

Impacts 08 Team

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Impacts 08 (2007) *Baseline Report 2006/07 Core Messages*



Baseline Report 2006/07

Core messages

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Liverpool's nomination and hosting of the ECoC 2008 is taking place concurrently with rapid change in the city in terms of demography and regeneration. The city's population is increasing with figures for 2005 putting Liverpool's population at 447,500, compared with the 2003 figure of 441,800. The 2004 figure was the biggest percentage rise Liverpool has seen in a single year since the 1970s. The city's economy is also growing and the 6.3% increase in Liverpool's economic output (GVA per head) is well ahead of the national (5.5%) and Northwest (5.4%) figures.

But Liverpool also has the continuing challenge of tackling the legacy of deprivation generated by the economic restructuring which devastated many of its most vulnerable neighbourhoods some 30 years ago. Liverpool is the most deprived city in England in the Index of Multiple Deprivation (IMD2004) and nearly 60% of Liverpool's population is within the most vulnerable 10% in all of England. Equally challenging are the stark differences within the city; certain wards suffer disproportionately with high levels of poor housing, worklessness and ill health.

In this context, *Impacts 08* is set to establish the economic, environmental, social and cultural impact of being nominated, planning for and hosting the European Capital of Culture in Liverpool. This summary report reflects the main outcomes of the first year of research and establishes the baseline against which impacts will be measured.¹

The core messages emerging from research to date are grouped below, according to the *Impacts 08* main research themes.

Economic Impacts and Processes

- Overall, the economies of Liverpool, Merseyside and the North West are prospering, growing in line with or above UK trends. However, the employment rate in Liverpool remains low compared with similar UK cities;
- Business sustainability is increasing with a growing rate of new business start-up and decreased business failure;
- Visitor expenditure continues to grow above the rate of inflation;
- Visitors to Liverpool see the city as a leisure holiday destination rather than a shopping destination or a place to visit friends and family;
- The city is attracting a high percentage of new visitors.

The City's Cultural System (creative industries, city attractions, visitor infrastructures, and retail)

- Employment in the city's 'visitor infrastructure' (encompassing hotels, restaurants, bars, etc.) noticed a remarkable growth between 2000 and 2001, and has since remained stable;
- Employment in the 'creative industries sector' has grown over the period 2000 to 2005;
- The proportion of employees in the creative industries sector remains smaller in Liverpool than in other core cities. However, there has been growth between 2004 and 2005, particularly in the area of software, computer games and electronic publishing;
- Between 2004 and 2005, employment volume has grown remarkably in the area of architecture and engineering consultancy, linked to the growth in construction / capital developments;
- The city's arts and cultural sector has a positive profile nationally both in the press and in people's perceptions. The main focus of such coverage has been the city's music scene, its museums and galleries, and event programming;
- The 08 Highlights event in November 2006 attracted 68% positive coverage in the local media and 50% nationally, and has led to increasing numbers of positive press features about the city's cultural provision;
- National perceptions of Liverpool's cultural system are generally positive, with up to 35% of people identifying its music scene as a UK and European leader;
- The city's nightlife and sports provision are also generally thought to be better than those of other UK cities.

¹ The full *Impacts 08* Baseline Report 2006/07 is available online at: www.impacts08.net

Cultural Access and Participation

- In 2005/06, there were a significantly greater number of events and performances funded by or directly organised by Liverpool Culture Company, than occurred in Lille (2004) during its ECoC year. This has also led to higher levels of audiences than those reported by Lille in 2004.
- The range of participation in Liverpool's cultural activities broadly reflects national patterns. Yet, for Creative Communities events, there are comparatively higher levels of young people and ethnic minorities taking part: in projects funded by the smaller Creative Communities grants programme, 62% of artists/participants are under 15, and 42% are from BME groups.

Identity, Image, and Place

- The nomination of European Capital of Culture has had some short to medium term impact on the city's image, at a local as well as a national level. In 2003, national papers produced four times more positive stories about Liverpool's culture and arts scene than was the case in 1996;
- The local press is positive about potential for change in the city's cultural infrastructure, but negative about other developments, mainly linked to social concerns;
- Sustained positive press associations relating to Liverpool at a local as well as national level include references to its galleries/visual arts scene; business and inward investment; TV media and entertainment; music scene; cultural events; and universities/ research;
- Nationally, the Liverpool ECoC is mainly associated with the wider city's renaissance, in particular, its renewed (enhanced) image and economic regeneration;
- The November 6th '08 Highlights' launch attracted extremely positive coverage at local level. National coverage has been slow but steady, with increasing numbers of long broadsheet feature (and particularly weekend or Sunday) articles dedicated to the city's cultural assets from November onwards.

Physical Infrastructure and Sustainability of the City

- Liverpool is undergoing an intense period of physical development activity, which people associate with the ECoC;
- By the end of 2006, three quarters of the capital infrastructure projects identified as supporting Liverpool ECoC within the bid proposals, have been completed;
- The 'Big Dig' is one of the developments most closely associated with the Liverpool ECoC. Surveys indicate that although people complain about "travel disruption", there is a general feeling that "it will all be worth it in the end";
- Currently a higher proportion of tourists to Liverpool travel by public transport than in other cities;
- Visitors see parking in Liverpool as worse than in other UK cities, both in terms of ease of parking and cost;
- Local people and tourists feel that street cleanliness is improving, although they still identify it as a problem;
- An environmental sustainability policy has been written for Liverpool Culture Company, reflecting a broader process in which environmental sustainability measures such as bio-diesel generators are being used at events.