has been driven by LCR’s success in attracting additional staying visitors. The value of these visitors between 2019 and 2023 increased by 50%, accompanied by an uplift in staying visitor numbers (+11%). This clearly demonstrates the rationale for encouraging short breaks, extended and overnight stays.
- The lower level of visitors in 2023 (compared to 2019) is driven by lower levels of days visitors, which are just 89% of pre pandemic levels. While the value of day visitors remained below 2019 levels in 2022, it had largely recovered in 2023 (although continued to lag behind the growth in staying visitor value).

- Key challenges relate to a slowdown of the economy, inflationary pressures restricting demand within domestic markets and lower ADR/occupancy rates.

## Strategic Priorities

From the evidence base, consultation and analysis, the strategic priorities below have been identified under this mission which capture key markets and opportunities that will drive economic growth in the LCR visitor economy over the next five years:

- **Securing Events and Festivals:** Consolidating LCR's position as a leading events destination, increasing and diversifying the programme of major, national, regional, and local events and festivals throughout the year. This activity needs to be linked to high-net-worth visitors to encourage investment in the region. There is also the opportunity to build on the leadership demonstrated by Liverpool, who has committed to only issuing licences for those concerts and festivals that agree to help reduce greenhouse gas emissions by 50% to help meet climate goals, including using a proportion of renewable energy to power the festival and reducing the number of cars visitors take to events. Measuring environmental impact of major LCR events will be a key requirement of the regional events.
- **Increasing Business Tourism:** Capturing a larger share of the business tourism market and maximising the impact and legacy of business events and conferences. Sustaining and growing the subvention model that will allow the region to compete effectively in high value corporate, national, and international association, industry, and political conference markets.
- **Increasing repeat visits:** Maximising the opportunity of Visiting Friends and Family to the region and encouraging business visitors to return to the region, through incentivised schemes (Club LCR concept to be developed), with their families as leisure visitors.
- **Developing Emerging Growth Opportunities:** Exploring untapped opportunities to develop new products, services, attractions, and experiences and/or package the existing offer relating to film, music, fine dining, health and wellbeing, heritage, architecture and our transatlantic links and sports (including water sports). Celebrating the diversity of the region and the community engagement that can appeal to residents and visitors. It is key to use local knowledge to reveal the hidden gems and authentic storytelling and this can also support an increase in repeat visits.

- **Maximising opportunities to enhance attractions:** Identifying development opportunities including digital enhancements and the creation of thematic packages across the region with itineraries and complementary visitor products. Facilitate gateway partnerships to spotlight regional and borough products.
- **Extending Dwell Time:** Packaging and promoting the existing cultural, heritage, architectural, natural assets and night-time offer encouraging visitors to spend more time enjoying the visitor economy in Liverpool and across the City Region, throughout the year.
- **Increasing Stay Duration:** Capitalising on the priorities above to target short breaks, encouraging longer stays from business tourists and to convert day visitors to staying visitors.
- **Sustainable Destination Management:** expand organisational and sector knowledge and practices on sustainable and regenerative tourism to support sector resilience.



Mission One - Catalyst for Inclusive Growth & Prosperity					
Goals	ACCELERATE OUR GLOBAL REACH		RE-IMAGINE OUR TOWNS AND DESTINATIONS	IGNITE THE CITY REGION	
	Using our established attract brand, Liverpool, we will position LCR as a major destination for international visitors. The accelerate activity will focus on leveraging our global reputation, to entice international audiences and brands across a range of sectors to strengthen our appeal to visitors and maximise our inward investment opportunities.		Working in partnership with our towns we will use their distinctive selling points, such as their attractions, historical landmarks, and culture to create unique itineraries designed to showcase the regional offer. Highlighting the ease of connectivity, transport will be a key component and will underpin this activity.	Expanding the tourism economy across the region by building on our successful events programme and developing new experiences through engaging our communities to help transform the region's fortunes.	
Priority	Year	Action	Action	Action	Lead
<b>Securing Festivals &amp; Events</b>	1	Develop the major events strategy on behalf of LCR: identifying major events that positively impact the local economy and increase			LCR LVEP LCC



		sustainability, inclusivity, and accessibility.			
	2/3	Develop and resource, the submission of bids for events which have been prioritised across the City Region, increasing the number of events hosted (e.g., sports and music events).			LCR LVEP, LAs, Culture Liverpool
		Review annual programming of events across the City Region with partners aiming to ensure that a year-round offer is in place, and we are representing key heritage events for the region such as Chinese New Year, Slavery Remembrance Day, and Africa Oye.			
			Identify and/or create opportunities to support and secure funding for inclusive, accessible, sustainable local events/festivals.		
<b>Increasing Business Tourism</b>	1	Develop a regional business tourism strategy to increase the economic and social impact of events and conferences across LCR.  Identify large scale conferences and events to benefit hospitality, accommodation,			LCR LVEP

		and attractions in the wider city region.			Inward Investment Team  Strategic Events Group  LAs
	1	Maximise the potential of business events ambassador programmes and share best practice where feasible.  Scope resourcing required for successful delivery of a city region business tourism strategy, identifying best practice from other cities.			Convention Bureau
	1/2	Maximise the sustainability and legacy of business events and conferences by promoting societal and sector development as well as creating opportunities for inward investment and local supply chain networks.			
	4/5		Undertake an evaluation over the appetite, need and resources required for convention bureau services and pan regional working practices.		
<b>Increase Repeat Visits</b>	1	Maximising the opportunity of Visiting Friends and Family to the region and encouraging business visitors, through incentivised schemes (Club LCR concept to be developed), with their families as leisure visitors.			LCR LVEP  LAs

				Private Sector
<b>Developing Emerging Growth Opportunities</b>	1	<p>Promote and expand the existing offer of the independent food and drink sector - fine dining - and wider destination experience in the city region.</p> <p>Raising the quality and diversity of the food and drink offer to attract higher value audiences and encourage investment.</p> <p>Maximise culinary and drink ambassador networks and reputation to access markets, grow the international travel offer and position the city region as a culinary destination including guest cities initiative.</p>		LCR LVEP LAs
	2/3	<p>Develop new products for film, TV and music tourism, health, and wellbeing, and enhance the existing offer, and its promotion, maximising regional assets such as Salt &amp; Tar, Future Yard etc.</p> <p>Explore business support to pump prime the opportunity.</p>		LCR LVEP Film Office LAs Private Sector National ALBs
	2/3	<p>Explore the opportunity to create a LCR database building on existing databases and ticketing platforms to develop a unique LCR visitor club allowing users to sign up to bespoke events, offers, legacy projects.</p>		LCR LVEP Innovate UK

	4/5	Undertake a water sports feasibility study to maximise water-based opportunities including LCR Waterfronts, Tidal Gateway, Bridgewater Canal, and Sankey Canals restoration as well as the potential for a legacy programme post 200th anniversary of the railway.		LCR LVEP Private Sector ALBs
		Potential for partnership with NP 11 and other arm's length funders.		
<b>Maximising Opportunities to Enhance Attractions</b>	1	Increase quality of the offer for luxury / higher end markets - food and drink, accommodation, and exclusive experiences and itineraries packaged with attractions for consumers and travel trade.		LCR LVEP  Strategic Marketing Group  LAs  Private Sector
		Encourage green tourism initiatives by highlighting the uniqueness of LCR's natural assets - coastal areas, parks, nature reserves - links to the health and wellbeing market. Scope funding to support attractions / hotels and venues to adopt a certification process.		
		Develop partnerships and themed packages that highlight the destination's story by connecting attractions throughout LCR.		
	2/3	Conduct evaluation of high-end luxury markets as vehicle for economic growth.	Review of current attractions offer and identify development opportunities including use of digital technology to enhance the visitor experience.	Inward Investment Team
		Explore the role of a pan regional TIC in supporting visitors' discovery of attractions through ticketing and travel systems.		LCC
		Explore the concept of developing a city region box office through Ticket Quarter <sup>6</sup> whereby packaging of attractions with sustainable travel options could be developed to increase dispersal and carbon footprint of visitors to the region reduced while gaining valuable data insights to drive further activity.		Cultural Organisations

<sup>6</sup> Ticket Quarter is a Liverpool City Council owned asset.

	4/5	Explore investment opportunities and interest in attracting anchor attractions for the city region.			
<b>Extending Dwell Time</b>	1	Develop a dedicated Night-Time Economy Strategy covering public transport, safety and major events considering movement of both visitors and the workforce.	Conduct a feasibility study to explore options for leveraging and packaging existing assets across LCR and resourcing appropriately: Culture, Heritage, Natural assets, sports – e.g., developing trails.	LCR LVEP LAs Private sector CA Policy	
			Conduct research into neighbourhoods to understand what the unique and ‘off grid’ offer is.		
	2/3	Develop an attraction / visitor integrated pass with transport (sustainable and active) making travel across the city region simple for the user via TIC services.	Promote themes, packages and sustainable/responsible tourism to consumer and travel trade.	Private Sector Cultural Organisations	
			Scope linking sustainable business activities to Visitor Economy charter.		

	2/3	Explore the opportunity to provide a voluntary per ticket donation, to support grass roots artists, small venues, community engagement etc, promoting an inclusive element to ticketing across the region.		
	4/5	Increase quality of the offer for luxury/ higher end markets.		
<b>Increasing Stay Duration</b>	1	Assess supply of accommodation stock to meet the demands and growth ambitions across LCR and linkages to other strategies such as NTE.		
	1	<p>International visitors: Market research to explore and refine target markets (includes new international markets); Support businesses and intermediaries to develop new products for these markets; work with VB to develop international markets including Ireland, Scandinavia, and USA.</p> <p>Establish alliances in the region to build wider offer beyond LCR e.g., Cheshire, Chester, North Wales, Cumbria, and Manchester.</p>	<p>Extending stays: through longer stays from business tourists; Elongate day visitors to staying visitors; Market short breaks specifically.</p>	<p>LCR LVEP/ LAs</p> <p>ABID</p> <p>Visit Britain</p> <p>Visit England</p> <p>Strategic Marketing Group</p>

		Develop a travel trade strategy to expand market reach to new domestic and international visitors - promoting off-peak travel periods by creating tailored packages that encourage year-round visits.	
<b>Sustainable Destination Management</b>	1	Expand knowledge and understanding of sustainable destination management and regenerative tourism to develop a LCR strategy.	LCR LVEP

## 6 Mission 2: Harnessing LCR Global Influence and Brand Distinctiveness

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### Mission Overview and Rationale

The LCR visitor economy's success in attracting visitors, especially **international visitors**, is largely dependent upon the **destination's profile** and the underpinning **brand and marketing**, as well as how this translates into the arrival and **welcome** at the destination. This mission is based upon the opportunity to create a shared narrative and branding for the region, building on **its globally recognised brand and assets** for music and sport (including football, golf, horse racing and rugby) and **showcasing the products and offer across the whole City Region** to boost LCR's profile and ranking as a global destination and to increase staying visitors.

LCR is blessed with its location and proximity to major and leading international airports – Liverpool John Lennon Airport and Manchester International Airport – as well as a cruise terminal in an iconic location on Liverpool's waterfront. These assets present and support opportunities for the City Region when thinking about its position as a global destination and as a location for further capital investment. However, this needs to be balanced with the impact of increasing visitors and the impact on carbon emissions and methods such as regulation and airport green certification should be explored to balance this effect.

Key opportunities relate to strengthening the city region's **brand distinctiveness** capturing and packaging the wide variety of tourism assets and brands across the region (especially to staying visitors) and the **distinctiveness of destinations**, bringing their unique charm and offer to life through destination marketing. Very few major cities have beaches and seaside resorts such as Southport, in such proximity to be able to blend city and coastal breaks. Opportunities also lie with brands enhancing and promoting the **visitor welcome** – a well-recognised feature of the LCR visitor economy offer and experience; investing in public realm and gateways creating a **safe, secure, and clean** environment meeting visitor expectation; and **delivering innovative and targeted destination marketing**. There are also opportunities to promote LCR as a diverse, sustainable, and accessible destination as well as region of distinct borough identity which compliments each other. This will boost **economic growth** in the sector, create jobs and strengthen LCR's reputation as a must-visit welcoming, friendly global destination.



## Key Statistics and Evidence

- A strong brand and shared story are a key feature of global comparator cities and successfully showcase the uniqueness and diversity of their offer. The Liverpool city brand has global recognition that can be strengthened further for the city and the region. Global awareness of the rest of the region's visitor offer is currently limited and can be improved through the LCR place branding and coordinated packaging and promotion of key tourism assets.
- Tourist information provided at key points in the visitor journey is expected from a global city to provide a quality visitor experience and welcome. This includes essential information to ensure visitors are given the opportunity to experience the destination fully, stay longer and return. They can play an impactful role in revealing the hidden gems and experiences across the region to encourage dispersal of visitors from the main tourist attractions, encouraging them to reimagine their visit. Adoption of the latest digital and AI technologies is key to meet visitor information expectations and the needs of the digital native Generation Z audience and the sectors future travellers.
- Leveraging resources and maximising distribution can be achieved through engaging and working closely with relevant national organisations. Visit Britain, National Trust, Arts Council, as well as with private sector and other regions which can further enhance the regional offer to appeal to specific audiences such as the USA market.
- Liverpool has one of the largest Chinese communities and oldest Black communities in Europe and this diverse heritage presents opportunities for heritage tourism. Linked to this Liverpool's acknowledgment of its growth and involvement in Transatlantic Slavery and the steps the city has taken to accept its past and apologise for its involvement, makes it a unique place for visitors to explore this part of the UK's history.
- Successful global destinations balance the impact and needs of both visitors and residents. It is important to regularly consult with residents on tourism and event matters and to implement changes to benefit residents. Maximising the participation of residents and businesses and providing positive experiences generates social impact, helps to maintain support for the visitor economy and achieve a managed equilibrium. Resident engagement and visitor ambassador programmes contribute to the destination welcome and help maintain a positive relationship between visitors and local communities.

- The international appeal of high-profile events across the region - the Eurovision Song Contest and The Open Golf Championship alongside wider city region events such as The Grand National coupled with an annual uplift of 7% in the average income per occupied room (ADR) contributed to the positive impacts recorded in 2023.

## Strategic Priorities

From the evidence base, consultation, and analysis, four strategic priorities relating to branding, marketing and the visitor welcome have been identified to drive global awareness, reach, and recognition. The priorities capture the key opportunities to market and position LCR as a premier global destination, attracting further staying visitors and boosting the economic impact of the City Region's visitor economy. The international dimension of this mission will also boost the indirect benefits to other sectors in the LCR economy, such as retail.

- **Promoting key tourism assets/brands from across the region.** The rich heritage, vibrant music scene, world-class cultural institutions, natural assets, and dynamic events support the opportunity to showcase LCR and its iconic brands globally. By highlighting UNESCO World Heritage sites and renowned sports venues – football, golf<sup>7</sup>, rugby and horse racing – the city region can captivate international visitors and strengthen its position as a leading global destination.
- **Strengthening Liverpool's recognition as a global brand:** Strengthening global recognition in international markets using Liverpool's brand awareness. Supporting other valuable regional tourism brands through inclusion in the shared LCR Place Brand story as well as targeted tourism communications and campaigns. Promoting a dynamic narrative that highlights fantastic visitor experiences that are diverse, inclusive, and sustainable working collaboratively with regional, national, and global partners.
- **Building on brand distinctiveness through Destination Marketing & Communications:** Developing and delivering evidence-based targeted destination marketing plans reflecting the brand narrative and framework, to ensure all key destinations and tourism brands across the region are packaged

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<sup>7</sup> LCR is home to two of the three Open Championships venues of Royal Birkdale and Royal Liverpool which form part of the England's Golf coast.

and promoted effectively. Securing sustainable funding is essential to continue to drive awareness, reach and visitation and will be achieved by working closely in partnership with public, private sector, commercial, national and destination partners. Visitor marketing also needs to engage with local communities and ambassadors to secure positive social impact and share the benefits of a fantastic destination.

- **Enhancing the Visitor Welcome – Tourist information and Wayfinding:**

Creating a positive and memorable visitor experience upon arrival and throughout the visitor journey. This will involve understanding how visitors access and consume information through mobile apps, digital guides, and interactive maps and enhancing tourist information, wayfinding, and accessible services, across LCR utilising the latest digital platforms to meet visitors' diverse information needs. Tourist guides also play a crucial role in storytelling, offering unique and immersive experiences that resonate with visitors. The physical environment - including public realm – and perceptions of safety will also be a key consideration. Further scoping work must also consider the impact of potential major incidents on visitors and their safety.

## Mission Two – Harnessing LCR Global Appeal and Brand Distinctiveness

Goals	ACCELERATE OUR GLOBAL REACH		RE-IMAGINE OUR TOWNS AND DESTINATIONS	IGNITE THE CITY REGION	
	Using our established attract brand, Liverpool, we will position LCR as a major destination for international visitors. The accelerate activity will focus on leveraging our global reputation, to entice international audiences and brands across a range of sectors to strengthen our appeal to visitors and maximise our inward investment opportunities.		Working in partnership with our towns we will use their distinctive selling points, such as their attractions, historical landmarks, and culture to create unique itineraries designed to showcase the regional offer. Highlighting the ease of connectivity, transport will be a key component and will underpin this activity.	Expanding the tourism economy across the region by building on our successful events programme and developing new experiences through engaging our communities to help transform the region's fortunes.	
Priority	Year	Action	Action	Action	Lead
		Partner with Liverpool John Lennon Airport, Cruise Terminal, and rail operators to secure investment from carriers from identified target markets, bringing visitors to the city region.  Strengthen partnerships with regional gateways such as Manchester Airport and rail links to support the ability to grow			LCR LVEP, Transport Partners,

<p><b>Promoting key tourism assets/brands from across the region.</b></p>	1	<p>business events and leisure visits, with the aim of maximising new rail links to disperse visitors.</p> <p>Balance growth of flights/cruises with the increase in carbon emissions / poor air quality / poor river quality to ensure growth is not detrimental to the environment.</p> <p>Encourage the use of more sustainable transport options for visitors.</p>		Private Sector
		<p>Create a shared story/narrative about LCR that reflects hero and thematic brand as well as diversity, inclusivity, and sustainability to enhance assets and brands from the region.</p>		
		<p>Create a city region marketing strategy based on growth from the analysis of data and intelligence insights for international and domestic markets.</p> <p>Drive short term growth from existing assets and underperforming areas and identify longer term growth markets, using the enabling priorities as key drivers.</p> <p>Analyse and align country profiles with development themes.</p>		LCR LVEP
	2/3	<p>Develop destination partnerships to enhance themes, storytelling and geographical location creating LCR as the hub for</p>		LCR LVEP, LAs, Private Sector

		visitors – North Wales, Chester, Lake District.			
		Identify and secure funding resource to support activities to create packages, trade activity for evidence-based themes reflecting trends and data to maximise opportunities for the wider region.			
<b>Strengthening LCR's recognition as a global brand</b>	1	Position the visitor economy as a key strand within the Place brand work.  Collaborate with existing global operators to maximise global assets such as England's Golf Coast			
	2/3	Position LCR as a global brand complemented by regional hero, place, and thematic brands.  Brand framework to be developed for and the positive influence of Liverpool on the framework on LCR assets.			LCR LVEP  Inward Investment Team  LCR CA
		Destination brands used to attract key audiences for both business and leisure visitors.			
		Identify global channels, brands and partners that align with LCR brand (music, culture, sport, gaming) to enhance positioning and alignment and subsequently develop this growth opportunity both economically and socially.			

	3/4	Development of the International Slavery Museum, the only museum of its kind, and the surrounding areas provides an opportunity for us to full acknowledge our past and provide a space for learning, healing, and reflection unseen anywhere else in the world.			LCR CA Climate Partnership  LAs  Private Sector partners
	4/5	Participate in GDS-Index to commit to environmental and social wellbeing, boosting LCR’s reputation, attracting conscientious visitors and create a more regenerative destination.  Identify funding and resource to participate but also to implement the changes required to improve.			
<b>Building on brand distinctiveness through Destination</b>	1	Identify opportunities for dissemination of brand/narrative through trade missions, mayoral visits and wider partner and investment opportunities.			LCR LVEP  LAs

<b>Marketing &amp; Communications</b>		Ensure best practice from Destination Marketing SIF programmes is embedded in future approach and delivery with particular focus on regional collaboration and the need for all boroughs and private sector partners to participate and contribute to the LCR LVEP and future destination activity.		Private Sector
		Conduct a funding review to identify and secure a sustainable funding model for destination marketing (public & private sectors across LCR) including evaluating options under devolved powers in partnership with the private sector.		
		Identify resource to develop and deliver a data and intelligence led approach/strategy to destination marketing building on SIF lessons and enabling more targeted marketing (e.g., based on visitor demographics, preferences, and behaviours).		
		Create targeted destination marketing plan reflecting the shared brand framework and narrative for the region, including global, hero, thematic, hidden gems, and emerging and distinct brands		LCR LVEP
	2/3	Identify strategic commercial, national (VisitBritain) and destination partners to amplify delivery of marketing plan and wider DMP priorities.		Strategic Marketing Group  LAs  Private Sector
		Target strategic communications about the visitor economy to key stakeholders.		



<p><b>Visitor Welcome – tourist information and wayfinding</b></p>	<p>1</p>	<p>Make a case for funding to review, refresh and formalise the regional Visitor Welcome (including TIC role and guidelines/training). Based on trends analysis a fully integrated digital welcome for LCR needs to be fully explored including planning, booking, and experiencing the region.</p>		<p>LCR LVEP</p>
	<p>2/3</p>	<p>Recognising the desire for sustainability amongst visitors to create a sustainable travel visitor guide showcasing ease of use of public transport, bike/scooter rental, and walking trails promoting soft mobility options.</p>		<p>LCR LVEP, Strategic Marketing Group, LCR CA, Universities, Innovate UK, LAs, LCR CA Climate Partnership</p>
		<p>Explore and align wayfinding with Active Travel across LCR for the benefit of visitors and residents for events, short breaks and to encourage wider exploration of the City Region maximising the unique city USP as a walkable city and the expanse of accessible waterfront and country walks/ cycle routes.</p>		
		<p>Embrace digital technology and innovation to create personalised itineraries signposting visitors to the city region, enhance visitor information, to deliver a seamless and tailored experience for all visitors.</p>		

	4/5	Consider investment required to ensure a safe, secure, and clean environment to enhance the visitor experience and position LCR as a globally attractive destination.		
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## 7 Mission 3: A Thriving and Resilient Visitor Economy

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### Mission Overview and Rationale

A **thriving and resilient visitor economy** is required to drive dynamism within the sector and the business base, support economic growth and maximise the sector's ability to overcome challenges and withstand shocks. This includes the environment, culture, and community to ensure there is the social licence to operate.

As a people-based sector, the quality of the **workforce** is crucial and has a direct impact on the **visitor experience** – especially in LCR, where the friendliness of its people is recognised as a unique part of the area's **visitor welcome**.

The sector faces challenges – globally, nationally and in LCR - which need to be addressed to strengthen and enhance the visitor offer. These challenges include **climate change, skills shortages** and gaps, **staff retention** and **vulnerability** in the business base and **productivity** of the sector. There are also opportunities to **scale up businesses, enhance supply chain linkages, improve productivity, increase resilience, and staff diversity** through adopting more sustainable practices and to ensure that a **year-round offer** is in place.

A comprehensive and collaborative approach to building workforce capability, address structural challenges and attract people into tourism will be fundamental to address the long-term challenges of the sector and start to provide the secure footing needed for future success.

### Key Statistics and Evidence

- There are 58,500 jobs within the visitor economy across LCR. Skills gaps and high staff turnover, particularly in hospitality, are ongoing challenges reported by stakeholders and recognised as an issue nationally. Factors causing high levels of turnover include perceptions that jobs within the sector are temporary or a stop gap, inadequate pay and rewards and irregular work patterns. There are also cases where jobs are seasonal limiting structured training opportunities such as apprenticeships.
- There are businesses with high growth potential within the LCR visitor economy - 6% of the sector's businesses are forecast to grow by over 20% in the next year. There are also businesses (6%) showing signs of financial distress. This is to be expected in any economic context, and particularly the

current context given the challenges businesses have faced linked to rising costs, energy prices and VAT.

- There are businesses with high growth potential and businesses showing signs of financial distress in all sub-sectors. The sub-sector with the largest number of growth businesses is food and drink, followed by sports and arts. Exhibition and conference activities, and water transport have the highest proportion of growth businesses although they have small numbers of businesses.
- Accommodation and food/ drink, exhibitions and conferences are the only three sub-sectors which have a higher proportion of businesses showing signs of financial distress than businesses showing high growth potential.
- Food and drink and accommodation account for the highest number of businesses showing signs of financial distress are simultaneously showing high growth potential. While the visitor economy is typically less productive than other sectors, productivity levels in the LCR visitor economy are approximately 20% lower than the national average for the sector. Closing the gap with the national sector could generate an additional £309m of GVA per annum.
- While a regional events calendar has been compiled in the past, it is no longer seen as an effective tool for LCR. There is a growing ambition to develop a more robust back-end events calendar, with input from all venues across the region. This would streamline the coordination of year-round events, helping to enhance both productivity and economic impact across LCR.

## Strategic Priorities

There are four strategic priorities aimed at addressing critical areas identified in the evidence base and consultation, such as the workforce supply, the skills gap, business growth, and productivity challenges. These priorities will support businesses with high-growth potential, enhance workforce capabilities, and help close the national productivity gap, ultimately driving a stronger, more resilient visitor economy.

- **Improving workforce development and promoting the visitor economy as a Career of Choice:** There is the requirement to improve the structural challenges faced by the visitor economy and ensure the sector has access to a secure and resilient domestic workforce. It's also essential it is resourced with a modern and well skilled workforce that is resilient and adaptable when faced with changing

market forces. The strategic opportunities presented with the new skills agenda by the government must be influenced to ensure the sector can rectify existing challenges of workforce development and recruitment. Furthermore, there is the opportunity to stop modern slavery ensuring a fair living wage is paid to encourage all those working in the visitor economy. Building upon the sector's existing skills and training offer, encourage best practice amongst employers and promote career pathways to showcase the visitor economy as a sustainable career of choice, boost staff retention, increase skills levels, adopt 'green' skills and meet the evolving demands of the sector.

- **Delivering business support to attract, scale up and retain visitor economy businesses:** The creation of options to support new start-ups, businesses with growth potential, strategic employers, and vulnerable businesses. Potential areas of support, which align with the priorities of the DMP, including sustainability, accessibility, inclusivity, productivity, digital innovation, product development and strengthening supply chain initiatives. There is a need to encourage employers to take more ownership in developing the talent pipeline through apprenticeships and traineeships and work with local suppliers to help shape training needs.
- **Programming of events and activities to provide Year-Round offer:** A coordinated approach with partners for a shared events calendar across the region to improve sharing of information, avoid major event clashes, support accommodation, reduce seasonality and develop a mechanism to measure the carbon footprint.
- **Developing supply chain networks:** Developing reliable access to local goods and services, supporting business sustainability, and improving the overall visitor experience.
- **Developing a Commercial Strategy** – It is important that all revenue streams are explored to develop a sustainable and long-term funding model for the sector and collaboration with brands, key stakeholders and businesses offer the chance to align efforts and maximise resource. This is a key activity and needs to be prioritised.

Mission 3: A Thriving and Resilient Visitor Economy					
Goals	ACCELERATE OUR GLOBAL REACH		RE-IMAGINE OUR TOWNS AND DESTINATIONS	IGNITE OUR CITY REGION	
	Using our established attract brand, Liverpool, we will position LCR as a major destination for international visitors. The accelerate activity will focus on leveraging our global reputation, to entice international audiences and brands across a range of sectors to strengthen our appeal to visitors and maximise our inward investment opportunities.		Working in partnership with our towns we will use their distinctive selling points, such as their attractions, historical landmarks, and culture to create unique itineraries designed to showcase the regional offer. Highlighting the ease of connectivity, transport will be a key component and will underpin this activity.	Expanding the tourism economy across the region by building on our successful events programme and developing new experiences through engaging our communities to help transform the region's fortunes.	
Priority	Year	Action	Action	Action	Lead
Improving Workforce Development and promoting the	1	Establish a Visitor Economy Workforce and Skills Working Group to provide advice and guidance for sector evaluation including working with Visit Britain and UK Hospitality to influence Skills England on new technical and vocational qualifications for the sector.			LCR LVEP, HE & FE Colleges. Private Sector

<b>visitor economy as a Career of Choice</b>		Evaluate, enhance existing work experience, and career pathway programmes for the visitor economy sector, including business partnerships with schools, further and higher education institutions, and the engagement of underrepresented groups.	Industry Bodies, LAs, CEC, Race Equalities Hub
		In line with our ambition to grow our heritage tourism offer we must support the development of Black Led tourism working with the LCR Race Hub, NML and other partners.	
		Develop a city region food culture to drive forward the sector skills agenda.	
		Encourage employers to develop talent pipeline through apprenticeships and traineeships and work with local suppliers to shape training needs.	
		Encourage LCR partners to work with local colleges to secure devolved funding to address specific destination needs.	
	2/3	Raise awareness and provide guidance on navigating the existing training offer and opportunities.	LCR LVEP, HE & FE Colleges. Private
	Identify opportunities to tailor existing training / create new training that meets the demands of an evolving visitor economy (e.g., accessibility awareness, digital, AI, green skills).		

		Develop a Visitor Economy Charter (linked to Fair Employment Charter)- industry leaders pledge to best practice for the people, planet, and place initiatives.			Sector Industry Bodies, LAs, CEC, VE sustainable Taskforce
<b>Business Support to attract, scale up and retain</b>	1	Maximise uptake of existing business support schemes (e.g., linked to growth, productivity, sustainability, accessibility, and inclusion) amongst visitor economy SMEs to close the productivity gap with the national average. Scope university partnerships to research and understand supply chains and impacts on sector productivity.			LCR LVEP, Private Sector, Chambers Industry Bodies, LAs, HE Universities
		Review and develop business cases for targeted business support for new starts, vulnerable businesses with growth potential and strategic employers considering digital innovation, product development, increasing productivity, supply chain initiatives, sustainability, accessibility, and inclusivity.			LCR LVEP
		Identify interventions to protect vulnerable businesses including economic, environmental etc.			



<b>Programming of events and activities to provide Year-Round offer</b>	1	Coordinated approach to facilitate and deliver events across the region – improving sharing of information through digital innovation tools for partners, venues, and visitor economy sector to support infrastructure, hotel bookings and reduce seasonality.	LCR LVEP, Private Sector, LAs
	4/5	Create a shared LCR events calendar using digital tools that are user-friendly for partners to update, with a clear hierarchy of major, national, regional, local events.	LCR LVEP, Private Sector, LAs
<b>Supply chain network</b>	4/5	Create a local supply chain network to promote local businesses in the sector by establishing local/regional networks – for events and hospitality and wider visitor economy opportunities.	LCR LVEP, Private Sector, LAs
<b>Commercial Strategy</b>	1	A pivotal activity. Create a commercial strategy for the LCR LVEP identifying key collaborations and partnerships and leverage existing international connections.	LCR LVEP

## 8 Enabling Priorities

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### Mission Overview and Rationale

The enabling priorities for LCR underpin the opportunities to address barriers to growth. Enhancing transport connectivity and investing in digital innovations will create richer visitor experiences and streamline operations. Strategic infrastructure development will modernise facilities to meet evolving demands, while targeted intelligence gathering will provide the data needed to inform strategic decisions, helping to position LCR as a leading global destination. Nevertheless, further capital investment is needed to support a balanced approach to development.

### Key Statistics and Evidence

- Public transport and connectivity have highlights and recent investments in the Merseyrail fleet and station projects offer significant opportunity for the sector, however there are several areas of concern including cross regional connectivity with neighbouring counties and the ability to influence cross regional investment projects. Airport connections, and travel in the evening and during major events (including parking) and for the night-time economy workers, journeys from transport hubs and attractions and navigating the network are all areas that need further consideration and improvement.
- Currently there is no specific visitor transport strategy for LCR. Transport and connectivity to / from and within LCR are essential for a quality visitor experience – particularly for international visitors and for visitors who wish to travel from Liverpool to other parts of LCR. Input into the LCR Transport strategy from the visitor economy sector perspective is needed to improve the visitor experience.
- The growing trend of consuming information online presents a significant opportunity for destinations to enhance its digital presence and the experience for visitors. Digitalisation adoption enables destinations to have a competitive advantage in reaching and influencing visitors as well as providing the sector with the latest technologies and platforms to manage their businesses and provide services.
- Collecting consistent and real time data to support strategic planning, product development, case making, investment decisions and monitoring activities e.g., data on the impacts of tourism, events and festivals, accommodation stock and footfall across the region, and international visitors and visitors that arrive through the airport.

## Enabling Priorities

There are four enabling priorities which outline opportunities to provide the sector with support and infrastructure that underpins the tourism growth and global ambitions of LCR:

- **Transport – Providing connectivity to and between visitor destinations across LCR and beyond:** Working with transport organisations to provide visitors and employees with convenient, accessible and low carbon transport and active travel options to significantly improve the distribution of visitors across LCR and boost the night-time economy (including the workforce), particularly for major visitor attractions and major events. This includes the development of integrated sustainable transport hubs at key visitor locations, offering options such as bike rentals, scooters, and public transport city cards. Further work is needed to develop the use of regional gateways and their services which can benefit the city region with improved travel options.
- **Digital – Establishing a digital innovation approach for LCR’s visitor economy:** Innovation and the use of digital technologies has the potential to bring about a step change in the sector growth and performance. There needs to be an increasing focus on how we can maximise new technology in the sector and encourage adoption, and this will influence productivity of the sector. Utilising digital technologies and innovations to ensure visitor marketing, experiences and the sector are cutting-edge and business adoption of the latest digital connectivity will ensure that the industry is fit for purpose.
- **Infrastructure – Inputting into and maximising opportunities from LCR’s investment pipeline:** Assessing infrastructure supply and investment pipeline against visitor demands and opportunities, including tourism information, accommodation stock and attractions (especially off-peak provision). Identify where the investments are needed to enhance tourism infrastructure to improve transport links, accommodation, and public spaces to make the region more accessible and appealing to visitors and residents. Enhancing train and bus routes and upgrading roads and bicycle lanes (links to transport). Annex B details the investments and developments in LCR for the sector and supporting the promotion of these assets will be importance activity for LCR LVEP.
- **Intelligence – Establish a LCR data dashboard for the visitor economy:** Coordinating and consolidating market intelligence that provides essential insights to inform campaigns and interventions including visitor value, volume, trends, and drivers in addition to a business dataset for the industry to flag up businesses requiring support to achieve their growth potential. It is also

important to highlight and include carbon footprint, social and environmental indicators. Data driven insights will support the optimisation of marketing and promotional efforts, helping to identify the most effective channels, messaging and timing for campaigns and other marketing activity, this will then maximise the ROI for marketing spend.

## Key Actions

Enabling Priorities					
Goals	ACCELERATE OUR GLOBAL REACH		RE-IMAGINE OUR TOWNS AND DESTINATIONS	IGNITE THE CITY REGION	
	<p>Using our established attract brand, Liverpool, we will position LCR as a major destination for international visitors. The accelerate activity will focus on leveraging our global reputation, to entice international audiences and brands across a range of sectors to strengthen our appeal to visitors and maximise our inward investment opportunities.</p>		<p>Working in partnership with our towns we will use their distinctive selling points, such as their attractions, historical landmarks, and culture to create unique itineraries designed to showcase the regional offer. Highlighting the ease of connectivity, transport will be a key component and will underpin this activity.</p>	<p>Expanding the tourism economy across the region by building on our successful events programme and developing new experiences through engaging our communities to help transform the region's fortunes.</p>	
Priority	Year	Action	Action	Action	Lead
Transport	1	Partner with Liverpool John Lennon Airport, Cruise Terminal, and rail operators to secure investment from carriers, bringing visitors to the city region, balancing the demands to meet sustainable and social impact targets.			LCR LVEP, Transport Partners,

		<p>Partner with national and other regional transport providers e.g., Transport for Wales, Avanti, Northern to maximise regional connectivity, open up new markets and enhance the visitor experience.</p> <p>Explore and develop the relationship with other regional gateways for travel to maximise the benefit for the region including Manchester air and rail links and Newcastle/ Hull port links (where appropriate for country analysis/ marketing strategy).</p>		Private Sector
		Align visitor and sector employees' needs within the Transport Strategy especially sustainable routes within the transport policy including night-time transport.		
	2/3	Identify key visitor areas that require improvements to accessibility, connectivity, and overall visitor experience with a view to investment.		LCR LVEP, LAs, Private Sector
	4/5	<p>Include green and accessibility transport initiatives in visitor promotions and visitor pass development e.g., electric buses and rail (low level access) for major events and to encourage wider exploration of the city region.</p> <p>Explore potential to establish sustainable transport hubs (providing access to electric scooters, bike rental, public transport) at key visitor locations.</p>		LCR LVEP, LAs, Private Sector
				LCR LVEP, LAs, Transport Partners

		Influence and explore how the new rail link between Manchester and Liverpool will transform the connection for business, and visitor economy between major cities of the Northwest.		LCR LVEP, Transport Partners, LCR CA
<b>Digital/Innovation</b>	1	Create a digital Innovation task group (including UK Innovation, ACE) to encourage digital innovation in the centre (Sector catapult centre) with aim of driving productivity, new visitor experience and meeting new audience demands.		LCR LVEP, VE/VB, Innovate UK
		Promote LCR Connect to VE businesses.		LCR LVEP, LAs
<b>Infrastructure / Capacity</b>	1	Develop an LCR accommodation strategy (considering previous work completed) to ensure supply meets demand & future aspirations including short-term lets and the impact on communities, housing prices, availability for residents.		LCR LVEP, LAs, ABID, BIDs, Private Sector
		Maintain a city region strategic marketing group to explore the potential for off-peak promotions/attractions and accommodation packages.		LCR LVEP Strategic Marketing Group
	2/3	Conduct an attraction gap analysis (including products, routes to market, data, and intelligence) and identify new strategic opportunities and align to Local Growth Plans.		

	4/5	Maximizing priority future investment projects (listed in the evidence base) for the visitor economy, based on sustainability and social impact credentials.			LCR LVEP, LCR CA, LAs	
<b>Intelligence/Data</b>	1	Develop a data strategy for the city region to help analysis data sources (private and public) and provide more meaningful insights, scope research and modelling services and industry information sharing.				LCR LVEP, Private Sector, LCR CA
		Create a visitor economy dashboard, bringing all data sources inc. transport and real-time data together, to drive marketing activity and decisions, efficiency, and innovation.				
		Develop a market segmentation tool to establish size/value of potential markets and profiles/ motivations of visitors (exploring the role of AI).				
	1/2	Scope AI research project to support sector modelling for performance/ investment.			LCR LVEP, Innovate UK, Private Sector	



	2/3	Create business base data set (Growth/Red Flag data sets), including alert to growth opportunities and risk requiring support.	LCR LVEP, LAs
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## 9 Strategy Delivery

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### Governance

The following framework will provide robust governance, ensure alignment with other LCR strategies, and enable the successful delivery and evaluation of the DMP, in partnership with key stakeholders.

- **Political Leadership & Scrutiny** – Political leadership of the DMP will be provided by LCRCA’s Cabinet Member for Business, Investment and Trade, with scrutiny provided by the Neighbourhoods and Communities Committee. The Growth Directors Group will also be consulted to input and feedback on the DMP to ensure alignment with economic strategies across LCR.
- **The LCR LVEP Board** – The LCR LVEP Board, will be the sponsors of the DMP and oversee the strategic direction and delivery of the DMP. The Board includes private and public representatives from the key aspects of the visitor economy and representatives from across the region. The Board also ensures wider aspects including LCR’s economic strategy, inward investment, culture and heritage, transport, skills, and business development support are aligned with the visitor economy’s priorities and enable successful delivery of the DMP. As the delivery of the DMP develops, it is anticipated that Board members will become leads on priority initiatives.
- **National Accreditation** – The LVEP’s accreditation body, VisitEngland, is also a key partner to support the DMP and provide enabling support e.g. accessibility initiatives as well as strategic connections with other LVEPs in the UK.

### Funding/ Resource

Successful delivery of the DMP will depend on the shared values, commitment, delivery, and funding from a range of partners. The private sector has a significant role in this space and is pivotal to the stated ambitions of this strategy. Further deepening and developing the partnership with the private sector will underpin the success of this strategy, as well as other stakeholders’ engagement and backing. LCR, for example, has already invested in major events like Eurovision and The Open Golf, working with the private sector on major developments including the Waterfront and NML Canning Dock to drive benefits such as spend, footfall, investment, and improved perceptions. The national government, local authorities and other organisations including Arts Council

England and the National Lottery are also supporting programmes across the region for example Tate Liverpool and Shakespeare North.

Continued sustainable funding will need to be secured to realise the DMP's success to fund the management, oversight, and coordination of the strategy delivery, ensuring that progress is made, projects are coordinated and progressed, and outputs are monitored. Previous public/private sector funded projects such as the Destination Marketing SIF Project and Growing Business Events SIF Project established a framework of collaboration which has been highly effective enabling evaluation of activity delivery where lessons can be utilised to inform future models. This document provides the opportunity for the newly established LCR LVEP to be structured to deliver the strategic priorities and identify existing best practice and new ways of working and resource to deliver the DMP's shared ambitions. The strategic projects which require additional resource will be worked into full business cases which will seek collaboration, funding based on impact and ROI. This work will commence immediately.

## **Risk**

There are several areas of risk that need to be monitored and evaluated during the delivery of this strategy and how it will impact on the sector.

- Economic instability on Consumers – economic fluctuations, both nationally and globally will impact on disposable income of travellers and their spending patterns and their willingness to travel.
- Willingness or ability to travel also impacted by consumer awareness on sustainability and climate change.
- The growth trend on the limitations by business and other organisations such as universities on the number of business trips taken and events organised
- Inflationary Pressures - The rising cost of goods and services (impacted by climate change) means everything from food supplies to utility bills becomes more expensive. This increase affects the bottom line, as hotels and restaurants, arts and cultural venues must spend more to maintain the same level of service quality.
- Staffing Shortages and Wage Increases - Shortage of skilled labour and the turnover of staff are risk to the high-quality delivery of services we want to retain and develop across the region. To attract and retain staff, businesses are often compelled to offer higher wages, further increasing operational costs and recent hike in national insurance contributions and minimum wage has further compounded sector pressures. Businesses taking action on sustainability can

alleviate some of these pressures and have a positive impact on recruitment and retention.

- Energy Costs – Sky high energy costs have contributed to a cost of doing business crisis for the sector. There is an increasing need for increased energy efficiency and use of renewables, which can mitigate the impact.
- Environmental degradation and the impact on the offer to both residents and visitors.
- Climate change and the transition to low carbon economy.
- Overtourism and community disengagement/ pushback – Environment impact and sustainability challenges are becoming more frequent and these need to be alleviated with sustainable and regenerative tourism management.
- Lack of investment in infrastructure – Without proper investment infrastructure and insufficient facilities will negatively impact visitor and resident experiences, particularly around visitor peak periods. Increasingly investors and insurance companies are looking for a clear commitment and action plans to focus on sustainability and mitigate and adapt to impact.
- Closure of key tourism assets (even temporary) such as the International Slavery Museum and The Tate Gallery.
- Reputational damage following the tragic Southport incident and subsequent civil unrest across the region.
- Delays to sector investment projects such as the Marine Lake Events Centre and the impact on accommodation stock investment.
- Other UK destinations are exploring new funding mechanisms to boost the sector performance and manage destinations such as a tourism levy. There is a risk that other parts of the UK will accelerate away with the access to additional funds and formulated processes.
- Funding to secure delivery of the DMP priorities.
- Competing and divergent priorities of sector partners which could undermine effective use of resource and coherence in planning and coordination of activity.

## **Delivery**

The CA's visitor economy team will be part of the LVEP and will provide overall coordination for the delivery of the DMP in collaboration with various partners outlined in the delivery plan and oversight provided by the LVEP Board. As the number of opportunities and actions are extensive and the delivery plan encompasses a multitude of organisations, business, and sub-sectors, to be successful and achieve the desired outcome it needs to be embraced and delivered in partnership.

An annual delivery plan which is informed by the strategy missions and strategic priorities, will be overseen by the LVEP Board, and delivered by a wide group of partners. The Delivery Plan will detail short-term actions and be reviewed and updated on an annual basis. As the strategy is implemented, it should be allowed to evolve and respond to new data, opportunities, and challenges as they emerge.

### Monitoring and Evaluation

A DMP Delivery Plan will be developed that will include further detail of how the actions are progressed, monitored, and measured. Success and achievement of the overall DMP outcomes will be measured through key performance indicators that will be assigned to relevant actions in the delivery plan, including the following:

KPI	Measurement
Visitor Value and volume	STEAM
Visitor expenditure	STEAM and Visit Britain spend data
Average length of stay	National surveys – GBTGS and IPS
Accommodation Occupancy	STR
Perceptions, Motivations & Satisfaction	Visitor Survey including seasonal spread/ Seasonality rate, tourism intensity- % of tourists per resident
Number of businesses assisted / supported	LVEP data logs
Digital & Social Media reach	Digital analytics
Quality jobs	Living wage employers Fair employment charter pledges

<b>Distribution of economic benefits</b>	Geographical spread of employers and workforce and associated demographics
<b>Climate Change (carbon emissions of sector, % of businesses measuring their carbon footprint)</b>	Scheme to be implemented
<b>% of businesses with sustainability certification</b>	Scheme to be implemented
<b>Accessibility (% of businesses with an accessibility statement, engaged in training)</b>	Scheme to be implemented
<b>Resident Sentiment- resident sentiment survey</b>	Scheme to be implemented
<b>Productivity Levels</b>	Scheme to be implemented
<b>Destination Marketing Spend</b>	ROI (can be split per destination)

It is recognised that other factors beyond the DMP will also contribute to change on the above measurements and indicators. It is anticipated the output and impact measurements assigned to individuals' actions and activities will help demonstrate causality and links between the DMP and the headline outcome measures.

## 10 The LCR Visitor Economy in Detail

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LCR has a vibrant and dynamic visitor economy that is a cornerstone of its cultural identity. Renowned for its rich history, iconic cultural landmarks and glorious coast and countryside, the region is a top destination for both domestic and international visitors. The LCR's deep-rooted connections to music, along with its maritime heritage, strong shopping and culinary offer and world-class sporting venues draw millions of visitors each year.

From its iconic waterfront to its natural assets and country parks, seaside attractions and heritage sites, LCR offers a varied and many unique attractions, many of which are reachable by public transport. The welcome from LCR's people – both residents and visitor economy employees - adds a distinctive and authentic dimension to the visitor experience and one like no other city region which has resulted in several accolades for friendliest UK city and positive social media activity.

Always pushing to innovate further, Liverpool has recently become the world's first 'Accelerator City' for climate action, under UN Climate Change's [Entertainment and Culture for Climate Action](#) (ECCA) programme. The title comes in recognition of Liverpool's impressive commitment to innovation and smart regulation to rapidly decarbonise the live music and TV/Film production sectors – both vital parts of the city's economy.

As an 'Accelerator City', Liverpool will expand on this use of policy, technology, infrastructure, and transport practices to pilot and then embed decarbonisation methods into the fabric of the city, extending the scope of this work to include national film and television institutions, establishing cross-sectoral solutions with clean, green providers and sustainability-focused event and onscreen producers.

The region's reputation is enhanced by its impressive calendar of events on both national and international scales which boosts its attractiveness throughout the year. The region boasts a worldclass business events programme, linking key conferencing opportunities with inward investment clusters and has significant growth opportunities with the advent of the Southport Marine Lake Events Centre in 2027. The leisure offer has a mixture of well-established, international famous events including the world's most famous and challenging horse race, The Grand National at Aintree; The Open Golf Championships, frequently hosted at the quality golf courses available in Sefton and Wirral; and the Southport Flower Show, the largest independent flower show in the UK. LCR continues to attract and host high-profile events like Eurovision 2023

which is testament to its commitment to the visitor economy and a demonstration of its current appeal to global audiences.

## The LCR Visitor Economy in Numbers

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- Tourism activity is valued at £6.25bn.
- Over two thirds of tourism expenditure is on shopping / retail (37%) and food and drink (30%).
- There are over 60 million visitors to LCR each year, with peak months tending to be July and August, while November and December are typically off-peak months.
- The large majority of visitors (90%) are day visitors – 54m.
- The 6m overnight visitors (10% of overall visitors) generate 39% of the sector’s value.
- Overnight visitors have driven the sector’s recovery and growth in tourism value post-pandemic.
- Liverpool was the 5<sup>th</sup> most visited UK City by international visitors in 2023, with 900,000 overseas visitors.
- LCR is home to:
  - 10 of the top 20 free tourist attractions in the Northwest – including the top three attractions and six which are within the top 10.
  - Four of the top 20 paid tourist attractions in the Northwest.

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### 2023 STEAM

## An Important Sector for the LCR Economy

The visitor economy is vital to the local economy, accounting for over 10% of jobs and businesses in the region, and 12% of Gross Value Added (GVA) in 2023 with opportunities for this to be boosted through productivity improvements such as the adoption of technology and in particular AI, improving employment conditions in the sector and creating local supply chains to support the sector.

The value and scale of the sector increases when considering its role in attracting visitors – especially overnight and international visitors – and driving spend within other supporting sectors such as retail. This underscores the sector’s significance for sustained economic growth and employment, particularly in key tourist areas across the City Region, such as the city centre and Southport, where visitors enhance the retail footprint.



The visitor economy contribution to the delivery of other regional priorities should not go unrecognised. The sector has a pivotal role in regeneration of place, socio economic inclusion, enhancing skills and employment, developing community cohesion and civic pride, and attracting new enterprise and inward investment are all achieved through the visitor economy.

A wide range of opportunities are available across the sector's 58,500 jobs, from valuable entry level jobs which can support residents to take a first step into or re-enter employment to highly skilled occupations which provide exciting career pathways.

The diversity and dynamism of the visitor economy's business base - including high levels of business start-ups - drives the vibrancy of the sector, with businesses with high growth potential in each sub-sector.

As the visitor economy continues to evolve, it will play a critical role in driving growth, supporting local entrepreneurs and businesses, and creating good quality employment opportunities, contributing to key economic and employment policy priorities for LCR.

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- Over 58,500 people are employed in the LCR's visitor economy, accounting for almost 12% of total employment.
  - LCR has almost 4,800 businesses operating in the visitor economy, accounting for 11% of the business base.
  - Growth in LCR's visitor economy employment and business base has exceeded national levels in recent years.
  - Increasing productivity levels – the level of GVA per job filled – from £22,700 to £27,200, closing the gap with the current productivity of the national visitor economy could generate an extra £309m of GVA per annum.
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### **Sector Assets: Current and Future**

The diversity of LCR's visitor economy is anchored by key assets that appeal to various markets. From world-renowned museums, galleries, and cultural landmarks to impressive waterfronts, stunning beaches, expansive parks, botanical gardens, and nature reserves, the region's offer matches the motivations of many visitor segments. Iconic sports venues and locations further enhance LCR's appeal, while key transport hubs such as Liverpool John Lennon Airport, the Mersey Ferries, and Liverpool Lime Street Station provide access for international and domestic visitors.

Visitors can experience natural coastal beauty and countryside alongside Liverpool city centre, home to the Royal Albert Dock, National Museums Liverpool, a plethora of

theatres and Liverpool ONE. Southport's seaside attractions extend into miles of unique beach landscape, culminating in the internationally recognised Anthony Gormley statues at Crosby beach and the Wirral offer access to the coast and countryside, world-class golf, and major events. While Knowsley is home to one of the most popular paid visitor attractions in the region and has the award winning with Shakespeare North, with Halton and St Helens contributing to the region's industrial and cultural heritage with unique assets such as Norton Priory, The Catalyst Museum, World of Glass and sporting venues including Haydock Park and home to rugby league's Widnes Vikings, St Helens RFC and Liverpool Women's Football Team. Together, these make LCR a rich, compelling destination for visitors.

## **Connectivity**

LCR is well located with its proximity to two international airports, a cruise terminal and public transport connecting the city region nationally and beyond. The linkages with London via train are excellent, but frequency of service and complex ticketing can be detrimental in the dispersal of tourists from London. From a regional perspective Merseyrail is a crucial component of public transport in the city region and the surrounding areas including Chester. This integrated network connects several of the major tourist destinations in the region and its electrified fleet, with state-of-the-art low-level access on all trains, provides an environmentally friendly and inclusive option for visitors to travel with ease across the region. It provides frequent and highly punctual services compared to other rail networks.

The Merseytravel, public bus network also provides a valuable opportunity to support the dispersal of visitors and the plans to franchise the network will enable an improved integrated system with other modes of transport – including the region's £500m fleet of new, publicly-owned trains. A key opportunity for the sector is to utilise the mayoral commitment to secure a further devolved and long-term transport funding pot and establish Transport for Liverpool City Region. Taking back control of the local rail and integrating bus networks will result in simpler, more convenient ticketing (tap and go pass), and building in a visitor pass connected to attractions is a prime opportunity for the region.

However, there are challenges with the cross-region connectivity. Journey times and exchange points proximity to attractions forces car usage and the current focus on residential travel on the bus network rather than visitors. There has long been support in the north of the region to reinstate the Burscough Curves rail link between Southport, Preston, and Manchester Piccadilly, which would improve regional network capacity,

standardise service accessibility, reduce journey times and open a visitor route to Southport from Manchester via rail.

Nevertheless, investment has been announced to cross regional rail connections. The recently announced plans to open an extra line between Liverpool and Manchester Airport will open new opportunities for travellers, cutting the journey time between Liverpool to Manchester from over an hour to 25 minutes. This will present a significant opportunity to grow international visitors from both a leisure and business perspective. The new rail investment in stations such as Daresbury and the Baltic present the opportunity in advancing business tourism (Daresbury) – linking key cluster strength facilities with the accessibility of conferencing facilities, and dispersing leisure tourists (Baltic) to new investments (Box Park) and to offbeat attractions, appealing to differing audience segmentation. Other investment in connectivity includes a new station at Carr Mill, St Helens, opening up new leisure opportunities for tourists to visit Carr Mill Dam and its picturesque lakeside trails and walks, as well as national competitive powerboating and angling events.

## **Workforce and Skills**

The visitor economy is vital for driving growth and providing employment. The sector provides 58,500 jobs in the region, an increase in of 13 % since 2022 (source STEAM 2023) but despite the headline statics there are fundamental structural challenges to the workforce development and recruitment. Investing in interventions to grow a secure and resilient workforce is an urgent priority to underpin the ambitious growth for the region, and to ensure that businesses have a stable supply of appropriately skilled workers to deliver high-quality experiences.

Historically the sector has faced workforce shortages and challenges in attracting and retaining staff, due to the seasonal and/or casual nature of many roles. This led to the reliance of migration labour and the COVID-19 pandemic and the UK's exit from the European Union has also reduced the pool of available workers especially in seasonal roles. Addressing workforce supply, its turnover of staff and raising productivity in the sector are imperative for its continued growth.

There is a need to address the workforce supply both internationally and domestically, and in doing so facilitate access to employment from underrepresented groups which will lead to a more resilience. We need to think about the diversity of the leadership of those within the industries of the VE to increase the understanding of untapped markets and improve workforce representation. It is also key to understand what the healthy balance of the workforce should look like – how many seasonality and casual roles are required, what it is an acceptable level of turnover, how we can improve T&Cs of the

workforce without being detrimental to businesses. Understanding what good looks like for the sector workforce will help determine priorities and actions to maximise impact.

Skills development to improve capability is key meeting productivity aspirations and we must ensure that training and education is aligned to the industry requisites and that it is inclusive and culturally appropriate. Simultaneously there is the need to evaluate the sector as a career and highlight the opportunities, change perceptions and work alongside other partners (Careers and Enterprise Company, FE and HE colleges and other education providers) to develop a framework to engage with schools and colleges to influence perceptions.

This work will be aligned to the recently published Liverpool City Region Long Term Skills Plan which sets out a long-term vision for transforming and better integrating post -16 employment and skills needs. This will support agreeing skills priorities and investment decisions for the sector, to ensure that people are equipped with the skills needed to access employment and progress in work, aligned to employer need linked to business growth.

### Visitor Economy Trends and Drivers

Recent developments in tourism, including post-Covid recovery, new ways of experiencing destinations and the rise of AI, have and will continue to lead to changes in consumer behaviour. The way the visitor consumes information, primarily millennials (aged 28-43) and Gen Z (up to age 27), their expectations of a destination experience and their demand for sustainable and regenerative tourism are key drivers for the visitor economy. Key trends and drivers which are relevant to LCR, and which have been considered when identifying priorities and actions for the DMP include:

**Digital Transformation**, including the use of AI, which is being implemented and is evolving as a support tool to help travellers as they visit destinations. Its applications are not only relevant to the way visitors consume information but also in how they travel, book, check-in/check-out, access tickets, and in the experiences available at a destination. Continued innovation is key. Liverpool City Region leads the way with digital expertise which could be harnessed for the sector. The £210m National Centre for Digital Innovation at Sci-Tech Daresbury drives AI and data expertise, allowing businesses to acquire the technical capability required to adopt digital technologies like AI and Immersive Technology. This provides an opportunity for the sector to advance using the applied tech and expertise within the region.

There is an increasing drive to personalise the experience for visitors through **customisation and personalisation**. The level of service has increased and runs

throughout the travel and tourism industry. It includes the need for individualised marketing, tailored itineraries, curated and authentic experience recommendations and personalised accommodation. There are many city region assets and products which can be packaged to deliver the demand for these unique experiences and ignite their growth.

As consumers continue to consider the impact of their travel footprint, and businesses consider their environmental impact for conferences and events, there is a need for **sustainable and regenerative tourism** plans to be in place and perceptions ‘of greenwashing’ are a growing risk to all parts of the visitor economy. The tourism industry needs to commit and develop quickly in particular with regards to food waste, adopting sustainable supply chains and carbon emission planning to meet consumer expectations as well as destination net zero ambitions. This approach resonates with the region’s ambitions, with a focus on low carbon economy opportunities to meet LCR’s target to achieve Net Zero by 2035, with the government’s aim to achieve a clean electricity (energy) system by 2030. The city region having a 2035 goal, ensures we align ourselves very firmly with the government agenda and being part of the solution.

The sector can meet the needs of this trend and satisfy the wider regional and national strategic framework by promoting regenerative tourism opportunities, improved energy efficiency in the sector and reduction of waste, and growing the circular economy, which in turn can enhance productivity.

- There has been an ongoing trend towards increased **short stays and city breaks** among both domestic and international visitors to UK cities like Liverpool. They offer visitors the opportunity to experience new destinations and Liverpool has emerged as a prime destination for city breaks. With a wide range of visitor attractions and the ease of travel across the region, city breaks can include countryside and coast and offer returning visitors new experiences to try in differing parts of the region.
- There is growing evidence that people want to have more life rewarding experiences. With the desire for **experiential** travel visitors are keen to develop more elaborate itineraries looking for different cultural experiences. They want to experience places that are ‘off grid’ and LCR can capitalise on this opportunity with its broad mix of cultural, music, film and TV experiences, and access to the outdoors, blue space, and countryside, to develop unique experiences.
- **Local authentic** experiences are a driver, such as ‘Living like a local.’ This will continue and is increasingly taking the form of ‘ultra-localised’ itineraries and ‘meaningful’ travel. Regional tailored local experiences could be developed and offered to meet this demand to help ignite wider regional growth.

- The **night-time economy** in LCR is thriving, fuelled by its rich cultural heritage and vibrant music scene. There is a focus on diversifying with more late-night dining, live performances, and arts events, alongside efforts to enhance safety (purple flag status) and inclusivity through better transportation (particularly at night) and anti-social behaviour initiatives. When integrated with place making strategies, the night-time economy can become a highly influential aspect of the vibrancy of towns and cities and how visitors, workers and residents interact with restaurants, bars, attractions, and spaces after dark.
- **Health and Wellness** is a large and growing share of the visitor economy. Motivated by a desire for healthy living and stress reduction, visitors are looking to use their time to relax and rejuvenate. The UK wellness market is the 5<sup>th</sup> largest in the world (2<sup>nd</sup> in Europe). With a plethora of open spaces and miles of coastline, the city region is well placed to take advantage of this growing opportunity and enables visitors to re-discover and reconnect with firm holiday favourites but repositioned in a new dynamic light.
- **Cost of living** pressures have made international travel less affordable, driving a shift towards domestic tourism and staycations in the UK. This trend, influenced by changing travel patterns from the COVID-19 recovery, supports local economies but challenges outbound tourism, including airports, as competition from domestic and international destinations increases. Preferences may continue to evolve as economic conditions improve but there must be a focus on maximising day and frequent visitors to the region.

## SWOT Analysis

The extensive evidence base that was prepared to underpin the development of the DMP led to a detailed SWOT analysis being undertaken which can be found at Annex A.

## **Annex A**

### **SWOT Analysis**

The extensive evidence base that was prepared to underpin the development of the DMP led to a detailed SWOT analysis being undertaken which identified the following key strengths, weaknesses, opportunities, and threats for the LCR visitor economy. These factors have informed the development of the DMP's strategic priorities and actions.



## Strengths

- Well-established location with significant heritage and cultural assets, recognised globally
- The built environment, waterfront, natural assets (coast, countryside, and parks) and proximity to the City Diverse calendar of attractive events scaled at the national and international level
- Growing stock and range of accommodation available
- Leading international airport LJLA, proximity to Manchester Airport, cruise terminal and rail links
- The people and the welcome resonate with visitors and supports unique offer of LCR
- Known market for international visitors as the fifth most visited UK city
- International recognition of Liverpool as a city for music and sport - Beatles and LFC
- Staying visitor numbers surpassing rates prior to the pandemic and driving recovery
- An important sector to the LCR accounting for more than one in every ten jobs and businesses
- Liverpool is the second most filmed city in the UK, outside London and there is significant scope to develop TV & Film tourism aligned with the depth of offer
- Club Liverpool Ambassador Programme
- Accommodation BID
- Engaged and innovative private sector
- Unique cultural heritage with the largest Chinese communities and oldest Black communities in Europe

## Weaknesses

- Poor promotion of the regional VE outside immediate Liverpool city centre areas for national / international visitors
- Lack of awareness and association of the region's assets outside Liverpool for national / international visitors
- Perceptions of City's leisure break offer predicated upon stag/hen do's – opportunity to diversify
- Staff recruitment and retention is challenging across VE (particularly hospitality)
- Challenges in connectivity around NTE and connection to attractions outside city core
- Seasonal patterns and disparity between mid-week and weekend occupancy
- Accommodation spend has decreased since 2021 indicating need for review of stock
- Number of day visitors has not recovered to pre pandemic levels, suppressing overall numbers
- A lack of real-time and consistent LCR focussed data to drive investment and growth potential
- Productivity of the sector remains low
- Lack of evidence about the 'spread of spend' from international visitors to other LCR destinations
- Sector skills gap
- Transport gaps



## Opportunities

- Positioning the visitor economy within a newly developed place brand for LCR
- Build stronger links within LCR to promote a wider range of unique experiences
- Capitalise on LCR's well-established reputation for hosting high level events, using the Major Events Strategy to become destination of choice for international events in the North
- Stronger packaging of the offer including visitor pass and integrated transport initiatives. Also recognising the desire for immersive experience
- Unlocking sports and culture/arts growth opportunities working with partners
- Capitalise on TV & film strength across the region, including working with VisitBritain
- Enhancing existing attractions and maximising the growth potential of existing food and drink and retail offer to uplift visitor numbers
- Partnership working with other areas to develop packages and compelling offers
- Increasing capacity and expertise for accessibility via Visit Britain and LVEP structures
- Realising major investment opportunities to support sector and wider economic growth
- Drive growth in VE businesses to create further prosperity and jobs across all skills levels
- Increase productivity in the sector and drive GVA growth
- Be positioned as a test case for the delivery of sector specific devolved funding powers
- Increase awareness of the health and wellbeing offer, highlighting the unique wealth of natural assets in close proximity to city.

## Threats

- Cost of living and decreasing disposable income limiting leisure choices and expenditure
- Increased competition for day visitors, short breaks, and international visitors (especially given cost of living crisis, for example, visitors having to choose a single holiday / short break destination)
- Day visitor numbers (a crucial market) remain lower than 2019 levels. This may suggest a new baseline position in a post-COVID-19 context
- Lack of core funding to deliver marketing, develop and deliver new initiatives, and to maintain adequate capacity and expertise within LVEP delivery team
- Reduction in funding affecting public realm and visitor experience
- Extreme weather and climate change impacts, sustainability, protection of natural assets and the carbon footprint of the visitor economy
- Coastal/river regions, risk of flooding
- Risk of closure for vulnerable businesses with growth potential and /or at an early start up stage
- External factors including unlicensed short stays (Airbnb), cost of living and tax implications
- Additional taxation and impact on visitor motivations and business operational environment
- Lack of sector regulation and planning around short term lets
- Vacant Premises
- Skills shortages and sector career planning
- Support of private sector for tourism levy
- Hotel pricing and demand led pricing can often deter visitors and event organisers

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| <ul style="list-style-type: none"><li>• Investment in regional destinations like to add to the diversity of the LCR offer.</li><li>• Introduction of tourism levy or Accommodation BID to other LCR Destinations</li><li>• Partnership working with private sector</li><li>• Development of new Heritage Tourism offers</li></ul> |  |
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## Annex B

### Developments and Investment

Development opportunities that are either recently completed, planned or underway, including significant levels of coordinated investment will grow, enhance, and diversify the offer in the coming years.

In particular, the Waterfront Transformation is a bold plan to evolve the city’s riverside into a world-class place to live, work, visit and create. Liverpool Waters regeneration scheme will completely transform the city’s northern docks and surrounding area with plans spanning 30 years. The project will include Everton’s new stadium, Isle of Man Ferry terminal, the UK’s first public floating sauna, new homes, and new commercial spaces. This will compliment investment already made in venues such as Salt & tar in Bootle. The new development – to be known as Liverpool North – would span 5km between Bootle and Liverpool and include Everton, Anfield and Kirkdale.

The Kings Dock development, Tate Liverpool, National Museums Liverpool, and Royal Albert Dock Limited will invest in heritage infrastructure, community spaces, jobs, tourism and placemaking – strengthening the creative ecology and visitor economy, whilst driving regional economic growth.

Tate Liverpool and National Museums Liverpool have been central to the cultural regeneration of Liverpool since the 1980s with Royal Albert Dock now receiving 8m+ visitors a year. The Waterfront Transformation will ensure culture is a driving force of LCC’s Masterplan to maximise the waterfront’s contribution to sustainable development, unlocking growth for local neighbourhoods and LCR. The Mersey Tidal Project presents a major opportunity as a tourist attraction that will create a step change as a global visitor attraction.

The opening of Shakespeare North in Knowsley has welcomed 121,000 visitors in its first year. Eureka in the Wirral added to its attraction's portfolio and investment in Sefton’s Marine Lake Events Centre as well as Southport’s ambitious proposals for its Waterfront development contribute to the ambition for the visitor economy. The ongoing investments in the wider city region will enhance the region’s offer to drive growth and resilience in the sector.

Investment Pipeline			
Name	Status	Investment Value	Funding sources (Confirmed and/or potential)
Liverpool			

<b>Mersey Tidal Project</b>	Future scheme	£multi-billion	Sources - TBC
<b>New Liverpool Manchester Railway</b>	Future Scheme	£multi-billion	National Government Other sources
<b>Liverpool Central and Moorfield Station</b>	Future Project	£2.5bn	DFT, LCR CA
<b>Liverpool Music Programme</b>	Pipeline	c.£200m	DCMS, LCR CA, private sector, Philanthropic fundraising
<b>NML International Slavery Museum</b>	Pipeline	£100m	NLHF, DCMS, LCR CA, Philanthropic fundraising
<b>Baltic Station</b>	Progressing to commence 2025	c.£100m	LCR CA Others TBC
<b>Liverpool Waterfront Strategy – projects</b>	Future Scheme	£100m	MHCLG, DCMS, LCC, LCR CA, private sector, other
<b>Liverpool City Centre SPD projects including place making, public realm, greening and play</b>	Future Scheme	£35m	MHCLG, DCMS, LCC, LCR CA, private sector, other
<b>Williamson Square / Playhouse</b>	Pipeline	c.£30m	NLHF, DCMS, LCR CA, Philanthropic fundraising
<b>Tate Liverpool</b>	Currently closed, delivery underway	£29m	Levelling Up Fund, DCMS, Tate, LCR CA, Other foundations/trusts
<b>Cruise Terminal</b>	Future scheme	£25m	Private sector source
<b>NML Canning Dock</b>	Due to commence Aug 24	£15m	Levelling Up Fund, DCMS NML, S106, CA
<b>Everton Stadium Regeneration (Bramley Moore)</b>	Pipeline (conditional)	£15m	LCR CA Other private sector source
<b>Littlewoods Studios</b>	Progressing	TBC	MHCLG, DCMS, LCC, LCR CA, private sector, other
<b>Kings Dock / ACCL Remodelling</b>	Scoping	TBC	LCR CA/ LCC and other partners TBC
<b>Halton</b>			
<b>Runcorn Town Deal</b>	Progressing	£23.6m	Towns Fund
<b>Widnes Town Centre</b>	Progressing	TBC	TBC
<b>Knowsley</b>			
<b>Kirkby</b>	Progressing	£19.51m	Long-Term Plan for Towns

<b>Shakespeare North</b>	Delivery underway/site open	£34.5m	National Government, Knowsley Council, LCR CA
<b>Sefton</b>			
<b>Marine Lake Exhibition Centre</b>	Progressing	£73m	Towns Fund LCR CA
<b>Bootle Town Centre</b>	Progressing	£20m	Levelling Up Fund
<b>The Cove</b>	Progressing	£75m	TBC
<b>Southport Pleasureland</b>	Progressing	TBC	TBC
<b>Southport Pier</b>	Progressing	£20m	TBC
<b>St Helens</b>			
<b>Newton-le-Willows</b>	Progressing	£19.51m	Long-Term Plan for Towns
<b>Cannington Shaw Bottle Shop No. 7</b>	Progressing	£1.37m	Towns Fund
<b>The World of Glass / St Helen's Heritage World</b>	Delivered	£0.89m	Towns Fund
<b>Earlestown Development</b>	Progressing	£20m	Levelling Up Fund
<b>The Gamble Building</b>	Future Scheme	TBC	TBC
<b>Carr Mill Station</b>	Future Scheme	TBC	TBC
<b>Wirral</b>			
<b>Uboat Exhibition</b>	Future scheme	TBC	Big Heritage LCRCA (TBC)
<b>Eureka! Science + Discovery and Eureka! Landscaping</b>	Delivered	£13.5m	Town Deal
<b>Hamilton Square area public realm (and link to waterfront)</b>	Progressing	£22.7m	Town Deal
<b>Transport Museum</b>	Progressing	£6.7m	Town Deal
<b>Future Yard Music and Skills Venue</b>	Progressing	£2.1m	Town Deal
<b>Argyle Street Makers Hub</b>	Progressing	£1.9m	Town Deal
<b>Woodside FV</b>	Progressing	£1.1m	Town Deal

<b>Start Yard</b>	Progressing	£0.6m	Town Deal
<b>The Priors</b>	Progressing	£0.5m	Town Deal
<b>Scouting Square</b>	Progressing	£0.3m	TBC
<b>Dock Branch Park</b>	Progressing	TBC	TBC
<b>UNESCO bid for Birkenhead Park</b>	Progressing		

## **Annex C List of Consultees**

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The following organisations were requested to participate in the development of the DMP:

- 2030 Hub - net zero
- ACC Liverpool
- Active Leisure
- Arts Council England
- Avanti West Coast
- Baltic
- Birkenhead Park WHS
- Black and Ginger
- Borough of Culture
- Botanical Garden Liverpool
- Canal River Trust
- Catapult Centre
- City of Liverpool College
- Cruise Liverpool
- Culture Liverpool
- Culture Network
- DCMS
- Department for Transport
- Engage
- England Golf Coast
- ENSPIRE Management
- Everton FC
- Everyman Playhouse
- FutureYard
- GSG Hospitality

- Halton Borough Council
- Here for Culture and Place
- Historic England
- Knowledge Quarter
- Knowsley Borough Council
- Knowsley Estate
- L8 Education Hub
- La Salle Hotel School
- LCR Combined Authority
- LCR Tour Guide
- LIPA
- Live Nation
- Liverpool BID
- Liverpool City Council
- Liverpool City Council Cabinet for Health, Wellbeing and Culture
- Liverpool City Region Combined Authority
- Liverpool Cruise Port
- Liverpool FC
- Liverpool Food Network
- Liverpool Hope
- Liverpool Hospitality
- Liverpool John Lennon Airport
- Liverpool John Moores University
- Liverpool Knowledge Quarter
- Liverpool Nighttime Economy Advisor
- Liverpool ONE
- Liverpool Pride
- Liverpool Royal Court
- Liverpool Sport Board



- Marketing Liverpool
- Merseyrail
- National Museums Liverpool (NML)
- National Trust
- Network Rail
- New Brighton Coastal Community
- Northern Rail
- Norton Priory
- Novotel Liverpool Paddington Village Hotel
- Paul Beesley
- Port Sunlight Village
- Race Equality Hub, LCR
- Red and Grey Creative
- Redbag Pictures
- Royal Court Trust
- Savvy Hotels
- Sefton Borough Council
- Shakespeare North Playhouse
- Southport BID
- Southport Flower Show
- St Helens Borough Council Cabinet
- St Helens BC
- St Helens Rugby Club
- The 2030 Hub
- The Art School
- The Bluecoat
- The Jockey Club
- TransPennine Express
- Transport Chair LCRCA

- UK Music
- University of Liverpool
- VE Sustainability Taskforce
- Visit Halton
- Visit Southport
- Wirral Borough Council
- Wirral Metropolitan & NED Association of Colleges
- Writing on the Wall