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Document Reference:

ENWRS & Impacts 08 (2010) – *The Look of the City*



The Look of the City

The impact of the Liverpool European Capital of Culture
on the city's public realm

March 2010

Report for Impacts 08 by:



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Executive Summary

Background

The Look of the City programme was a key part of Liverpool's year as European Capital of Culture in 2008, aimed at ensuring a "green, clean and well dressed city". A number of elements came together as part of this strategy, including:

- "Branding" many components of the city, including new or additional street and infrastructure dressing
- New signage
- A "Media wall" opposite the main exit from Lime Street station

As part of this project, Impacts 08 and Liverpool City Council commissioned a study to evaluate:

- General perceptions of the city's cleanliness and the quality of the urban environment
- How people negotiate routes around the city and between attractions and how they are supported or otherwise by signage and dressing;
- Views on signage and Liverpool 08 branding around the city, particularly the interventions of the Look of the City programme
- Views of international delegations, who had a specific interest in the European Capital of Culture regeneration programme, who visited during 2008.

England's Northwest Research Service (ENWRS) was commissioned to conduct an evaluation into this project. In order to evaluate the views and perceptions of visitors and residents, two separate face to face surveys were conducted:

- The awareness and perceptions of the branding used (generating 611 interviews in the city centre, split evenly between Liverpool residents and visitors)
- The experience of the visit itself (generating 264 interviews amongst visitors, split by different modes of transport used to reach the city)

An online survey was also used to reach International Delegates (generating 67 responses).

General profile of visitors (face-to-face surveys)

In terms of those whose views are represented within this study – which represents semi-stratified sampling rather than a pure cross-section of visitors or passers-by – it is estimated that this represents some 47% being Liverpool residents, 19% from elsewhere in Merseyside, 18% from UK locations outside Merseyside and 17% being overseas visitors.

Of those interviewed, the purpose of visit – which would influence both the pattern of visits and the reaction to the Look of the City – varied according to respondent origin.

Liverpool residents were most likely to be in town for a shopping trip (60%), as were Merseyside residents (66%).

Some 38% of visitors from elsewhere in the Northwest were also on a shopping trip – but were almost as likely to be present for sightseeing (32%)

Those visiting Liverpool from elsewhere in the UK were most likely to be sightseers (58%) – although almost a third were visiting friends (29%)

63% of overseas visitors were in Liverpool for sightseeing – although note that some 39% were visiting a specific attraction (the tourist board's Destination Benchmarking 2008 study suggests that this is most likely to be Beatles or Football related, although there were also a high number over the course of the year who were drawn to some of the high-profile Liverpool 08 exhibitions being held in the city, including Klimt at Tate Liverpool, Art in the Age of Steam at the Walker Gallery and the Liverpool Biennial.

Of the visitors captured by this project in face-to-face surveys¹

Some 26% of Northwest visitors were on their first ever visit to Liverpool; on average this group made 4.5 trips to the city per year.

Some 37% of UK visitors were on their first ever visit to Liverpool; on average this group made 2.4 trips to the city per year.

Some 55% of Overseas visitors were on their first ever visit to Liverpool; on average this group made 1.0 trips to the city per year.

Thus the year saw visitors with varying amounts of familiarity, with implications for how aware they were of the components of the programme.

Awareness of the Look of the City programme

In terms of the overall branding used in the campaign, just over a fifth of the overseas visitors (21%) associated this with the Liverpool ECoC. This rose to 34% of visitors from other parts of the UK – although 21% of Merseyside residents could not immediately identify the branding.

Visitors from all geographic origins tended to refer to the branding as “colourful”, “bright” and “eye-catching”; 67% of residents agreed that this was attractive (rising to 71% for visitors from further afield). European visitors were the most likely to agree that it was Modern (83%, compared to just 68% of Liverpool residents). However roughly a quarter disagreed that the branding was reflective of Liverpool's character and 28% of residents disagreed that it was suitable for future use (although only 10% of UK visitors disagreed!)

Within the survey we assessed seven specific components of the city's look, and this is summarised below:

Element	Awareness (all)	Liverpool Resident	Rest of UK visitor	Overseas visitor
Banners	62%	69%	57%	44%
Building dressing	69%	77%	56%	45%
Flag poles	61%	67%	46%	58%
Lamp posts	63%	73%	44%	38%
Transport wraps	52%	58%	36%	21%
Media Wall	50%	60%	40%	21%
Treatment of derelict buildings	50%	62%	36%	21%

¹ Please note that this should be regarded as relating specifically to this project. Other research conducted across a wider span of the year and a wider range of interview locations (such as the ECoC visitor study, Liverpool Destination Benchmarking, etc.) may show different outcomes – although when weighted to ensure a like for like comparison is being made we would expect any variance to be <5%..

In general at least 50% of all visitors recalled each component:

Residents were most likely to recall seeing the building dressing and lamp post treatment

UK visitors were most likely to recall the banners and the building dressing

Overseas visitors were significantly likely to have seen the flag poles.

In addition to this, roughly a fifth mentioned seeing some street art during their visit – this was predominantly amongst local / UK residents, and tended to refer to the Go SuperLambananas parade².

In terms of *satisfaction with the programme*, there was strong agreement both that it “Improved the city’s appearance” and that “the designs and colours were attractive / appropriate” (although for the former of these, this was less likely amongst overseas visitors). Three quarters of both local residents and UK visitors believed that the programme made the city “appear fun”. Note also that 61% of Liverpool residents indicated that the “look” made them feel the city was the European Capital of Culture.

In terms of the *overall impression of Liverpool* more than three quarters of visitors in all geographies were likely to agree that the city “looked cleaner”, that it looked “colourful” and “dressed for special events”. Notably, whilst overseas visitors were highly likely to agree that they felt safe from crime (82%) this was significantly lower for all UK residents.

As an overview, 35% of all visitors to the city were both attracted by the Liverpool ECoC status and agreed with the statement that the city “looked dressed” for special events.

Taking a selection of nine other UK and Ireland cities, on a ranked scale as a “green, clean and well dressed city”:

Liverpool residents ranked Liverpool 1st at 1.82

Merseyside residents ranked Liverpool 1st at 2.14 (after recalibrating for interview bias, this would suggest Liverpool as 3rd, after Manchester and Dublin)

UK visitors ranked Liverpool 1st at 2.28 (after recalibrating for interview bias, this would suggest Liverpool as 4th, after Manchester, Dublin and Glasgow)

Overseas visitors ranked Liverpool 1st at 1.82 (after recalibrating for interview bias, this would suggest Liverpool as 3rd, after Manchester and Dublin)

Patterns of visitation

The awareness of branding was particularly affected by the route visitors took into the city.

Road users

38% of all road users did not notice any branding .

24% mentioned the treatment of derelict buildings – but not the first-time visitors

37% mentioned the flag posts – rising to 70% of first time visitors

29% of all road users recalled seeing one of the “welcome” road signs.

Rail users

36% of all rail users did not notice any branding

² Over 100 replicas of Liverpool's *Superlambanana* (a public art work by of Japanese-based artist Taro Chiezo on display in Liverpool since 1998) were decorated by artists and community groups from around the city and placed around the city for eight weeks in the summer of 2008

Roughly a half of all rail users recalled seeing the media wall outside Lime Street station

Roughly a fifth of all rail users recalled seeing some of the transport wraps

Airport users

- Some 43% of passengers arriving through Liverpool John Lennon Airport mentioned seeing "The '08 look" – but this was not mentioned by first time visitors to the city.

We would specifically note that international delegates to the city (as recorded through the online survey) shared a high awareness of the branding, they showed a relatively low awareness of the 'building dressing' (just 22%). This group was also distinguished by a relatively weak satisfaction regarding the branding on lamp posts.

In general there was positive satisfaction with the branding (with one exception as our net calculations on the series of test statements shows below:

It was easy to find my way into the city (+75%)

The branding made me aware of Liverpool's ECoC status (+28% agree)

The route into the city was attractive & clean (+24% agree)

The branding / imagery encouraged me to attend events / visit attractions (-13%)

In terms of visitors' experience of the city, this is dependent on *where* they visited, and amongst those in our survey almost all (85%) visited the waterfront at some stage; almost half (49%) visited the museum quarter; over half (59%) visited the city centre shopping areas; with a quarter visiting the Hope Street area. Of course, to some extent these responses may have been influenced by interview location, and it must also be noted that the Liverpool One development was not fully open until the latter stages of this study.

There were a few key points drawn out from the visitation study:

For first time visitors the Waterfront area, Museum Quarter and Cathedrals were particularly strong draws.

Visitors arriving by car had a higher visitation to the central area and shops; this group were also less likely to be "mobile" in that they tended not to stray too far from their car park location.

Visitors arriving by rail were the most likely to cross the city, forming distinctive channels evident through Church Street from Lime Street to the Pier Head.

There tended to be widespread satisfaction amongst all groups in navigating the city, reflecting one of the aims of the programme. Further, 40% of all visitors put their ease of navigating the city at being due to the signage. In all cases net satisfaction was expressed, with over half of all visitors indicating that finding their way to / from the transport nodes, waterfront and main shopping areas had been "very good". This was lower in terms of reaching the museum quarter (though no dissatisfaction was expressed).

The one issue the study raised was in terms of the positioning of the Hope Street and Cathedrals area relative to the rest of this city, with some 16% of all visitors here indicating that the experience had been "poor".

We would also, though, note that both international delegates and overseas visitors in general showed a relatively weak level of satisfaction regarding "display maps and information boards".

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1. Introduction

1.1. Background

The Look of the City programme was a key part of Liverpool's year as European Capital of Culture in 2008 (Liverpool ECoC).

The programme was an initiative by Liverpool City Council to ensure a green, clean and well dressed city during the year. This research project is mainly focused on the assessment of the City's dressing strategy in the city centre, which was coordinated with the Liverpool Culture Company. A number of components came together as part of this strategy, including:

- A "branded" visual application of many of the features listed
- New signage directing visitors along specific routes around Liverpool
- Banners
- A "Media wall" opposite the main exit from Lime Street station
- Welcome signs
- Wraps around Merseyrail trains
- Treatment of derelict buildings with branded materials

Impacts 08 is a major programme of research, monitoring and evaluation concerned with the social, cultural, economic and environmental impacts of Liverpool's nomination as European Capital of Culture 2008. Liverpool City Council commissioned the University of Liverpool and Liverpool John Moores University to conduct this work from 2005 to 2010 and produce an exemplary, longitudinal research framework for major event and regeneration impact assessment.

Impacts 08 aimed to understand the impact of The Look of the City programme in the following areas:

- Views on signage and Liverpool 08 branding around the city
- How people negotiate routes around the city and between attractions and how they are supported or otherwise by signage and dressing;
- General perceptions of the city's cleanliness and the quality of the urban environment.

The Liverpool Culture Company were also interested in surveying overseas 'delegations' visiting Liverpool during 2008; these were special delegations with a particular interest in the European Capital of Culture programme. (A point to be aware of here when analysing this report is that as such, these groups might be expected to have higher aptitude and recall than of 'typical' overseas visitors to the city.)

England's Northwest Research Service (ENWRS) was commissioned to conduct an evaluation into this project.

1.2. Methodology

In order to provide an adequate assessment of the Look of the City programme, ENWRS conducted a series of on-street face-to-face interviews with the “audience” affected by this programme. However, a limiting factor in this kind of approach is *time*; practical research experience suggests that for the best quality data face to face interviewing should, as a maximum, be 10 minutes per respondent – otherwise, ‘interview fatigue begins to creep in. Accordingly, the project was split into two sections of fieldwork, ensuring shorter interview times and covering in each a slightly different research focus:

- a) The awareness and perceptions of the branding used (from now on referred to as: ‘Awareness survey’)
- b) The experience of the visit itself (from now on referred to as: ‘Visitation Survey’)

Both surveys had a number of elements in common, including ‘visit motivation’ and ‘influence of the Liverpool ECoC’ to enable cross-analysis. Copies of both questionnaires are included at appendix 6.1.

Interviews were conducted with local residents, visitors from the immediate hinterland, domestic tourists and overseas visitors, with the following sample levels, based on targets set in the project bid. Note that as the concern with this study was to gain a good cross-section of opinions and experiences regarding the Look of the City, these were based on quotas and hence do not represent true random sampling:

a) Awareness Survey:

- 288 Liverpool residents
- 113 Merseyside residents
- 108 UK residents
- 102 Overseas visitors

b) Visitation Survey:

- 63 Visitors arriving / leaving via LJLA
- 84 Visitors arriving / leaving via Liverpool Lime Street (rail)
- 96 Visitors arriving / leaving by Car
- 21 Visitors arriving / leaving via other means (bus, coach tour or ferry)

In 2008 some 27.7m visitors in total came to Liverpool, approximately 8.9m during the timeframe covered by the survey. Allowing for the fact that i) these numbers had increased since 2007 and that ii) this study needed to allow the inclusion of a proportion of residents as well as visitors, we would suggest that the results have an error of between 1.7% and 4.0% when compared to the expected universe. Further details of the confidence levels are supplied within the appendix 6.2.

However, in addition to this work, as we mentioned in the Background section, it was also an important requirement to evaluate the views and perceptions of overseas visiting delegations. A web survey was identified as the most reliable and appropriate method of conducting research amongst this group, and the list of contacts to target was compiled by the Culture Company International Team, with email addresses being passed to ENWRS who designed the web-based survey. A copy of this questionnaire is included at appendix 6.1. Although a key concern was for questions to be as comparable as possible to those used in the on-street interviews evaluating the Look of the City, these varied somewhat to allow for the differing degree of involvement and the memory of their visit.

Email invites were sent out during early spring 2009, with a reminder to boost the sample during May 2009. As at termination of the interviewing phase in June 2009, some 67 full responses had been received. All data was gathered anonymously, in accordance with the market research code of conduct.

1.3. Reporting

Within this report, we present initially the profile of those involved in the research, together with the common themes. The report then examines first the issue of awareness of the elements of the Look of the City programme, before moving on to looking at the visit patterns.

Reference is also made briefly to Liverpool Destination Benchmarking a survey of 700 visitors to Liverpool city centre, which was also conducted over this period by the tourist board, and to the Impacts 08 visitor study, which was conducted throughout 2008, in order to provide some context.

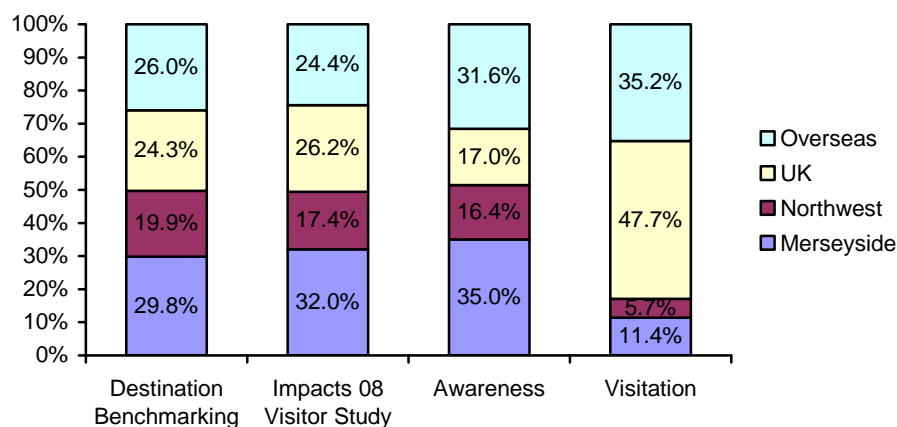
Data regarding the survey amongst international delegations is treated within a separate chapter in this report, although with reference for comparison purposes to the generic “awareness” and “visitation” findings. Again, the point must be emphasised that these groups should be expected to have higher awareness levels that is the case general with international ‘tourists’.

2. General visitor profile

This section of the report presents an overall profile of those who were interviewed as part of this study; both in terms of the profile of those responding within each face-to-face survey and how this compares to estimates for the generic visitor market in 2008. In order to adequately assess the Look of the City programme, it is important to understand where the views are coming from.

2.1. Visitor origin

Visitors were asked for their home town or country. In the chart below the origins in each of the project stages are shown, as well as those indicated by Destination Benchmarking and the 2008 Liverpool Visitor study. It should again be emphasised here that the aim of this project was to gain an understanding of reactions to the Look of the city programme, so the proportions of visitors by origin may not be expected to be representative of the city's attendance in general. This data is presented more to ensure an understanding of who the views and opinions were coming from.



* Note: the "Awareness" column excludes Liverpool residents in the interests of comparability; the 'true' figures for origin on this survey would be:

Liverpool Residents	47.1%
Merseyside	18.5%
Northwest	8.7%
UK	9.0%
Overseas	16.7%

Both Destination Benchmarking and the Impacts 08 visitor study show a high level of comparability, illustrating what was the 'true' nature of visits to Liverpool during the ECoC year. In all in 2008, we would expect that a third of visitors were Merseyside (non-Liverpool) residents, a quarter from overseas and a quarter from UK locations outside the Northwest.

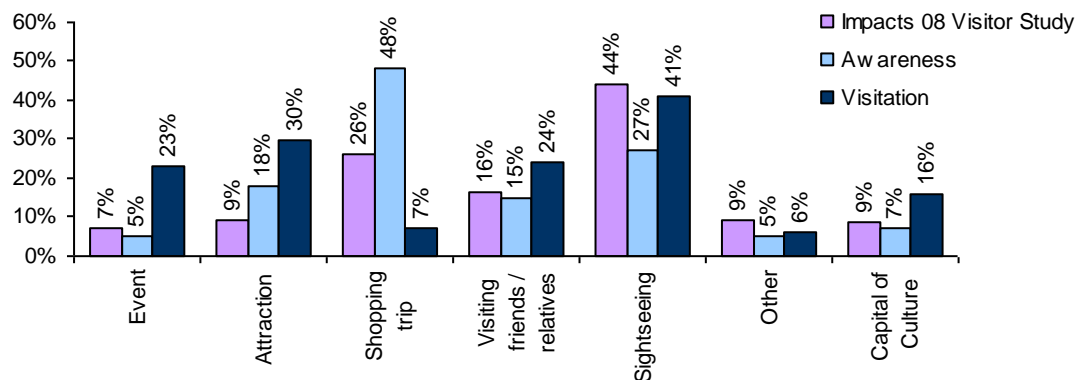
Naturally, the results for the two surveys show what we might already expect from the sample sizes; namely that the "awareness" survey is roughly 50% residents / 50% visitors, and that the "visitation" survey reflects a high level of overseas visitors (35%, travelling via the Liverpool John Lennon Airport) and visitors from elsewhere in the UK, especially drawn in via the key rail hub of Lime Street.

In terms of more detail for the two studies this report focuses on, the table below breaks this down at a higher resolution:

	Awareness	Visitation
Merseyside	66%	11%
Liverpool	47%	na
Halton	1%	2%
Knowsley	3%	2%
Sefton	7%	2%
St. Helens	1%	2%
Wirral	7%	2%
Northwest	9%	6%
Cheshire	3%	1%
Cumbria	<0.5%	-
Lancashire	3%	1%
Gtr Manchester	3%	4%
UK	9%	48%
Yorkshire & NE	1%	3%
Midlands	2%	11%
London & Sth	4%	23%
Wales	1%	5%
Scotland	1%	2%
N. Ireland & Other	1%	3%
Overseas	17%	35%
Ireland	1%	3%
Western Europe	7%	9%
North America	2%	9%
Australia / New Zealand	2%	7%
Other	5%	2%

2.2. Purpose of visit

All visitors were asked about their reason for being in Liverpool on the day of the interview. Note that only “leisure” visitors were interviewed, those on a regular shopping trip, work or studying being filtered out. Again, it must be repeated that the sampling distorts the numbers on this from the overall visitor levels during the year:



* Note that, in the above, mentions of the Liverpool ECoC were spontaneous responses which have been coded, whereas other reasons were included on a showcard; this explains the lower level of mentions of this.

Again, thinking in terms of what we might have expected from the overall visitor market during 2008, general sightseeing emerged as a dominant motivation (44% of all visitors) followed by shopping trips (26%).

2.2.1. Reasons for visit – awareness study

With the Awareness survey, 'reasons for visit' was dominated by shopping trips: This in a way is explained by the inclusion of local residents within the survey, as shown when we see why those interviewed just for this research is displayed:

	Liverpool residents	Merseyside residents	Northwest visitors	UK visitors	Overseas visitors
Attending an event	3%	4%	11%	5%	9%
Visiting attractions	15%	11%	13%	16%	39%
Special shopping trip	60%	66%	38%	25%	9%
VFR	10%	16%	19%	29%	18%
Sightseeing	11%	15%	32%	58%	63%
Other	8%	3%	6%	2%	2%
Liverpool ECoC	2%	4%	13%	20%	12%

Overall, the above table shows that:

Liverpool and Merseyside residents were most likely to be in the city centre on a special shopping trip; this is in particular likely to reflect on the phased opening of the Liverpool One shopping complex.

Rest-of-the North West and other UK domestic tourists appeared to represent a wide(r) range of motivations, from shopping to visiting friends and family, sightseeing, and also specifically due to the Liverpool ECoC.

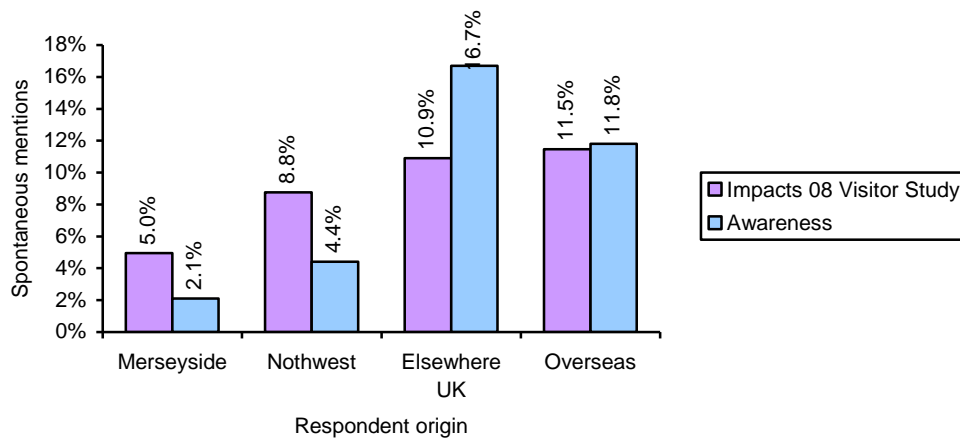
Overseas visitors were most likely to be in Liverpool either for sightseeing or for a specific attraction.

2.2.2. Reasons for visit – visitation study

We can conduct the same analysis in the visitation study. This presents the same messages, although bearing in mind the small sub-samples (see visitor origin section 2.1), this is not really reliable for local visitors:

	Merseyside residents	Northwest visitors	UK visitors	Overseas visitors
Attending an event	20%	-	29%	21%
Visiting attractions	70%	40%	26%	21%
Special shopping trip	-	60%	-	7%
VFR	10%	-	26%	29%
Sightseeing	-	20%	42%	52%
Other	30%	-	-	5%
Liverpool ECoC	-	-	19%	19%

2.2.3. Spontaneous mentions of the Liverpool ECoC

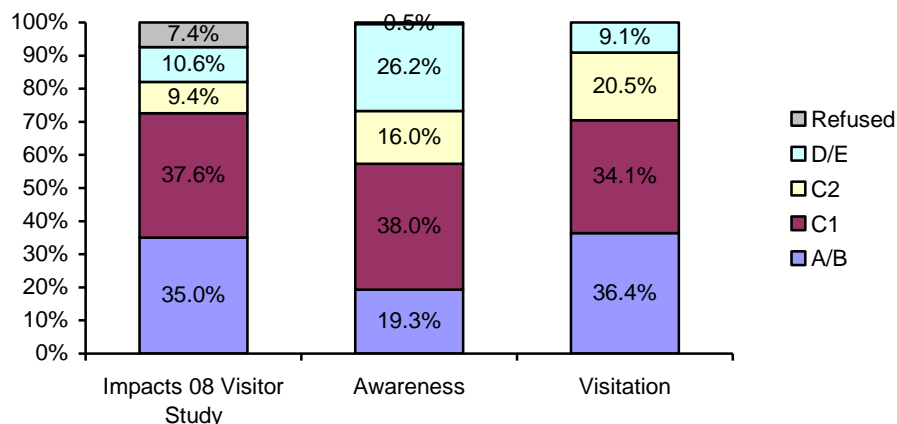


If a respondent mentioned the Liverpool ECoC as being a factor – either for an event or overall – this was coded and is represented in the above chart. The ECoC was a key motivating factor for 12% of overseas visitors interviewed and 17% of domestic tourists on the Awareness study.

Note that awareness was *lower* than that indicated in the overall survey for local visitors and *higher* than that indicated for UK visitors; this is expected to be an effect of the time period when the survey was conducted, with greater engagement by local visitors in the ‘low season’.

2.3. Social grade of visitors

Visitors were asked for details of their economic status so that their social grading could be analysed; this is important, as we need to see whether those responding match the general profile of visitors to the city.



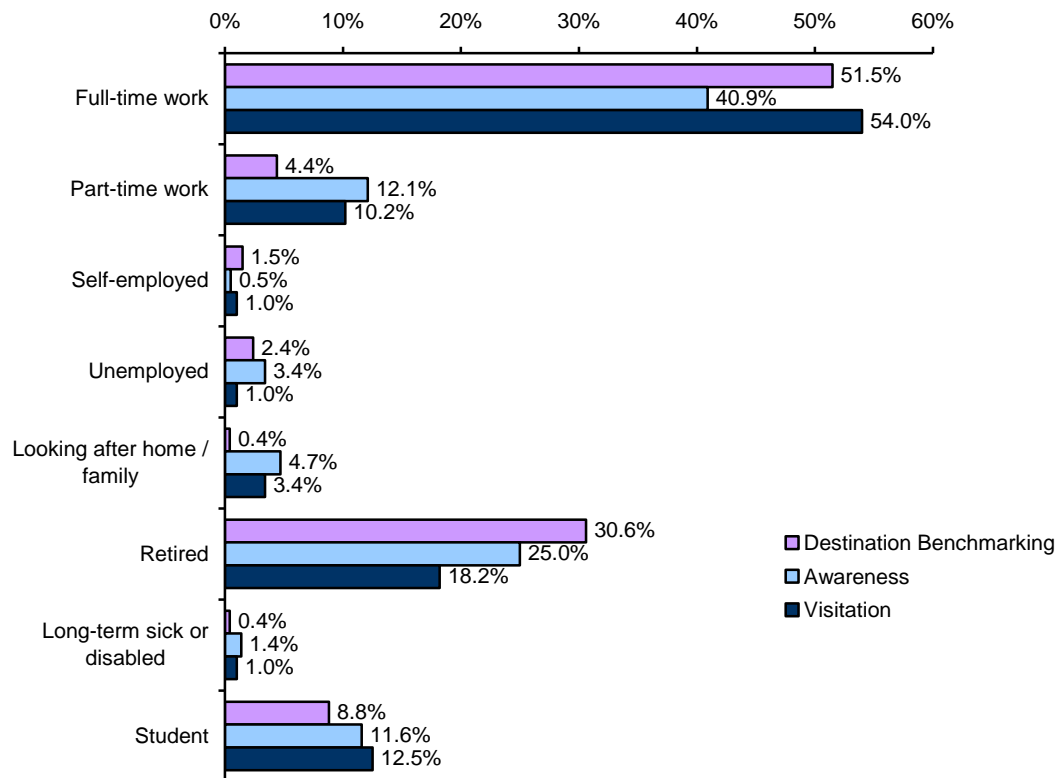
The social grade is always calculated based upon the employment profile of the head of the respondent's household. We use social grading as we can predict certain lifestyle and spending patterns from other external survey work, including the National Readership Survey (NRS). In general, in many surveys higher social grades are assumed to be consistent with higher spending power.

Social grades are equivalent to the following employment categories;

A/B	Higher and intermediate managerial/administrative/professional
C1	Supervisory clerical junior managerial/administrative/professional
C2	Skilled manual workers
D/E	Semi-skilled and unskilled manual workers / on benefits

The point here is that although in general the Visitation study is more reflective of the overall audience profile, the targeted 'Awareness' section has considerably higher levels of C2/D/Es (42% compared to 20% and lower levels of A/B/C1s (57% compared to 73%).

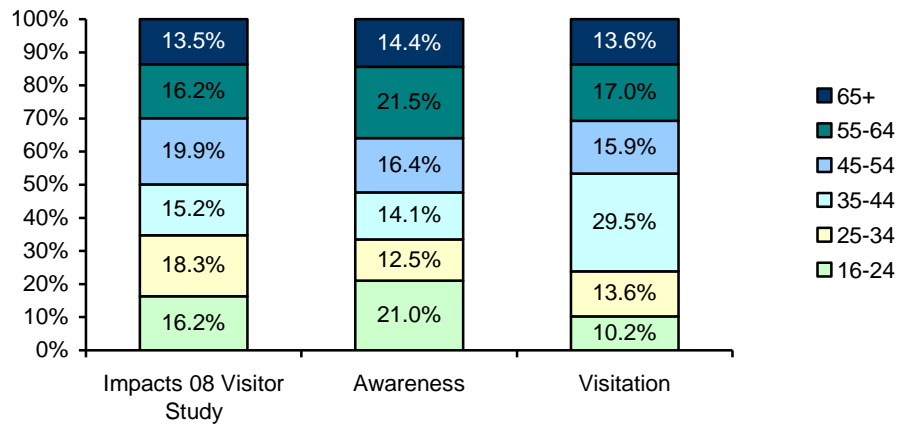
Connected to this is the visitor profile according to their economic activity levels (below):



Possibly reflecting the nature of the differing studies, the “awareness” research, including local residents, has a higher level of those who are unemployed, looking after the home or family or who are long-term sick or disabled. The “visitation” research, biased to some extent towards those travelling a greater distance, tends to have a *lower* level of retired respondents and a *higher* level of visitors in full-time employment.

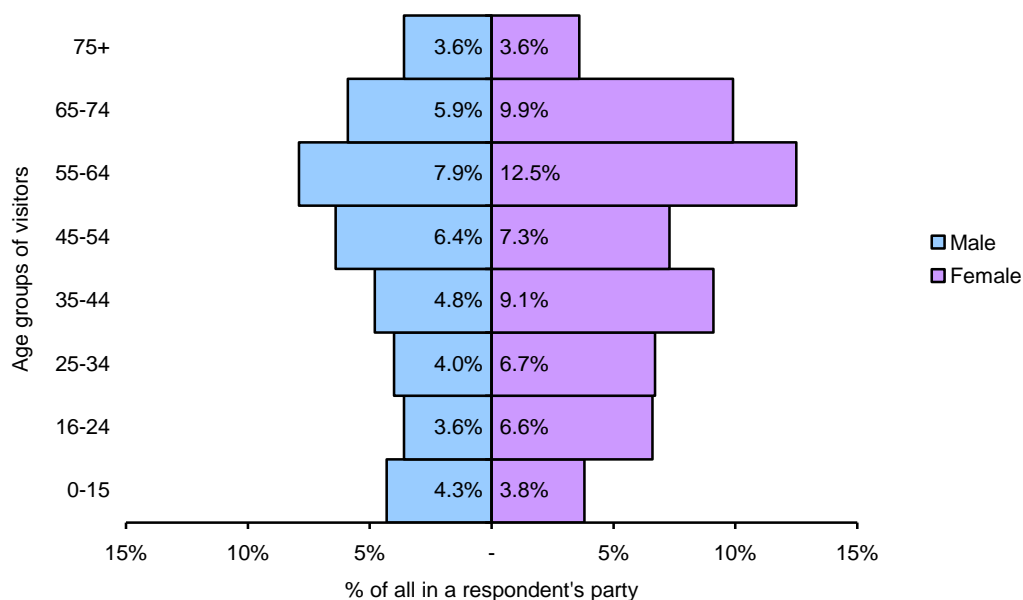
2.4. Ages of respondents

Those interviewed were also asked for their age. Although this is not a true indicator of all those visiting – as it excludes those in their full party, including children – it gives some measure of those who were giving responses.



The one difference we would flag up is that those interviewed in the visitation study were much **less** likely than the overall visitor market to be in younger age groups (24% being aged under 35, compared to 34% in the general visitor study). Partially this is a result of the semi-stratified sampling via transport mode, as mentioned in the methodology; partially a result of the longer questionnaire on this survey which resulted in a number of spoiled surveys (not included in the results).

Based on data from Destination Benchmarking, we would estimate the following tends to reflect the demographics of *all visitors* to Liverpool in 2008:



2.5. Frequency of visiting Liverpool

Visitors were also asked how often they visited Liverpool. Within the profiling of this study, this is a key question; any changes to the appearance of the city would be expected to be viewed very differently depending upon the frequency with which visitors came to the city.

2.5.1. Frequency of visit: an overall profile

The Impacts '08 visitor survey suggests that overall during 2008:

- 20% of visitors were 'frequent visitors' – visiting Liverpool once a month or more often
- 52% visited less often than once a month
- 29% were on their first visit

The typical visitor made **5.5 trips to Liverpool** in an average year.

To provide some more context, this was the typical frequency by visitors according to their origin:

	Merseyside residents	Northwest visitors	UK visitors	Overseas visitors
At least once a week	1.2%	1.2%	-	-
At least once a month	39.6%	7.0%	2.9%	-
7-11 times a year	35.2%	16.8%	5.0%	0.6%
2-6 times a year	17.8%	39.1%	36.3%	20.8%
Annually	4.2%	4.7%	5.8%	5.2%
Less often	2.0%	5.5%	12.6%	18.2%
First visit	-	25.8%	37.4%	55.2%
Mean number of visits per year	9.1	4.5	2.4	1.0

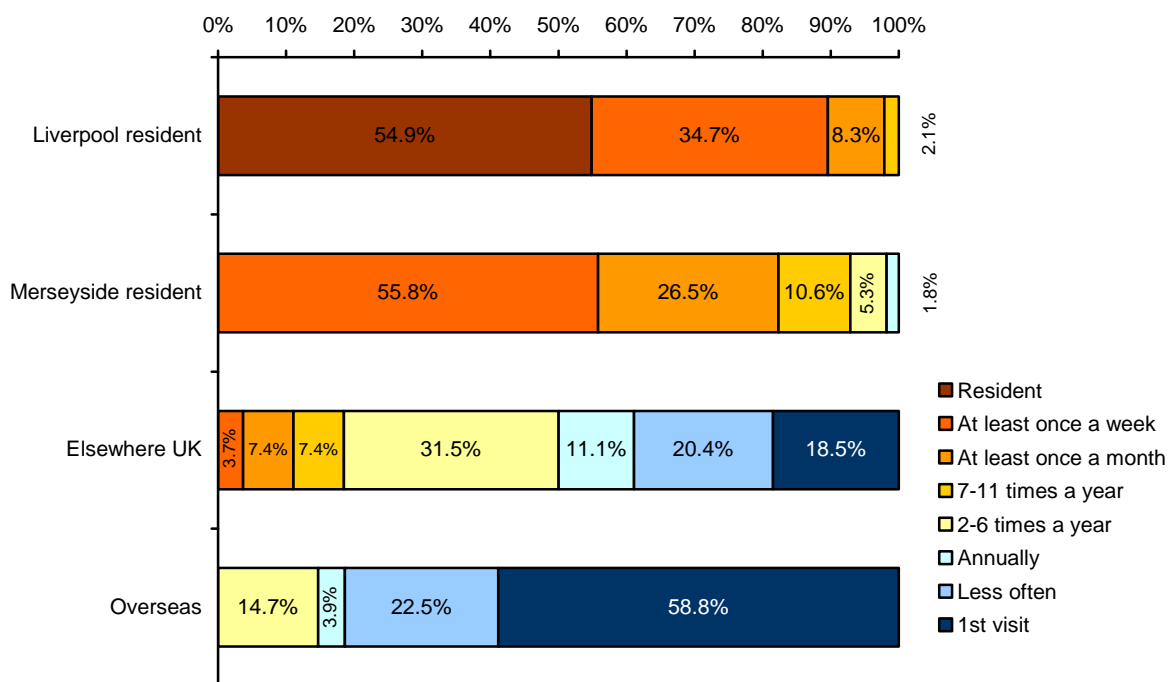
In terms of what this means in overall numbers:

- 56% were local (within the Northwest region) and regular visitors to the city (visiting more often than once a year)
- 8% were local but first time visitors
- 15% were from further afield and regular visitors
- 22% were from further afield and first time visitors

Although this is important background information for this study, it must again be emphasised that this profile excludes the patterns of Liverpool residents, which we can see in the Awareness survey data (below).

2.5.2. Frequency of visit: Respondents in the Awareness study

The chart below shows the frequency of visits by those interviewed for the awareness study



As should be expected, geography plays a major role in this. Some 59% of overseas visitors were on their first visit to Liverpool. This was also the case for 19% of domestic visitors from beyond the hinterland. A particular point to note: just 55% of residents described themselves as living in Liverpool! At first glance this seems like an error in the data, but analysis of residency postcode reveals that these 'other' responses come from those living in the outer suburbs such as Childwall, Garston and Aintree, but still within the Liverpool district. Some 10% of 'residents' had low frequency of visiting Liverpool city centre – just once a month or less.

Again, thinking in terms of what this means in overall proportions within the study:

- 47% were residents
- 26% were local (within the Northwest region) and regular visitors
- 2% were local (within the Northwest region) but classified themselves as first time visitors to Liverpool. This may cover those who simply have not been in the habit of visiting the area who live in the Greater Manchester, Cheshire, Lancashire areas.
- 5% were from further afield and regular visitors
- 19% were from further afield and first time visitors

NOTE: The point to be made here is that these numbers show us who is giving their *opinions*;

We would advise that to determine overall frequencies of visiting the city:

> the numbers given by **residents** from this page are used
(residents not having been interviewed within the Impacts '08 visitor survey)

> for **visitors** the numbers shown in the table on the previous page are used.

3. Visitor awareness of the Look of the City

Within this section we move on to look at the “awareness” section of the study; assessing awareness of the Liverpool ECoC (or Liverpool 08) branding and the overall appearance of city and how this may have impacted on residents’ and visitors’ views of Liverpool in 2008. Within this section, we tend to focus less in terms of a “total” number, but rather by the visitor origin. Liverpool residents form a distinct component of this, as requested in the research brief. However, we also recognise that Merseyside residents have a high familiarity with the destination, and thus these also form a category in their own right. Finally, ‘overseas’ and ‘UK’ visitors have their own very distinct profiles as noted in section 2 and these likewise are treated separately. Where it appears relevant, we also record the reaction of ‘first time’ visitors against ‘previous’ visitors.

3.1. Overall impression of Liverpool

Trying to assess the overall success of the “Look of the City” programme, visitors were presented with a range of statements and asked to indicate how much they agreed with them, on a scale from 1 to 5 (where 1 was disagree strongly and 5 was agree strongly – sometimes referred to as the Likert scale). The responses are presented as mean scores in charts at appendix 6.3.

We also show, for ease of comparison, the percentage of those who agreed with each statement in the table below:

	Liverpool Residents	Merseyside residents	UK Visitors	Overseas Visitors
Liverpool looks cleaner	75%	79%	83%	75%
Influenced to visit by Liverpool ECoC	14%	21%	50%	54%
It was easy to find my way around the city	93%	89%	81%	69%
I am inclined to come to the city more often	55%	55%	45%	37%
City looks colourful and attractive	82%	85%	82%	92%
Feel safe from crime	66%	73%	70%	82%
Physical assets are better highlighted than they used to be	72%	82%	70%	65%
City is more family friendly	69%	75%	71%	65%
The city has been dressed for special events	86%	80%	81%	78%

Statistical health warning:

Care needs to be taken with a number of questions; specifically:

“Liverpool looks cleaner”

“The city’s physical assets are better highlighted”

“I feel the city is more family friendly”

These were only asked of repeat visitors, and hence especially in the case of overseas and rest of the UK visitors may represent a lower base.

3.1.1. City Cleanliness

There was net agreement that Liverpool looked cleaner than it used to across all visitor types; approximately three quarters of Liverpool and Merseyside residents agreed with this. In analysing this question we can turn to external data to confirm some of the views expressed. The 2008 Liverpool Destination Benchmarking observed the following changes:

% rating as 'good' or 'very good'	2006	2008
Cleanliness of streets	58%	68%
Upkeep of parks and open spaces	67%	77%

Although this obviously does not include the views of residents, this represents a significant change.

3.1.2. Influence of the Liverpool ECoC

There was a clear inverse-gravity effect in terms of the influence of the Liverpool ECoC upon the visit to Liverpool- whereas 50% of visitors from further afield were influenced by this to make their visit, just 14% of local residents mentioned "08" or the Liverpool ECoC. As we saw in section 2.2, residents were most likely to be in the city due to a 'special shopping trip'.

To some extent, this message is reinforced by the 2008 visitors' survey:

% rating the Liverpool ECoC as 'important' or 'very important' factor in visiting Liverpool	
Merseyside resident	29%
Northwest visitor	47%
UK visitor	56%
Europe	57%
Overseas (exc. Europe)	63%

3.1.3. Ease of finding way around

The majority of visitors showed high satisfaction with finding their way around the city – although this was less the case for visitors from overseas (69%). For more detail on this aspect – in contextual terms – we turn to the two most recent Destination Benchmarking studies.

Although the 2008 Destination Benchmarking showed improvements in this regard, this may not appear as significant a leap forward as the programme expected, and looked distinctly poor in regards to Display Maps and Information Boards: again, remember that these are mean scores based on the Likert scale, where 1 = "Very poor" and 5 = "Very good"; thus any score above 3.0 indicates net satisfaction, any score below 3.0 indicates net dissatisfaction.

Mean score: "Finding way around"	2006	2008
Road signs	3.83	3.98
Pedestrian signs	3.92	3.94
Display maps & info. boards	3.86	3.72

When we look at this by visitor origin a different 'mood' emerges:

Mean score: "Finding way around"	2006	2008
Merseyside		
Road signs	3.53	4.05
Pedestrian signs	3.71	4.07
Display maps & info. boards	3.76	3.73
NW		
Road signs	3.72	3.98
Pedestrian signs	3.81	3.86
Display maps & info. Boards	3.70	3.75
UK		
Road signs	3.88	3.99
Pedestrian signs	3.94	4.02
Display maps & info. Boards	3.76	3.89
Overseas		
Road signs	3.81	3.85
Pedestrian signs	3.89	3.77
Display maps & info. Boards	3.86	3.57

Overall, the findings indicate that:

- Local residents (Merseyside) in particular were apt to indicate improved road signage on the way into the city.
- Local residents (Merseyside) and UK visitors were likely to indicate pedestrian signage as having improved. Visitors from the Northwest, with high familiarity of the city, were less likely to do so.
- Display Maps / information boards were likely to be rated as significantly improved by UK visitors in 2008; though they were likely to be rated as significantly worse by those from overseas, possibly reflecting a language issue.

Mean score: "Finding way around"	2006	2008
First time visitors		
Road signs	3.85	3.81
Pedestrian signs	3.91	3.75
Display maps & info. boards	3.82	3.56
Repeat visitors		
Road signs	3.85	4.02
Pedestrian signs	3.91	3.98
Display maps & info. Boards	3.85	3.88

A further point to be aware of is that first time visitors were not likely to give an 'improved' rating, whereas those who had showed improvements in all regards. This indicates a significant level of people noting improvements – although with first timers having their expectations unmet in this regard.

Of course, an issue in all this is that of how many people *used* the tools to help them navigate Liverpool:

- 27% did not use road signs
- 22% did not use pedestrian signs
- 31% did not use display maps & information boards

3.1.4. Inclined to come to the city more often

This statement is particularly likely to be affected by “distance”; with travel time likely to be a determinant factor on visit frequency as well as changes to the city’s appearance.

- 55% of residents (Liverpool and Merseyside) indicated that they were inclined to come to the city more often.
- This applied to 45% of UK visitors and 37% of overseas visitors.

Below, this is tabulated against frequency of visit (section 2.5). A point to be seen is that those visiting the city with a high frequency were now stating that they were likely to visit with a frequency higher than in the past.

Frequency of visit	Inclined to come more often	Not inclined to come more often
At least once a week	55%	11%
At least once a month	53%	19%
7-11 times a year	60%	15%
2-6 times a year	51%	24%
Annually	29%	29%
Less often	37%	29%

3.1.5. City looks colourful and attractive

Based on our sample, more than four out of every five visitors across *all* origin categories agreed with this statement (at least 80% in each geographic area). This includes:

- 82% of residents
- 82% of UK visitors
- 92% of overseas visitors
- 88% of first-time visitors.

The only noticeable levels of disagreement came from Liverpool residents (4% of this segment).

3.1.6. Feelings of safety from crime

Respondents were asked how safe they felt from crime on their visit to Liverpool. Distance again – or perhaps familiarity - exerts an inverse influence on this question.

- 82% of overseas visitors felt safe from crime on their visit to Liverpool, with none disagreeing with this statement.
- 70% of UK visitors felt safe from crime (4% disagreeing).
- 66% of residents felt safe from crime – with some **13%** disagreeing with the statement. This would seem to suggest that this is a particularly weak area, even if only for Liverpool’s ‘internal’ image.

Again we have some external data that can be used as a reference point, in the shape of the 2008 Liverpool Destination Benchmarking:

Feelings of safety from Crime	2006	2008
Mean score	3.93	4.31
% feeling safe or very safe	73%	90%

This appears to show that, at least in the eyes of visitors to the city, there has been a dramatic improvement in their perceived safety during their visit.

3.1.7. Highlighting of the city's physical assets

Respondents were asked to what extent they agreed that the city's physical assets were highlighted better than they used to be. There was a mixed response to this question; although c70% agreed with this, the agreement was much higher amongst Merseyside residents than any other group (82%).

It is possible that this particular question is felt more notably by higher social grades; 75% of A/B/C1s agreed with this, against 68% of C2/D/Es.

3.1.8. Family friendly nature of the city

Respondents were then asked to whether they agreed that the city's was more family-friendly. Again, this was more likely to be agreed with by Merseyside residents (75%) than either Liverpool residents (69%) or visitors from further afield (68%).

3.1.9. City looks 'dressed'

Finally, in this series of statements, the questions looked more explicitly towards the physical changes which Liverpool had undergone, asking visitors if they felt that the city had been 'dressed' for special events.

In this regard, the strongest agreement came from Liverpool residents, where 86% felt that the city had been dressed. With their high level of visitation, Merseyside residents were also likely to strongly feel this (81%) and there was also positive feedback from overseas visitors (80%).

Below, we see how this compares to those who were influenced by the Liverpool ECoC. Understandably, as we have seen before visits by residents had low association with the Liverpool ECoC. However in terms of visitors, 36% were on a Liverpool ECoC visit and indicated they felt the city was dressed for the occasion.

Residents

		Liverpool ECoC influenced	
% of all residents		Not influenced	Influenced
City looks "dressed"	Disagree	2.2%	0.0%
	Agree	68.6%	11.7%

Visitors

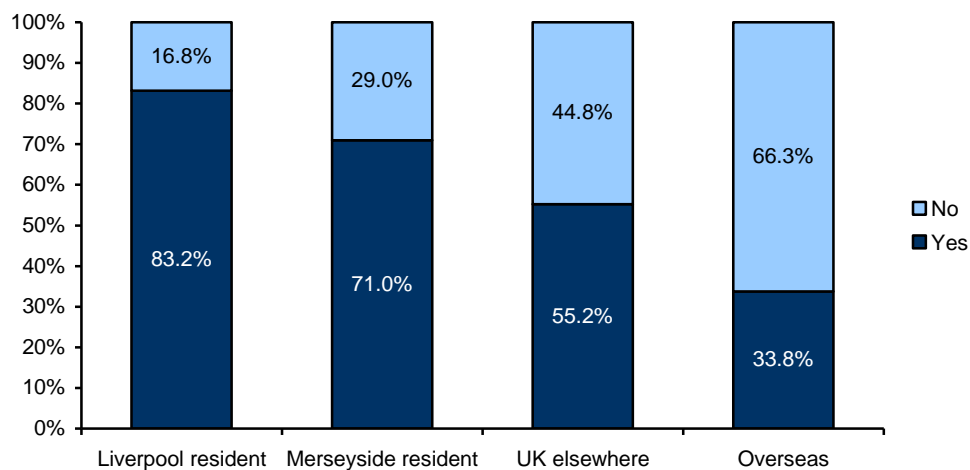
		Liverpool ECoC influenced	
% of all visitors		Not influenced	Influenced
City looks "dressed"	Disagree	3.7%	0.4%
	Agree	35.3%	36.0%

3.2. Overall impressions of Liverpool 08 branding

Visitors were shown a range of Liverpool 08 brand material used as part of the Look of the City programme in 2008 and asked a range of questions to detect levels of recognition as well as their opinions about it.

3.2.1. Recognition of branding (anonymised)

Visitors were first shown an unlabelled sample of Liverpool 08 brand material (as displayed below) and asked if they had seen it before.



The recall was lowest amongst overseas visitors, with just 34% indicating they had seen such branding. There were higher levels of awareness amongst residents, with 83% of Liverpool residents indicating they had seen the branding and 71% of Merseyside residents.

In terms of visitors indicating they had been influenced to visit Liverpool by Liverpool ECoC, 61% recalled the branding. When splitting by visitor origin, the following percentages had seen / were aware of the branding material:

- 89% of Liverpool residents
- 67% of Merseyside and Northwest visitors
- 50% of visitors from elsewhere in the UK
- 37% of overseas visitors

3.2.2. Identification of branding purpose

Of course, a measure of any branding's effectiveness is not just if visitors recalled it but also if they could accurately identify it.

The pattern of recognition is emphasised when visitors who recalled seeing the branding were asked what it was for; in the table below, in the interests of measuring brand strength, the percentages represent *all* visitors, not just those who indicated they had seen the material.

Branding identification	Liverpool Residents	Merseyside residents	UK Visitors	Overseas Visitors
"08"	13%	6%	7%	3%
"Capital of Culture"	41%	34%	27%	18%
Could not say	21%	21%	13%	5%

* Note: responses were captured verbatim; the above represents the coded analysis.

Some 54% of residents were able to identify with reasonable accuracy the branding; this was much lower for domestic tourists (34%) and overseas visitors (21%). As can be seen, for most of the remaining responses other than "08" or "Capital of Culture" respondents were unable to identify a specific association with the branding.

Of any "other" comments recorded for this question, the following topics or themes were mentioned:

- Advertising the city (5 responses)
- Liverpool heritage (4 responses)
- To hide building work / bad architecture (2 responses)
- The Beatles (2 responses)
- "Where it all happens" (1 response)

3.2.3. Opinions on aspects of the branding

At this stage, respondents who had not successfully identified the branding were told that the branding was for Liverpool '08, and shown a copy of the branding complete with '08 logo (as below).



They were asked what words they would use to describe the branding. Of those who provided a response (some 55% of the sample), the following were the key words:

Positive statements

- Colourful / eye-catching (51%)
- Bright (13%)
- Cultural [place] (7%)
- Fun / funky (5%)
- Modern (4%)
- Odd / unusual (4%)
- Exciting (2%)

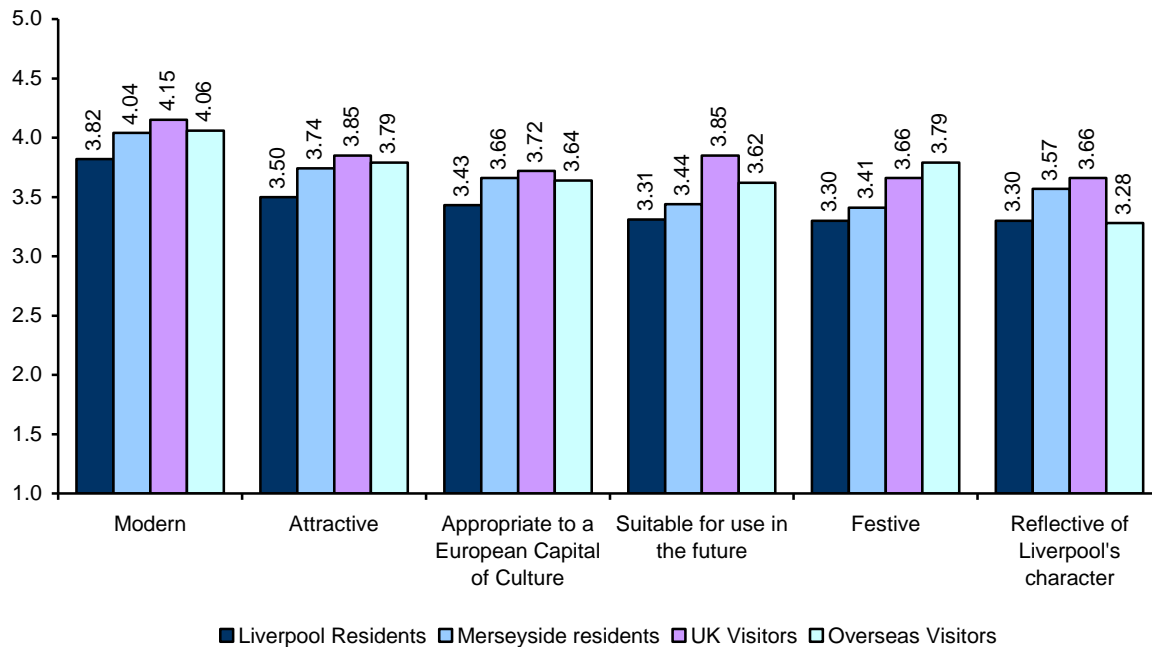
Negative statements

- Ugly / messy / complicated (7%)
- Dark / dull / boring (7%)
- Vague / unclear [purpose] (5%)

Below these comments are analysed by respondent origin; although it should be stated that with the bases concerned there is low reliability for all except Liverpool residents' comments.

% of those making comment	Liverpool Residents	Merseyside residents	UK Visitors	Overseas Visitors
Colourful / bright / eye-catching	49%	58%	51%	57%
Bright	13%	14%	15%	9%
Cultural [place]	5%	5%	13%	9%
Fun / funky	8%	4%	1%	2%
Odd / unusual	5%	2%	3%	9%
Modern	1%	7%	9%	-
Exciting	3%	2%	3%	-
Ugly / messy / unattractive	6%	7%	4%	13%
Dark / dull / boring	10%	4%	4%	2%
Vague / unclear [purpose]	4%	-	1%	-

Respondents were then asked to indicate how strongly they agreed with a set of statements about the branding; again this was on a scale of 1 to 5, as in section 3.1: any score *above* 3.0 represents net agreement; any score *below* 3.0 represents net disagreement. We also represent absolute levels of agreement and disagreement.



% agreeing that the branding is...	Liverpool Residents	Merseyside residents	UK Visitors	Overseas Visitors
Reflective of Liverpool's character	46%	53%	60%	41%
Appropriate to a European Capital of Culture	53%	52%	61%	60%
Attractive	59%	67%	71%	64%
Modern	68%	75%	81%	83%
Festive	43%	52%	58%	73%
Suitable for use in the future	52%	54%	70%	65%

% disagreeing that the branding is...	Liverpool Residents	Merseyside residents	UK Visitors	Overseas Visitors
Reflective of Liverpool's character	25%	22%	20%	25%
Appropriate to a European Capital of Culture	24%	17%	17%	9%
Attractive	21%	14%	15%	3%
Modern	13%	7%	5%	3%
Festive	29%	26%	19%	15%
Suitable for use in the future	28%	20%	10%	18%

This reveals a wide range of opinions in terms of the branding; in particular with quite a division between the perceptions of Liverpool residents and those of visitors to the city.

Although in terms of all statements there was net agreement, there were some particular issues raised:

Liverpool Residents

In general, Liverpool residents showed a lower agreement score than visitors. Residents were *most* likely to agree that the branding was “Modern” and “Attractive” and *least* likely to agree that it was “Festive” or “Reflective of Liverpool's character”.

Merseyside residents

The branding seemed to appeal more to Merseyside residents. At least 50% agreed with all statements – although, as with Liverpool residents widest agreement was reserved for the branding being “Modern” and “Attractive”.

UK Visitors

Agreement was higher still for visitors to Merseyside from elsewhere in the UK, showing a strong regard for the branding from this segment. Again, the “Modern” aspect of the branding was most likely to be agreed with (81%); visitors were most likely to disagree with the statement that the branding was reflective of Liverpool's character.

Overseas visitors

This group were *most* likely to believe the branding was “Modern” (83%) - but, unlike other visitor segments, they were also highly likely to see the branding as “Festive” (73%). Perhaps of some note is that they were *least* likely to agree that the branding was “reflective of Liverpool's character” - just 41% agreed with this, the lowest rating by any of the segments.

This data can be compared to the survey conducted amongst special international delegations (see Section 5), who were particularly inclined to describe the branding as “colourful” and “bright”. Below we compare the reactions of international delegations with those of overseas visitors, both in terms of the latter's agreement with statements and verbatims. In the table below we place the data in terms of a rank order to enable some form of comparison (delegates were only asked for verbatim responses, so direct comparisons are not fully cohesive):

Statement	Overseas visitors Net agreement	Comments coded	Overseas visitors %	Overseas delegates %
Modern	80%	Modern	-	6%
Attractive	61%	Colourful	57%	37%
Festive	58%	Bright	9%	24%
Appropriate to a European Capital of Culture	51%	Cultural	9%	3%
Suitable for use in the future	47%	Ugly or unusual (negative comment)	9%	4%
Reflective of Liverpool's character	16%	Old (positive)	-	7%

3.3. Elements of the Look of the City programme

3.3.1. Awareness of components

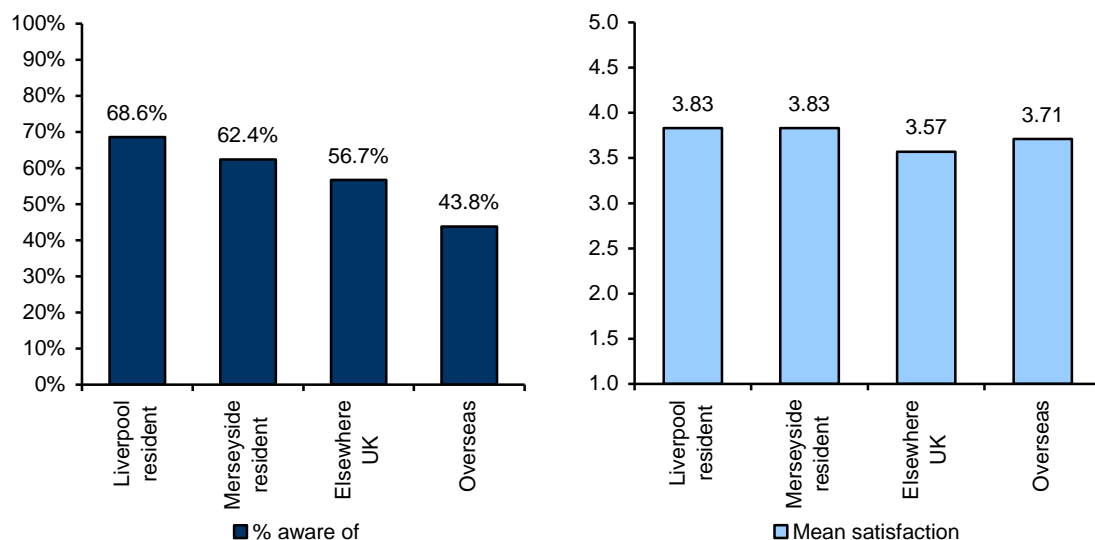
Turning to the specific components which made up the Look of the City programme, visitors were asked of which they were aware. To aid this question, they were also shown a prompt card which contained photographic examples of each element. To ensure maximised quality of data, a rotating showcard was used for this (3 showcards, each with a different set of images). Respondents were also asked to grade each element, on a scale from 1 to 5 (where 1 was very poor and 5 was very good).

The charts below present these questions for each element. Regarding the mean scores, as before, any score *above* 3.0 indicates net satisfaction; any score *below* 3.0 indicates net dissatisfaction. However, these scores should be viewed in conjunction with the chart on awareness; a low level of awareness will mean that the satisfaction score is based on fewer respondents and thus has lower reliability.

Overview

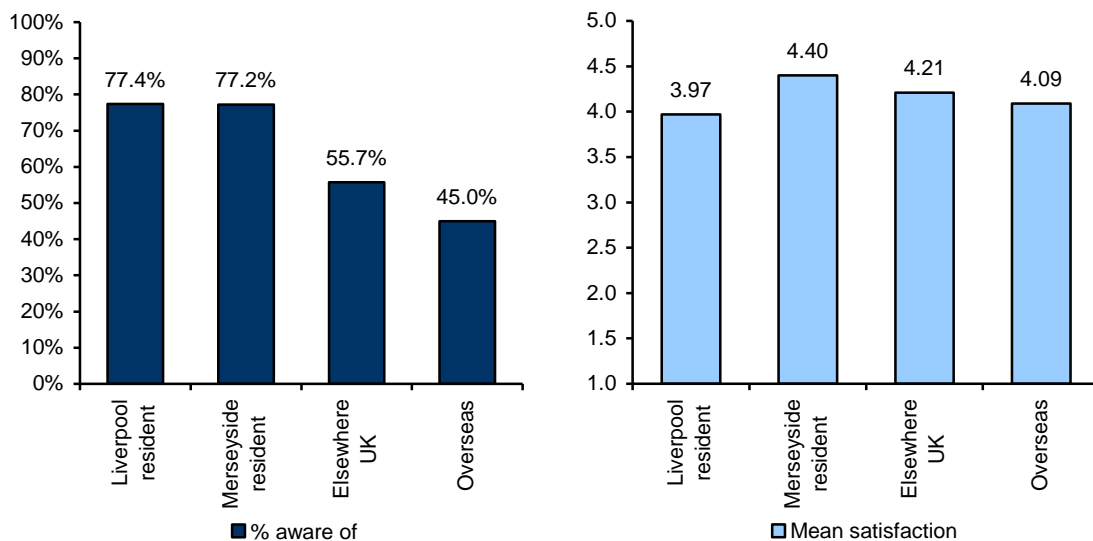
Element	Awareness	Mean satisfaction
Banners	61.8%	3.77
Building dressing	68.8%	4.11
Flag poles	61.1%	3.78
Lamp posts	62.5%	3.77
Transport wraps	51.8%	4.48
Media Wall	49.8%	4.18
Treatment of derelict buildings	50.0%	3.92
Street art*	20.5%	4.14

* Note: Street art was not included on the showcards, as the idea was to examine what would come to mind; hence they were just asked if they had seen any street art, in general.

Banners (ranked 3rd for awareness)

Residents had the highest awareness of banners, with more than two-thirds mentioning these; the number who noticed these declines the further afield they come from, with perhaps surprisingly just 44% of overseas visitors mentioning these. In addition, 65% of repeat visitors were aware of these, as were 38% of first time visitors. There was little significant variation in terms of satisfaction levels across the different visitor types for this element – overall, however, banners did not receive the highest satisfaction score compared with other branding elements.

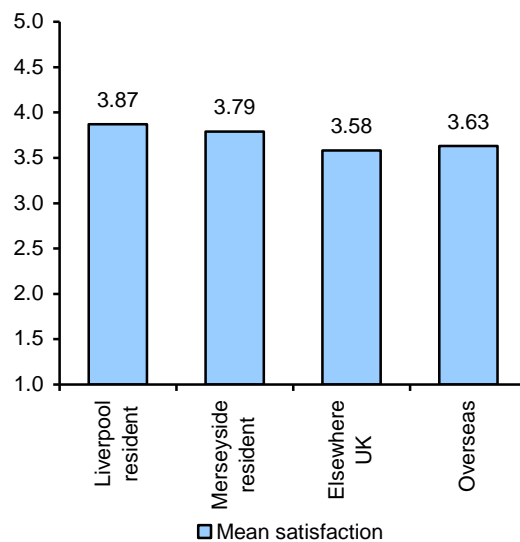
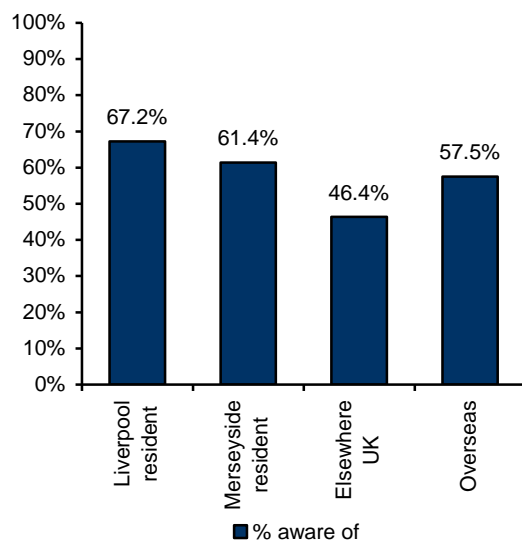
Building dressing (ranked 1st for awareness)



Over three-quarters of Liverpool and Merseyside residents were aware of the building dressing and for both these, and UK visitors this was the element of which they were most likely to be aware. Again just 44% of overseas visitors mentioned these.

71% of repeat visitors were aware of the building dressing, as were 41% of first time visitors.

Looking at satisfaction levels across the different visitor types, satisfaction by Liverpool residents was significantly lower than for other groups – though they still showed a highly positive reception. The group *most* likely to indicate high levels of satisfaction were Merseyside residents.

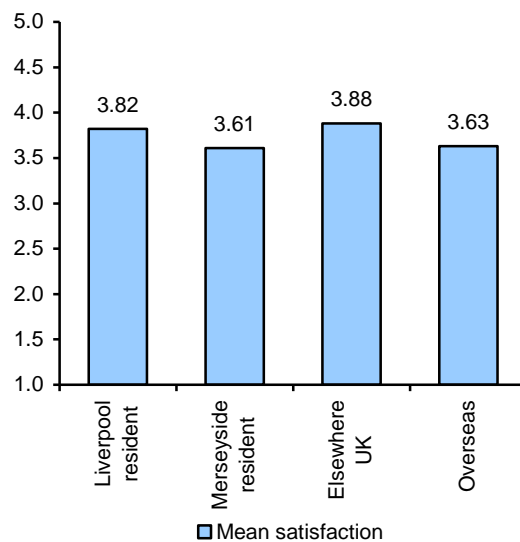
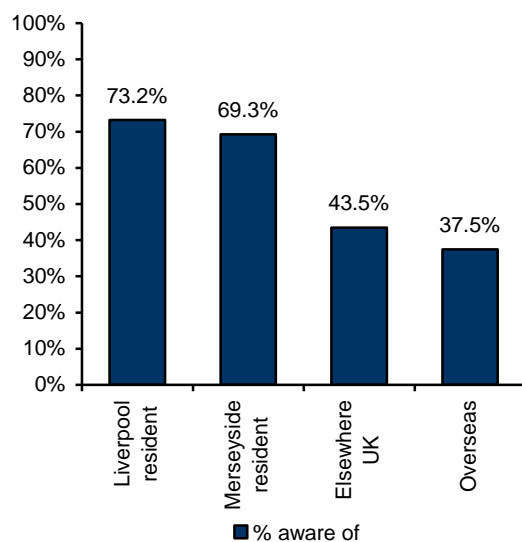
Flag poles (ranked 4th for awareness)

Over two thirds of Liverpool residents were aware of dressing on flag poles. Although this was a low mention for UK visitors (46%), this was the element of dressing *most* likely to be mentioned by overseas visitors (58%).

58% of repeat visitors were aware of the flag pole dressing, as were 50% of first time visitors.

Satisfaction was positive for all visitor groups; this was most noticeable for Liverpool and Merseyside residents, with visitors from elsewhere more inclined to be ambivalent regarding this element.

Lamp post dressing (ranked 4th for awareness)

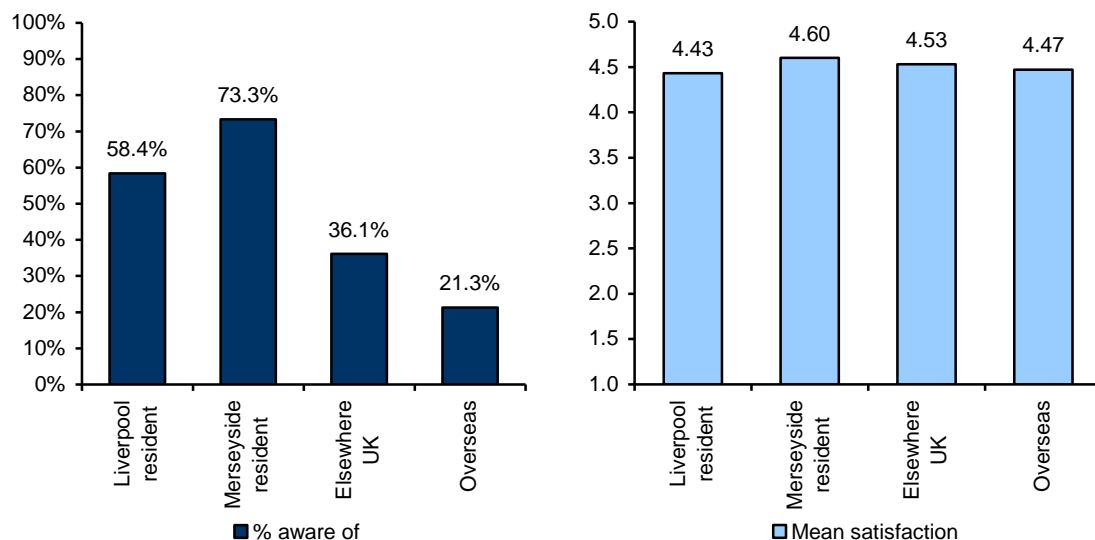


Almost three quarters of Liverpool residents and almost as many Merseyside residents were aware of the dressing on lamp posts. There was considerably *less* awareness of this from visitors from further afield.

63% of repeat visitors were aware of the lamp post dressing, as were 37% of first time visitors.

There was little significant variation in terms of satisfaction levels across the different visitor types for this element – as with banners the satisfaction score here although positive is not as high as other branding elements.

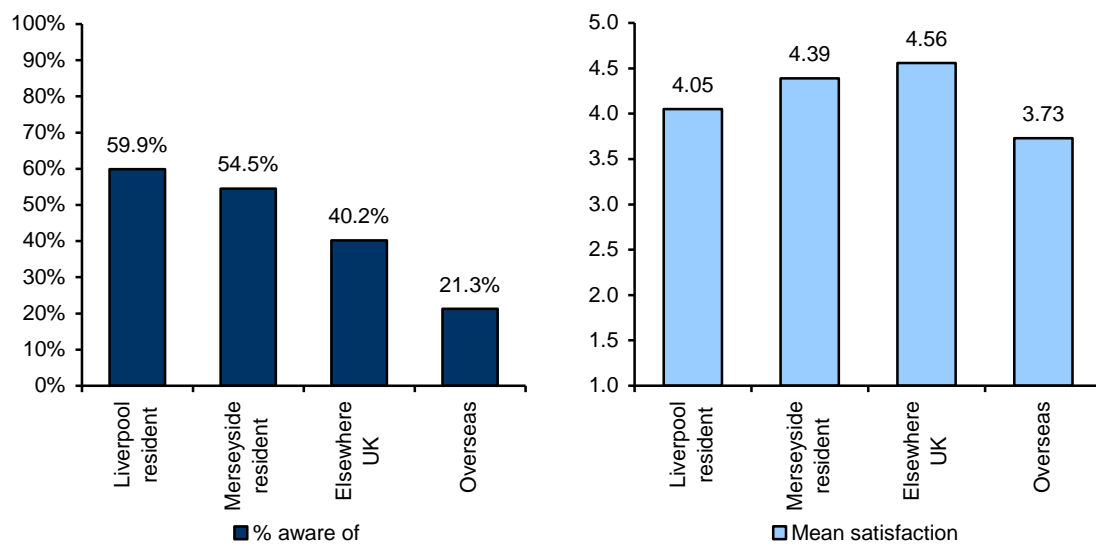
Transport wraps (ranked 5th for awareness)



Awareness of this element was significantly higher for Merseyside residents (73%) than for any other group (including Liverpool residents), and this may reflect on the commuting / familiarity aspect.

59% of repeat visitors were aware of the transport wraps – but just 18% of first time visitors mentioned this, which should perhaps be expected.

Although little significant variation in terms of satisfaction levels across the different visitor types are shown for this element, with the high level of Merseyside residents who were aware of this their very positive feedback on this part of the dressing is all the more significant. It should be noted that in terms of the total audience, this was the element with the highest satisfaction rating.

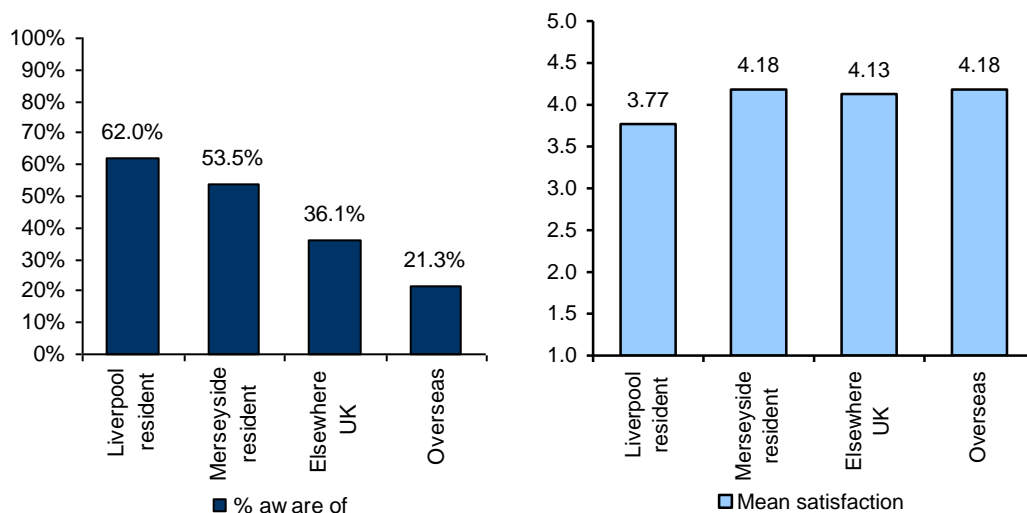
Media Wall (ranked 7th for awareness)

Awareness of the Media Wall outside Lime Street station was significantly higher for Liverpool residents (60%) and Merseyside residents (55%) than for visitors from further afield.

Over half of repeat visitors (52%) were aware of the Media Wall. Note that just 15% of first time visitors were aware of this, in part of course reflecting the route they took into the city (see the visitation section).

High positive feedback was evident for the media wall; particular from Liverpool and Merseyside residents. It should be noted that satisfaction is in fact *highest* from visitors from UK locations outside the Northwest, although the lower awareness levels and refusals on this particular question mean that this is of lower significance.

Treatment of derelict buildings (ranked 6th for awareness)

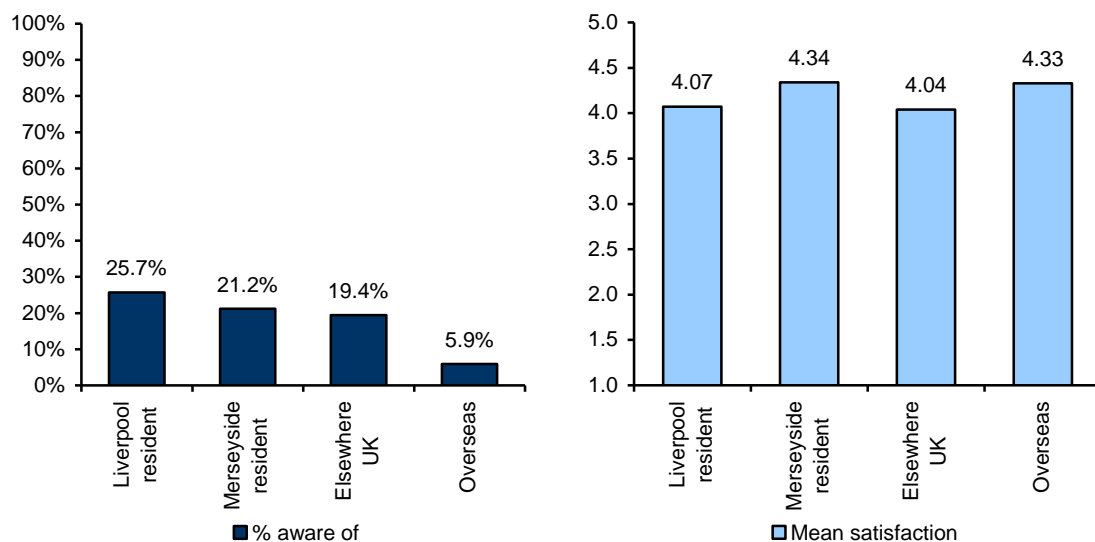


Again, awareness of the 'dressing' of derelict buildings – particularly along the key routes into the city – was significantly higher for Liverpool residents (62%) and Merseyside residents (54%). In general, there was lower awareness of this amongst visitors.

53% of repeat visitors were aware of this element - but just 12% of first time visitors mentioned this; the treatment of derelict buildings is the element with the lowest awareness amongst this group, although it should be realised that this will be influenced by the route they took into the city. A moot point is to pose what their reaction would be *without* this treatment being present.

Merseyside residents gave a high rating to this element; Liverpool residents showed lower satisfaction.

Street art



As should be expected from an unprompted question with no visuals, there was much lower recall of any street art – although again, distance was clearly a factor. This question was left completely open, so in terms of what respondents perceived as street art, the following were the key responses (percentages are shown as a percentage of all respondents):

- Superlambananas (11.9%)
- Art / painting / graffiti on walls (1.6%)
- Street performers (1.6%)
- Spider (1.5%)
- "Treatment of derelict buildings" (1.0%)
- Biennial exhibits/posters (exc. Spider) (0.8%)
- Statues (0.8%)

Clearly the SuperLambananas dominated with 12% of visitors spontaneously associating these with being street art, all other mentions being much lower. Notice amongst the oddities, 1.6% mentioned on-street performers as being what they considered street art and a further 1% mentioned the treatment of derelict buildings in specific locations, despite this already having formed a question.

Satisfaction levels were shown as being high for this "street art", but obviously, as indicated this is based on a lower sample level.

3.3.2. Opinions regarding the elements of the Look of the City programme

Trying to assess the success of these elements in relation to the objectives of the Look of the City programme, visitors were presented with a range of statements and asked to indicate how much they agreed with them, again, using a scale from 1 to 5. Responses are presented in charts at appendix 6.4.

We also show immediately below the percentage of those who agreed with each statement:

	Liverpool residents	Merseyside residents	UK visitors	Overseas visitors
It improved the city's appearance	77%	85%	76%	59%
The designs and colours were attractive and appropriate	76%	84%	83%	75%
It played an important part in making me feel Liverpool was a Capital of Culture	63%	66%	61%	56%
It made the city appear clean, safe and attractive	64%	65%	61%	67%
Highlighted the city's architectural assets	54%	53%	42%	47%
Highlighted key pathways through the city	56%	58%	39%	34%
Improved my understanding of what the city offered	45%	50%	41%	27%
Made the city appear fun	75%	75%	75%	55%

As a general point, satisfaction tended to be highest for Merseyside residents, as opposed to Liverpool residents; the following are some overall observations:

- Strongest agreement tended to go to two statements jointly; there was a strong level of agreement that the programme “improved the city’s appearance” and that “the designs and colours were attractive and appropriate”. The former was less likely to be indicated by overseas visitors, an indication of their lack of familiarity with the location.
- For Liverpool residents a third statement was equally likely to be applicable as a top mention; that the elements had made the city appear “fun” (this also being indicated by a high level of Merseyside and UK visitors).
- For overseas visitors, a strong feature of the programme was that it “made the city look clean, safe and attractive”.
- The ‘weakest’ agreement came with “improved my understanding of what the city had to offer - this receiving particularly low levels of agreement for both residents and overseas visitors.
- Although Liverpool and Merseyside residents showed a higher level of agreement that the programme “highlighted key pathways through the city” this was less evident amongst visitors from further afield, who took a neutral view on this.

3.4. Positioning of the city

Finally, respondents were asked to rate Liverpool alongside other cities to try and gauge how the city was positioned with regards to both their experience and perception against a series of key measures.

We have selected nine cities in all to compare Liverpool against; this being based on cities which share with Liverpool (to a certain extent) an industrial history and a dedication to developing regeneration programmes.

Cities	Resident population	Overseas visits
Birmingham	1,016,800	763,000
Leeds	770,800	326,000
Glasgow	584,200	629,000
Sheffield	534,500	161,000
Dublin	[^] 506,211	[*] 4,449,000
Manchester	464,200	889,000
Liverpool	434,900	553,000
Nottingham	292,400	290,000
Newcastle	273,600	244,000
Belfast	268,300	[#] 507,000

Mid-year population estimates 2008, ONS International Passenger Survey 2008, VisitBritain

[^] Census 2006, CSO Ireland [#] Tourism facts 2008, NITB
^{*} Dublin Statistics 2007, Fáilte Ireland

The top 3 cities in terms of visitation and rank order in each segment are highlighted in **green**; the bottom 3 cities in terms of visitation and rank order are highlighted in **red**.

Cities have visited: (%)	Liverpool residents	Merseyside residents	UK visitors	Overseas visitors	All respondents
Liverpool	-	-	-	-	-
Manchester	81%	88%	78%	64%	79%
Dublin	40%	39%	49%	48%	43%
Birmingham	37%	49%	50%	23%	39%
Leeds	40%	48%	38%	11%	36%
Glasgow	31%	39%	39%	16%	31%
Newcastle	25%	30%	40%	18%	27%
Sheffield	22%	29%	32%	6%	23%
Nottingham	26%	23%	25%	7%	22%
Belfast	17%	13%	28%	14%	18%

Clean, green & well – dressed city: (mean rank order)	Liverpool residents	Merseyside residents	UK visitors	Overseas visitors	All respondents
Liverpool	1.8	2.1	2.3	1.8	2.0
Manchester	2.8	2.7	2.6	2.2	2.7
Dublin	3.4	3.4	3.0	2.2	3.2
Birmingham	5.5	5.4	5.3	4.7	5.4
Leeds	4.2	4.4	4.9	4.2	4.3
Glasgow	5.9	5.4	4.2	5.8	5.3
Newcastle	5.7	5.3	5.3	6.8	5.6
Sheffield	6.6	6.2	6.9	8.1	6.7
Nottingham	5.4	5.1	6.0	6.1	5.5
Belfast	6.1	6.7	6.8	5.2	6.3

In general, the majority of visitors had high experience of Manchester, Dublin and Birmingham; Liverpool and Merseyside residents had a high experience of Leeds, but this was a destination less visited by overseas visitors.

In terms of destinations overall as 'clean, green and well-dressed city', Liverpool fares well across all categories, with strong indications that it is ranked first. It must be remembered of course that this will be slightly coloured by the interviews taking place within the city. Even so (and allowing for a 50% reduction in this effect) this would still place Liverpool in the top 3 rankings for all cities. The one exception to this mood would be amongst UK visitors, where Liverpool would be placed alongside Glasgow.

The cities Liverpool is classed alongside as a 'clean, green and well-dressed city' are Manchester and Dublin.

Appendix 6.5 provides a detailed representation of how Liverpool is positioned in comparison with each of these nine cities, according to visitor origin (local residents, Merseyside, rest of the UK or overseas).

4. Patterns of visitation in Liverpool

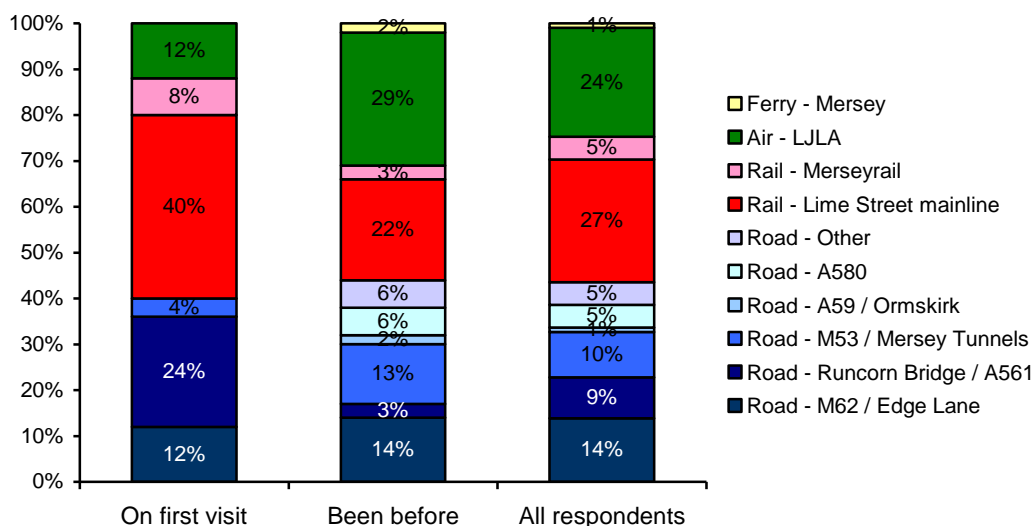
Within this section we examine the actual “visit” to the city; assessing how people have moved through the city on their visit, and how they were influenced in this by the elements of the Look of the City programme. A number of different factors will drive visitors’ opinions, including: their origin, the route they used to reach the city on the day of the interview and their familiarity – or otherwise – with the destination.

Note that an important part of this research was a ‘visitation diary’ identifying locations visited within the city in order to gather information on any areas of strength or weakness in the Look of the City programme. The key maps developed from this are displayed within Appendix 6.6 although we make mention of these within the text, where appropriate.

4.1. Awareness of branding on route

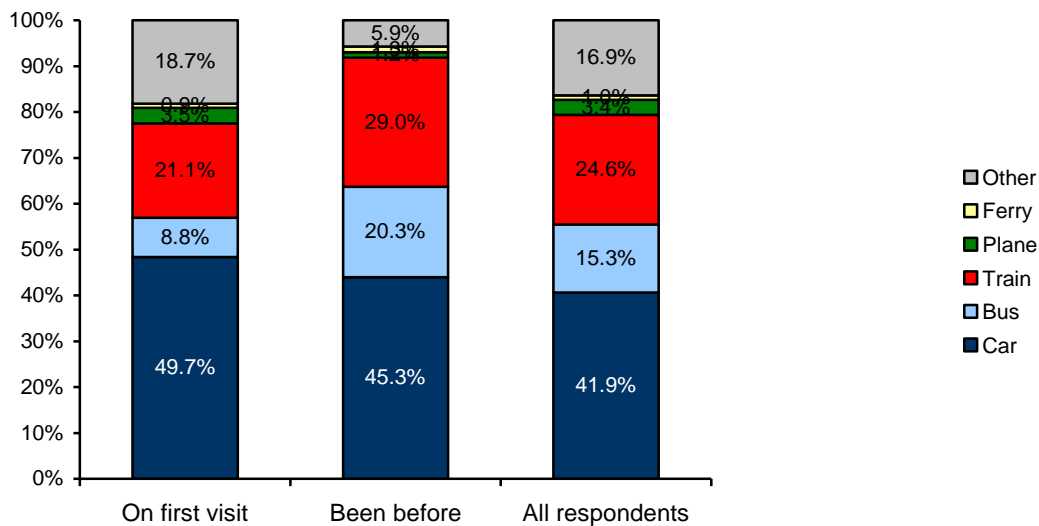
4.1.1. Route used to reach Liverpool

Depending on the route that visitors took into the city, they were asked how aware they were of the differing aspects of the 08’ branding.



As was seen in the profile section of this report (section 2), frequency is an important component to be considered in awareness. Although, as has been mentioned, the data from this survey is not representative of the overall visitor market, it is clearly influenced more by those on a previous visit (72%) than those who were first-time visitors to the city (28%).

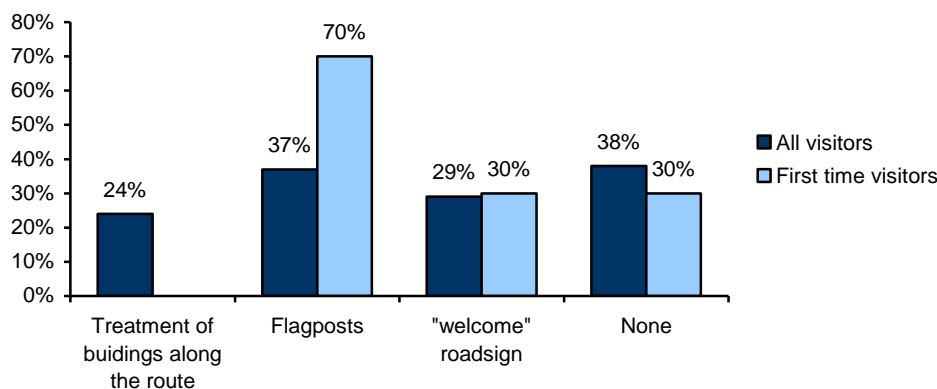
It should also be remembered that this sample was targeted across different modes, so does not fully reflect the modal split of travel. According to the general Liverpool visitor study, this is estimated as being:



Thus to some extent the sampling (section 1.2) has resulted in an *overrepresentation* of air travellers and *underrepresentation* of those reaching Liverpool by road. This does not imply an error in the data as this was intended, but should be born in mind when examining the results.

4.1.2. Branding on route

Road users



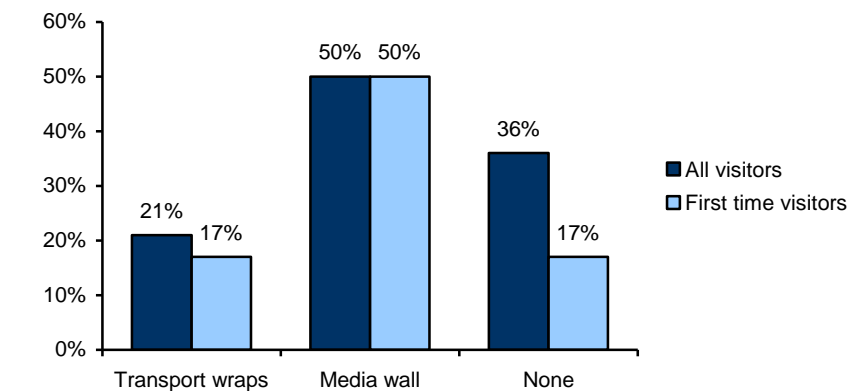
Just over a third of visitors arriving by road did not notice any aspects of the branding; importantly, although first time visitors did not notice the treatment of derelict buildings along the route they were very likely to have observed the flagpole dressing.

Again, this is particularly influenced by the route taken.

	M62 / Edge Lane	Runcorn Bridge / A561	M53 / Mersey Tunnels	A59 / Ormskirk	A580
Treatment of buildings along route	17%	25%	56%	-	-
Flag posts	33%	100%	22%	-	-
Welcome road signs	42%	25%	-	-	50%
None	33%	-	44%	100%	50%

** be cautious with the interpretation of this table due to the low bases it can represent.*

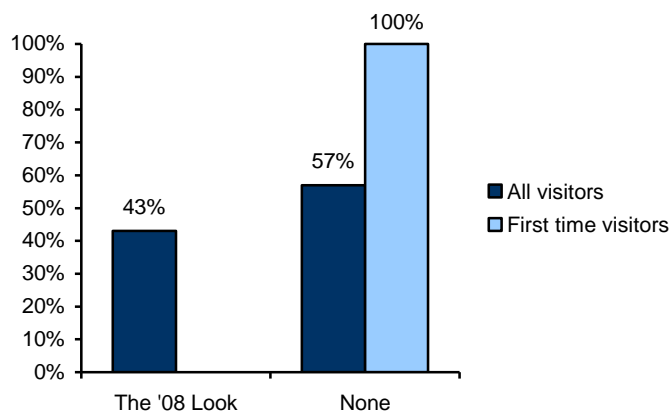
Rail users



	Lime Street (mainline)	Merseyrail
Transport wraps	17%	53%
Media Wall	58%	-
None	33%	47%

Over half of all visitors arriving at Lime Street (mainline) by rail were aware of the media wall; over half of all Merseyrail users were aware of the transport wraps.

Travellers through Liverpool John Lennon Airport



Notice that for travellers through Liverpool John Lennon Airport, some 43% of all visitors claimed to recall the '08 Look that had been applied as they passed through arrivals. This does not seem to have been something

which had a noticeable impact on first-time visitors; possibly explained by this group being more focussed on location of way out of the airport, etc.

“Other” branding recalls

Thus far, respondents had been prompted with specifics attributable to their mode; they were then asked what ‘other’ elements of branding they recalled:

Road users:

- 6% mentioned ‘banners’
- 5% mentioned hoardings around building works

Rail users:

- 14% mentioned banners and posters on the station/s (Lime street and elsewhere on the Merseyrail network)
- 7% mentioned seeing building dressing as they exited the station

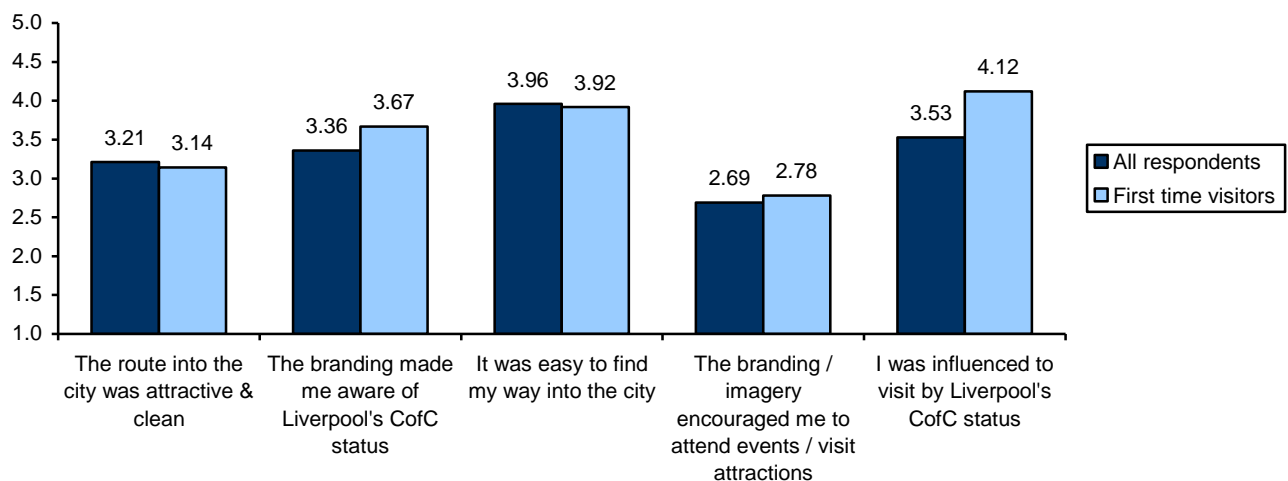
LJLA air travellers

- 14% recalled seeing “Welcome to Liverpool” signs with ‘08 branding.
- A similar number saw flags and banners on their journey from the airport into the city centre.

4.1.3. Assessment of branding

Trying to assess the success of these, visitors were presented with a range of statements and asked to indicate how much they agreed with them; as we saw in the Awareness chapter (section 3), using a scale from 1 to 5. Hence, any score *above* 3.0 indicates net agreement; any score *below* 3.0 indicates net disagreement.

Overview



	% agree	% disagree
The route into the city was attractive & clean	38%	14%
The branding made me aware of Liverpool's ECoC status	53%	15%
It was easy to find my way into the city	77%	2%
The branding / imagery encouraged me to attend events / visit attractions	20%	33%
I was influenced to visit by Liverpool's ECoC status	62%	15%

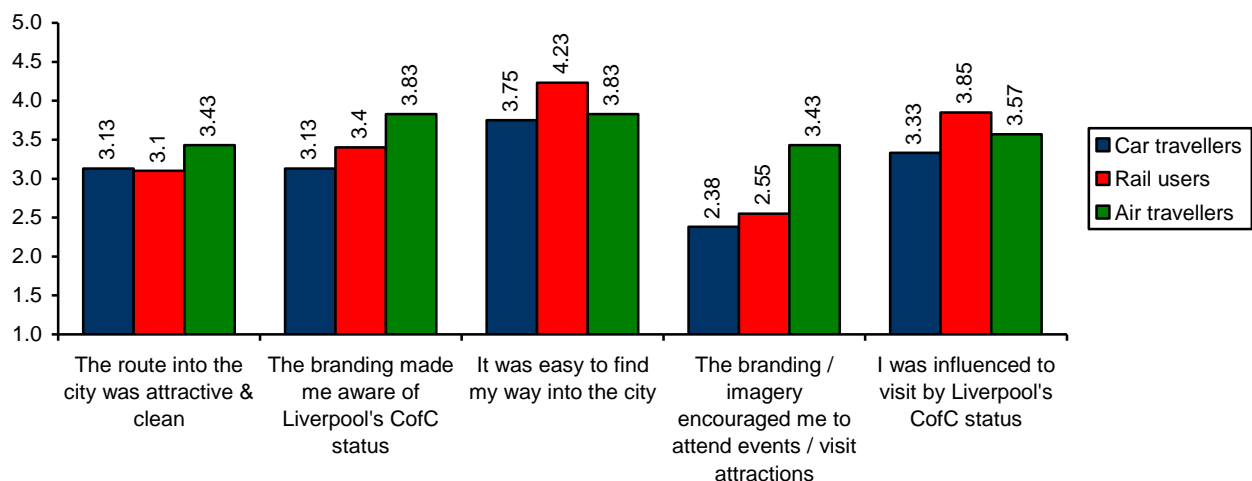
In general there was net agreement with the statements, with the exception of the statement: "The branding / imagery encouraged me to attend events / visit attractions"; here a third disagreed.

There was strong agreement from visitors that they found it easy to find their way into the city centre (77% agreeing), this being equal for both all visitors and first-time visitors.

First time visitors were significantly more likely to agree that:

- They were on a visit that was influenced by the Liverpool ECoC status (4.12 : 3.53)
- The branding made them aware of the city's the Liverpool ECoC status (3.67 : 3.36)

Branding impact by mode



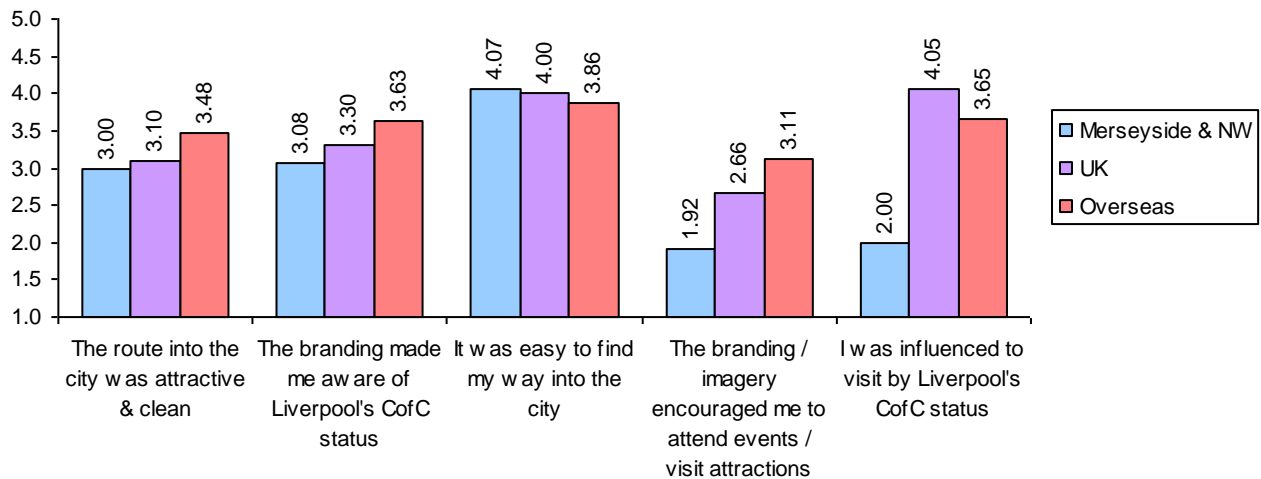
Road users showed the lowest levels of agreement with the statements.

Rail travellers were most likely to agree that it was easy to find their way around the city [from the station], and also reflecting the higher level of first-timers using rail to reach Liverpool, they were more likely to agree that they were influenced to visit by the Liverpool ECoC.

Air travellers were significantly more likely to agree that:

- The branding made them aware of the Liverpool ECoC status
- The route into the city was attractive and clean
- And they were the only group to show net agreement that the branding encouraged them to attend events or visit attractions.

Branding impact by visitor origin



Visitors from Merseyside and its hinterland were the least likely to indicate that the route into the city was clean and attractive – or that it made them aware of the Liverpool ECoC status. This is very much an indicator of familiarity (as is their high agreement that they found it easy to make their way into the city!) rather than a criticism of the branding

UK visitors were the group who were most likely to agree that they were influenced to visit by the the Liverpool ECoC status – and had a higher satisfaction with the branding on their route.

Overseas visitors were mostly flying in via LJLA, and thus many of the comments featured above tend to be applicable.

4.2. Visitation Diary

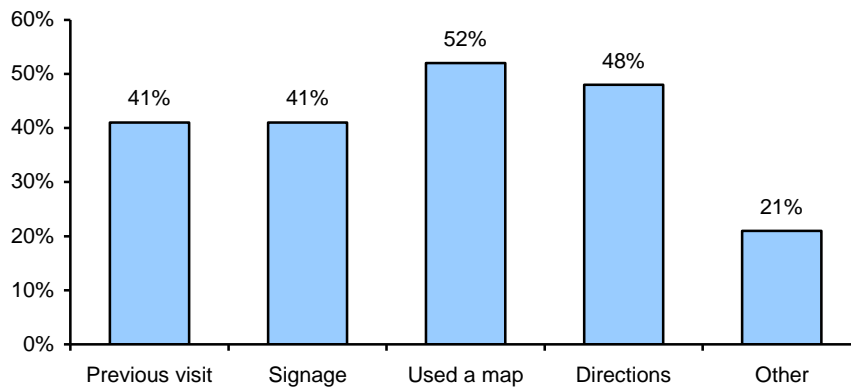
4.2.1. Reaching their hotel

Some 34% of those interviewed were visitors staying in the city centre. Location staying in included:

- Waterfront / South Docks (14% of all visitors)
- Lime Street / Mount Pleasant (10% of all visitors)
- City Centre / Liverpool One (6% of all visitors)
- North Docks (5% of all visitors)

Just 3% of all respondents who were staying found it difficult to make their way to their hotel; and 3% found it difficult to find their way from their hotel to locations in the city centre. In all cases these responses related to visitors staying at hotels in the Mount Pleasant area. Other than this, almost all respondents found it either “easy” or “very easy” to find their way between hotel and city centre.

As to “Why” these visitors found it easy to reach their accommodation, the following were the reasons given:



Thus a wide range of reasons were given for ease of navigation, although 41% of staying visitors mentioned “signage”.

N.B., in terms of “other” reasons, this relates either to use of a SatNav or taking a taxi from station / airport / city centre to the hotel.

The table below breaks these reasons down by the hotel’s location; please note this data should only be used as being indicative only, owing to the low base in some of the sub-samples.

	City Centre / Liverpool One	Lime Street / Mount Pleasant	North docks area	Waterfront / South docks
Previous visit	60%	38%	-	50%
Signage	-	63%	50%	42%
Used a map	-	88%	100%	33%
Directions	-	38%	50%	75%
Other	40%	25%	-	17%

Signage appeared more important for visitors staying in the Lime Street / Mount Pleasant areas and the South Docks; although note that in the latter visitors were most likely to have had to ask for directions.

4.2.2. Pattern of visits within the city centre

Visitors were then asked to record the specific nature of their visits around the city centre; this was broken down into broad zones as well as specific locations. This was in order to understand how visitors moved around the city centre, and to see whether this varied according to the visitor’s opinion and experience of the branding and signage.

Appendix 6.6 includes the visual mapping, highlighting the key patterns by visitor segments.

Overall visitation patterns

Area grouping	% visiting	Specific location visited	% visiting
Bold Street area	6.8%	Bold Street	6.8%
		FACT	0.5%
Business District	14.8%	Liverpool Town Hall	13.6%
		Castle Street	13.6%
		Tithebarn Street	1.1%
City Centre	59.1%	Liverpool One	46.6%
		Church Street	38.6%
		MetQuarter	21.6%
		Cavern Walks	23.9%
		St John's shopping centre	2.3%
		Clayton Square shopping centre	8.0%
		Bluecoat	11.4%
		Queens Square	5.7%
		The '08 Place	3.4%
Hope Street	25.0%	Anglican Cathedral	20.5%
		Metropolitan Cathedral	21.6%
		Philharmonic Hall	14.8%
		Playhouse	0.5%
		Everyman Theatre	4.5%
		Hope Street	13.6%
		Unity Theatre	-
Museum Quarter	48.9% (28.4% excl. Lime St)	World Museum Liverpool	8.0%
		Walker Art Gallery	25.0%
		Empire Theatre	1.1%
		National Conservation Centre	9.1%
		Liverpool Central Library	-
		Odeon Cinema	-
		St George's Hall	5.7%
		Lime Street Station	27.3%
Waterfront	85.2%	Albert Dock (Tate, Maritime Museum, Beatles Story, etc)	85.2%
		Mersey Ferry / Pier Head	20.5%
		Arena and Convention Centre	11.4%
		Liver Building/ "Three Graces"/ The Strand	27.3%
		Cruise Liner terminal / Princes Parade	5.7%
		Church of St Nicholas/ Liverpool Parish Church	10.2%

In overview:

- A majority of visitors to Liverpool visited the Waterfront area (85%)
- Over half visited the 'city centre' area (59%), covering the main shopping streets.
- Almost half visited the museum quarter (49% - although this falls to 28% by excluding Lime Street station)
- A quarter visited the Hope Street area
- Some 15% went to locations within the business district
- A relatively low proportion – 7% - indicated their visit included a trip to the Bold Street area.

These percentages are important, as areas with the highest mentions will have more reliable inferences and mentions of ratings, etc.

Note that the mapping suggests that for first time visitors the Waterfront area, Museum Quarter and Cathedrals were particularly strong.

Visitation by origin

	Merseyside & Northwest	UK	Overseas
Waterfront	87%	79%	94%
City centre	33%	74%	52%
Museum Quarter	40%	57%	42%
Museum Quarter (exc. Lime St.)	12%	38%	29%
Hope St	3%	38%	19%
Business district	3%	19%	16%
Bold St. area	5%	10%	6%

Although clearly the Waterfront area dominates, this is more so for overseas visitors. Another point to be observed is that 'visitation', in terms of the *range* of areas of the city covered in the visit, were highest for domestic visitors.

Visitation by mode

	Air travellers	Rail users	Car travellers	Other
Waterfront	86%	79%	88%	100%
City centre	57%	57%	69%	29%
Museum Quarter (exc. Lime St.)	29%	29%	25%	43%
Hope St	29%	14%	31%	29%
Business district	-	14%	25%	14%
Bold St. area	-	14%	6%	-
Most visited locations:				
	Albert Dock (86%)	Albert Dock (78%)	Albert Dock (88%)	
	Liverpool One (57%)	Church Street (43%)	Church Street (44%)	
	Met Quarter (57%)	Walker Art Gallery (29%) / Cavern Walks (29%)	Liverpool One (38%)	
Locations most likely to be visited 1 st and 2 nd :				
	Cavern Walks ³ (14%)	Pier Head (25%)	Albert Dock (46%)	
	Met Quarter (43%)	Albert Dock (36%)	Liverpool One (19%)	

Looking at how people arrived in the city centre, for those reaching Liverpool by air – predominantly 'tourists' – the waterfront area was key.

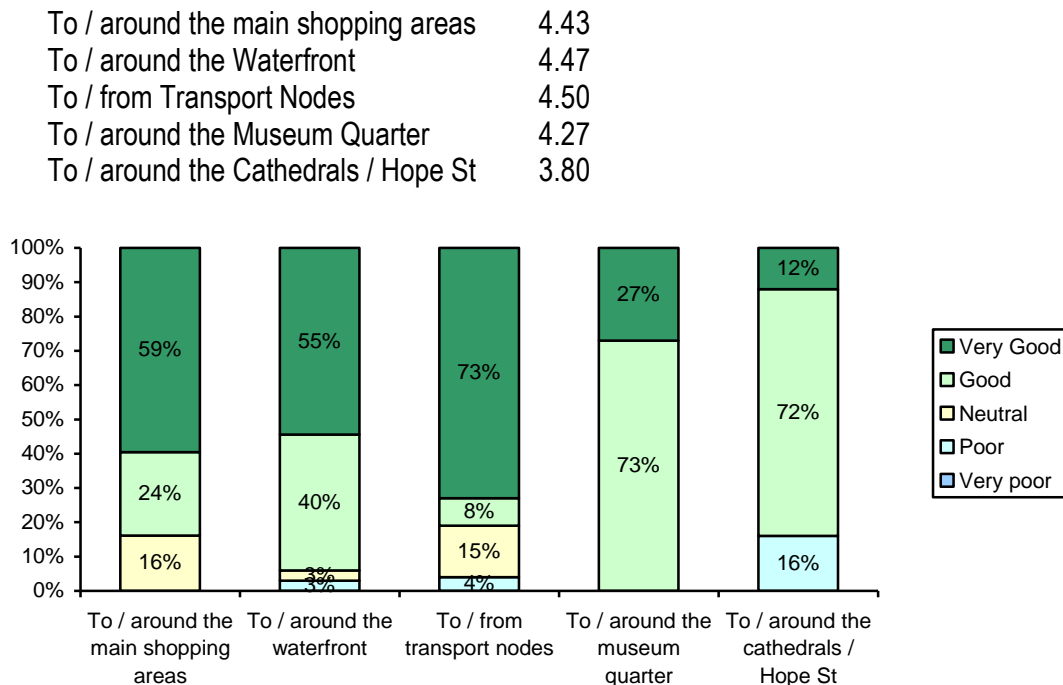
For those coming by car the Waterfront was also dominant, but had a much higher visitation to the central area and shops. As the mapping suggests (Appendix 6.6, maps 6 and 7) car users tended to be much more 'location specific'; only visiting locations close to where they had parked their car, with relatively few venturing on foot across the city from this 'base'.

³ Air travellers were much less likely to have a specific first point of visitation, and this reflects on the dispersed nature of their hotel accommodation.

Visitors arriving by rail were the group most likely to be making their way to the cultural quarter, although as can be seen there were a majority making their way across the city to the Albert Dock too, with distinct 'channels' evident especially for first-timers (Appendix 6.6, map 5).

4.2.3. Experience of visits within the city centre

Respondents were asked to indicate their satisfaction with the ease of finding their way around the city; again this was on a scale of 1 to 5, as in section 3.1: any score *above* 3.0 represents net agreement; any score *below* 3.0 represents net disagreement. Note that this question was *only* asked of those who had visited the areas concerned.



In general, and as we indicated in the "awareness" section of this report, satisfaction with the ease of finding way around the city was high, with net positive ratings. The only areas where any dissatisfaction appeared to emerge was in reaching the Cathedrals / Hope Street area and getting to transport nodes

It might be expected that this satisfaction might vary by visitor origin and familiarity:

Mean satisfaction scores	Merseyside & NW	UK	Overseas
To / around the main shopping areas	5.00	4.36	4.38
To / around the Waterfront	4.69	4.35	4.48
To / from Transport Nodes	5.00	4.24	5.00
To / around the Museum Quarter	5.00	4.40	4.00
To / around the Cathedrals / Hope St	5.00	4.06	3.33

Sure enough, there were very high levels of satisfaction – if not complete satisfaction – from those familiar with the city. Other than this, visitors from elsewhere in the UK showed less satisfaction with navigating to the Waterfront and transport nodes; whilst overseas visitors found it *less* easy to reach the Museum Quarter and signs of some issues in reaching the area around the Cathedrals and Hope Street.

Mean satisfaction scores	Air travellers	Rail users	Car travellers
To / around the main shopping areas	4.75	4.67	3.88
To / around the Waterfront	4.33	4.82	4.15
To / from Transport Nodes	5.00	5.00	4.17
To / around the Museum Quarter	4.00	4.25	4.00
To / around the Cathedrals / Hope St	3.67	4.00	4.00

Those reaching Liverpool by car appeared to be more demanding in terms of navigation; showing lower satisfaction levels when compared to those who arrived by rail or air travellers (mostly overseas visitors staying in city hotels). As examples of this:

- People arriving by car were often neutral on the ease of reaching the shopping areas.
- Whereas rail users were very satisfied with how easy it was to find their way to and from the stations, this does not seem to have been the case with car parks.
- Rail users – especially those arriving through Lime Street – were particularly likely to signify the ease with which they navigated to the museum quarter.
- Air travellers – again, reflecting on overseas visitors as recorded above – showed a lower satisfaction with finding their way to the cathedrals or Hope Street.

In all this, a key issue is in terms of the frequencies with which people visit Liverpool; the table below shows the mean scores for satisfaction with reaching the different areas of the city.

Mean satisfaction scores	Frequent visitor (> Once a year)	Infrequent visitor (Once a year or less often)	First time visitor
To / around the main shopping areas	4.28	4.36	3.82
To / around the Waterfront	4.37	4.23	4.03
To / from Transport Nodes	4.40	4.25	3.50
To / around the Museum Quarter	4.30	4.50	4.00
To / around the Cathedrals / Hope St	4.00	3.72	4.00

This suggests that first-time visitors had some issues in terms of moving around the main shopping areas and to the car parks.

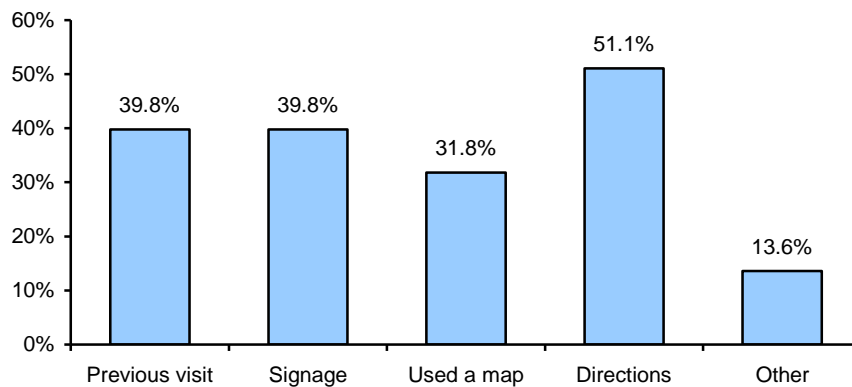
The mapping (appendix 6.6, map 9) highlights those locations within the city which tended to be associated with poor satisfaction towards signage. To calculate this, visitors expressing negative experiences with signage were extracted and their visitation patterns analysed. This appeared to reinforce the message of difficulties in reaching the Cathedrals and Hope Street area from the city centre; some negativity was experienced around the Waterfront area too, although it is probable that this was owing to the construction work (including the absence of a direct link between the Pier Head and Albert Dock locations).

Difficulties in navigating Liverpool

Visitors were not too forthcoming with reasons behind the difficulty, but there tended to be two reasons; visitors from elsewhere in the UK on their first believed that there were not enough signs around and those from elsewhere in the UK who had been before complained that the street layout was different from what they remembered. Again, it must be remembered that these comments relate to only a small proportion of visitors.

Factors behind ease of navigating Liverpool

In terms of reasons for it being easy to find the way around, the following were the main factors:



%s shown relate to all respondents, not just those who found it easy to navigate the city.

In contrast to finding the way to or from hotels, signage was much more of a factor, being mentioned by 40% of all visitors.

The dominant “other” reason was being with family or friends who were familiar with Liverpool.

Reasons behind ease of navigating city	Frequent visitor (> Once a year)	Frequent visitor (Once a year or less often)	First time visitor
Previous visit	62%	41%	-
Signage	44%	31%	44%
Used a map	21%	17%	64%
Directions	32%	72%	52%
Other	12%	7%	24%

Looking at this by the frequency of visit, some 44% of first-time visitors to the city found the signage helped them make their way (64% having used a map and 52% stopping and asking passers-by for directions).

5. Awareness and visitation patterns from international delegations

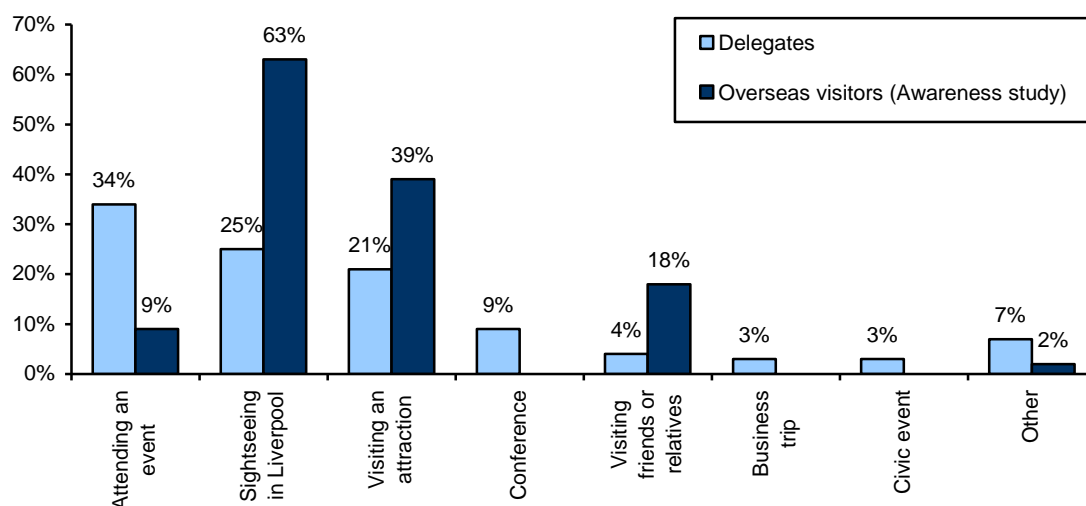
Finally, we view the results from the online survey conducted amongst international delegations that were visiting Liverpool in the lead up to, or during 2008 with a specific interest in observing and learning about the approach to hosting the European Capital of Culture programme or related city regeneration programmes. They are referred within the rest of the report as 'international delegates'.

It must be repeated that there are two factors affecting the views and opinions of this part of the study; on the one hand there was some passage of time between the visit of interviewed delegates and the email study which might degrade the recall; on the other hand this was a specialist group who might be expected to show higher interest and hence higher recall in the elements of The Look of the City programme, as they came to the city as dedicated observers. Where practical, we compare the results of this group with that of overseas visitors in general.

5.1. Visit Profile

5.1.1. Reason for visit

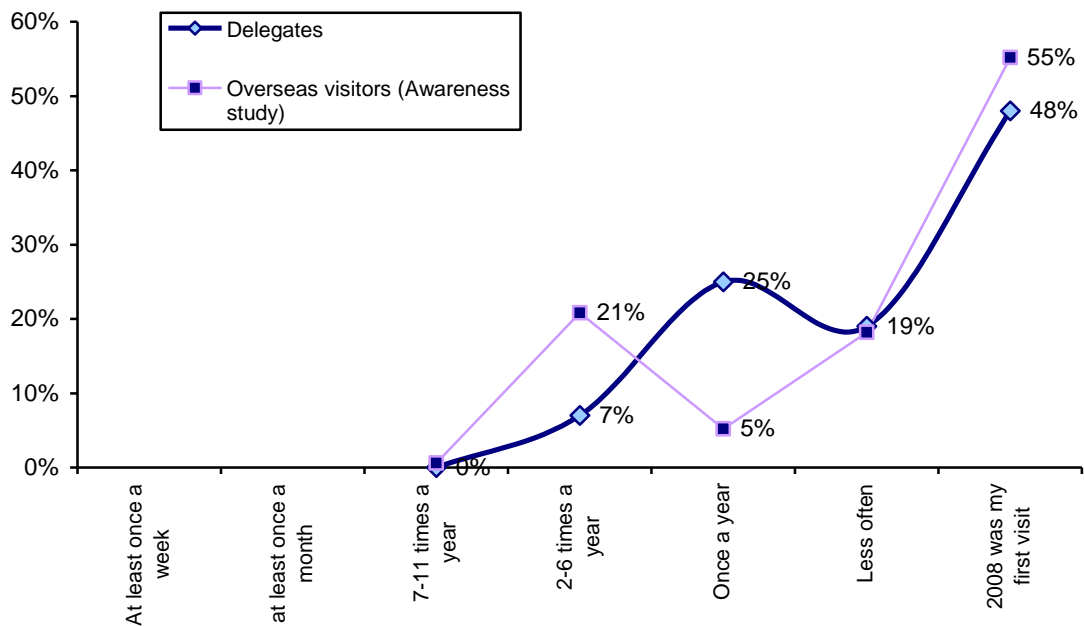
For international delegates, 'attending an event' dominated as the reason for their visit – this presumably reflects on the very nature of this group. So, it is perhaps important that a quarter indicated their main reason to be 'sightseeing' and 21% that they were visiting a specific attraction. Note that when comparing this data against overseas visitors in general, the latter group were able to provide this as a multiple response question.



NB: Amongst the "other" reasons given by delegates, 'invited group' dominates.

5.1.2. Familiarity with Liverpool

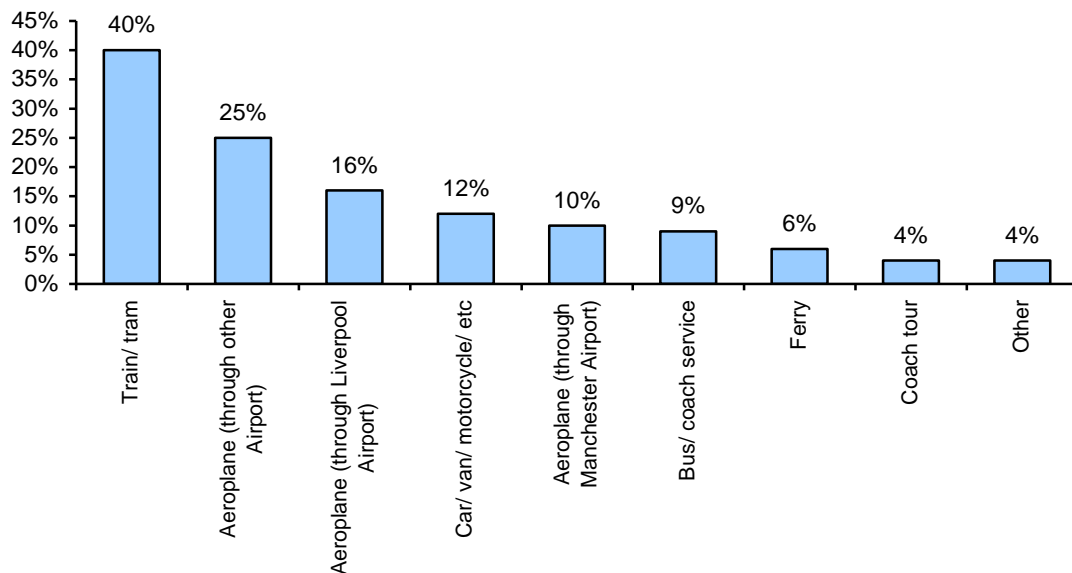
Approximately half of the international delegates were on their first visit to the city (48%) with a further 19% visiting less often than once a year; this tends to be reflective of the general overseas visitors, although some 25% of this group were in the habit of making annual trips to the city.



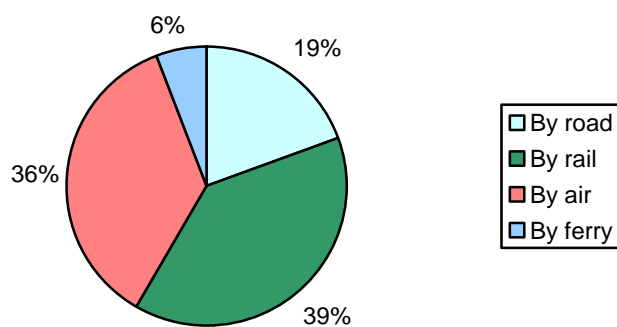
To try and draw a direct comparison between these two sets of data, the frequencies are converted to a mean score, which indicates a lower familiarity amongst delegates than a typical overseas visitor.

- Overseas visitors tended to make 1.0 visits to Liverpool per year.
- The delegates tended to make 0.6 visits to Liverpool per year.

5.1.3. Travel Data



Delegates were asked to indicate their mode of travel to reach the city – which may be an important component in evaluating their awareness of the Look of the City, as this will influence the components they experienced. Note that the above chart is a multiple response, showing all modes of travel used to reach Liverpool; this was pinned down to the more *main* reason below:

**Road:**

Runcorn Bridge / A 561 (9%)
Edge Lane / M62 (6%)
Don't know (4%)

Rail:

Liverpool Lime Street (34%)
Merseyrail (4%)

Air:

LJLA (16%)
Heathrow (14%)
Manchester (10%)
Gatwick (10%)
Stansted (3%)
Shows all airport traffic

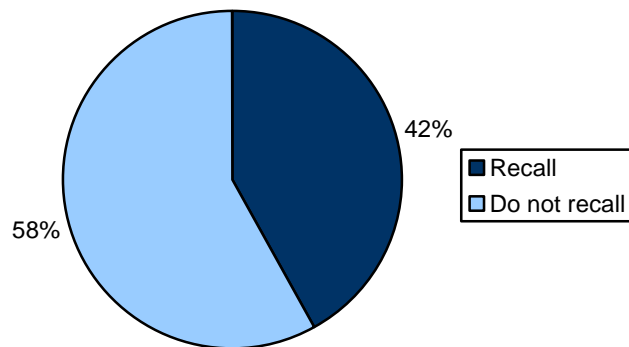
Ferry:

Irish Sea to Liverpool (4%)
Holyhead (1%)

5.2. Awareness of Branding

5.2.1. Identification of branding

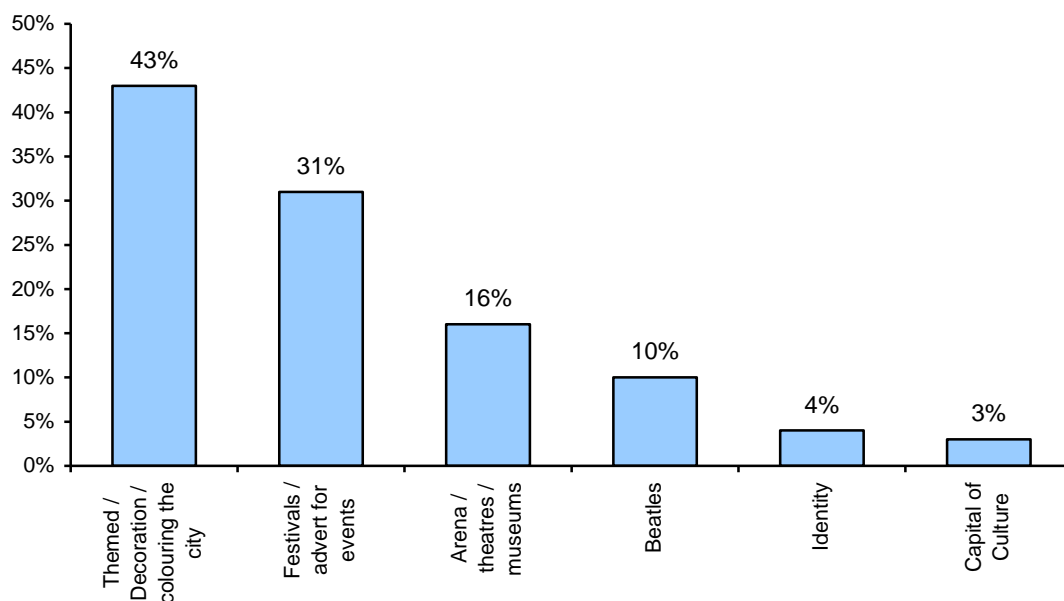
The delegates were shown the anonymised version of the material used in branding Liverpool for 2008 (see 3.2.1), and asked if they recalled seeing it.



This is a higher recall than amongst the on-street interviews conducted with overseas visitors to Liverpool in 2008 as part of the 'awareness' study (34%). Admittedly this is amongst a group linked to European Capital of Culture programmes in other countries, so a higher awareness would be expected; this would not be a 'like for like' comparison, but note also that some time had passed between the visit and the survey taking place, suggesting that the recall amongst delegates would otherwise be higher still.

5.2.2. Purpose of branding

Those recalling seeing the branding in Liverpool on their visit to the city were asked what it was for. The verbatim responses were coded up into the following categories:



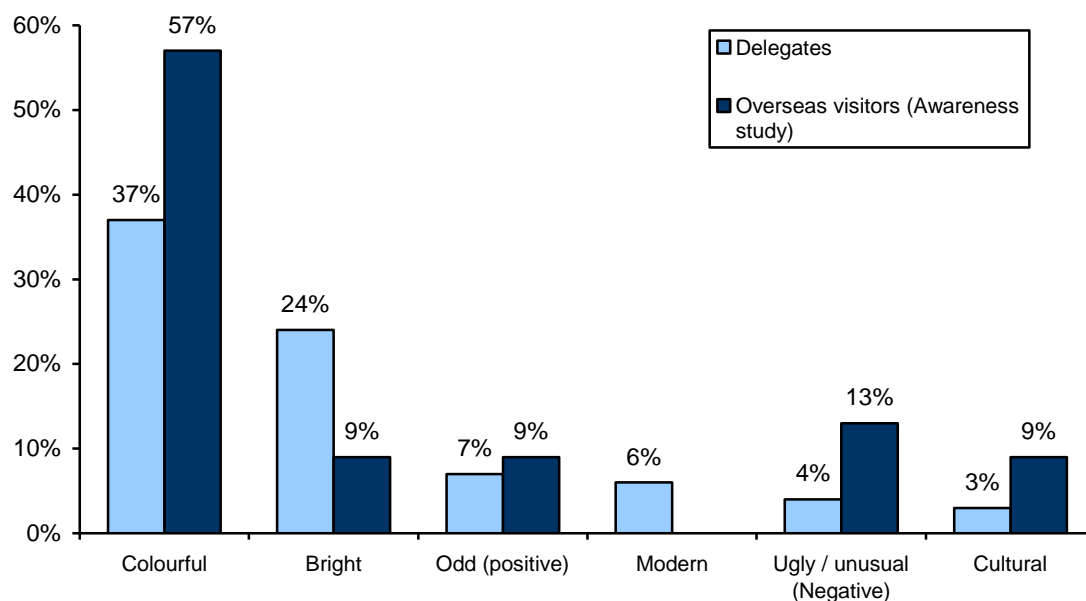
Obviously, this represents a small subsample, but there is some significant difference here from the views expressed by all overseas visitors, where some 18% stated that it was for "Capital of Culture" (against 3%,

above). A possible explanation could be that with the delegates' level of interest in the programme, they felt the 'Capital of Culture' purpose was inferred.

5.2.3. Opinions of branding

For all delegates it was then explained that the branding was for Liverpool '08, with a copy of the full branding being shown (3.2.3) and they were asked for what words they would use to describe the brand.

Again, the responses were captured as verbatims, and were coded up into the following categories (specifically to maintain comparability with other elements of this research programme, and in the chart below we display the "equivalent" coded responses from the overseas visitors in the "Awareness" study).



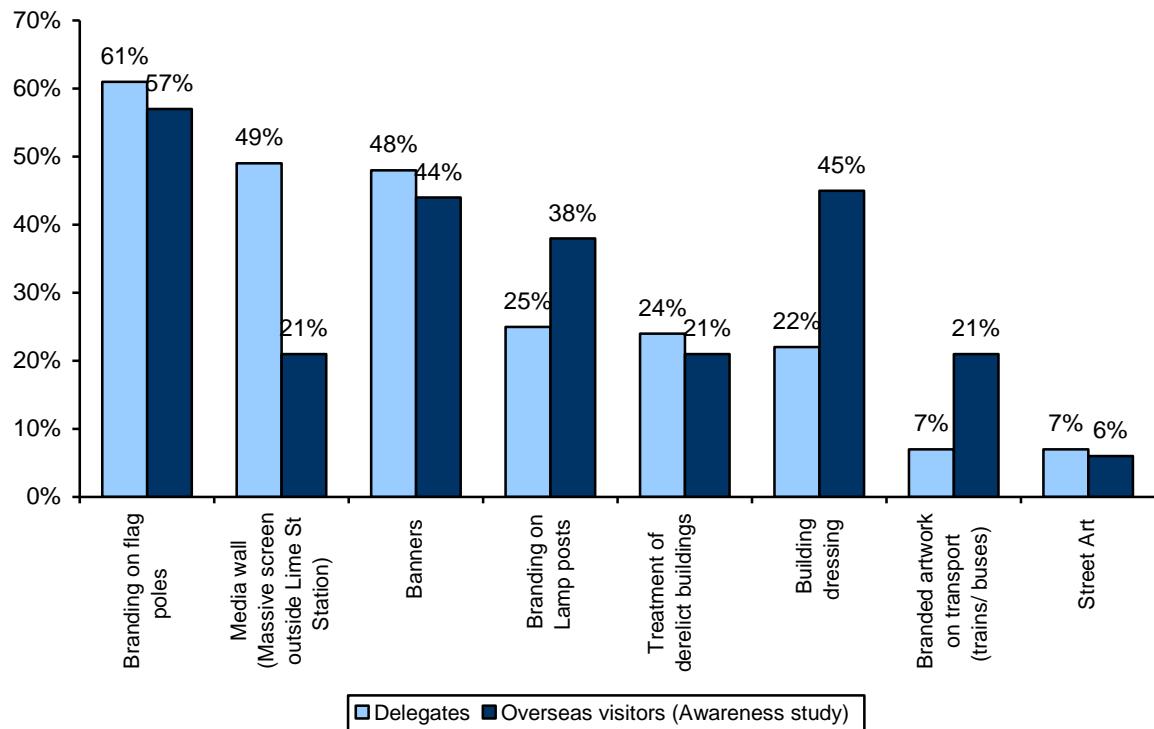
For both groups the generic impression of the branding appears to be that it is colourful and bright; although significant responses were received that describe it as odd or unusual – both in a negative and a positive light.

It may also be of interest that only a relatively few responses in each group regarded the branding with words connected to culture; also note that whilst some delegates felt the branding was modern, this was not a view explicitly expressed by visitors (though when prompted some 83% agreed with this).

5.3. Components of the city's 'look'

5.3.1. Awareness of components

Respondents were asked as to whether they were aware of the different components of the Look of the City. To facilitate this they were shown a series of randomly-rotating images (as displayed in section 3.3). Below we compare their levels of awareness with that of the 'average' overseas visitor.



Note: In terms of the 'street art', the only identification given here was that three respondents indicated the lambananas, and this tends to match the generic visitor experience.

Delegates shared the same high awareness of the branding on flag poles and street banner; however, they showed particularly lower levels of awareness regarding building dressing, with just 22% mentioning this. (It should also be pointed out that they had a lower awareness of the lamp post branding too.)

However, another significant difference between delegates and general overseas visitors is that the former were significantly more aware of the media wall (49% compared to 21%). This may of course be reflective on the levels of delegates who used rail to reach Liverpool.

5.3.2. Satisfaction with components

As well as presenting overall awareness, we also analyse satisfaction; in terms of;

- the mean satisfaction score
- the proportion who rated each component as "good"

This analysis is displayed below, and again, in the interests of having a comparison, we also present the views of overseas visitors in general from the awareness survey. Strong satisfaction levels are shown in **green**, relatively weak satisfaction levels are shown in **blue**.

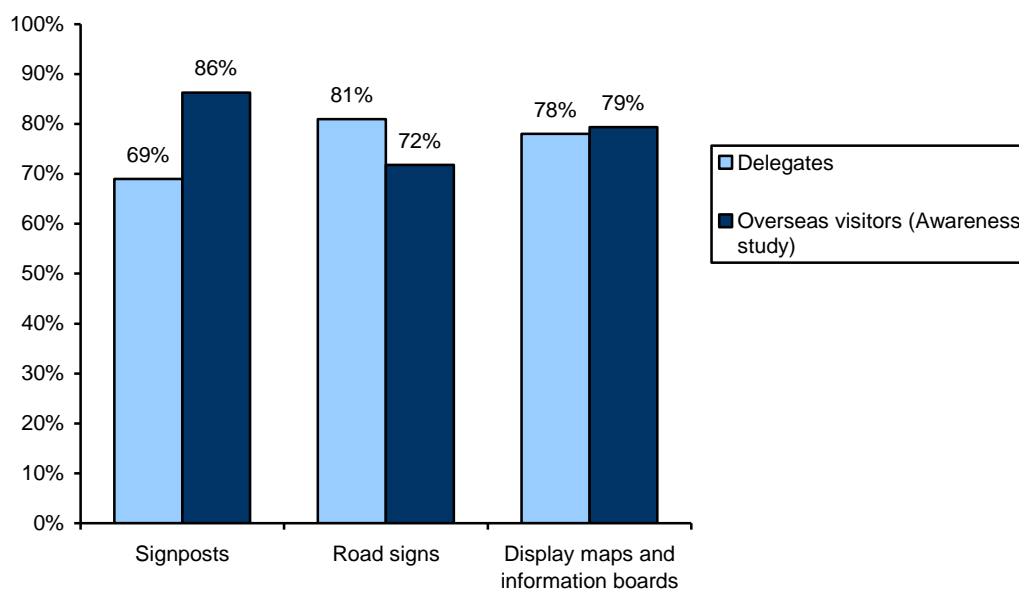
Satisfaction score –	Overseas visitors	International delegates	% rating as 'good' or 'very good'
Branding on flag poles	3.63	4.12	78%
Media wall	3.73	4.06	69%
Banners	3.71	3.97	69%
Branding on Lamp posts	3.63	3.59	53%
Treatment of derelict buildings	4.18	3.69	69%
Building dressing	4.09	4.00	67%
Branded artwork on transport	4.47	4.80	100%
Street Art	4.33	5.00	100%

The satisfaction expressed by delegates towards elements of the Look of the City tended to be higher than that expressed by overseas visitors in general; this is particularly the case where the responses are the most significant (flag poles, media wall, banners).

For delegates, the only component which might be considered as having a weaker satisfaction was of 'branding on lamp posts – although even here over half (53%) of delegates rated this as "good" or "very good".

5.3.3. Finding way around the city

Respondents were asked a number of statements regarding finding their way around the city; improvements to this being a key part of the programme. To provide a comparison here of sufficient robustness, we use the data from Destination Benchmarking 2008 (see also section 3.1.3).



Generally, overseas delegates – and indeed overseas visitor in general – had a high level of awareness of the components, which in part may be a product of the high level of first time visitors (section 5.1.2, above).

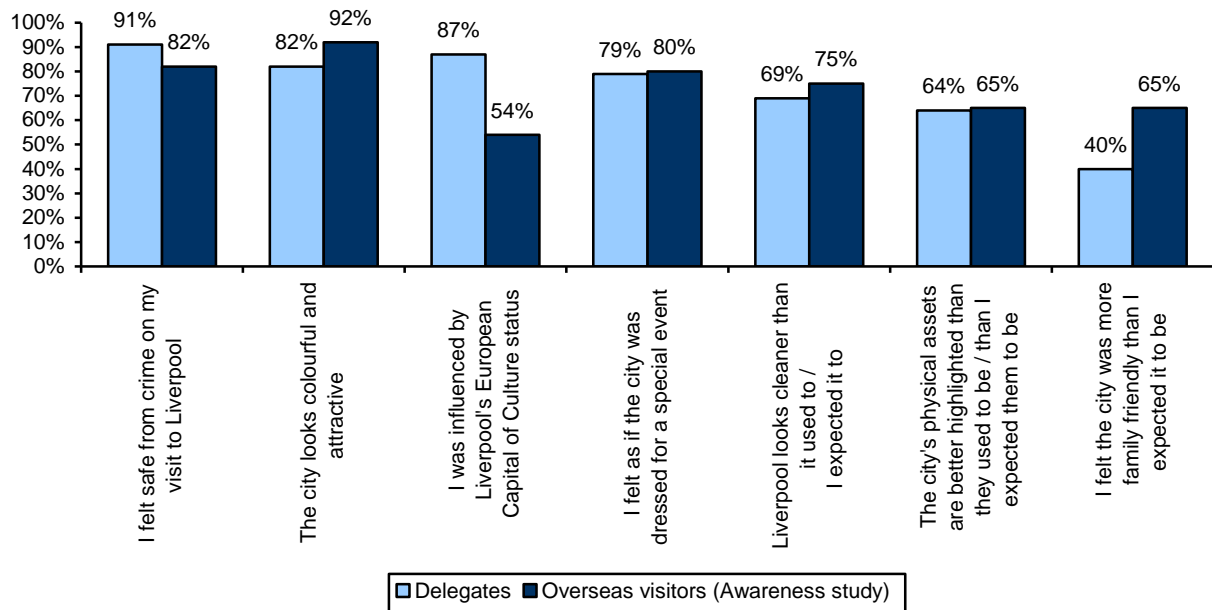
Delegates tended to have a lower awareness of the signposts and a higher awareness of road signs.

Satisfaction score	Overseas visitors	International delegates	Delegates % rating as 'good' or 'very good'
Signposts	3.77	3.93	67%
Road signs	3.85	3.85	63%
Display maps and information boards	3.57	3.44	50%

When we come to look at satisfaction, although at least half of all delegates recorded that each element of 'finding their way around' was good or very good, the satisfactions scores whilst positive tend to be weaker than in terms of the aspects of the branding; weakest both for delegates and visitors in general tended to be satisfaction with the display maps and information boards.

5.3.4. Agreement with statements on the Look of the City

Delegates were also presented with seven statements regarding Liverpool's 'look' in 2008 and asked how strongly they agreed with each; again, this was presented using the Likert scale, only in this case 1 is assumed to equal "Disagree strongly" and 5 is assumed to equal "Agree strongly".



Both delegates and overseas visitors showed comparably high levels of agreement (>75%) in terms of feeling safe from crime, the city looking colourful/attractive and that the city gave them a feeling of a place dressed for a special event. Perhaps understandably given their very nature, delegates were also highly likely to agree that they were influenced to visit by the city's ECoC status.

Delegates had a relatively low level of agreement in terms of how family friendly the city was; how rather than indicating *disagreement* this would rather reflect on those who did not feel the question was appropriate to them; as we see below, the mean score for this statement was still positive.

Agreement score –		
	Overseas visitors	International delegations
"Liverpool looks cleaner than it used to / I expected it to"	4.20	4.20
"I was influenced by Liverpool's European ECoC status"	3.20	4.57
"I felt the city was more family friendly than I expected it to be"	4.00	3.71
"The city's physical assets are better highlighted than they used to be / than I expected them to be"	3.90	4.39
"The city looks colourful and attractive"	4.20	4.40
"I felt safe from crime on my visit to Liverpool"	4.10	4.33
"I felt as if the city was dressed for a special event"	4.10	4.53

6. Appendices:

6.1. Questionnaires

6.1.1. Online Survey: International Delegations questionnaire

This survey is being conducted on behalf of Impacts 08, in order to understand perceptions of Liverpool amongst those who visited the city in 2008. All of your responses will be treated in the strictest confidence and used solely for research purposes.

Q1 Thinking about your visit to Liverpool in 2008, what were your reasons for visiting?

Please tick all that apply.

- | | |
|---|--|
| <ul style="list-style-type: none"> <input type="checkbox"/> Attending an event <input type="checkbox"/> Visiting an attraction <input type="checkbox"/> Special shopping trip <input type="checkbox"/> Visiting friends or relatives <input type="checkbox"/> Sightseeing in Liverpool <input type="checkbox"/> Business trip <input type="checkbox"/> Conference <input type="checkbox"/> Civic event <input type="checkbox"/> Studying <input type="checkbox"/> Other | <ul style="list-style-type: none"> <input type="checkbox"/> Ferry <input type="checkbox"/> Narrowboat/ yacht/ boat <input type="checkbox"/> Walked <input type="checkbox"/> Aeroplane (through Liverpool Airport) <input type="checkbox"/> Aeroplane (through Manchester Airport) <input type="checkbox"/> Aeroplane (through other Airport) <input type="checkbox"/> Other |
|---|--|

Q4 How did you travel into Liverpool itself?

- ☐ By road
- ☐ By rail
- ☐ By air
- ☐ By ferry

Q2 How often do you typically visit Liverpool?

- ☐ At least once a week
- ☐ At least once a month
- ☐ 7-11 times a year
- ☐ 2-6 times a year
- ☐ Once a year
- ☐ Less often
- ☐ 2008 was my first visit

Q3 How did you travel to Liverpool - by what type of transport?

Please tick all that apply.

- ☐ Car/ van/ motorcycle/ etc
- ☐ Bus/ coach service
- ☐ Coach tour
- ☐ Bicycle
- ☐ Train/ tram

a) Road - By which route?

- ☐ M62/ Edge Lane
- ☐ Runcorn bridge/ A561
- ☐ M53/ Mersey Tunnels
- ☐ A59/ Ormskirk
- ☐ A580
- ☐ Other

b) Rail - By which route?

- ☐ Liverpool Lime Street (main line)
- ☐ Merseyrail

c) Aeroplane - which airport?

- ☐ Liverpool John Lennon Airport
- ☐ Manchester Airport
- ☐ London Heathrow
- ☐ London Gatwick
- ☐ Other

d) Ferry - Which ferry?

- ☐ Mersey ferry
- ☐ Isle of Man ferry
- ☐ Irish sea ferry to Birkenhead
- ☐ Other

Q8a While visiting Liverpool, do you recall seeing any banners, such as those shown below?



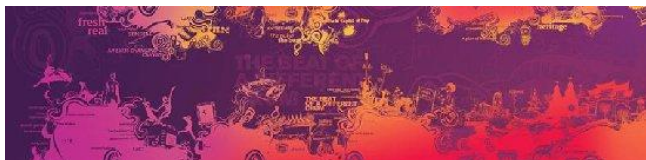
- ☐ Yes
- ☐ No

Q8b While visiting Liverpool, do you recall seeing any posters or banners covering buildings ('building dressing'), such as that shown below?



- ☐ Yes
- ☐ No

Q5 Have you seen branding like this before?



- ☐ Yes
- ☐ No

Q6 What do you think this branding is for?

Please write in your own description

Q7 This branding is for Liverpool '08. What words would you use to describe the branding?



Please write in your own description

Q8c While visiting Liverpool, do you recall seeing any flag poles, such as those shown below?



- ☐ Yes
- ☐ No

Q8d While visiting Liverpool, do you recall seeing any lamp posts with dressing, such as those shown below?



- ☐ Yes
- ☐ No



- ☐ Yes
- ☐ No

Q8h While visiting Liverpool, did you see any 'street art' that was part of the '08 branding?

If so, please write in below

Q8e While visiting Liverpool, do you recall seeing any '08 branded artwork on transport ('transport wraps'), for example, such as those shown on the train below?



- ☐ Yes
- ☐ No

Q8f While visiting Liverpool, do you recall seeing the media wall outside Lime Street station - as shown below?



- ☐ Yes
- ☐ No

Q8g While visiting Liverpool do you recall seeing derelict buildings dressed and treated - for example like those below?

Q9 How would you rate the following from your visit to Liverpool in 2008?

	Very good	Good	Neither	Poor	Very poor	Have not seen
Media wall	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Branding on Lamp posts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Treatment of derelict buildings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Branding on flag poles	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Branded artwork on transport (trains/ busses)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Building dressing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Banners	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Street Art	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q10 And how would you rate the ease of finding way around the city in terms of...

	Very good	Good	Neither	Poor	Very poor	Have not seen
Signposts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Road signs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Display maps and information boards	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q11 How much do you agree with the following statements?

	Strongly agree	Agree	Neither	Disagree	Strongly Disagree
"I was influenced by Liverpool's European Capital of Culture status"	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
"I felt safe from crime on my visit to Liverpool"	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
"Liverpool looks cleaner than it used to / I expected it to"	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
"The city looks colourful and attractive"	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
"I felt the city was more family friendly than I expected it to be"	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
"The city's physical assets are better highlighted than they used to be / than I expected them to be"	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
"I felt as if the city was dressed for a special event"	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q12 Have you visited any of the previous European Capitals of Culture? If so, which of the comments do you agree with?

Please tick all that apply

	Am from / live here	Visited before it was European Capital of Culture	Visited whilst it was European Capital of Culture	Visited after it was European Capital of Culture	Is an attractive location to visit	Is a major city for culture	Has great architectural assets	Has an improving public environment
Antwerp	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Avignon	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bergen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bruges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Brussels	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Copenhagen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cork	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dublin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Genoa	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Glasgow	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Graz	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Helsinki	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Krakow	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lille	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lisbon	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Luxembourg	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Madrid	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Patras	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Porto	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prague	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reykjavik	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rotterdam	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Salamanca	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Santiago do Compostella	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Stockholm	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Thessaloniki	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q13 Would you describe Liverpool as:

	Yes	No
A major city for culture?	<input type="radio"/>	<input type="radio"/>
Having great architectural assets?	<input type="radio"/>	<input type="radio"/>
An attractive location to visit?	<input type="radio"/>	<input type="radio"/>
Having an improved public environment?	<input type="radio"/>	<input type="radio"/>

6.1.2. Face-to-face visitor Survey: Awareness & Evaluation

Respondent Details

Name:

Address:

Home town:.....

Postcode:

Tel:

*If the respondent refuses, thank and close.
Re-use the questionnaire. Do not count
towards quota.*

Respondent Classification

Age Group

1. 16-24 ☐

2. 25-34 ☐

3. 35-44 ☐

4. 45-54 ☐

5. 55-64 ☐

6. 65+ ☐

Gender

1. Male ☐

2. Female ☐

Social Grade

1. A/B ☐

2. C1 ☐

3. C2 ☐

4. D/E ☐

Sampling Point

.....

I declare that I have recruited this respondent in strict accordance with ENWRS instructions. The respondent was not known to me prior to the interview. I have checked the questionnaire for accuracy and completeness.

Interviewers

name:.....

Signed:

Date:

Good morning/afternoon. My name is and today I am conducting a survey on behalf of the University of Liverpool. Can you spare a few minutes to help with this survey?

Yes
No

Go to Q1
Close

About the visit

Q1 What are your reasons for visiting Liverpool today?

(**SHOW CARD A.** Tick all that apply.)

1. Attending an event ☐
Which event?

.....

2. Visiting an attraction ☐
Which attraction/s? Specify

.....

.....

3. Special shopping trip ☐
Where in city? Specify

.....

4. Visiting friends or relatives ☐

5. Sightseeing in Liverpool (Specify) ☐

.....

.....

6. Business trip **CLOSE**

7. Studying **CLOSE**

8. Other: (Please write in below) ☐

.....

.....

Interviewer tick box if any mention is made
of Capital of Culture. ☐

If the respondent does not meet the criteria, thank and
close. Circle the next number in the box below and re-
use the questionnaire. Do not count towards quota.
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15

Q2. How often do you typically visit Liverpool?

- 1. At least once a week ☐
- 2. At least once a month ☐
- 3. 7-11 times a year ☐
- 4. 2-6 times a year ☐
- 5. Annually ☐
- 6. Less often ☐
- 7. This is my first visit ☐
- 8. Resident ☐

Q3 On a scale of 1 to 5, where 5 is 'Strongly agree' and 1 is 'Strongly disagree', how much would you agree with the following statements?

Liverpool looks cleaner than it used to (Do not ask 1 st -time visitors - those coded 7 above)	
I was influenced to visit today by Liverpool's Capital of Culture status	
It was easy to find my way around the city	
I am inclined to come to the city more often	
The city looks colourful and attractive	
I feel safe from crime on my visit to Liverpool	
The city's physical assets are better highlighted than they used to be	
I feel the city is more family friendly	
I feel as if the city has been dressed for a special events	

Q5 What words would you use to describe the branding? (Probe: anything else?)

.....

.....

.....

.....

Branding

(**SHOWCARD B** - of anonymised branding)

Q4a Have you seen branding like this before?

- 1.Yes ☐ Go to Q4b
2.No ☐ Go to Q5

Q4b What is the branding for? (Write in)

.....

.....

.....

Interviewer tick box if branding is correctly identified
as '08 or Capital of Culture. ☐

If incorrectly identified or not known, inform
respondent "This branding is for Liverpool '08."

(**SHOWCARD C** - of overall branding)

Q6 And on a scale of 1 to 5, where 5 is 'Strongly agree' and 1 is 'Strongly disagree', how much would you agree that this branding is...

Reflective of Liverpool's character
 Appropriate to a European Capital of Culture
 Attractive
 Modern
 Festive
 Suitable for use in the future

Elements of the city's "look"

(SHOWCARD D – visuals of elements of city's look)

Q7a Which of these types of object have you seen? Either on today's visit or on any visit?

Interviewer, tick all components respondent identifies.

1 Banners
 2 Building dressing
 3 Flag poles
 4 Lamp posts
 5 Transport wraps (trains / buses)
 6 Media Wall
 7 Treatment of derelict buildings

Q7b And have you seen any 'street art' that was part of the '08 branding? (Probe: as to what this was)

.....

Interviewer: For each of the components the respondent indicates above, ask the following.

Q8 And on a scale of 1 to 5, where 1 is 'very poor' and 5 is 'very good'. How would you rate the...

1 Banners
 2 Building dressing
 3 Flag poles
 4 Lamp posts
 5 Transport wraps (trains / buses)
 6 Media Wall
 7 Treatment of derelict buildings
 8 Street art

Q9 Overall in terms of these different elements, how much would you agree or disagree with the following statements? This is on a scale of 1 to 5, where 5 is 'Strongly agree' and 1 is 'Strongly disagree'.

It improved the city's appearance	
The designs & colours were attractive and appropriate	
It played an important part in making me feel Liverpool was a capital of culture	
It made the city appear clean, safe and attractive	
It highlighted the city's architectural assets	
It helped highlight the key pathways through the city	
It improved my understanding of what the city offered	
It made the city appear fun	

Q10 Do you have any comments you would like to make about the look of the city in 2008? (Interviewer probe)

.....

.....

.....

.....

Liverpool's image

Q11 Finally, I would like to ask some questions about how Liverpool compares to other cities.
(SHOWCARD E – list of comparator cities – tick all that apply)

a Which of these cities have you ever visited?

Belfast	
Birmingham	
Dublin	
Glasgow	
Leeds	
Liverpool	✓
Manchester	
Newcastle	
Nottingham	
Sheffield	

- b** Which of these cities would you describe as attractive locations to visit?

Belfast	
Birmingham	
Dublin	
Glasgow	
Leeds	
Liverpool	
Manchester	
Newcastle	
Nottingham	
Sheffield	

- c** Which would you describe as major centres for culture?

Belfast	
Birmingham	
Dublin	
Glasgow	
Leeds	
Liverpool	
Manchester	
Newcastle	
Nottingham	
Sheffield	

- d** Which of these cities would you describe as having a pleasant urban environment?

Belfast	
Birmingham	
Dublin	
Glasgow	
Leeds	
Liverpool	
Manchester	
Newcastle	
Nottingham	
Sheffield	

- e** Which of these cities would you describe as having great architectural assets?

Belfast	
Birmingham	
Dublin	
Glasgow	
Leeds	
Liverpool	
Manchester	
Newcastle	
Nottingham	
Sheffield	

- f** Which of these cities would you describe as having an improving public environment?

Belfast	
Birmingham	
Dublin	
Glasgow	
Leeds	
Liverpool	
Manchester	
Newcastle	
Nottingham	
Sheffield	

- Q12** In terms of being a 'green, clean and well dressed city', how would you rank these cities (where 1 is 1st and 10 is last)?

Belfast	
Birmingham	
Dublin	
Glasgow	
Leeds	
Liverpool	
Manchester	
Newcastle	
Nottingham	
Sheffield	

- Q13** Are there any other comments you would like to make about your experience of this visit to Liverpool?

.....

.....

.....

.....

Respondent details

- Q14** of these best describes your current status (**SHOWCARD F**)?

Full time work (30+ hrs/wk)	1
Part time work (<29 hrs/wk)	2
Self employed	3
Govt Training Scheme	4
Unemployed	5
Looking after home/family	6
Retired from paid work	7
Long term sick/disabled	8
Student	9
Other (please specify)	10

.....

- Q15** And what is the occupation of the head of your household?

.....

Obtain contact details for the purpose of back-checking; if respondent is not willing to provide, obtain home town / county.

Thank respondent and close

Ensure all details on front page are complete.

6.1.3. Face-to-face visitor survey: Pattern of visitation

England's Northwest Research Service
 Operated by The Mersey Partnership
 12 Princes Parade, Liverpool L3 1BG.
 Tel: 0151 237 3935 Fax: 0151 227 2325

Yes Go to Q1
 No Close

If the respondent refuses, thank and close. Re-use the questionnaire. Do not count towards quota.

Respondent Details

Name:

Address:

Home town:.....

Postcode:

Tel:

Respondent Classification

Age Group	Gender		
1. 16-24 <input type="checkbox"/>	1. Male	<input type="checkbox"/>	
2. 25-34 <input type="checkbox"/>	2. Female	<input type="checkbox"/>	
3. 35-44 <input type="checkbox"/>			
4. 45-54 <input type="checkbox"/>	Social Grade		
5. 55-64 <input type="checkbox"/>	1. A/B	<input type="checkbox"/>	
6. 65+ <input type="checkbox"/>	2. C1	<input type="checkbox"/>	<input type="checkbox"/>
	3. C2	<input type="checkbox"/>	
	4. D/E	<input type="checkbox"/>	<input type="checkbox"/>

Sampling Point

.....

I declare that I have recruited this respondent in strict accordance with ENWRS instructions. The respondent was not known to me prior to the interview. I have checked the questionnaire for accuracy and completeness.

Interviewers name:.....

Signed:

Date:

Good morning/afternoon. My name is and today I am conducting a survey on behalf of the University of Liverpool. Can you spare a few minutes to help with this survey?

About the visit

Q1 What are your reasons for visiting Liverpool today?*(SHOW CARD A. Tick all that apply.)*

1. Attending an event ☐
Which event?

.....

2. Visiting an attraction ☐
3. Special shopping trip ☐
4. Visiting friends or relatives ☐
5. Sightseeing in Liverpool (Specify) ☐
6. Business trip CLOSE
7. Studying CLOSE
8. Other: (Please write in below) ☐

.....

.....

Interviewer tick box if any mention is made of
Capital of Culture. ☐

If the respondent does not meet the criteria, thank and close.
Circle the next number in the box below and re-use the
questionnaire. Do not count towards quota.
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15

Q2a And is this a day visit or a staying visit?

1. Day visit ☐ Go to Q3
2. Staying visit ☐ Go to Q2b

Q2b How many nights are you staying for?

Q3. How did you travel to Liverpool on this visit – by what type of transport?

1. Car/van/motorcycle/etc ☐
2. Bus/coach service ☐
3. Coach tour ☐
4. Bicycle ☐
5. Train/tram ☐
6. Ferry ☐
7. Narrowboat/yacht/boat ☐
8. Walked ☐
9. Aeroplane (through LJLA) ☐
10. Other (please specify) ☐

.....

Q4a Which route did you take into the city?
(SHOWCARD B – map of key routes for road users)

Road	
M62 / Edge Lane	
Runcorn Bridge / A561	
M53 / Mersey Tunnels	
A59 / Ormskirk	
A580	
Other	
Rail	
Lime Street (main line)	
Merseyrail	
Airport	
Liverpool John Lennon Airport	
Other	
Ferry	
Mersey ferry	
Isle of Man	
Irish ferry	

Q4b And which of the following did you notice?
(SHOWCARD C – visuals of key gateway branding elements)

Rail	
1 Transport wraps - trains	
2 Media Wall outside Lime St	
Road	
3 Treatment of buildings along route	
4 Flagposts	
5 Welcome roadsign	
(Probe: where was this?)	
.....	
LJLA	
'08 Look	

Q4c Did you notice any other Capital of Culture branding on your journey into the city? *(Probe for what and where)*

.....
.....

Q4d On a scale of 1 to 5, where 5 is 'Strongly agree' and 1 is 'Strongly disagree', how much would you agree with the following statements.

The route into the city was attractive and clean	
The branding / imagery made me aware of Liverpool's Capital of Culture status	
It was easy to find my way into the city	

The branding/imagery encouraged me
to attend events and/or visit attractions
I was influenced to visit the city today
by Liverpool's Capital of Culture status

Q5. How often do you typically visit Liverpool?

1. At least once a week ☐
2. At least once a month ☐
3. 2-6 times a year ☐
4. 7-11 times a year ☐
5. Annually ☐
6. Less often ☐
7. This is my first visit ☐
8. Resident ☐

Visitation Diary

[ASK Q6a-Q6e OF STAYING VISITORS ONLY]

Q6a Are you staying in the City Centre?

Yes Go to Q6b
No Go to Q7a

Q6b Where are you staying? (Establishment name or location)

.....

Q6c On the following scale (Show Card D)...

How easy did you find it to locate
this establishment?

How easy was it to find your way
from this establishment to other
places in the city centre?

**Q6d [Ask if either of the above is rated as 1 or 2]
Why did you not find it easy?**

.....

.....

**Q6e [Ask if either of the above is rated as 4 or 5]
Why did you find it easy? Showcard E**

1. Previous visit / knowledge ☐
2. Signage ☐
3. Used a map in a visitor guide ☐
4. Directions from people ☐
5. Other ☐

.....

[NOW ASK ALL]

(SHOW MAP– visual map of city centre)

Interviewer note; for the next question we need to understand where the respondent visited and the order in which they did it. Ensure that you probe to get the full pattern of the visit. If easier you can just talk through the order in which people visited places and ignore Q7a.

Q7a Can you tell me where you went in the city as part of this visit today? (tick responses)**Q7b And in what order did you go to these places? (enter number as order of activity – i.e., 1 = 1st, 2 = 2nd, etc.)**

Location	7a	7b	Area
Bold Street			Bold Street area
FACT			Bold Street area
Liverpool Town Hall			Business District
Castle Street			Business District
Tithebarn Street			Business District
Liverpool One			City Centre
Church Street			City Centre
MetQuarter			City Centre
Cavern Walks			City Centre
St John's shopping centre			City Centre
Clayton Square shopping centre			City Centre
Bluecoat			City Centre
Queens Square			City Centre
The '08 Place			City Centre
Anglican Cathedral			Hope Street
Metropolitan Cathedral			Hope Street
Philharmonic Hall			Hope Street
Playhouse			Hope Street
Everyman Theatre			Hope Street
Hope Street			Hope Street
Unity Theatre			Hope Street
World Museum Liverpool			Museum Quarter
Walker Art Gallery			Museum Quarter
Empire Theatre			Museum Quarter
National Conservation Centre			Museum Quarter
Liverpool Central Library			Museum Quarter
Odeon Cinema			Museum Quarter
St George's Hall			Museum Quarter
Lime Street Station			Museum Quarter
Albert Dock (Tate, Maritime Museum, Beatles Story, etc)			Waterfront
Mersey Ferry / Pier Head			Waterfront
Arena and Convention Centre			Waterfront
Liver Building/ "Three Graces"/ The Strand			Waterfront
Cruise Liner terminal / Princes Parade			Waterfront
Church of St Nicholas/ Liverpool Parish Church			Waterfront
Norton St Coach Station			Other
Pembroke Place			Other
Other 1 (specify).....			
Other 2 (specify)			
Other 3 (specify)			

Q8 Now, on a scale of 1 to 5, where 1 is 'very poor' and 5 is 'very good', how would you rate your overall satisfaction with...

- | | |
|--------------------------------|----------------------|
| a) road signs | <input type="text"/> |
| b) pedestrian signs | <input type="text"/> |
| c) display maps & info. boards | <input type="text"/> |

Q9 And how easy did you find it to find your way to the following areas on this scale (Showcard D again...

[Interviewer read out list of areas: note only to ask of areas respondent indicated they had visited at Q7.]

- | | |
|--|----------------------|
| a) to / around the main shopping area / city centre | <input type="text"/> |
| b) to / around the waterfront | <input type="text"/> |
| c) to / from the car parks / rail stations / bus station | <input type="text"/> |
| d) to / around the museum quarter | <input type="text"/> |
| e) to / around the Cathedrals / Hope St. area | <input type="text"/> |

Q10a *[Ask if any question at Q9 is rated as 1 or 2]*
Why did you not find it easy?

.....

.....

.....

.....

Q10b *[Ask if any question at Q9 is rated as 4 or 5]*
Why did you find it easy? Showcard E

- | | |
|----------------------------------|--------------------------|
| 1. Previous visit / knowledge | <input type="checkbox"/> |
| 2. Signage | <input type="checkbox"/> |
| 3. Used a map in a visitor guide | <input type="checkbox"/> |
| 4. Directions from people | <input type="checkbox"/> |
| 5. Other | <input type="checkbox"/> |

.....

.....

Q11 Are there any other comments you would like to make about your experience of this visit to Liverpool?

.....

.....

.....

.....

Respondent details

Q12 Which of these best describes your current status (*SHOWCARD F*)?

Full time work (30+ hrs/wk)	1
Part time work (<29 hrs/wk)	2
Self employed	3
Govt Training Scheme	4
Unemployed	5
Looking after home/family	6
Retired from paid work	7
Long term sick/disabled	8
Student	9
Other (<i>please specify</i>)	10

.....

Q13 And what is the occupation of the head of your household?

.....

Obtain contact details for the purpose of back-checking; if respondent is not willing to provide, obtain home town / county.

Thank respondent and close

Ensure all details on front page are complete.

6.2. Guide to Statistical Confidence Levels

There are two tables shown. The first gives the range around a particular percentage result within which one can be confident that the true result across the whole population lies; the second shows the minimum difference you would need between two results to be confident that there was really a difference.

These tables are based on the following assumptions:

The samples have been randomly drawn (in actuality this is never true in survey research, because there is always an element of refusal to cooperate - but, for practical purposes we have to assume that it is true).

The degree of confidence we will work with is 95%. This means that there is still a 5% chance that the result is outside of the range by chance. There is no absolute reason why 95% should be used - but it has become the convention in balancing degree of confidence against cost of data collection.

Table 1. Confidence in a single percentage result.

The +/- figures show the variation around the result (left hand column) that applies for each chosen sample size.

Thus a survey result of 40% from a sample of 500 would mean that we were 95% confident that the true result across the whole population lies between 35.7% and 44.3%.

% result	Sample Size				
	100	200	500	1,000	5,000
50%	+/- 9.8%	+/- 6.9%	+/- 4.4%	+/- 3.1%	+/- 1.4%
40% / 60%	+/- 9.6%	+/- 6.8%	+/- 4.3%	+/- 3.0%	+/- 1.4%
30% / 70%	+/- 9.0%	+/- 6.4%	+/- 4.0%	+/- 2.8%	+/- 1.3%
20% / 80%	+/- 7.8%	+/- 5.5%	+/- 3.5%	+/- 2.5%	+/- 1.1%
10% / 90%	+/- 5.9%	+/- 4.2%	+/- 2.6%	+/- 1.9%	+/- 0.8%
5% / 95%	+/- 4.3%	+/- 3.0%	+/- 1.9%	+/- 1.4%	+/- 0.6%

Table 2. Confidence in a difference between two percentage results.

The +/- figures show the difference from the first result (left hand column) that the second result needs to display.

Thus if the first survey result was 40% from a sample of 500, the second result would have to be either over 46.1% or under 33.9% for us to be 95% confident that there was a true difference in the population at large.

% result ⁴	Sample Size				
	100	200	500	1,000	5,000
50%	+/-13.9%	+/- 9.8%	+/- 6.2%	+/- 4.4%	+/- 2.0%
40% / 60%	+/-13.6%	+/- 9.6%	+/- 6.1%	+/- 4.3%	+/- 1.9%
30% / 70%	+/-12.7%	+/- 9.0%	+/- 5.7%	+/- 4.0%	+/- 1.8%
20% / 80%	+/-11.1%	+/- 7.8%	+/- 5.0%	+/- 3.5%	+/- 1.6%
10% / 90%	+/- 8.3%	+/- 5.9%	+/- 3.7%	+/- 2.6%	+/- 1.1%
5% / 95%	+/- 6.0%	+/- 4.3%	+/- 2.7%	+/- 1.9%	+/- 0.9%

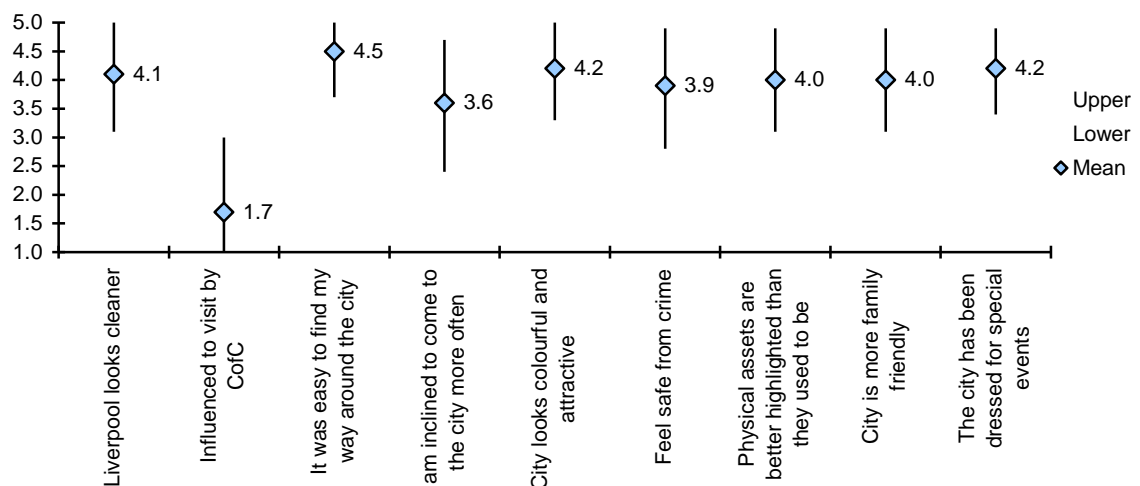
⁴ (Footnote to this table. These are approximations - for guidance only. The precise difference required for the second percentage will vary with whether it is below or above the first percentage)

6.3. Visitors and residents overall impression of Liverpool

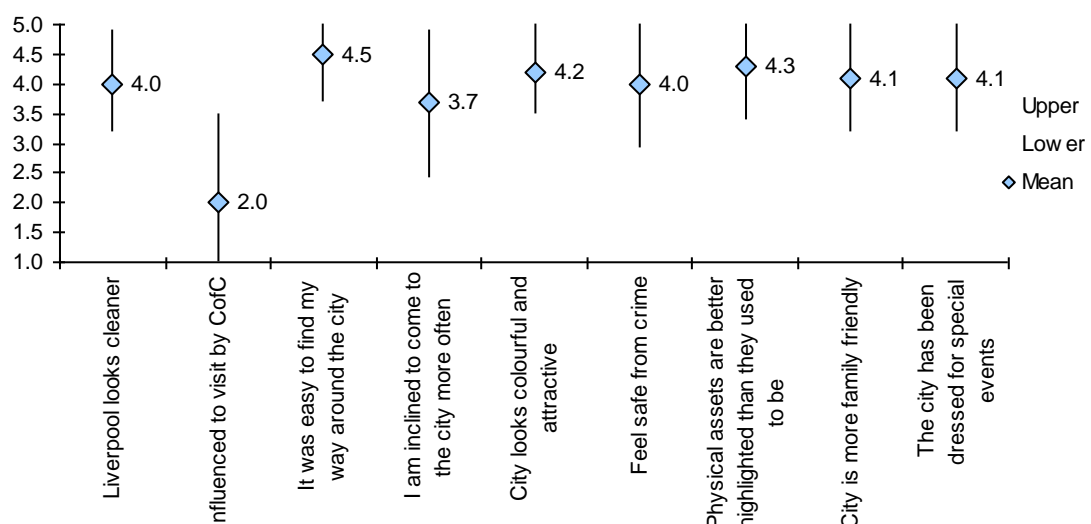
Visitors were presented with a range of statements and asked to indicate how much they agreed with them, on a scale from 1 to 5 (where 1 was disagree strongly and 5 was agree strongly – sometimes referred to as the Likert scale). The charts below present these as mean scores; any score *above* 3.0 indicates net agreement; any score *below* 3.0 indicates net disagreement. Also note that we present the *upper* and *lower* levels of opinion which we expect would show the *range* of opinions when applied to the universe.

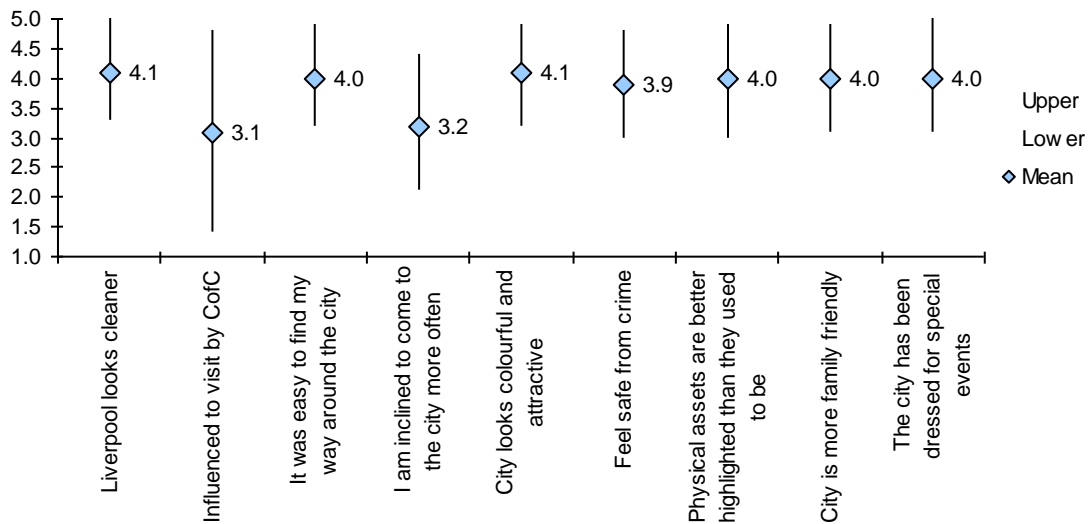
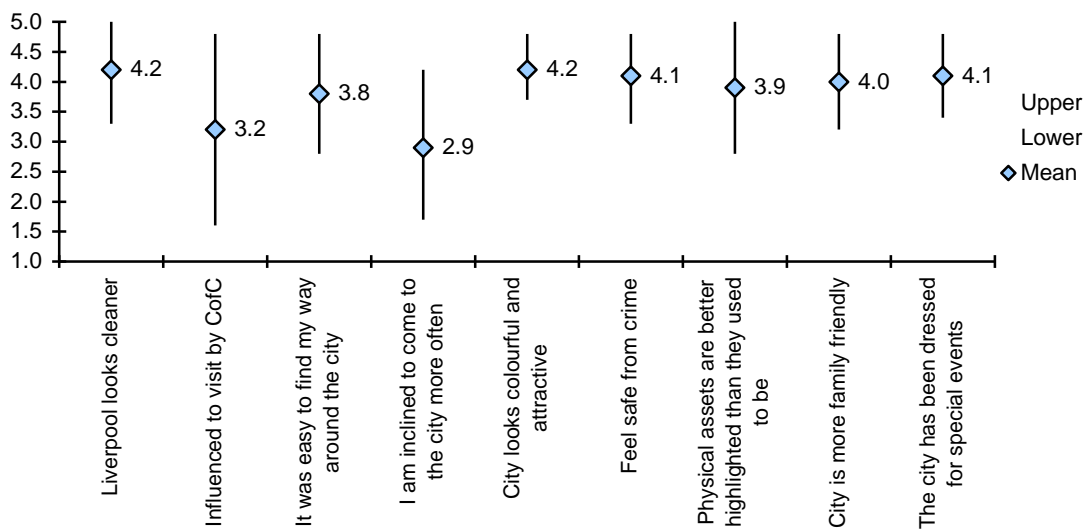
Range of agreement with statements by origin of respondent

Liverpool Residents



Merseyside Residents

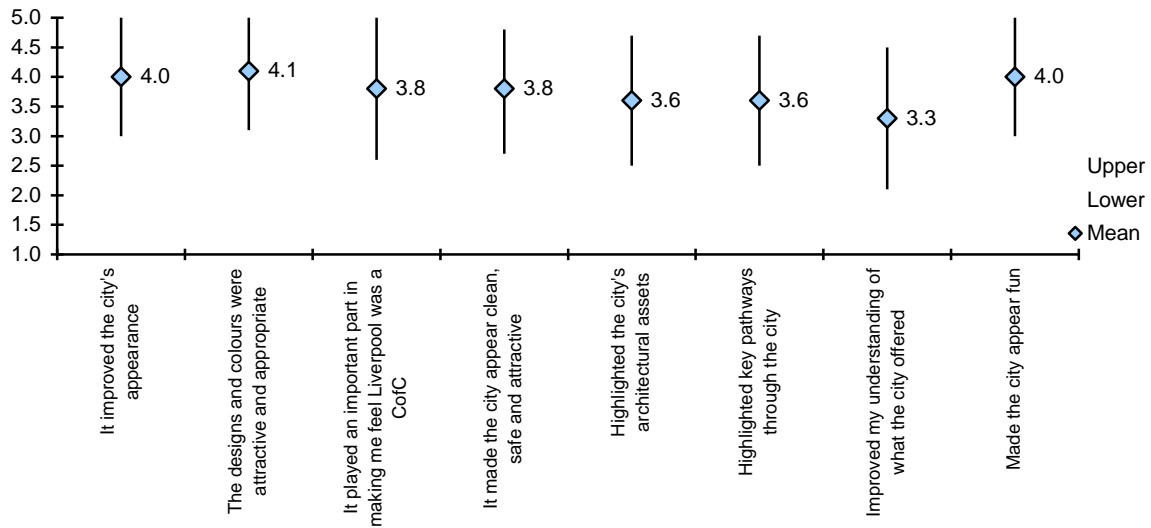


UK Visitors*Overseas Visitors***6.4. Opinions regarding the elements of the Look of the City programme**

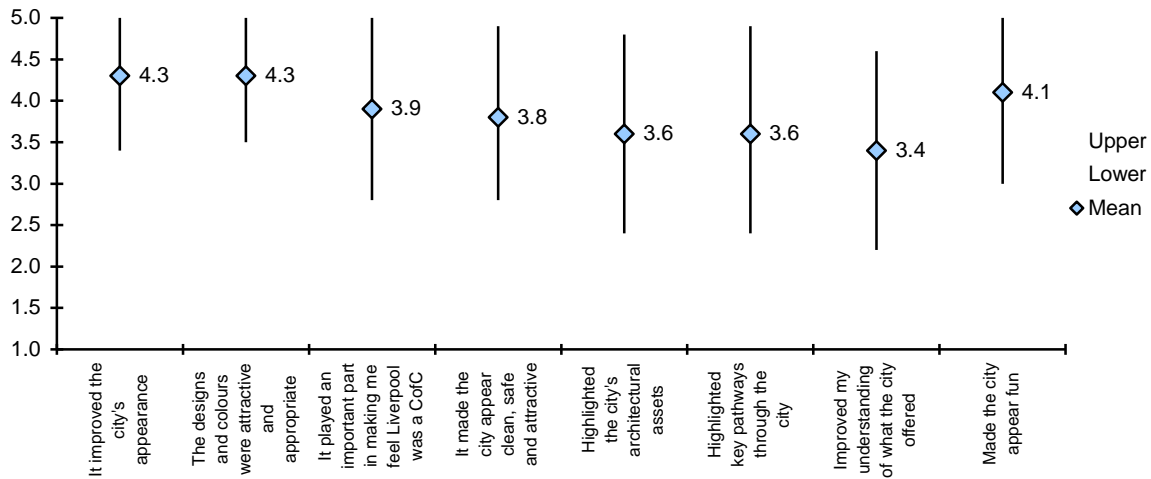
Trying to assess the success of these elements in relation to the objectives of the Look of the City programme, visitors were presented with a range of statements and asked to indicate how much they agreed with them using a scale from 1 to 5. We present the *upper* and *lower* levels of opinion which we expect would show the *range* of opinions when applied to the full survey universe.

Range of agreement with statements by origin of respondent

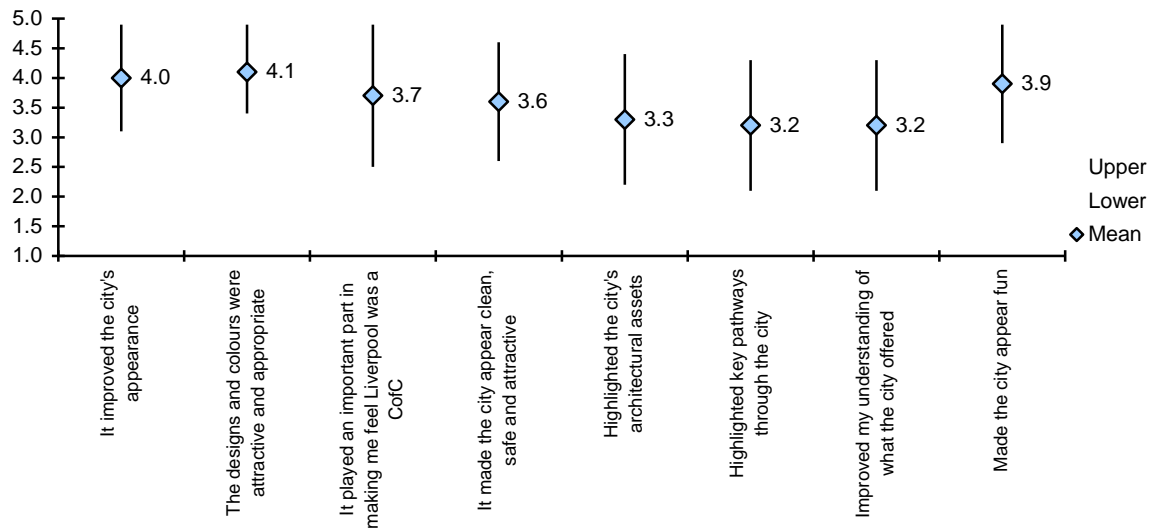
Liverpool Residents



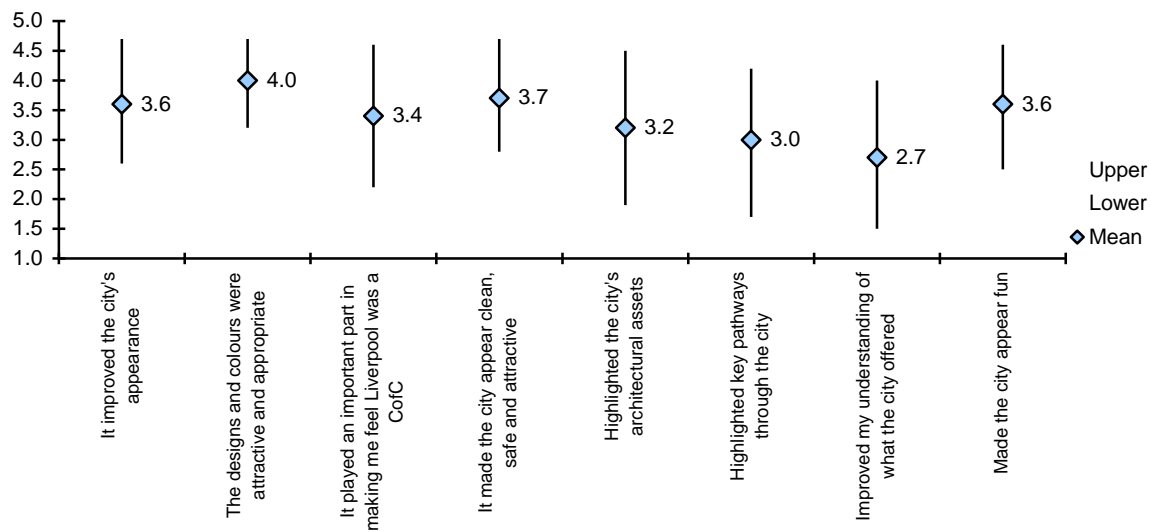
Merseyside Residents



UK Visitors

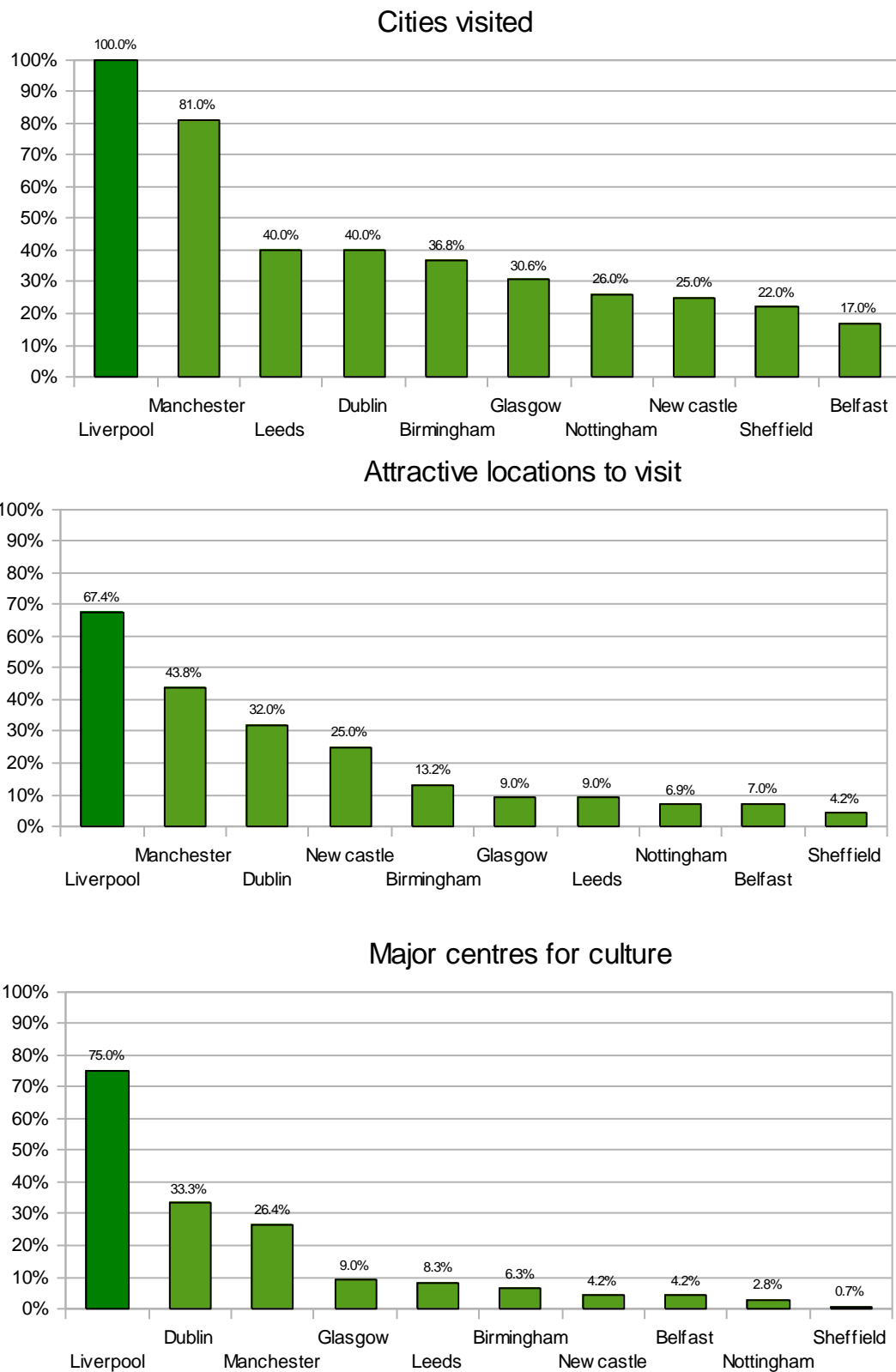


Overseas Visitors

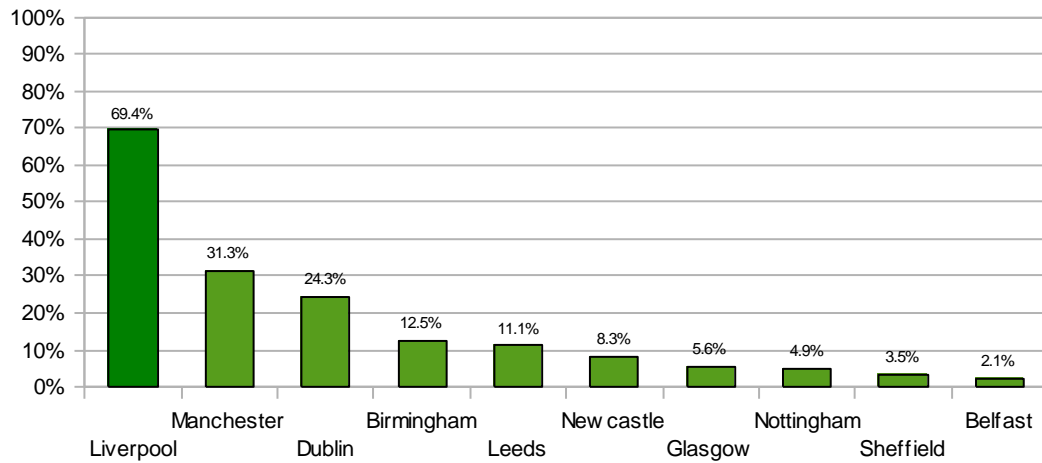


6.5. How Liverpool is positioned in comparison with each of nine comparator cities, according to respondents' origin

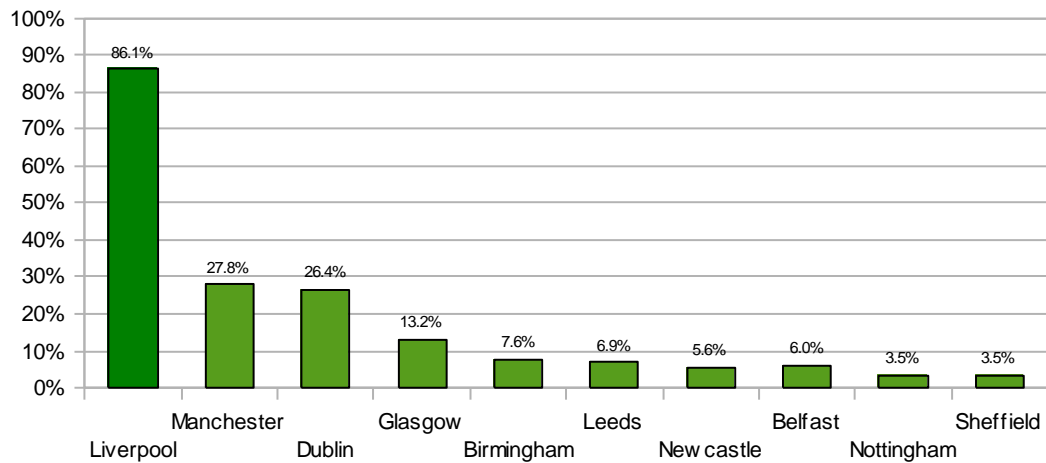
6.5.1. Positioning of Liverpool by local residents



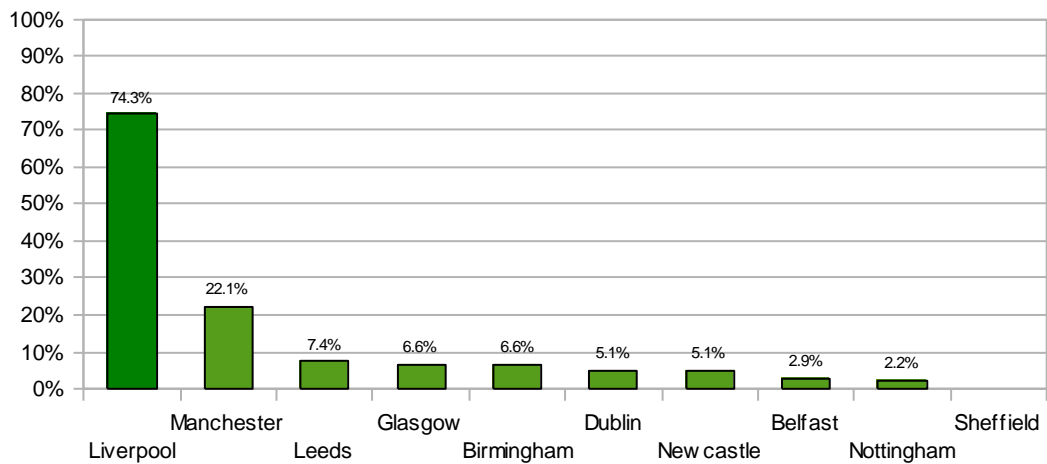
Pleasant urban environment

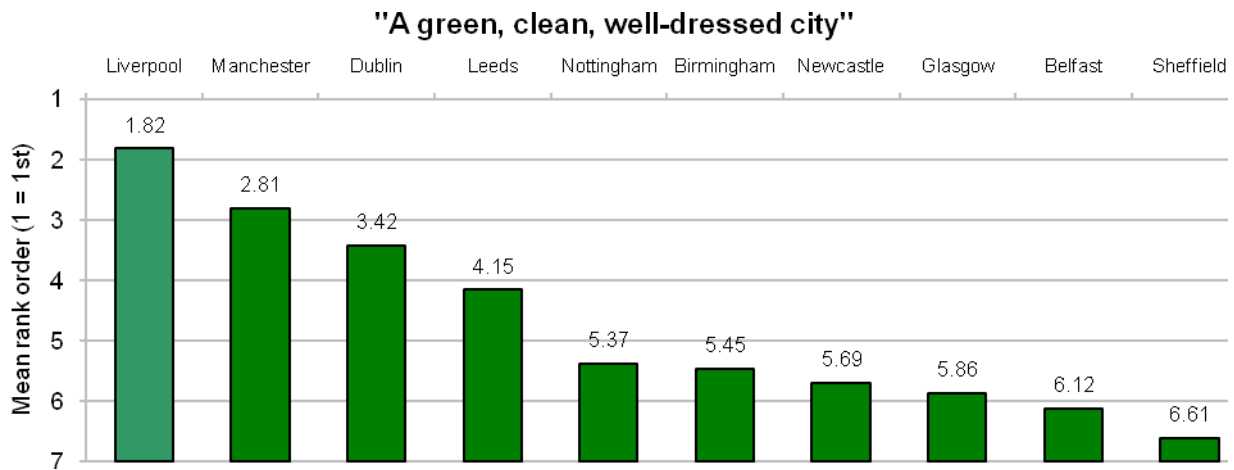


Great Architectural Assets

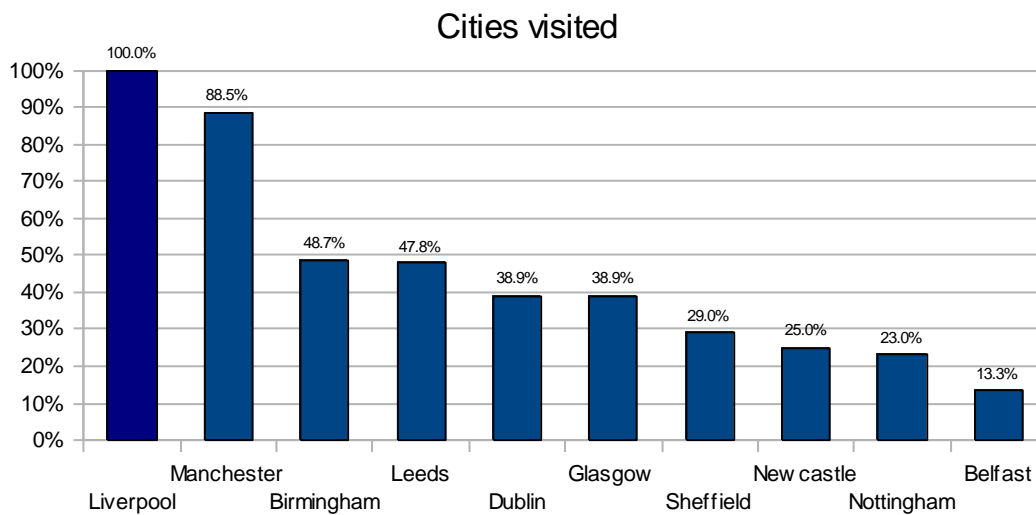


Improving Public Environment

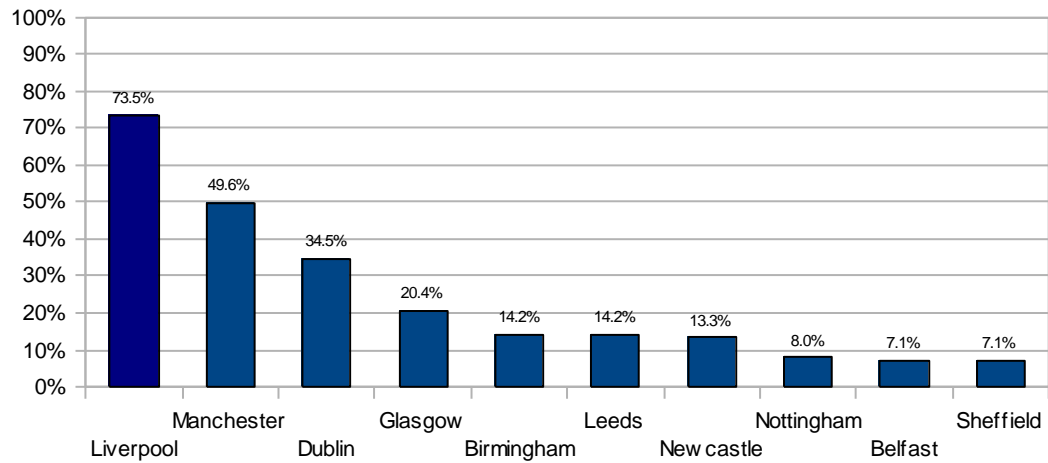




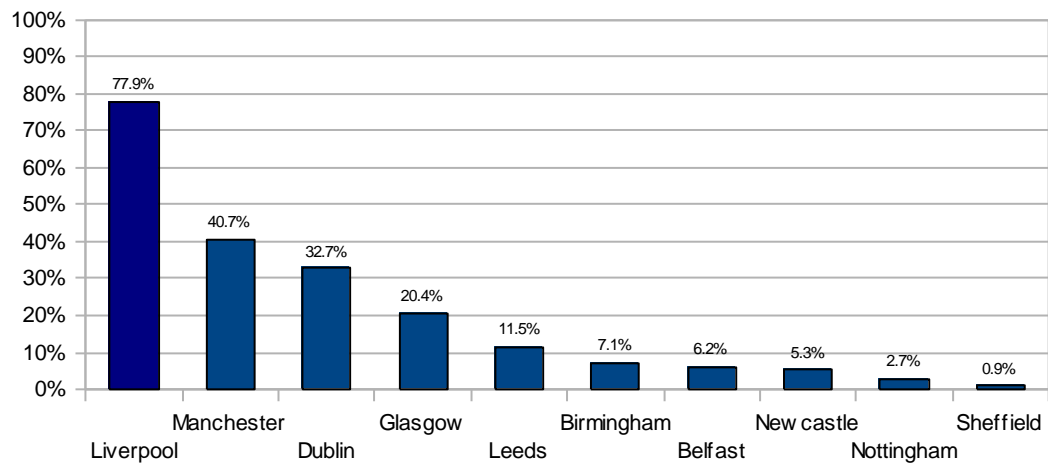
6.5.2. Positioning of Liverpool by Merseyside residents



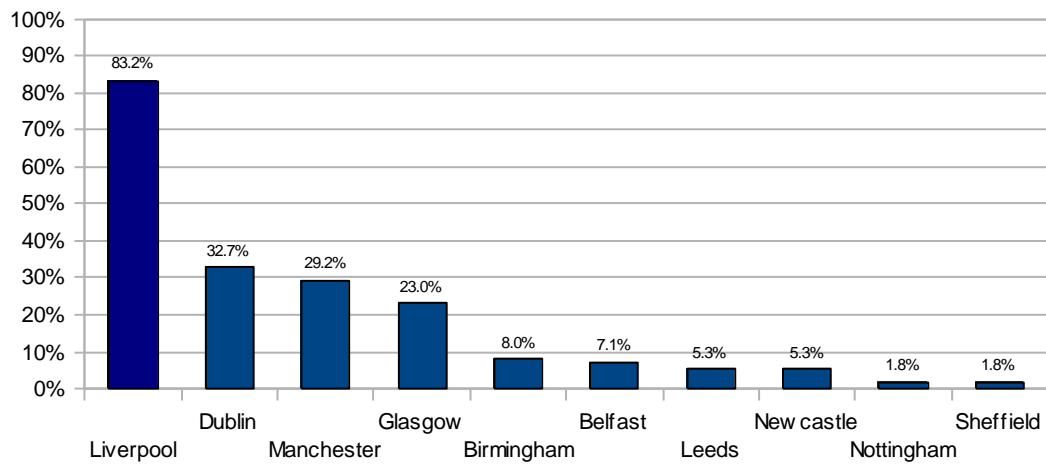
Attractive locations to visit



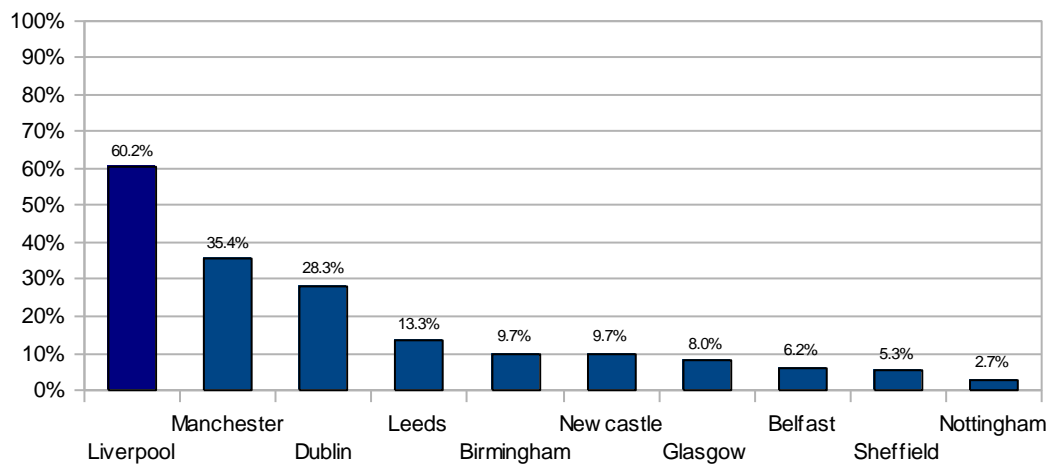
Major centres for culture



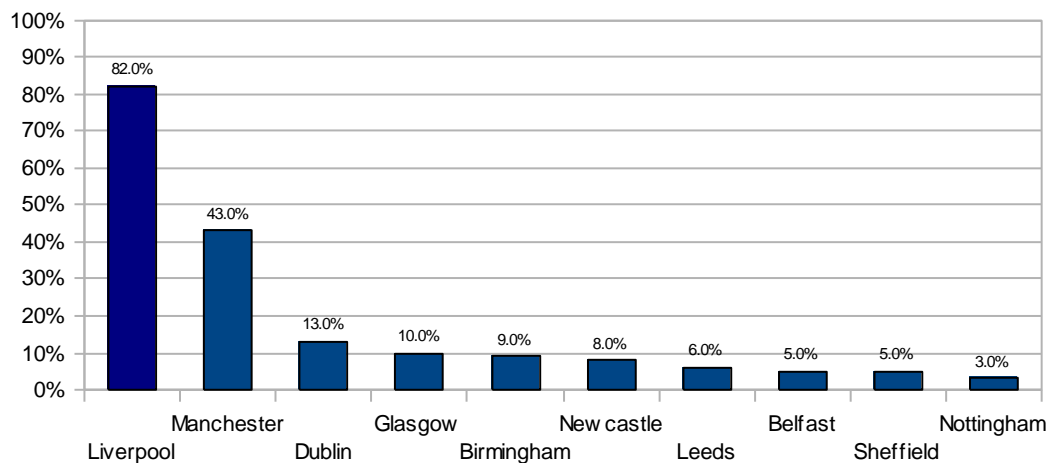
Great Architectural Assets

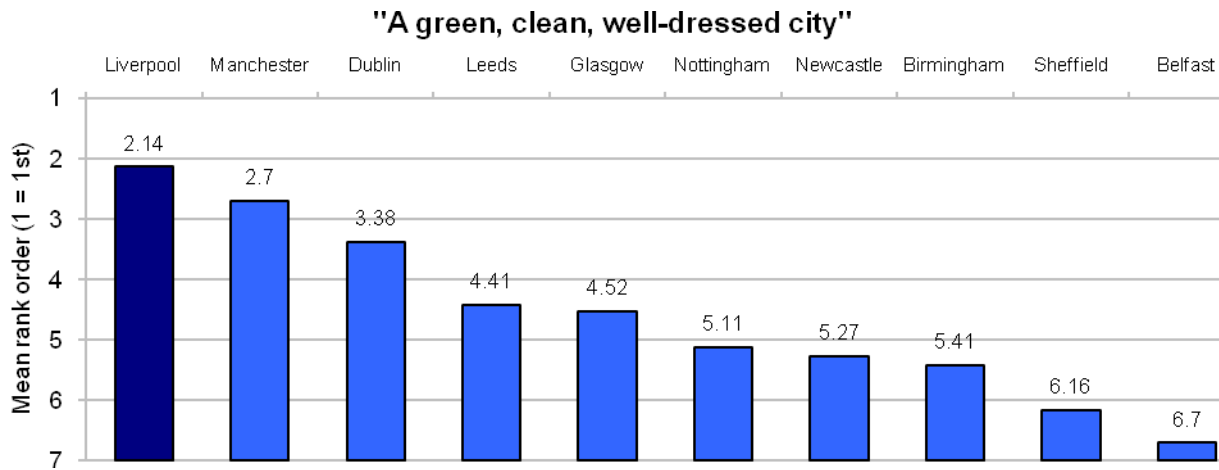


Pleasant urban environment

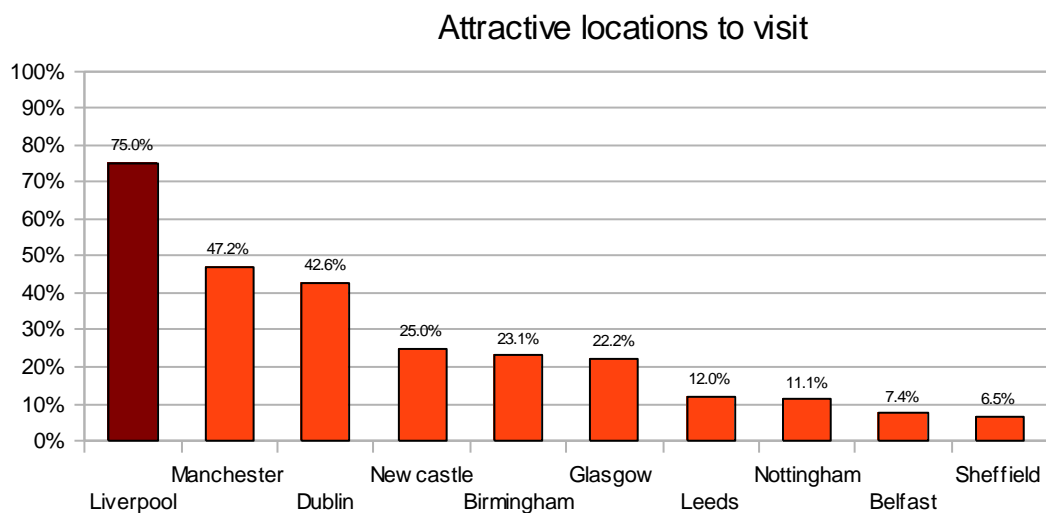
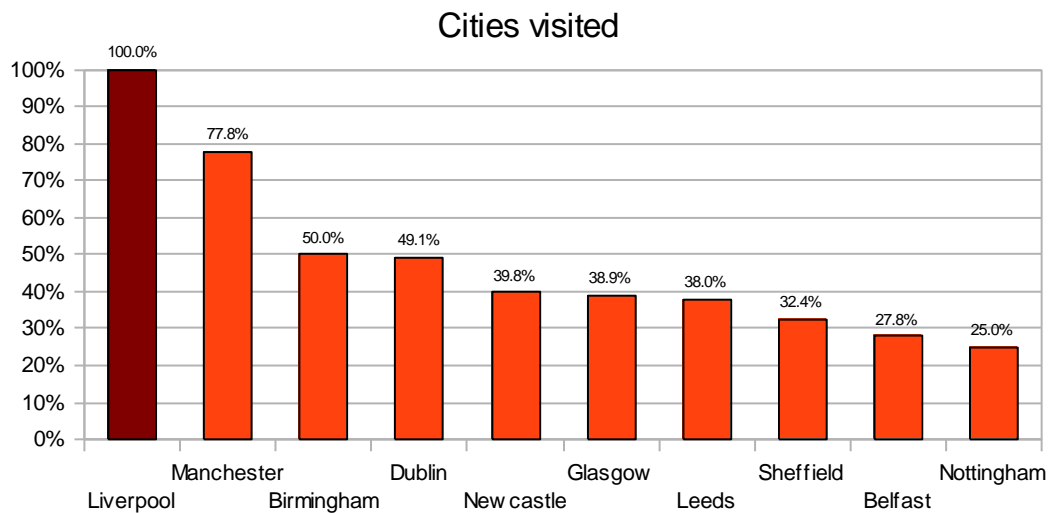


Improving Public Environment

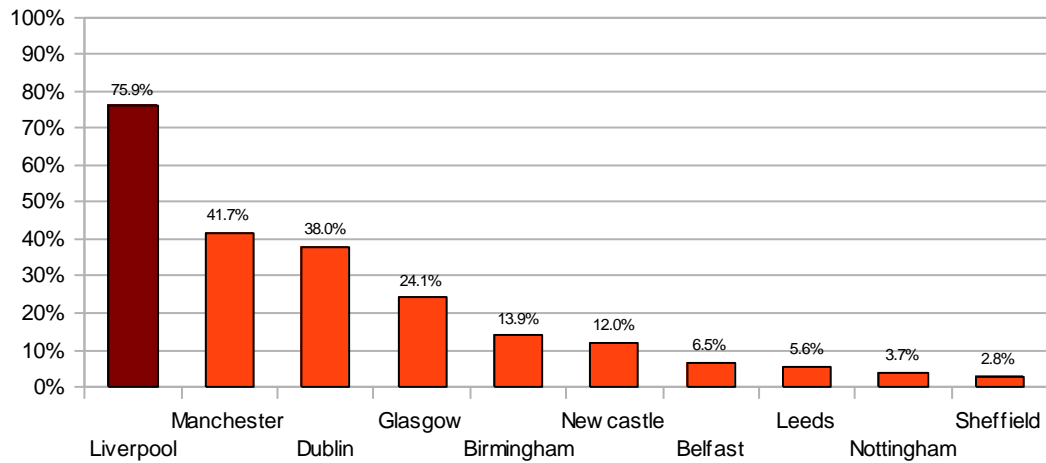




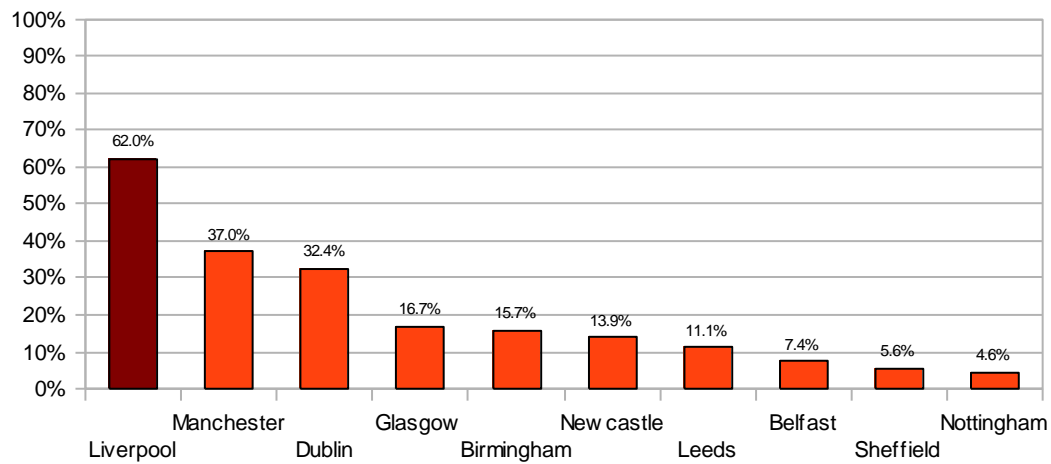
6.5.3. Positioning of Liverpool by UK visitors



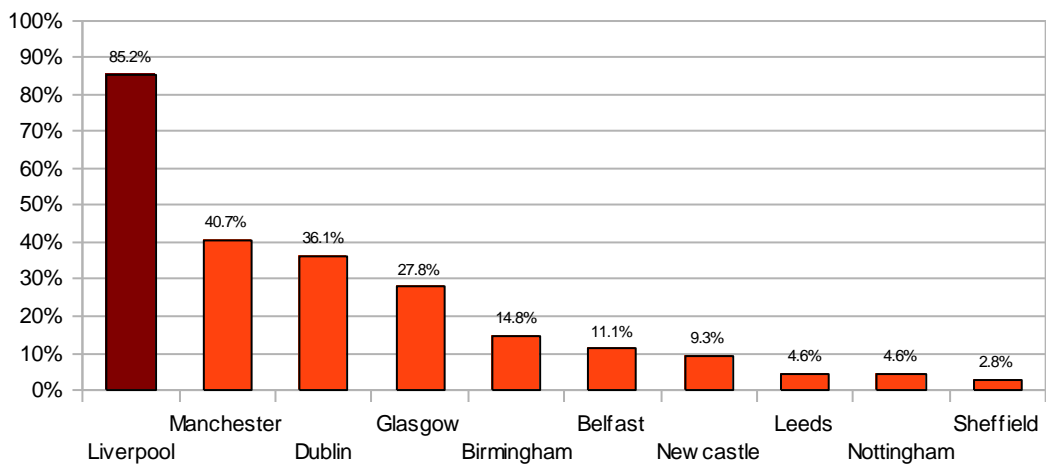
Major centres for culture



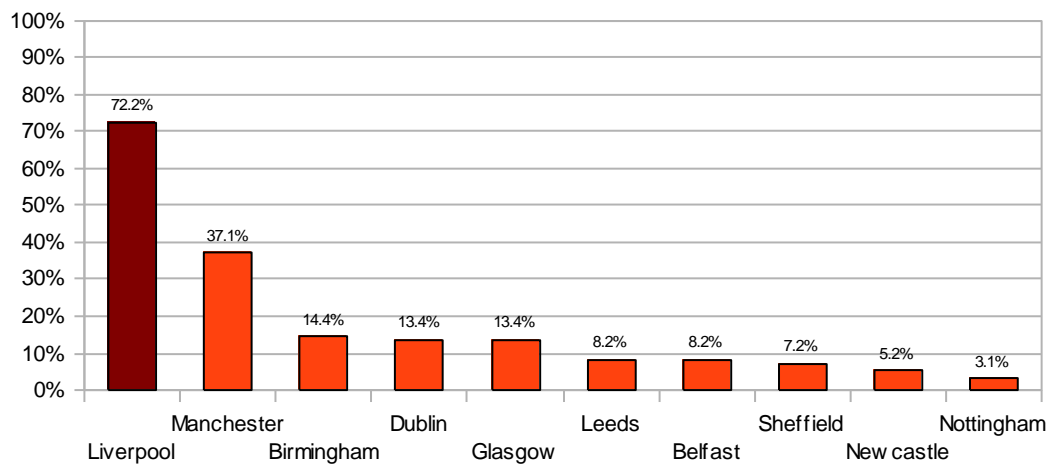
Pleasant urban environment



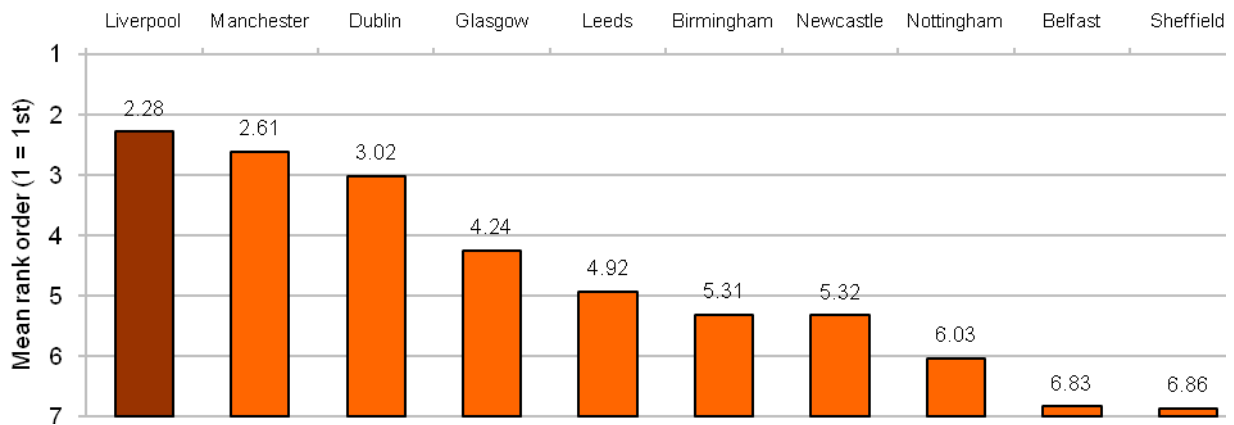
Great Architectural Assets



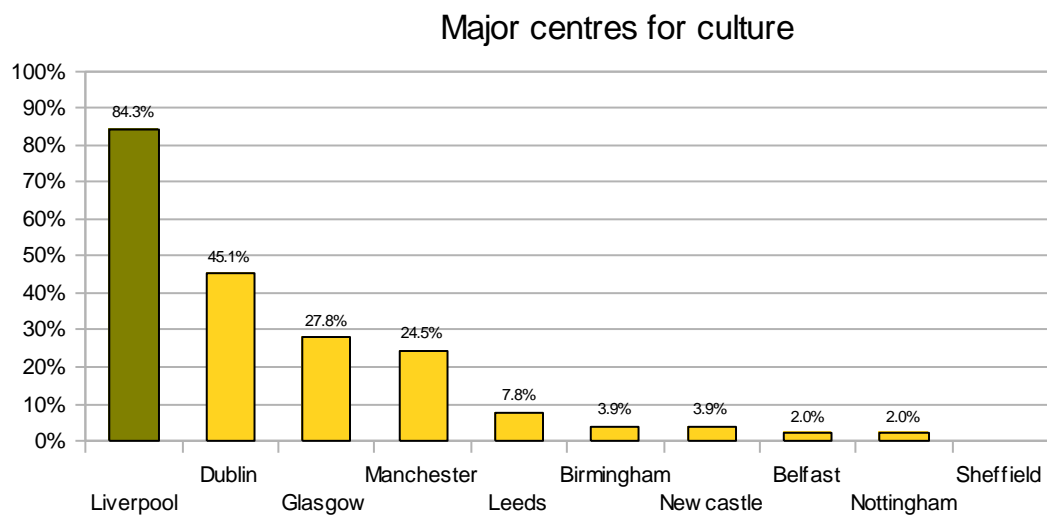
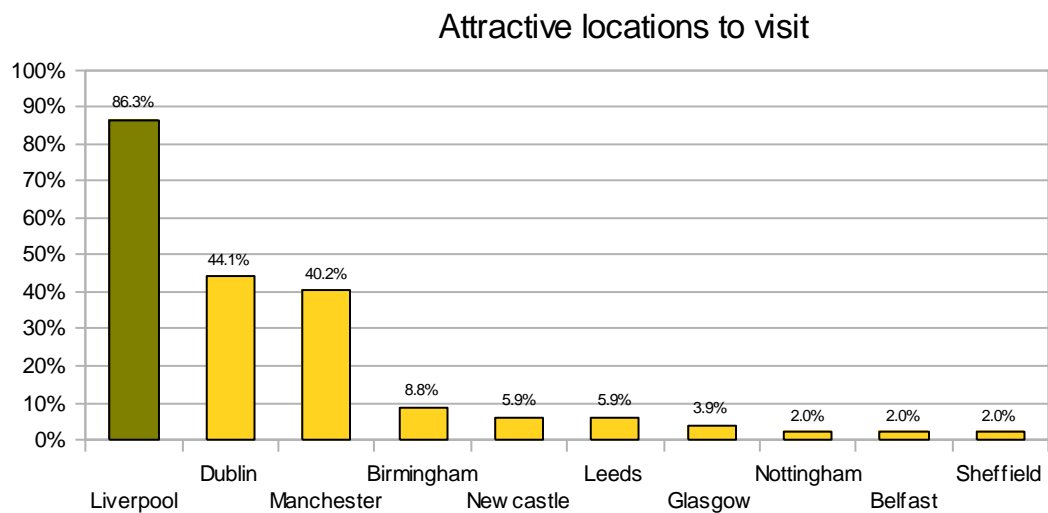
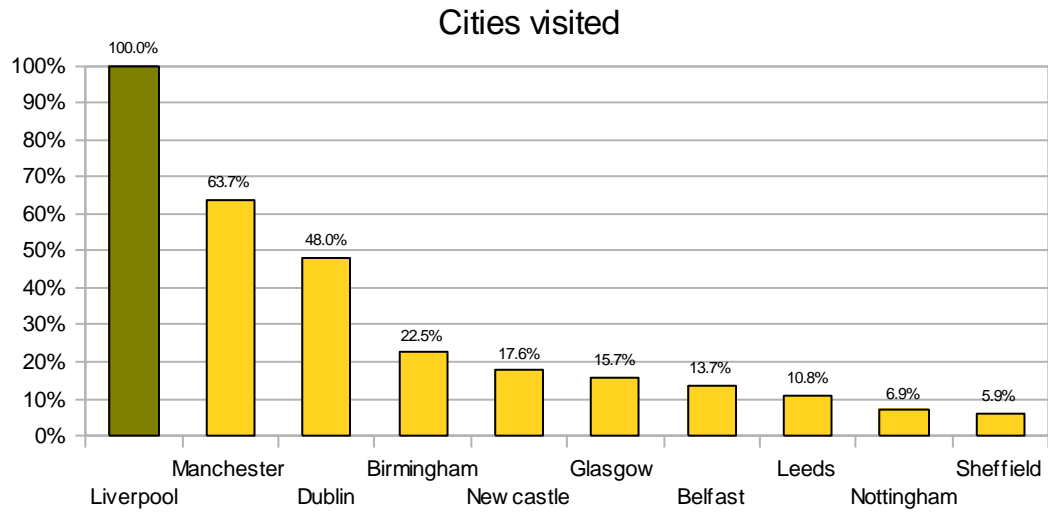
Improving Public Environment



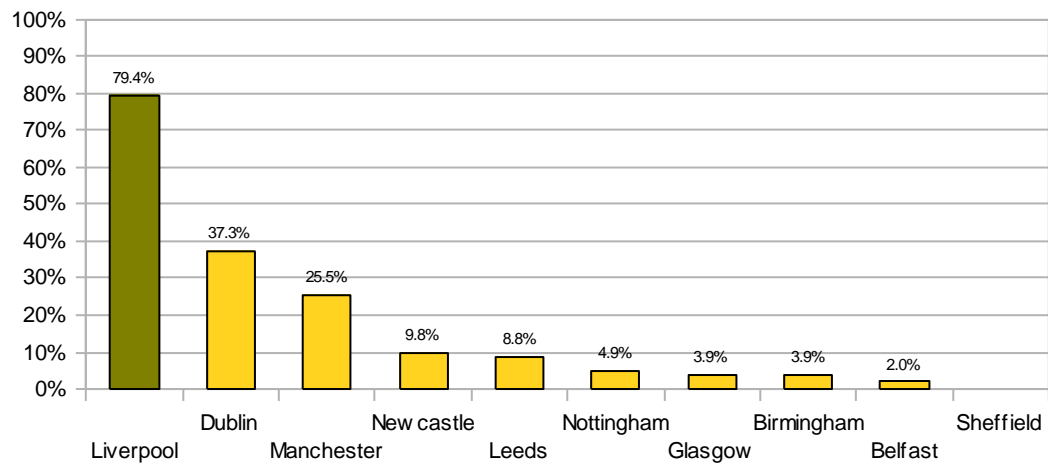
"A green, clean, well-dressed city"



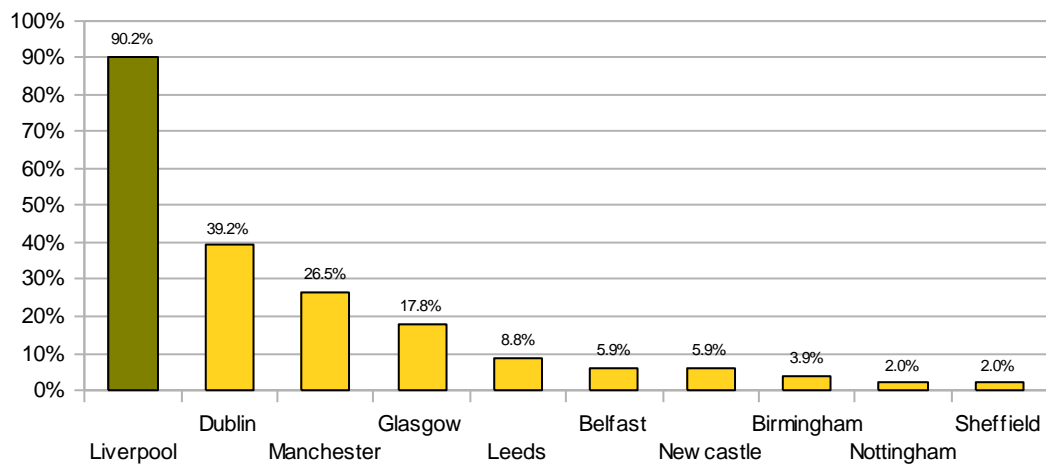
6.5.4. Positioning of Liverpool by Overseas visitors



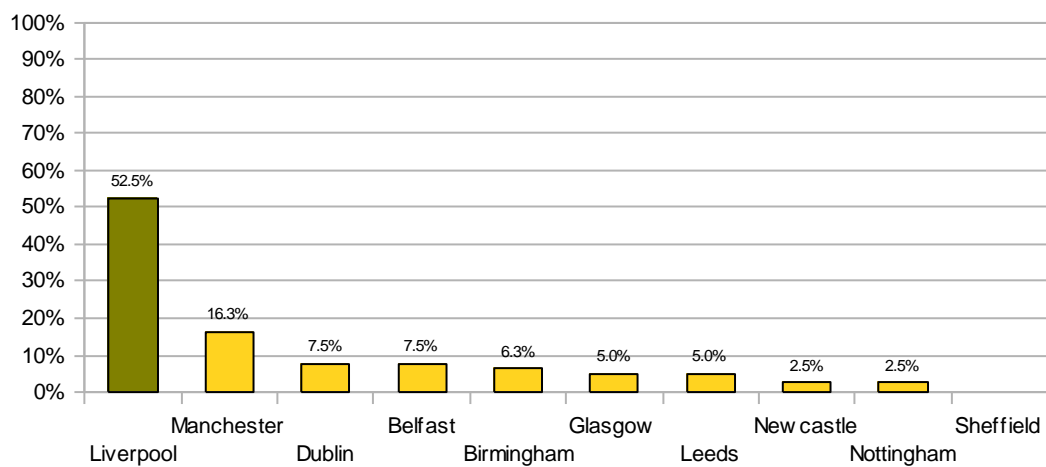
Pleasant urban environment

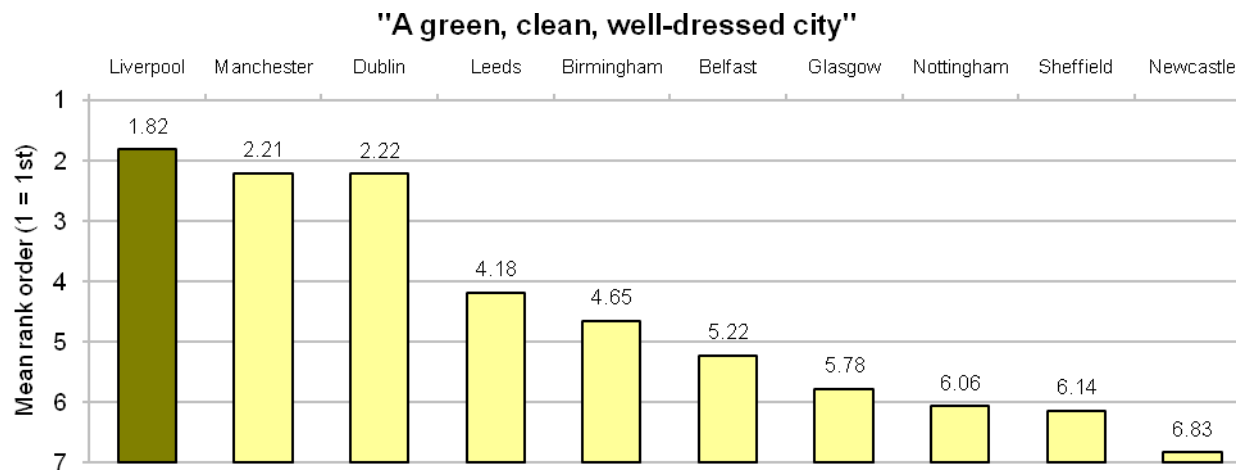


Great Architectural Assets



Improving Public Environment





6.6. Visitation Visual Mapping

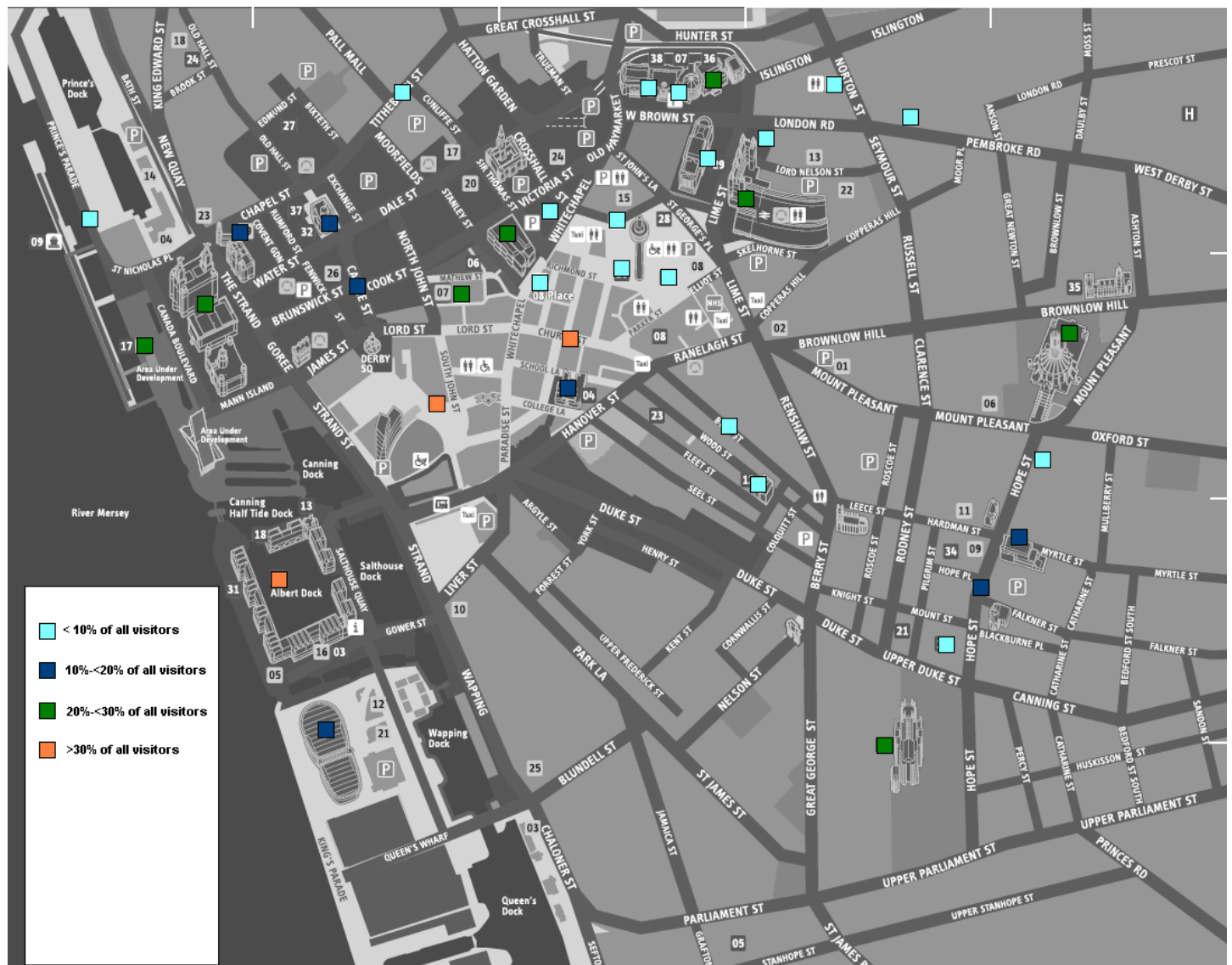
Map 1: Reference Locations

The following map shows the ‘nodes’ used in this research to generate the visitation analysis.



Map 2: Level of visits

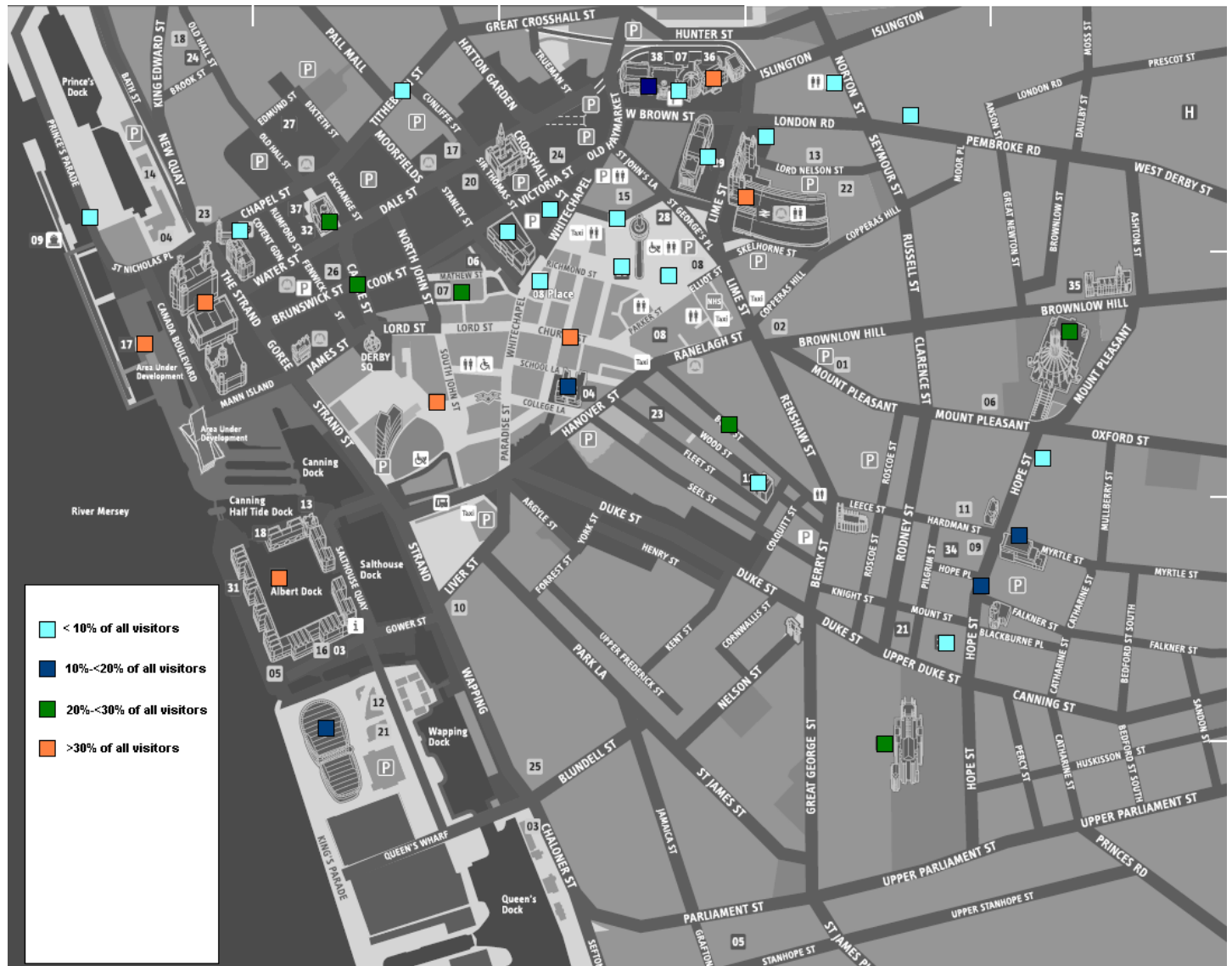
In terms of overall levels of visits to locations, the following shows the percentage of visits indicated as having been made to of via the different nodes:



Map 3: First time visitors – level of visits

This analysis is displayed for those who indicated they were on their first time visit to Liverpool:

Here the Waterfront area emerges as stronger than average, as does the museum quarter and cathedrals.



Map 4: “Local” visitors – level of visits

In terms of those who were from Merseyside or its hinterland, this group would be expected to have a higher knowledge of the city, and their level of visitation is shown below.



Notice here in particular the higher use of shopping areas – not just Liverpool One – and the low level Hope Street and key attractions were displayed as drawing.

Map 5: 1st time visitors arriving by rail

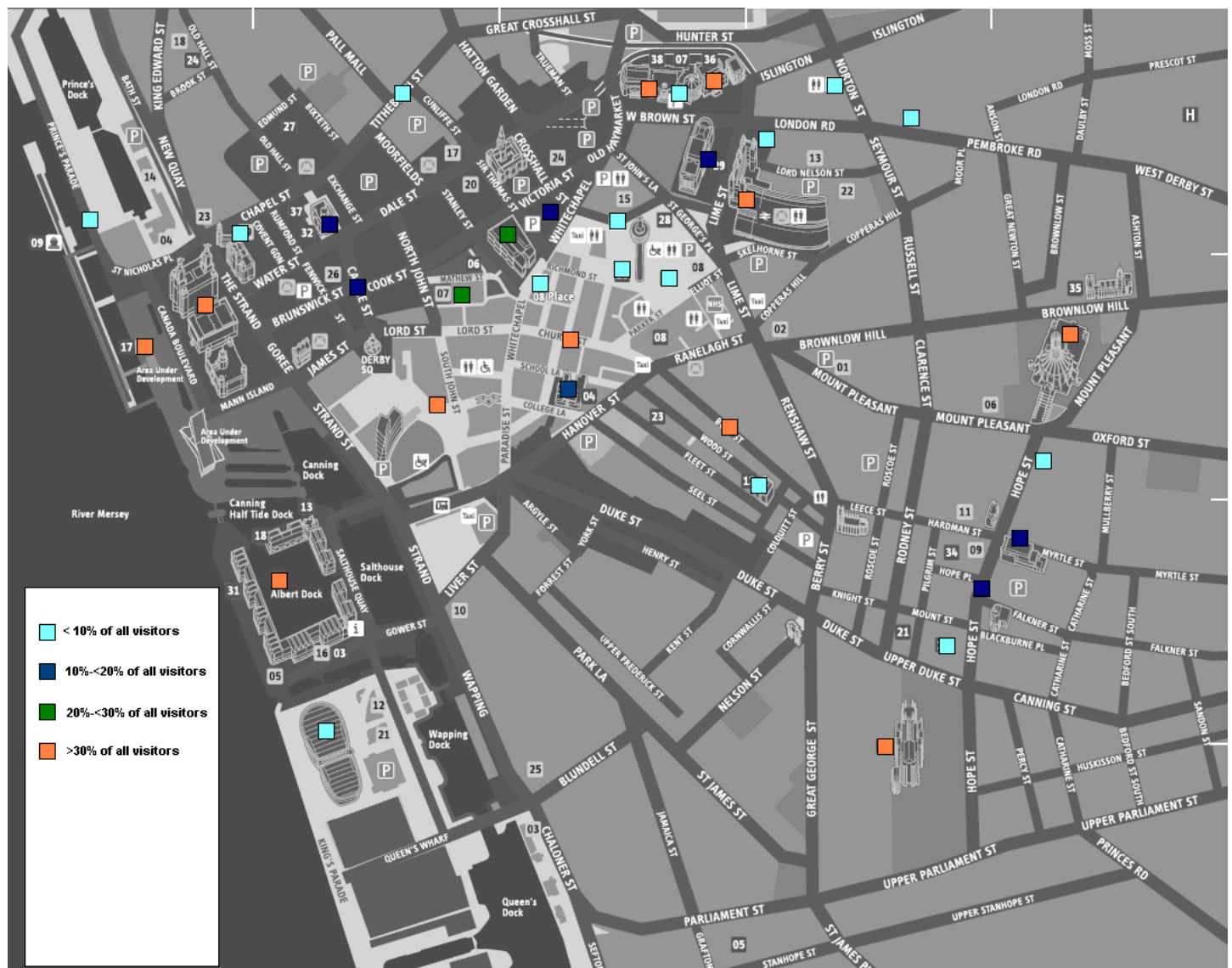
For this group, their high level of visits is evident, with four “channels” being evident:

From the station down church street (some detouring to the Cavern Walks, Castle Street and the Mersey Ferries Then (sometimes as a separate trip) across to the Albert Dock, Liverpool One and back to Lime Street.

A trip across to the Walker and World Museum by St. George's Plateau,

Via Bold Street and Hardman Street to Hope Street and the Cathedrals. For these, the data suggests the points to reach Bold Street were confused

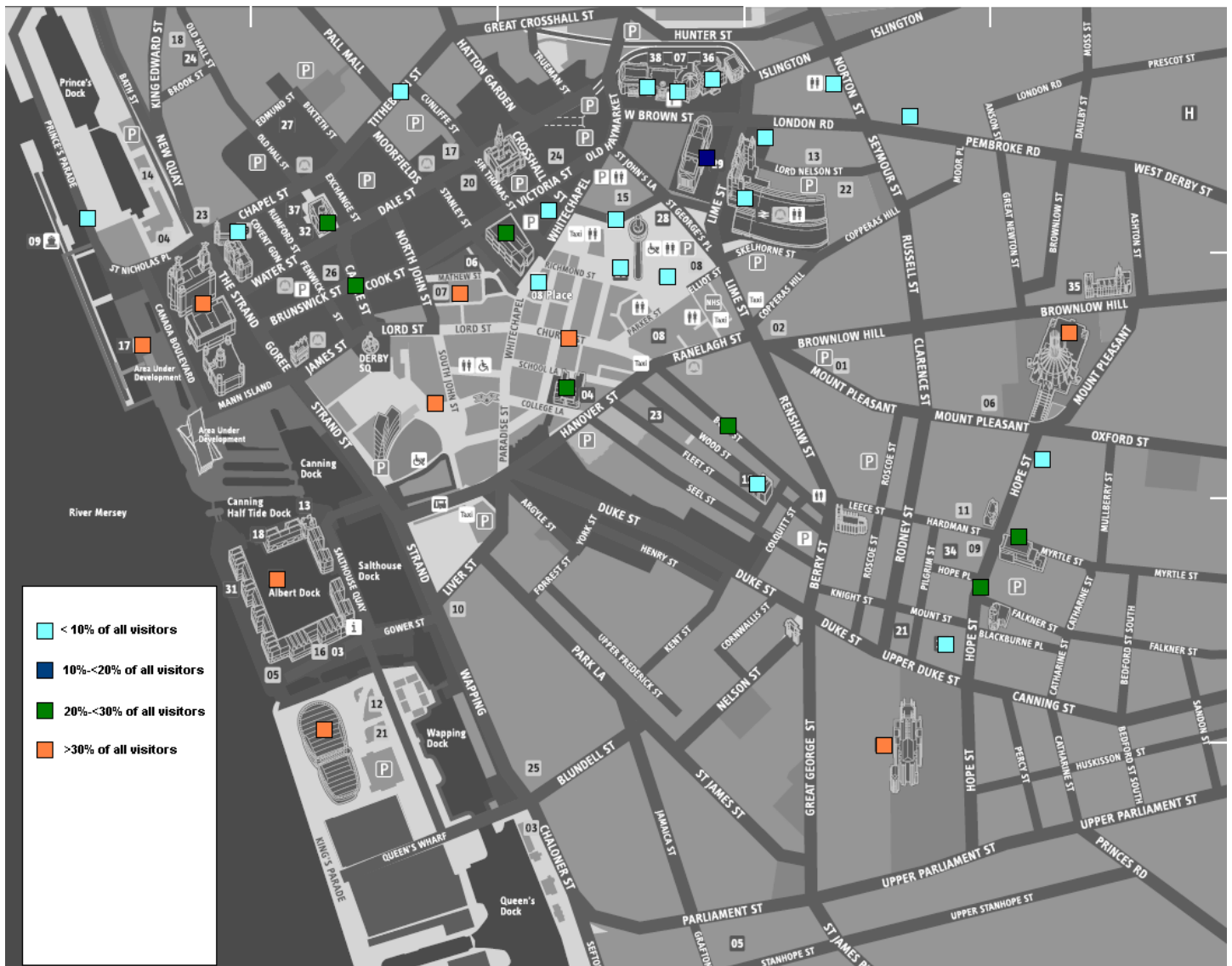
It may be worthwhile noting that this group, as is the case for other visitor profiles, had a low level of visiting the specially designated '08 Place's.



Map 6: 1st time visitors arriving by road

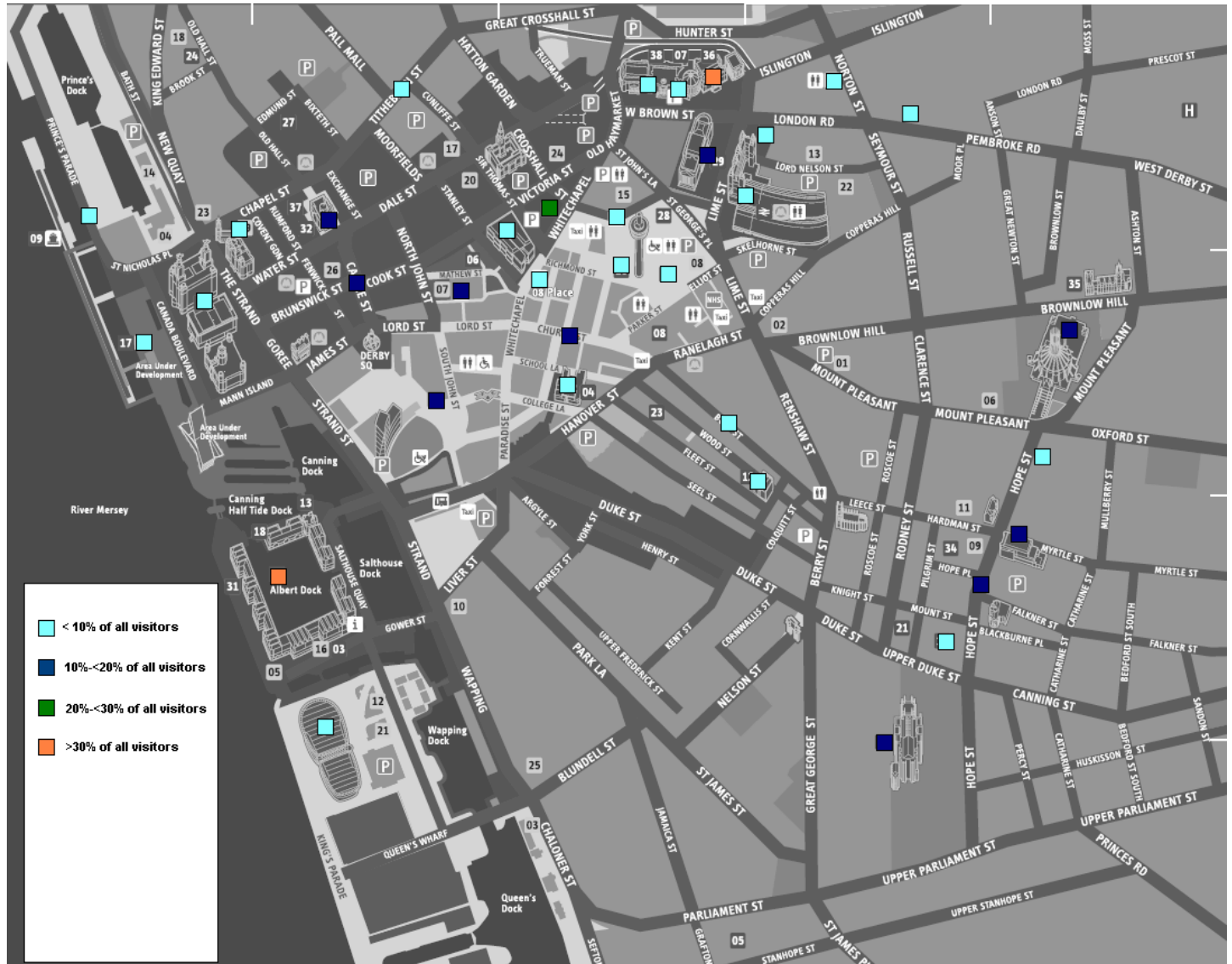
For the first time visitors arriving by road, these appear to have two patterns of visit. Those who evidently were using the new(er) parking facilities were more likely to be on a 'special shopping trip', using Liverpool One and Church Street, before crossing to the Waterfront area in general OR parking by the arena and visiting the waterfront area before crossing to Church Street.

This group had a much lower level of 'cross-city' exploration, as the second pattern of visitors in this category parked near either cathedral before walking along the Hope Street area, very few making the trip into the city itself.



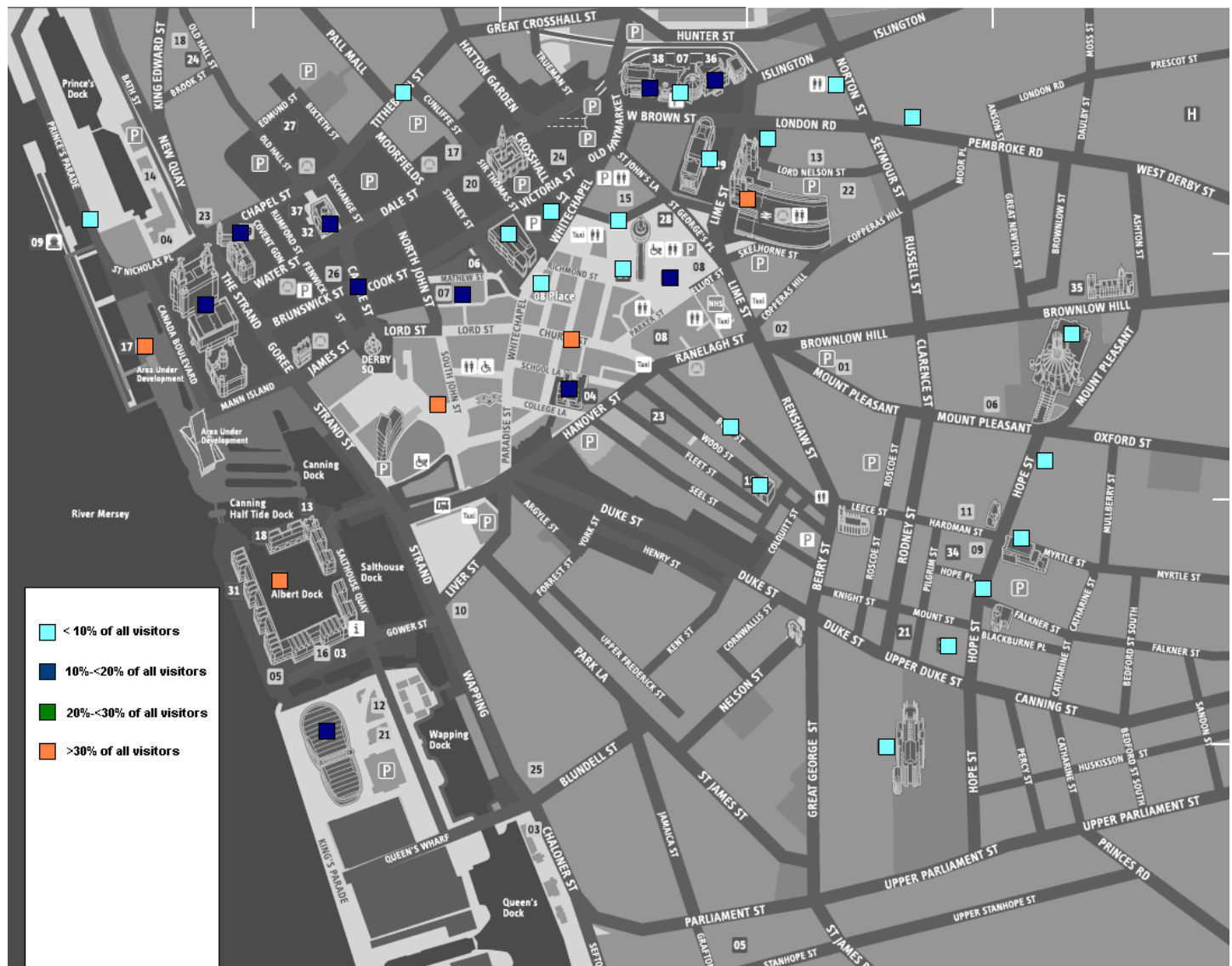
Map 7: Repeat visitors arriving by road

Those repeat visitors arriving in the city by car tended to have a higher knowledge of and familiarity with Liverpool. They tended to be ‘focussed’ – visiting a specific attraction which they would park close to, paying little attention or regard to signage.



Map 8: Repeat visitors arriving by rail

Visitors familiar with the city arriving by rail were far more likely to make a cross-city visit, rather than using James Street; as with first time visitors, following the direct route down church street, via Liverpool one to the Albert Dock and then the Pier Head area (or vice versa). However this group were (as with repeat road users) more focussed, with less inclination to follow routes off to either side.



Map 9: Locations associated with poor signage

The map below shows those nodes which are associated with respondents expressing dissatisfaction towards signage.

Reinforcing the message that first time visitors had some issues in locating Hope Street and the Cathedrals these are easily visible. However, the Pier Head also shows a strong association – although in part this may be more due to the disruption from the ongoing construction work.

There is also the suggestion that some found it less than satisfactory locating the TIC or Cavern Walks.

