Sustainable Consumption and Production

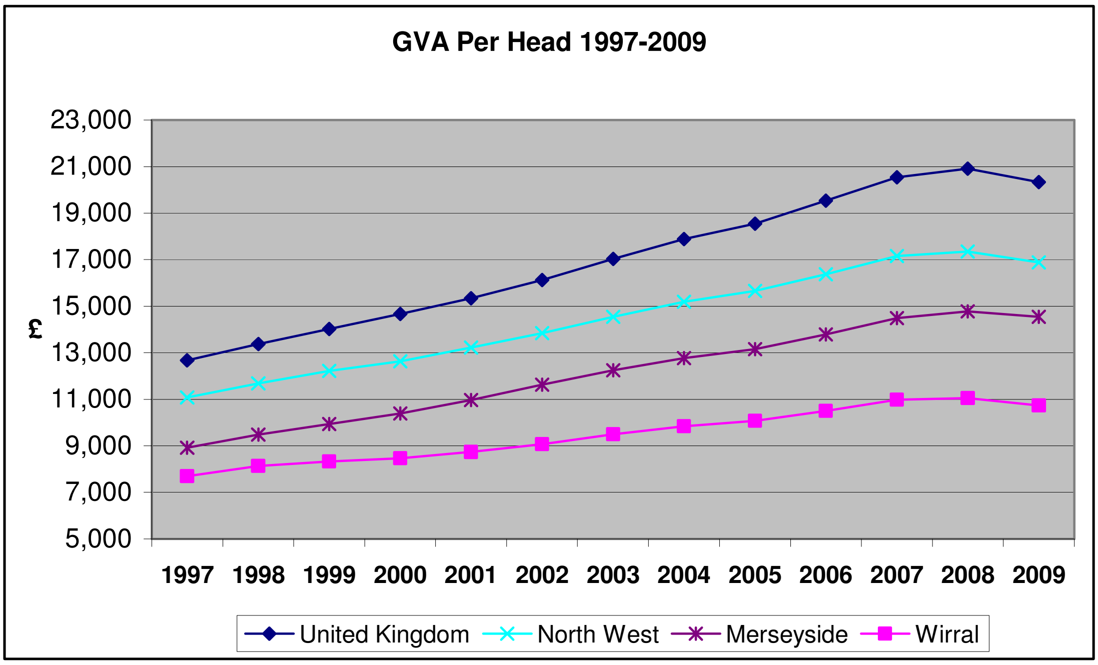
SA Objective 6: To Promote Improved Economic Performance

Indicator: GVA per Head

Gross Value Added (GVA) is an economic measure to assess the contribution to the economy and is the difference between output and intermediate consumption for an area, industry or sector of an economy. It is the value of goods and services produced after removing the costs of the raw materials and other inputs which are used in production.

Wirral's GVA per head was £10,736 in 2009. This was the second lowest of all local authority areas in the United Kingdom, only higher than Gwent Valleys (£10,654). The Borough's GVA per head was also significantly lower than Merseyside (£14,545), which itself is within the bottom five sub-regions nationally, the North West (£16,884) and the United Kingdom (£20,341).

The graph below shows that between 1997 and 2009 Wirral's GVA per head has remained below the sub-regional, regional and national average. GVA per head in the Borough has increased throughout this period, 39.3%, but this is a much smaller increase compared to Merseyside (63%), the North West (52.5%) and the United Kingdom (60.4%).

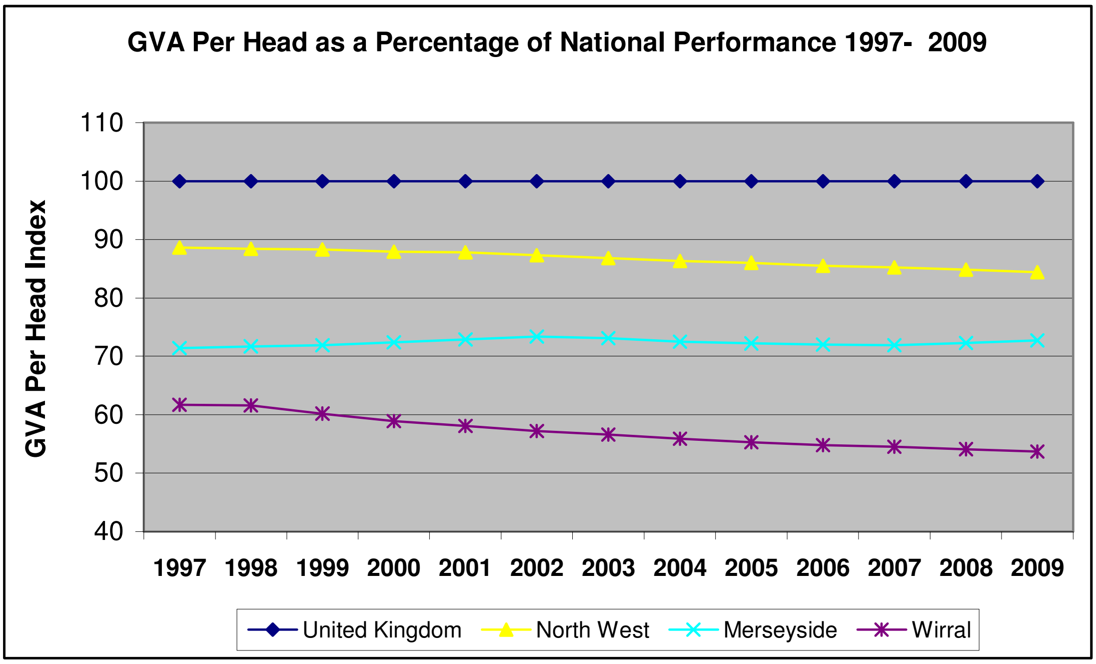


Source: ONS, 2012

Indicator: GVA as a Percentage of National Performance

GVA per head indices show how the area has performed against the national average. Between 1997 and 2009 Wirral's GVA per head has fallen year on year against the national index, despite a year on year increase in actual GVA per head. This is in contrast to Merseyside overall which has seen a small improvement in performance against the national index between 1997 and

2009. The North West, while showing a small decline in performance between 1997 and 2009, is significantly closer to the national average GVA per head.



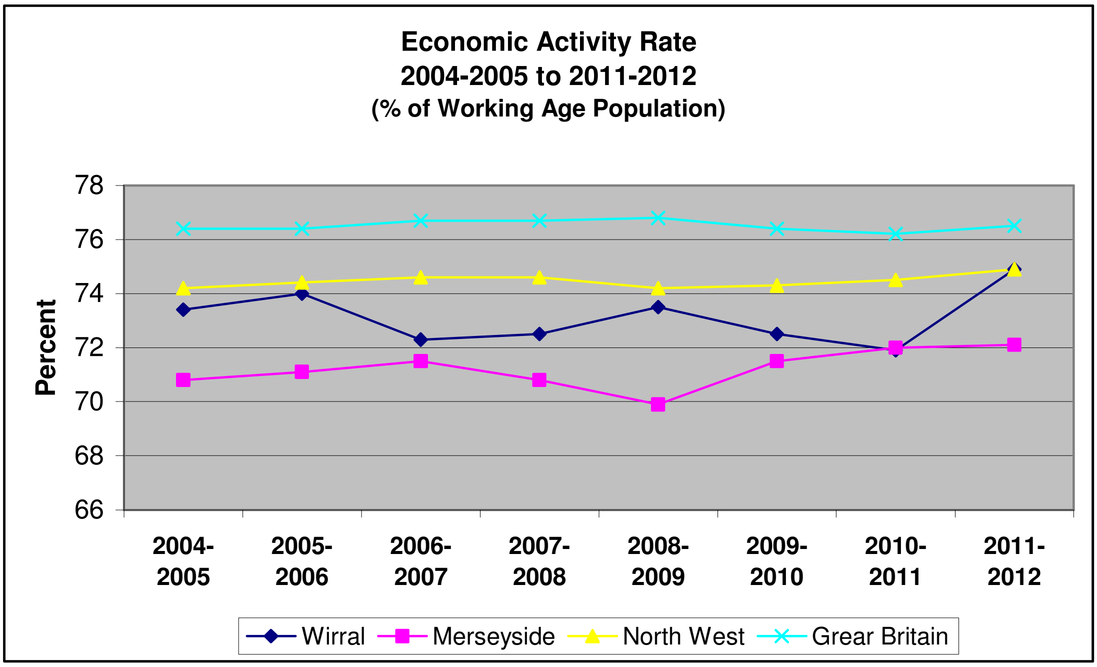
Source: ONS, 2012

Deleted Indicator: GVA as a Percentage of Sub Regional Performance

This indicator was identified in the July 2007 SA Scoping Report and the original baseline review included an index of GVA per head performance of each district against the overall performance of Merseyside. This dataset is no longer published and this indicator has been removed from this review. Wirral's relative poor performance against Merseyside GVA per head is however still clearly shown in the two indicators above.

Indicator: Economic Activity Rates

In 2011-2012 the working age population (16-64) in Wirral was estimated to be 186,800 people, of which 139,900 people were in employment or unemployment. This is an economic activity rate of 74.9% which was greater than Merseyside (72.1%), the same as the North West, but below the national average (76.5%). Wirral's economic activity rate has increased by 3% between 2004-2005 and 2011-2012. This is a greater rise than in Merseyside (2.2%), the North West (0.7%) and Great Britain (0.6%) over the same period.



Source: ONS Annual Population Survey

SA Objective 7: To Provide for Employment Growth and Business Creation

Indicator: Employment by Sector

The table below shows the breakdown of employment by sector, as defined by the 2007 Standard Industrial Classification (SIC) system, for Wirral, the Liverpool City Region, the North West and England in 2009 and 2010.

In 2010 the health sector made up the largest proportion of all employment in Wirral (21.4%), the Liverpool City Region (12.9%), the North West (14.7%) and England (18.3%). The next largest employment sectors in the Borough in 2010 were retail (11.9%) and education (11.7%) accounting for a higher proportion of employment in comparison to the Liverpool City Region, the North West and England.

The proportion of employment in manufacturing in Wirral fell from 10.1% in 2009 to 8.8% in 2010, but remained higher than the level nationally (7.8%). The decline in the proportion of employment in the manufacturing sector from 2009 to 2010 reflects the earlier trend seen between 2003 and 2008 (under an earlier SIC classification system) when it dropped from 12.6% to 10.2%.

Employment by Sector 2009 and 2010								
	Wirral		Liverpool City Region		North West		England	
	2009	2010	2009	2010	2009	2010	2009	2010
	%	%	%	%	%	%	%	%
1 : Agriculture, forestry & fishing (A)	0.1	0.1	0.0	0.7	0.5	0.5	0.7	0.0
2 : Mining, quarrying & utilities (B,D and E)	1.0	1.3	0.6	1.1	1.0	1.1	1.1	0.9
3 : Manufacturing (C)	10.1	8.8	8.9	8.8	11.1	10.3	9.0	7.8
4 : Construction (F)	4.6	4.1	4.5	4.3	5.1	4.5	4.7	3.8
5 : Motor trades (Part G)	1.5	1.7	1.3	1.7	1.7	1.8	1.7	1.4
6 : Wholesale (Part G)	2.1	2.1	2.8	4.3	3.9	3.8	4.2	2.8
7 : Retail (Part G)	12.2	11.9	11.0	10.3	10.8	10.7	10.5	11.0
8 : Transport & storage (inc postal) (H)	2.9	2.8	4.7	4.7	4.3	4.5	4.7	4.8
9 : Accommodation & food services (I)	6.6	6.1	6.7	6.6	6.8	6.7	6.7	6.7
10 : Information & communication (J)	1.3	1.2	2.3	3.9	2.6	2.4	3.9	2.1
11 : Financial & insurance (K)	1.4	1.4	3.6	4.0	3.5	3.3	4.0	3.1
12 : Property (L)	1.6	1.2	1.4	1.4	1.6	1.1	1.6	1.1
13 : Professional, scientific & technical (M)	5.5	6.5	4.9	7.2	6.0	6.5	7.2	5.4
14 : Business administration & support services (N)	5.7	6.4	5.5	8.2	7.0	7.9	7.9	7.2
15 : Public administration & defence (O)	6.4	6.2	8.6	5.6	6.1	6.1	5.5	8.5
16 : Education (P)	11.3	11.7	10.6	9.7	9.2	9.2	9.6	10.3
17 : Health (Q)	19.9	21.4	17.7	12.9	14.0	14.7	12.6	18.3
18 : Arts, entertainment, recreation & other services (R,S,T and U)	5.8	5.4	4.9	4.7	4.8	4.7	4.6	4.8
	100	100	100	100	100	100	100	100

Source: ONS Business Register and Employment Survey

Indicator: Births and Deaths of Enterprises
(Original SA Scoping Report July 2007 Indicator: VAT registration and de-registrations)

The original indicator, identified in the July 2007 SA Scoping Report, was included in the original baseline. The indicator has been amended in this review following an improvement in the available dataset. VAT registrations and de-registrations were previously used as an indicator of the level of entrepreneurship and to show trends in business growth. However, it is estimated that less than half of businesses in the United Kingdom are VAT registered. In 2008 the Business Demography dataset was introduced to provide a more inclusive method of identifying the number of active businesses and the number of births and deaths of enterprises.

The number of active enterprises in Wirral increased between 2004 and 2010 peaking in 2009 when there were 8,380 businesses. In recent years the number of 'births' of enterprises has decreased in the Borough while the number of 'deaths' of enterprises has increased. This has resulted in a greater number of deaths than births during 2009 and 2010 which reflects the trend nationally.

It should be noted that the count of active enterprises does not directly relate to the net change in the number of births and deaths in the previous year. This is due to the methodology used for calculating deaths of enterprises which allows for the reactivation of businesses after a number of years.

Count of Births and Deaths of Enterprises in Wirral

	Births	Deaths	Net	Count of Active Enterprises
2004	1155	920	235	7640
2005	1025	835	190	7715
2006	965	755	210	7825
2007	1175	815	360	8230
2008	985	780	205	8355
2009	875	1115	-240	8380
2010	815	1135	-320	8045

Source: ONS Business Demography 2010

Indicator: Amount of Land Developed for Employment by Type (Completed Gross Floorspace)

The table below shows the amount of employment floorspace completed in Wirral between 2004-2005 and 2011-2012. This is split between the different business Use Classes. During this period the greatest amount of employment floorspace was for general industrial (B2) and office (B1a) uses. In 2011-2012 18,964 square metres of warehouse floorspace (Use Class B8) was completed as part of a single major project.

Land Developed for Employment in Wirral completed floorspace (sq m)

	Use Class B1(a)	Use Class B1 (b)	Use Class B1 (c)	Use Class B2	Use Class B8	Total Floorspace (sq m)
2004/2005	961	Nil	Nil	23,497	Nil	**24,458**
2005/2006	4,857	Nil	Nil	24,407	Nil	**29,264**
2006/2007	8,542	Nil	Nil	13,576	Nil	**22,118**
2007/2008	3,801	Nil	Nil	12,797	Nil	**16,598**
2008/2009	8,803	Nil	Nil	19,099	Nil	**27,902**
2009/2010	275	Nil	Nil	1,948	Nil	**2,223**
2010/2011	1,426	Nil	Nil	14,380	440	**16,246**
2011/2012	91	Nil	Nil	7,571	18,964	**26,626**

SA Objective 8: To Reduce Worklessness and Income Deprivation

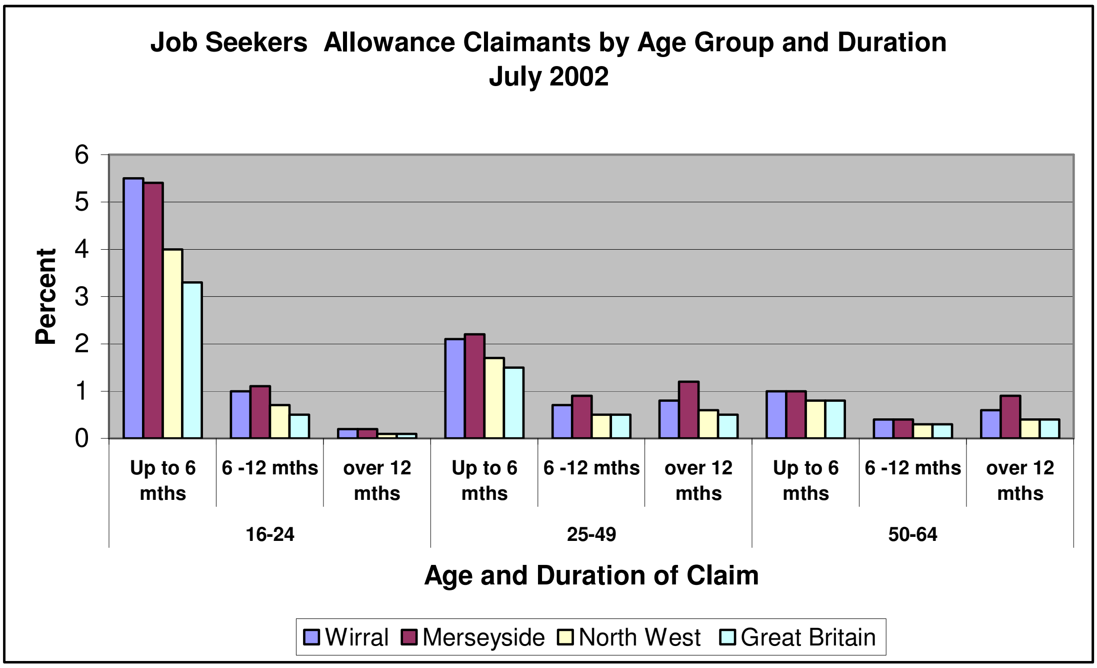
Indicator: Jobseekers Allowance Claimants by Age and Duration
(Original SA Scoping Report July 2007 Indicator: Unemployment by age and duration)

The original version of this indicator, identified in the July 2007 SA Scoping Report, was included in the original baseline review, but did not include any data. The indicator in this review has been revised to use the available data that best reflects unemployment by age and duration.

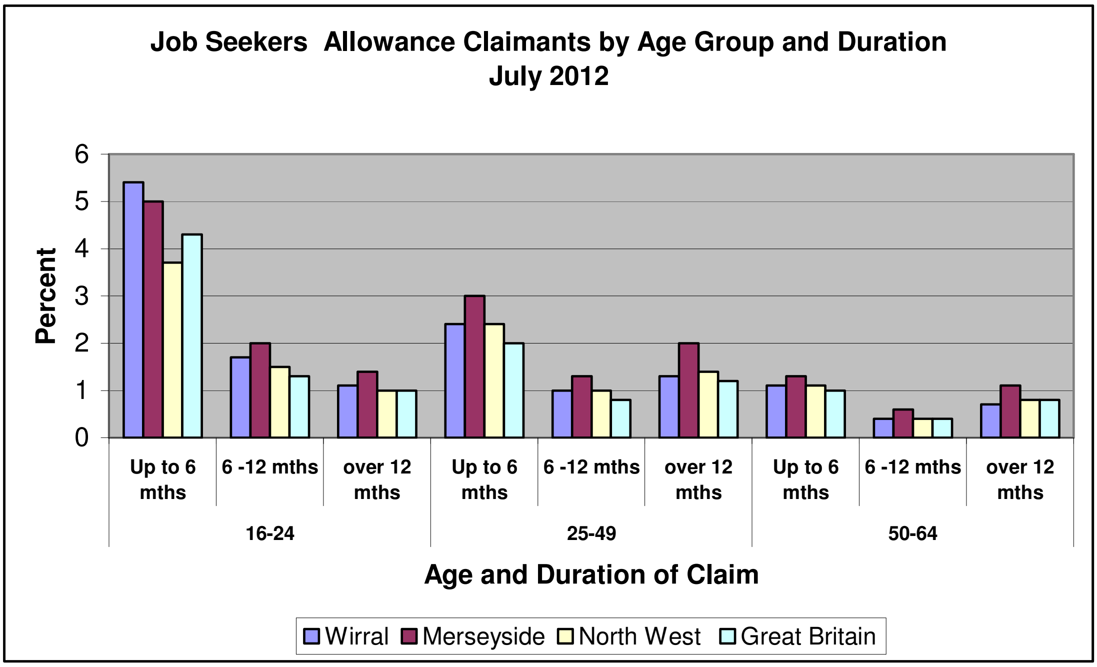
Jobseekers Allowance (JSA) claimant counts are not a direct measure of unemployment, but do have a strong correlation with the number of unemployed, as claimants must be available for work and actively seeking employment. In July 2012, 8,640 persons claimed JSA in Wirral, which is 4.5% of the Borough's working age population (16-64 years). This proportion is below that for Merseyside (5.7%) but greater than the North West (4.4%) and Great Britain (3.8%).

The charts below show the percentage of JSA claimants within each of the broad age groups, split by duration, in July 2002 and July 2012. In Wirral 8.2% of 16 to 24 years olds claimed JSA in July 2012, above the average in the North West (6.8%) and Great Britain (6.0%), but below the average in Merseyside (8.4%). Wirral did, however, have a greater proportion of 16-24 year old claimants who had only been claiming JSA for 6 months or less.

Between 2002 and 2012 the overall proportion of Wirral's working age population claiming JSA has risen from 3.6%. This reflects an overall increase seen sub-regionally, regionally and nationally between 2002 and 2012. In all areas the greatest rise has been in longer-term claimants (6 months+).



Source: ONS Claimant Count



Source: ONS Claimant Count

Jobseekers Allowance Claimants by Age and Duration July 2002 (percentage of working age population)

Age	Duration	Wirral	Merseyside	North West	Great Britain
16-24	Up to 6 mths	5.5	5.4	4.0	3.3
	6 -12 mths	1.0	1.1	0.7	0.5
	over 12 mths	0.2	0.2	0.1	0.1
25-49	Up to 6 mths	2.1	2.2	1.7	1.5
	6 -12 mths	0.7	0.9	0.5	0.5
	over 12 mths	0.8	1.2	0.6	0.5
50-64	Up to 6 mths	1.0	1.0	0.8	0.8
	6 -12 mths	0.4	0.4	0.3	0.3
	over 12 mths	0.6	0.9	0.4	0.4

Source: ONS Claimant Count

Jobseekers Allowance Claimants by Age and Duration July 2012 (percentage of working age population)

Age	Duration	Wirral	Merseyside	North West	Great Britain
16-24	Up to 6 mths	5.4	5.0	3.7	4.3
	6 -12 mths	1.7	2.0	1.5	1.3
	over 12 mths	1.1	1.4	1.0	1.0
25-49	Up to 6 mths	2.4	3.0	2.4	2.0
	6 -12 mths	1.0	1.3	1.0	0.8
	over 12 mths	1.3	2.0	1.4	1.2
50-64	Up to 6 mths	1.1	1.3	1.1	1.0
	6 -12 mths	0.4	0.6	0.4	0.4
	over 12 mths	0.7	1.1	0.8	0.8

Source: ONS Claimant Count

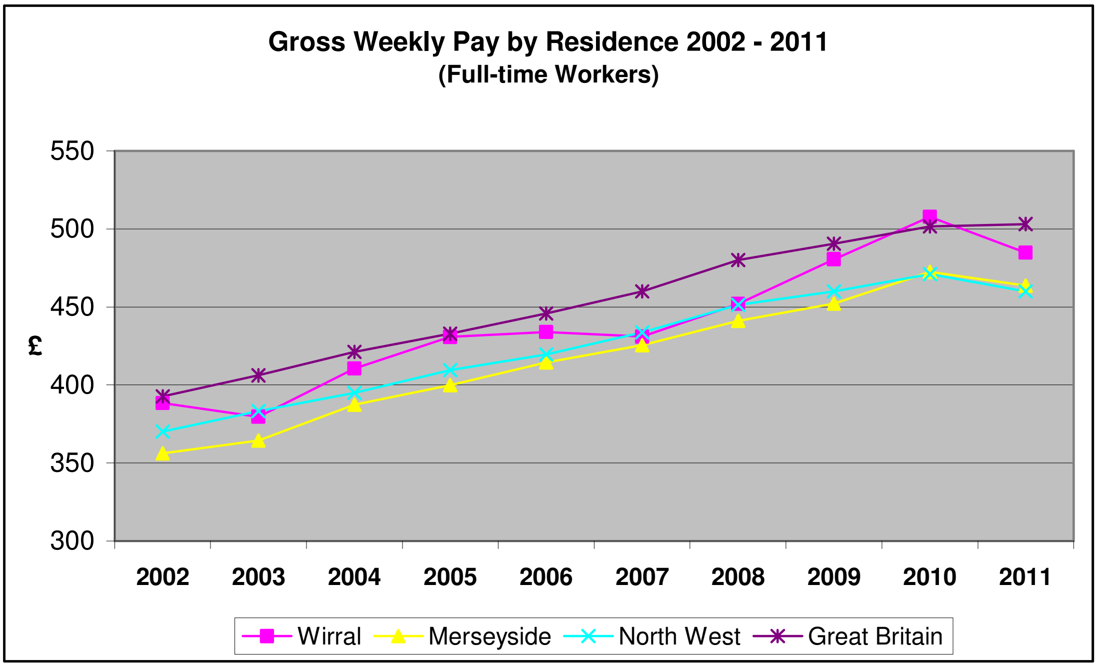
Indicator: Percentage of People in Employment Receiving Incapacity Benefits (Relocated to SA Objective 5 in this document)

This indicator was identified in the July 2007 SA Scoping Report and included in the original baseline review, but no data was collected. The percentage of the working age population claiming Incapacity Benefit or its replacement, Employment Support Allowance, is now being used as an indicator under SA Objective 5: (To promote inclusive healthy communities), to identify the proportion of population unable to work because of illness or disability.

Indicator: Average Weekly Earnings by Residence
(Original SA Scoping Report July 2007 Indicator: Average earnings compared with Merseyside and England)

The original version of this indicator, identified in the July 2007 SA Scoping Report, compared earnings with Merseyside and England. The original baseline review presented available data for annual household income for Wirral, Merseyside and the United Kingdom. The indicator in this review has been amended to utilise freely available data for weekly earnings for Wirral, Merseyside, the North West and Great Britain.

In 2011 gross average weekly earnings for residents of Wirral was £484.90. This was higher than average earnings in Merseyside (£463.70) and the North West (£460.00) but below average earnings in Great Britain (£503.10). Between 2002 and 2011 weekly earnings for residents of the Borough have increased by nearly 25 percent. This is a similar rate of increase to the North West but less than Merseyside (30.2%) and Great Britain (28.1%).



Source: ONS annual survey of hours and earnings - resident analysis (Nomis, 2012)

Deleted Indicator: Amount of land developed for employment, by type, which is in development and/or regeneration areas defined on the Local Development Framework (completed gross floorspace)
(Duplicates Indicator under SA Objective 7 in this document)

The July 2007 SA Scoping Report identified the above indicator under this SA Objective, but it was not included in the original baseline review. This indicator duplicates an indicator already included under SA Objective 7.

SA Objective 9: To Promote the Vitality and Viability of Town Centres

Indicator: Vitality and Viability of Town, District and Local Centres Measured by: (a) position in national shopping centre rankings (Birkenhead and Liscard) (b) percentage of vacant street level property (c) retail rents

Wirral's Town, District and Local Centres Study and Delivery Framework (Wirral Council, 2011) examined the current position of Wirral's 23 town, district and local centres, with the exception of Birkenhead Town Centre, and identified opportunities for supporting the future sustainability of each of the centres. This provided an update to part of the Wirral Retail Strategy Main Report (Roger Tym & Partners, 2004) and the Strategy for Town Centres, Retail and Commercial Leisure (Roger Tym & Partners, 2009). The Integrated Regeneration Study for Birkenhead and Wirral Waters (BIRS Study - GVA Grimley, 2010) examined the position of Birkenhead Town Centre and recommended key steps to ensure its long term sustainability.

Overall, the centres at Heswall, Moreton and West Kirby are continuing to function well. Although vacancy has increased by almost 5% in Heswall since 2003, the centre still appears to be thriving. Bromborough Village and Hoylake are showing some signs of visible decline, although vacancy rates have changed very little since 2003. Liscard, New Ferry and Prenton (Woodchurch Road) appear to be experiencing the greatest decline, with the largest increase in vacancy rates, perhaps reflecting competition from a greater comparison offer elsewhere.

Vitality and Viability of Town, District and Local Centres in Wirral			
Key Town Centre	**Summary of Areas' Health as a Centre of Retail and Leisure**	**Vacancy Rates**	**Retail Rents**
Birkenhead (Core Area)	The BIRS highlighted Birkenhead Town Centre as in significant decline and in need of finding a new purpose and direction. According to the study, the configuration of the retail centre does not meet the accommodation requirements of present day high street multiples and the town centre needs a more sustainable mix of uses to attract and retain users. The owners of the Grange and Pyramids Shopping Centre are unable to invest in the current market and occupiers are leaving as demand drops. The centre lacks a quality hotel or leisure-based offer to attract and retain overnight visitors. The town centre should become more multi-functional, a focal place for business and multi-service delivery, which could act as a catalyst for investment, helping to create confidence in the private sector to invest. Birkenhead Market is poorly configured and has lost its once strong focus on fresh produce. It is an important feature of the town centre and needs to be a priority for revitalisation. There is a need to improve the physical relationship with Conway Park station and Woodside.	The vacancy rate in 2008 (Roger Tym & Partners, 2009) stood at 16.0 per cent, an increase from the 2004 study. A significant proportion of the vacant premises are located at the Grange Centre, including some substantial units in prominent locations. This has a significant negative effect on the appearance and vitality of the eastern part of the town centre.	The Strategy for Town Centres, Retail and Commercial Leisure (Roger Tym & Partners, 2009) sets out retail rents for each centre. Zone A rents in Birkenhead averaged £110 per sq.ft in June 2008, which is below the level achieved in 9 out of the 10 strategic centres across the North West. Although rents have declined from a peak of £115 per sq.ft in June 2005, the June 2008 level represents a slight improvement from the average of £105 per sq.ft recorded in June 2007.
Bromborough Village	Wirral's Town, District and Local Centres Study and Delivery Framework (2011) detail the current position of each centre, with the exception of Birkenhead Town Centre. It shows that Bromborough is beginning to show signs of struggling as a centre with some empty properties and a decline in the retail offer. However, the centre does still have some key services and retail businesses which offer a reasonable choice for	The proportion of vacant units in the centre stood at 11% in 2011 (Wirral Council, 2011), broadly comparable to the rate of 10.4% recorded in the 2004 study.	Published time-series and yield data are not available for Bromborough Village. However, anecdotal evidence from local property market agents indicated that prime yields on property within the town centre are

	shoppers. It also benefits from a large car park and civic uses. A major concern for the centre is a lack of on-street parking and also the growth in the number of empty shops. Bromborough has a large surrounding population and also had good access to public transport. The centre could benefit from some small scale interventions to help rejuvenate the centre.		gradually worsening. (Roger Tym & Partners, 2009)
Heswall	Heswall is continuing to function extremely well as a centre (Wirral Council, 2011). The socio-economic profile of the catchment provides strong support for the centre and its role for convenience food shopping as well as for lifestyle shopping and luxury items. The centre also offers numerous restaurants with a healthy evening economy which sustains the local surrounding population. The centre has very little need for intervention and is self-sustaining and prosperous in its own right.	The proportion of vacant units in the centre stood at 9% in 2011, an increase of 4.7% from 2004.	Published time-series rental data are not available for Heswall. Prime yields have generally improved in Heswall, from 10.5 percent in April 2001, to 8.0 per cent in January 2006. Yields remained static at this level until January 2008, when they marginally deteriorated to 8.5 percent. (Roger Tym & Partners, 2009)
Hoylake	Hoylake is a long, linear centre which has a range of retail and service uses (Wirral Council, 2011). The centre is well connected by public transport and also has a large residential catchment within walking distance. Hoylake also has a vibrant evening economy with a mix of restaurants, bars and cafes. The centre does have some vacant units particularly towards the Meols end of the centre, which is performing poorly as part of the centre. The proportion of units given over to comparison retailing is below average, which, given the size of the centre, is surprising. The centre would benefit from a more central focus and broadening the retail offer to attract people to visit the centre for more comparison shopping with linked trips to other key services and leisure pursuits.	The proportion of vacant units in the centre stood at 9% in 2011, a reduction of 2.2% from 2004.	Published time-series rental and yield data are not available for Hoylake. However, anecdotal evidence from local stakeholders indicated that rents on retail property in certain parts of the town centre are too high, and are becoming prohibitive to some operators. In particular, rents on property along The Row are proving too high to support viable business operations. (Roger Tym & Partners, 2009)

Liscard	Liscard is the main shopping area for north Wirral and is second only to Birkenhead (Wirral Council, 2011). However, there is some evidence that the retail offer has continued to decline since 2003. The centre has a substantial population catchment within walking distance, as well as very good access by public transport to the centre, although the gyratory impedes some pedestrian movement. The socio-economic profile suggests that the population has some disposable income to spend on shopping and leisure activities, although this is limited in some areas. The area has limited opportunities to grow except the long-standing proposals to develop the Cherry Tree Centre and the former cinema, neither of which have yet come to fruition. Parking is considered to be an issue by shoppers and traders in the area.	The proportion of vacant units in the centre stood at 18% in 2011, an increase of 5% from 2004.	Zone A rents in Liscard have remained static since 2007, and averaged £45 per sq.ft in June 2008. This represents an increase on the average £40 per sq.ft achieved between June 2003 and June 2006. Whilst rents have overall increased by 29 percent since June 2000, the Manager of the Cherry Tree Centre reported static rents. (Roger Tym & Partners, 2009)
Moreton	Moreton is relatively healthy centre with a mix of convenience, comparison and service uses within the centre (Wirral Council, 2011). The centre is well situated for transport links and benefits from being on a main route through Wirral. The concern over car parking is important to the perception of visitors and shoppers to the centre. Only some very limited options to expand off-street car parking provision have been identified. The centre has a growing night time economy and ensuring a balance of uses (such as hot food takeaways) will be an important consideration in the future.	The proportion of vacant units in the centre stood at 10% in 2011, broadly comparable to the 8% vacancy rate recorded in 2004.	Published time-series rental and yield data are not available for Moreton Town Centre.
New Ferry	New Ferry has significantly declined over the years, with a reduced retail offer and many vacant units (Wirral Council, 2011). However, New Ferry does offer niche businesses which flourish, including butchers and the only Farmer's Market on Wirral in the nearby Community Centre. New Ferry benefits from a large residential catchment and from being in	The proportion of vacant units in the centre stood at 26% in 2011, a reduction of 5.3% since 2004.	Published time-series rental and yield data are not available for New Ferry Town Centre.

	close proximity to Port Sunlight Village. However, the links and benefits of this location are not being utilised to their potential. The offer has severely declined and there are concerns that people are no longer doing their weekly shopping in the centre, given its relative proximity to Birkenhead and the Croft Retail Park. New Ferry needs serious interventions and controls to restructure the retail function of the centre.		
Prenton (Woodchurch Road)	Prenton is a busy centre with several large convenience supermarkets and a range of service uses within the centre but with limited comparison offer (Wirral Council, 2011). Prenton is located on a busy main road through the Borough and is well connected by public transport as well as being accessible by car. The centre also benefits from a large prosperous population within walking and easy travelling distance to the shops. There are a few opportunity sites on the edge of the centre which could be considered for complementary uses in the future.	The proportion of vacant units in the centre stood at 13% in 2011, a significant increase from the 1.8% vacancy rate recorded in 2004.	Published time-series rental and yield data are not available for Prenton (Woodchurch Road) Town Centre.
West Kirby	Overall, West Kirby is a vibrant and flourishing centre which has a buoyant comparison retail offer in particular and low vacancy rate (Wirral Council, 2011). The centre has many independent boutiques and shops with a wide variety of lifestyle businesses. The centre benefits from its waterfront location and good sustainable transport connections with tourism bringing in thousands of visitors each year. The centre services the prosperous community who use and spend within the centre. There is little intervention required in West Kirby, however managing and maintaining the unique character and mix of independent shops is important to the ongoing vitality of the centre.	The proportion of vacant units in the centre stood at 6% in 2011, comparable to the 6.5% vacancy rate recorded in 2004.	Published time-series rental and yield data are not available for West Kirby. However, anecdotal evidence from local stakeholders indicated that rents on retail property have risen sharply since the Open Golf Championship in 2006, with the effect that trading conditions have become difficult for some operators. (Roger Tym & Partners, 2009)

Indicator: Amount of New Retail, Office and Leisure Development by Type (sq m developed per annum)
(Original SA Scoping Report July 2007 Indicator: Amount of new retail, office and leisure development by type and location (sq m developed per annum))

The original version of this indicator, identified in the July 2007 SA Scoping Report, was used in the original baseline review and included a map showing the location of new developments. The indicator in this review has been amended to remove the reference to the location of development.

The table below shows the total amount of completed retail, office and leisure floorspace in Wirral between 2004-2005 and 2011-2012, which shows few consistent trends.

Land Developed for Retail, Office and Leisure Uses in Wirral completed floorspace (sq m)				
	Retail (Use Class A1)	**Financial and Professional Services** (Use Class A2)	**Offices** (Use Class B1a)	**Assembly and Leisure** (Use Class D2)
2004-2005	4,963	0	961	522
2005-2006	5,363	0	4,857	5,594
2006-2007	2,385	0	8,542	488
2007-2008	10,366	0	3,801	4,044
2008-2009	967	0	8,803	1,826
2009-2010	2,484	0	275	0
2010-2011	1,603	0	1,426	3,739
2011-2012	21,880	0	91	4,304

SA Objective 10: To Maximise Provision for High Quality Tourism

Indicator: Number of Visitors to Wirral and the Liverpool City Region by Duration and Average Expenditure per Visitor
(Original SA Scoping Report July 2007 Indicator: Number of visitors to Wirral and Merseyside by duration and average expenditure per visitor)

The original version of this indicator, identified in the July 2007 SA Scoping Report, was used in the original baseline review and included data for Merseyside. The indicator in this review has been amended slightly to reflect the shift to a wider sub-regional data collection for the Liverpool City Region.

The number of tourists visiting Wirral in 2010 was 60% higher than in 2002, at over 6.5 million. The proportion of tourists visiting as ‘day-trippers’ has grown by a third (32%) in this period, and represents some 89% of all visitors. Although staying visitors have grown by only 9%, this is in part due to a lower proportion of visitors staying with friends and family. The numbers staying in serviced accommodation (Hotels, B&Bs, etc.) on Wirral has grown by 39% in this period.

Wirral's 6.5 million visitors generated a total of £268.2 million for the Borough's economy in 2010, an increase of 31% in real terms from 2002.

In 2010, Wirral's visitor numbers represented 12% of the total visitors to the Liverpool City Region, a similar level to that shown in 2002. Both day and staying visitor numbers seem to have been boosted by recent development initiatives. The level of expenditure per overnight visitor in Wirral is lower than the City Region as a whole, in part reflecting higher hotel use rates in Liverpool City Centre.

Overall these figures demonstrate that visitor numbers have increased significantly in both Wirral and the Liverpool City Region since 2002.

Wirral and the Liverpool City Region Visitor Economy			
2002*			
Area	**Overnight Visitors**	**Day Visitors**	**Total**
Wirral	675,620	4,386,517	5,062,137
Total Expenditure***	£67.7m	£136.6m	£204.3m
Expenditure/visitor***	£100.19	£31.14	£40.35
Liverpool City Region	3,811,877	38,095,560	41,907,437
Expenditure***	£705.3m	£1,621.8m	£2,327.1m
Expenditure/visitor	£185.03	£42.57	£55.53
2010**			
Area	**Overnight Visitors**	**Day Visitors**	**Total**
Wirral	737,447	5,800,326	6,537,773
Total Expenditure***	£88.7m	£179.5m	£268.2m
Expenditure/visitor***	£120.34	£30.94	£41.02
Liverpool City Region	4,419.346	50,088,014	54,507,360
Expenditure***	£862.0m	£2,116.8m	£2,978.8m
Expenditure/visitor	£195.06	£42.26	£54.65

Sources: *STEAM analysis England's Northwest Research Service.
** Liverpool City Region Local Enterprise Partnership, Digest of Tourism Statistics, March 2012 *** Note – all expenditure at 2010 prices.

It should be noted that the Digest of Tourism Statistics 2012 highlights that while figures for the Liverpool City Region are statistically robust, the exact split of visitor numbers and impact amongst the districts has a lower level of statistical reliability.

Indicator: Number of Visitors to Top Tourists/Visitor Facilities
(Original SA Scoping Report July 2007 Indicator: Number of Visitors to Top Ten Tourist/Visitor Facilities)

The original version of this indicator, identified in the July 2007 SA Scoping Report, was used in the original baseline review and refers to the top ten tourism attractions. The indicator in this review has been amended slightly to reflect the change in the way this data is collected.

Wirral has a wide variety and number of formal and informal tourism visitor facilities and attractions. These include coast and countryside attractions, golf courses, museums and art galleries, historic parks and gardens, and regular events as well as awarding winning accommodation and food and drink businesses including Merseyside's only 5 star hotel, guesthouse and Michelin starred restaurant.

The 2004 Digest of Merseyside Tourism included visitor numbers for the top 14 tourist attractions in the Borough in 2002 and 2003. This identified an increase of 2% in the total number of visitors between 2002 and 2003. Comparable data is no longer provided at a local authority level, but the following Wirral based attractions and events were highlighted as among the most significant within the Liverpool City Region (LCR) in 2010:

Top Tourists/Visitor Facilities in Wirral 2010			
Attraction	**Category**	**LCR Rank within Category**	**Attendance 2010**
Lady Lever Art Gallery	Top “free” attraction	12	200,937
Tam O’Shanter Urban Farm	Top “free” attraction	13	108,000
Mersey Ferries (*joint with Liverpool*)	Top “paid” attractions	1	646,821
New Palace Family Amusement Centre	Top “paid” attractions	6	140,000
Ness Botanic Gardens *(in CWAC not actually in Borough)*	Top “paid” attractions	8	101,701
Port Sunlight Museum	Top “paid” attractions	11	29,180
Tranmere Rovers FC	Top sports attraction	6	139,899
Wirral Food and Drink Festival	Top “paid” events	5	24,000
Hoylake RNLI Open Day	Top “free “ events	9	30,000

Source: The Liverpool City Region Local Enterprise Partnership, Digest of Tourism Statistics, March 2012.

The Lady Lever Art Gallery is identified as the most visited attraction in Wirral (excluding Mersey Ferries) in 2010, with over 200,000 visitors. This is a significant increase from 2003 when visitor numbers had fallen to 93,675. While not included in the Digest, the Floral Pavilion Theatre and Conference Centre recorded visitor numbers of 216,356 in 2010, rising to 230,619 in 2011.

Findings from the Wirral Visitor Research Study 2011 demonstrate that 90% of current visitors would recommend the Borough as a place to visit. It also highlights that there has been a significant increase in the proportion of visitors who are satisfied with their visit to Wirral when compared to 2006.

Indicator: Number of Bedspaces
(Original SA Scoping Report July 2007 Indicator: Number and Location of Bedspaces)

The original version of this indicator, identified in the July 2007 SA Scoping Report, was used in the original baseline review and identifies the location of bedspaces on a map. The indicator in this review has been amended to remove reference to the location of bedspaces.

Number of Bedspaces				
	Wirral		City Region	
	2002	2010	2002	2010
Serviced Accommodation	1,689	2,717	15,110	21,578
Non-Serviced Accommodation	1,261	1,013	6,498	13,228
Total Bed Stock (number of beds)	2,950	3,730	21,608	34,779

Source: STEAM analysis, England's Northwest Research Service

In 2010 it is estimated that the total number of bedspaces in Wirral was 3,730. Although this is an increase of 26% from 2002, the amount of serviced accommodation has risen by 61%.

Wirral's bedspace represents 11% of the City Region. Overall the whole Liverpool City Region has seen its bedspaces rise by 61%. Although much of this is attributable to an increase in the number of hotels, it also reflects the increased popularity of serviced apartments in Liverpool City Centre.

Indicator: Employment in Tourism

The 2012 Digest of Tourism Statistics suggests a method of estimating employment in tourism using Standard Industrial Classification Codes (SIC). This approach uses ONS data to calculate the number of jobs within SIC codes which are considered applicable to tourism (*see table below). It is recognised that this method does not provide an exact estimate and will not count indirect jobs that may be supported by tourism. Using this same methodology, estimated figures for employment in the visitor economy have been calculated for 2008 to 2010. Due changes in the SIC classification system it is not possible to compare data prior to 2008 using this method.

In 2010 employment in tourism accounted for 7.4% of all employment in Wirral, a fall from 2008 and 2009. This is just below the proportion of employment in Liverpool City Region (8%), the North West (8.2%) and England (8.5%) for 2010, although these areas had also seen a small fall from 2008. This small decline may reflect the downturn in the global economy or be a short term fluctuation. Calculated using a different SIC classification system, the percentage of tourism related employment in both Wirral and Merseyside between 1995 and 2003 was seen to fluctuate up and down several times by at least 1%, while rising overall.

Employment in Tourism						
Area	**2008**		**2009**		**2010**	
	number	**%**	**number**	**%**	**number**	**%**
Halton	3,900	7.1	3,500	6.7	3,300	6.2
Knowsley	2,300	3.9	2,400	4.1	2,400	4.3
Liverpool	20,600	8.7	20,700	8.8	19,700	8.5
Sefton	9,000	9.4	8,900	9.3	10,200	10.8
St. Helens	5,600	8.7	4,800	7.6	4,600	7.5
Wirral	8,200	8.1	8,000	8.1	7,200	7.4
Liverpool City Region	49,600	8.1	48,300	8.0	47,500	8.0
North West	268,900	8.5	260,800	8.3	253,800	8.2
England	2,170,600	8.8	2,072,600	8.6	2,058,800	8.5

Source: ONS Business Register and Employment Survey, 2012

The Standard Industrial Classification Codes (SIC) shown below are those which are chosen as best representing the visitor economy. Inevitably, there will be some overlap, with some businesses in these sectors performing wholly non-tourism related functions and some businesses in sectors not included having a tourism focus.

- 4932 : Taxi operation
- 5010 : Sea and coastal passenger water transport
- 5030 : Inland passenger water transport
- 5510 : Hotels and similar accommodation
- 5520 : Holiday and other short stay accommodation
- 5530 : Camping grounds, recreational vehicle parks and trailer parks
- 5590 : Other accommodation
- 5610 : Restaurants and mobile food service activities
- 5621 : Event catering activities
- 5629 : Other food service activities
- 5630 : Beverage serving activities
- 7711 : Renting and leasing of cars and light motor vehicles
- 7721 : Renting and leasing of recreational and sports goods
- 7911 : Travel agency activities
- 7912 : Tour operator activities
- 7990 : Other reservation service and related activities
- 8230 : Convention and trade show organizers
- 9001 : Performing arts
- 9002 : Support activities to performing arts
- 9003 : Artistic creation
- 9004 : Operation of arts facilities
- 9102 : Museum activities
- 9103 : Operation of historical sites and buildings & similar visitor attractions
- 9104 : Botanical and zoological gardens and nature reserve activities
- 9311 : Operation of sports facilities
- 9321 : Activities of amusement parks and theme parks
- 9329 : Other amusement and recreation activities

Source: The Liverpool City Region Local Enterprise Partnership, Digest of Tourism Statistics, March 2012.