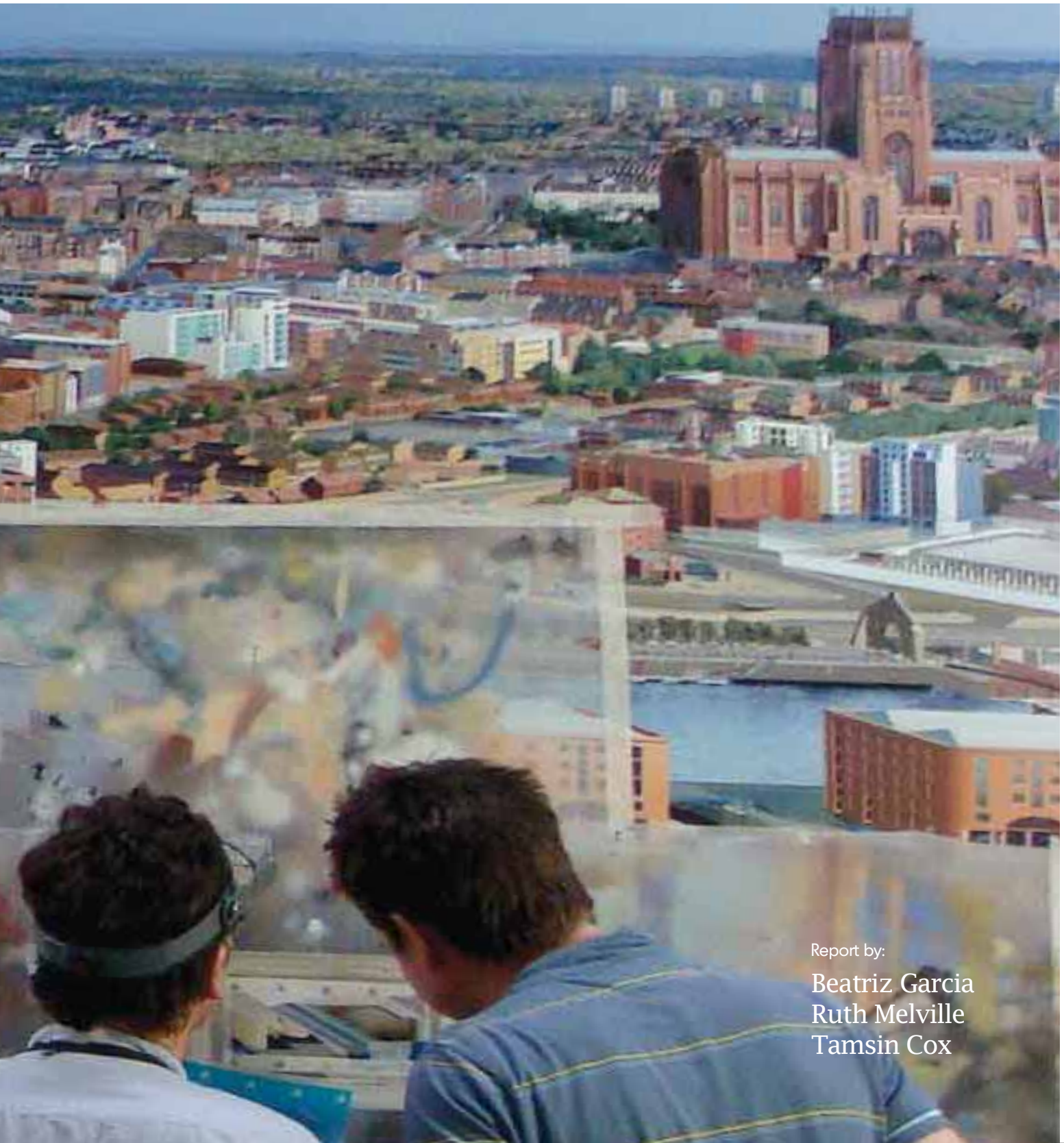




Creating an impact:

Liverpool's experience as European Capital of Culture



Report by:

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The Event

The Liverpool ECoC programme had a total income of **£130 million over six years**, the highest of any European Capital of Culture to date.

The Impacts

1 CULTURAL ACCESS AND PARTICIPATION

The ECoC programme was geographically and socio-economically inclusive

- **Geographically:** in 2008, one third of the audience was local, one sixth from beyond the region, and nearly 5% international.
- **Socially:** in 2008, the audience socio-economic profile largely matched the city's profile.
- Volunteers and other participants in the programme reported a range of social and cultural outcomes from their involvement including social interaction, the chance to welcome overseas visitors to their city and the satisfaction of promoting Liverpool's culture and heritage.

During the period 2006-2008 considerably wider cultural engagement occurred in both Liverpool and the North West region, including:

- A **10% rise** each year in arts audiences across Liverpool
- Higher levels of interest in going to museums and galleries in Liverpool than elsewhere in the UK, sustained across the ECoC period
- A drop in the proportion of people in Liverpool who claimed to have no interest in culture
- A **50% rise in visitor figures** to Merseyside's seven largest attractions since 2004, peaking at 5.5 million people in 2008.

By 2009

- 11% of Liverpool residents felt they had 'tried something new' in 2008
- 60% of North West residents considered that by 2008 there were more cultural activities and opportunities in the region than previously.

2 ECONOMY AND TOURISM

Visiting Liverpool ECoC

- The Liverpool ECoC attracted **9.7 million additional visits to Liverpool**, constituting **35% of all visits** to the city in 2008.
- These visits generated an **economic impact of £753.8 million** (additional direct visitor spend) across Liverpool, Merseyside and the wider North West region.
- **2.6 million European and global visits** were motivated by the Liverpool ECoC in 2008. **97%** of these were **first-time visits** to the city.
- The ECoC generated an additional **1.14 million staying visitor nights in Liverpool hotels**, 1.29 million in the rest of Merseyside and 1.7 million in the rest of the North West.

Overall tourism trends in 2008

- In 2008 there were an estimated **277 million visits to Liverpool**, a 34% rise on the previous year; and **75.1 million visits to Merseyside**, a 19% rise on 2007.
- This increase was proportionally much greater than in other cities. Merseyside saw a 20% rise in day visits between 2007 and 2008, in comparison to rises of between 1 and 4% in other areas of the North West; Merseyside also saw a 4% rise in staying visits over the same period, in comparison with a 7% drop in Greater Manchester.

Over four themed years 2005-2008

- 41,000+ activities including:
- 276 highlight events
 - 21,000 performance and exhibition days
 - 20,000 workshops and training sessions
- Resulting in:
- A total audience of 18 million
 - 1,000 volunteers giving 7,000 days

In 2008 alone

- 7,000+ activities
- An audience of 9.8 million
- 80%+ of audiences rated the events 'good' or 'very good'

3 CULTURAL VIBRANCY AND SUSTAINABILITY

Since ECoC nomination in 2003

- National and local media coverage on Liverpool's cultural offer has more than doubled and in 2008, positive stories on the city's cultural assets dominated over the traditional emphasis on (negative) social issues.
- Liverpool culture stories have diversified from the traditional focus on popular music and the built heritage to the visual and performing arts, and growing references to Liverpool's creative industries.
- The city's cultural sector has developed strong networks, which have resulted in the securing of multimillion pound national grants. These include the Liverpool Arts Regeneration Consortium and the Small and Medium Arts Collective, in addition to the previously established Arts and Culture Network.

By the end of 2008

- The arts sector viewed the Liverpool ECoC as a success in terms of raising the profile of the city and its arts and cultural offer, and in bringing visitors and the local population in to enjoy its offer.
- The city region's creative industries sector also felt that: the Liverpool ECoC had improved the profile of the city, particularly externally; that it had improved the 'local morale' of the sector and increased its credibility within the city region; and many anticipate long-term, positive impacts for their businesses.
- Up to 51% of local cultural sector peers agree that by the end of its ECoC year, Liverpool has been repositioned as a 'world class city'.
- At least 15 of the events of Liverpool ECoC were judged to be 'world class' or 'excellent' by the majority of a panel of consulted peer reviewers.
- There were 1,683 creative industry enterprises in Liverpool employing 11,000 people. This represents a growth of 8% in the number of enterprises since 2004.
- Total audience among the largest arts and cultural organisations in the city topped 5.6 million.

4 IMAGE AND PERCEPTIONS

Liverpool's media representation has become less polarised since the mid 1990s

- The traditional contrast between negative reporting on social issues and positive stories on city icons has been replaced by a wealth of stories on current cultural offer and economic change.
- By the end of 2008, this has led to a much more nuanced view of the city, with a balanced proportion of positive, negative and neutral coverage.

Press media

- Coverage of the Liverpool ECoC was overwhelmingly positive between 2003 and end of 2008, peaking in 2003 when 74% of all national stories were positive.
- Events delivered under the Liverpool ECoC brand received over 90% positive or neutral coverage throughout this period.
- Positive stories on Liverpool as a city grew by 71% in the national press between 2007 and 2008.
- Local papers have increased positive city coverage since 2003 (from 39% to 56%) - while negative city coverage was at its lowest in 2008.

Online social media

- flickr (50,000 Liverpool ECoC photographs)
- YouTube (2,200 clips, 2.5m views)
- Facebook (500 new group pages, 13,000 members)
- Google (Liverpool ECoC searches comparable to football searches).

People's awareness and perceptions

- From 2005 to 2008 overall positive impressions of Liverpool increased amongst the UK population (from 53% to 60%) while negative views dropped from 20% to 14%.

By the end of 2008

- 65% of UK residents were aware that Liverpool was European Capital of Culture
- 77% of visitors felt the city was 'safer than I expected'
- 99% of visitors particularly liked the 'general atmosphere' and 97% the 'feeling of welcome'
- 68% of UK businesses believed the ECoC had a positive impact on Liverpool's image.

5 GOVERNANCE AND DELIVERY PROCESS

- Liverpool's approach to ECoC governance was the result of extensive partnership across public, private and third sectors. This has contributed to the repositioning of culture as more central to cross-sectoral agendas, and is reflected in a new city-wide cultural strategy for 2008 to 2013.
- The Liverpool ECoC generated the highest amount of sponsorship and earned income of any ECoC, with a total of £22.3 million of sponsorship (both cash and in kind) and £4.1 million of earned income.

By the end of 2008

- Liverpool ECoC stakeholders agreed that the year was seen as a success, that it had added value to existing regeneration programmes and that there was great potential associated with the its legacy.
- Liverpool residents showed much higher levels of agreement with the claim that the city was a better place than before the ECoC award (85%, a 20% rise on 2007).
- Up to 78% of North West residents agreed that Liverpool had 'benefited' or 'benefited a great deal' from hosting the ECoC.
- Internationally, the Liverpool ECoC is perceived as a relevant reference point for future ECoC hosts and is presented as an exemplar by the European Commission in areas such as its volunteering, community involvement and research programmes.

Impacts 08 headlines

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Foreword

I am very pleased to introduce this excellent report. The genesis of this research lies in a decision by the University of Liverpool and Liverpool John Moores University to establish a consortium in order to bid for a five year research programme commissioned by Liverpool City Council. This university partnership was invaluable in securing funding and has led to a fruitful and dynamic collaboration across the two universities, building on their respective strengths in the area of cultural policy research and their many links with Liverpool's arts sector. We should be justifiably proud to have delivered so successfully on our commitment.

The Impacts 08 programme has demonstrated the added value that academics can bring to a large cultural event, giving our universities the chance to be part of Liverpool's legacy as European Capital of Culture (ECoC), which includes continuous opportunities for knowledge exchange across policy and practitioner networks.

The fact that the research programme has been led by university teams has meant that the work has not just focused on responding to a client brief but also taking some leadership on research priorities. Beyond providing useful data using tested methods, the Impacts 08 team has been dedicated to advancing methodologies to capture the value of cultural interventions, complementing established quantitative work with locally sensitive qualitative techniques. The latter has resulted in additional funding beyond the original local authority commission, including: match funding from the Arts and Humanities Research Council (AHRC) and Economic and Social Research Council; knowledge exchange funding from the AHRC and Arts Council England; and, legacy funding from the European Commission for a one year Cultural Policy Grouping, involving partners across Europe.

I very much hope that you will enjoy and learn from this report.

Professor Sir Howard Newby, Vice-Chancellor, University of Liverpool

The Impacts 08 programme is remarkable, not just for the interesting research outcomes and the valuable insights that have resulted from the programme, but that it actually happened at all. The Liverpool City Council should be congratulated for its forward thinking, and indeed its courage, in commissioning this work well in advance of the delivery of the 2008 programme and allowing a sufficient time of five years to facilitate a serious piece of investigation.

This action brought two major universities together with complementary skills and expertise in research and practice, and in mutual respect, to tackle this significant project with outstanding success. The results of this consortium work are impressive, as the Impacts 08 programme has been a first in the ECoC title's 25 year history: the first time that a host city invests in a five year programme of research, starting before the event year; the first time that the main research programme is led by a university consortium rather than a private consultancy; and the first time that the research covers a full range of impact dimensions simultaneously (economic as well as social and cultural).

The results will have significant local interest and impact but, most importantly, useful impact both nationally and internationally. At a national level the results will be valuable to the new UK City of Culture programme and the wider London Olympics programmes. Internationally, key learning points are being passed on to future ECoC hosts via the European Commission.

Finally, one of the side-effects of the successful programme has been to demonstrate the power of the two universities working together to work on key projects, beneficial to both universities and to the city of Liverpool itself.

Professor Michael Brown CBE DL, Vice-Chancellor, Liverpool John Moores University



I was lucky enough to be working in Liverpool when the city was awarded European Capital of Culture (ECOC), and in the years building up to and preparing for 2008. The tremendous sense of collective responsibility, felt across the city, for making a success out of the opportunity which the ECOC presented, generated intense partnership engagement leading up to 2008, including my own secondment with Liverpool Culture Company and the development of the Liverpool Arts and Regeneration Consortium (LARC).

When Dr Beatriz Garcia requested permission to attend the bi-weekly gathering of arts sector CEOs which LARC had become, it was easy to agree access in the knowledge that the frankness of our discussions would not be compromised by an academic observer. What actually emerged from these observations was another new partnership – between LARC and the Impacts 08 research team – which has enriched both parties’ understanding of each other and supported a broader discussion about the value and impact of culture which is both locally and nationally relevant.

The success of Liverpool’s year as ECOC has inspired the Government to design its own scheme – the UK City of Culture initiative. In his speech at the University of Liverpool in January 2009, then Secretary of State for Culture, Media and Sport, Andy Burnham set out his view that culture and creativity should be viewed as part of the answer to tough economic times - and not as a distraction or a luxury. I couldn’t agree with him more.

That’s why this UK-wide competition aims to build on the lessons learned from Liverpool in putting culture at the heart of city agendas, policies and planning. It will operate on a four-yearly cycle with the first UK City of Culture being awarded in 2013. What we want from the winning city is a high quality cultural programme that reaches a wide variety of audiences and that is a fitting follow-on not only from Liverpool but also the Cultural Olympiad taking place in the run up to the 2012 Olympic and Paralympic Games.

What we also want from the winning city is a clear approach to maximising legacy and, notably, being able to evaluate impact across social and economic, as well as cultural, domains. We need to capture the benefits of a focus on culture throughout this process and on an ongoing basis.

Impacts 08 – and particularly this report - is an excellent example of how valuable a rigorous, longitudinal and holistic approach to research and evaluation can be. The commitment to evaluation and research which Liverpool has shown in commissioning Impacts 08 shows the city’s determination to build on success, learn from mistakes, and all the while improve and strengthen its cultural offer for generations to come.

Michael Elliott, Director, Culture, Department of Culture, Media and Sport

Introduction

This report is a summary of the key findings and core messages of Impacts 08, the research programme evaluating the impacts of Liverpool, European Capital of Culture 2008 (Liverpool ECoC) on the city, the wider region and its people. Impacts 08 is a five-year joint initiative between the University of Liverpool and Liverpool John Moores University, commissioned by Liverpool City Council for the period 2005 to 2010.

Impacts 08 has delivered four main outcomes:

- The longitudinal impact analysis of the Liverpool ECoC as delivered by a wide range of stakeholders, which retrospectively covered Liverpool's pre-bid period (2000), through the bidding and nomination stages (2002-2003), event lead-up (2004-2007), the event year itself (2008) and beyond (early 2009).
- An enhanced evidence base for the multiple impacts of culture upon regeneration and city renaissance, which has assisted local and regional cultural planning as well as informing the UK national debate.
- The provision of intelligence to guide decision-making for the Liverpool ECoC delivery team.
- The legacy of a replicable research framework, which can be used to explore the impacts of culture-led regeneration programmes beyond Liverpool and 2008.

The research framework has focused on the economic, social and cultural dimensions of impact grouped in five main thematic clusters:

- Cultural access and participation
- Economy and tourism
- Cultural vibrancy and sustainability
- Image and perceptions
- Governance and delivery process

Consideration has also been given to the impacts on social capital and the physical environment. Findings relating to these areas cross-cut the themes above.



An important ambition of Impacts 08 has been to make a major contribution to the debate on measuring the impacts of culture-led regeneration and to offer an innovative approach which goes beyond usual quantitative indicators, such as job creation or tourism growth, to take into account the lived experiences of residents in the event host city. The research programme has sought to overcome the traditional limitations of short-term impact research by following the principles below:

- Recognising the breadth of areas of impact; developing a holistic model, with inter-related thematic clusters
- Exploring processes as well as outcomes; contextualising impact data by assessing surrounding narratives
- Understanding the challenges of impact disaggregation; placing the object of study in a wider context, acknowledging the effect of related initiatives and assessing lines of causality over time.

A detailed overview of the methodological approach is given in *Impacts08: methodological framework and recommendations for future research* (available at www.impacts08.net).



Further to this, the Impacts 08 research methodologies have been longitudinal, taking place over five years, and flexible enough to adapt to need and emerging findings. The methodologies combined an assessment of existing data collected by established agencies with the generation of new research and evidence. They included:

- The identification and mapping over time of a series of indicators (clustered around the five themes of the research programme)
- In-depth interviews with key stakeholders about the ideas and development of the Liverpool ECoC; from public, private and community sectors and from policy, culture and regeneration backgrounds
- A media impact analysis which explored the change in reporting on Liverpool from 1996-2009
- Local area studies which focussed on the experiences of local people in diverse parts of the city from 2006-2008
- The development of in-depth studies, both quantitative and qualitative, in response to themes and issues that arose during the research programme
- The regular assessment of secondary data collected by partners and other agencies, as well as data from external sources in the region and the rest of the UK.

Underpinning all of the methodologies has been the development of an active knowledge exchange process between Impacts 08 and key partners such as Liverpool City Council, Liverpool Culture Company, cultural organisations in Merseyside and agencies regionally and nationally. This has enabled improved monitoring and evaluation, collaborative research practice and enhanced research intelligence on the cultural sector and culture-led regeneration in Merseyside.

This report draws on work carried out over the life-time of the Impacts 08 programme, much of which has been published as project reports available online at www.impacts08.net and listed in full at the end of this report.

The report begins with selected core messages for quick reference (see inside cover). It then gives a contextual background to Liverpool as a city and as host of the European Capital of Culture in 2008. This is followed by the main report sections, the findings of Impacts 08 across the five themes of the research framework, and a conclusion.

The report has followed some conventions in referring to the key organisations involved in the delivery of Liverpool's European Capital of Culture programme; in the range of terms used to refer to parts or the whole of this programme; and in referring to geographical areas covered by the research, as follows:

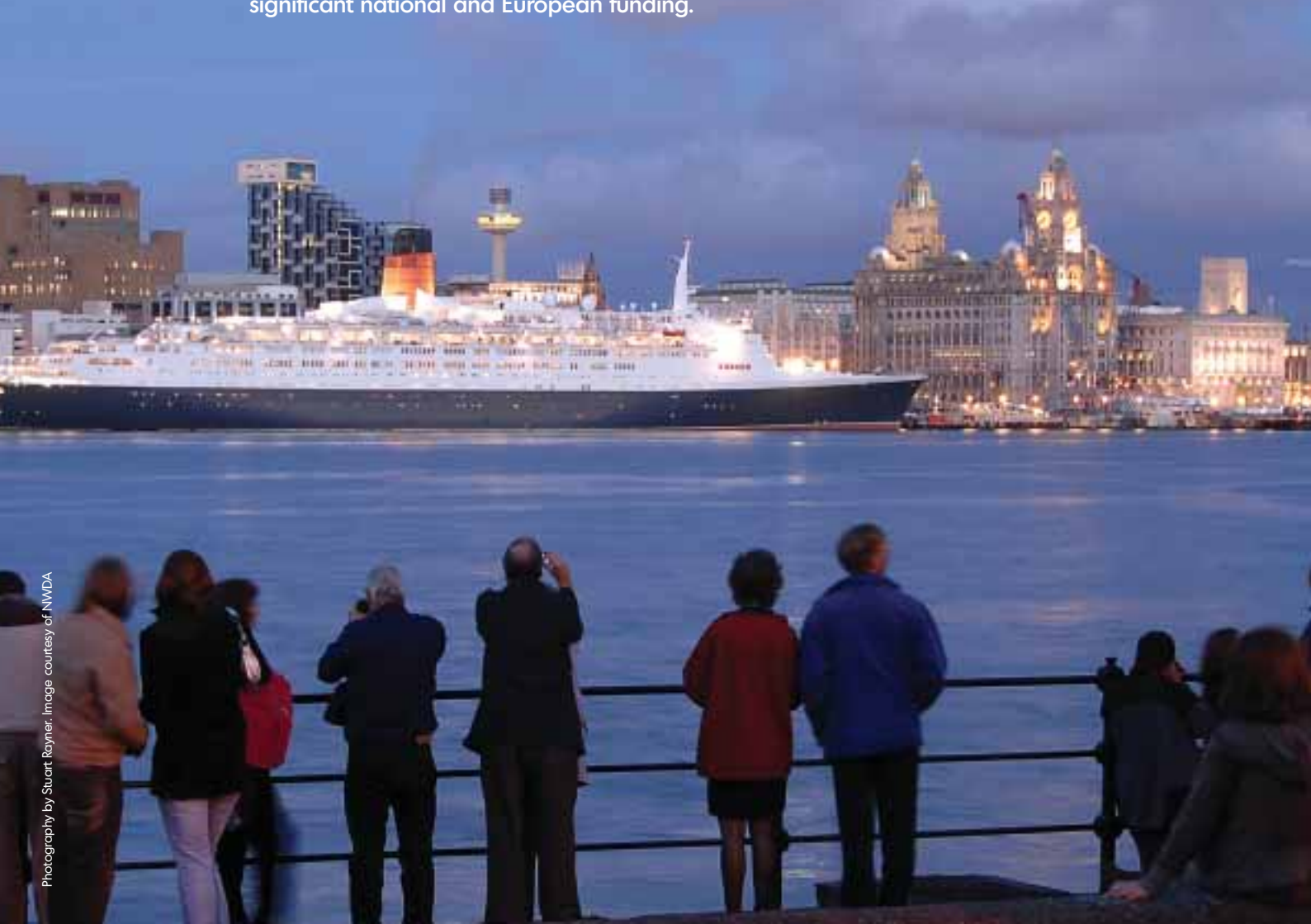
- The European Capital of Culture is abbreviated to the ECoC.
- The Liverpool European Capital of Culture 2008 is abbreviated to the Liverpool ECoC.
- The Liverpool ECoC was branded as 'Liverpool 08'. In this report, the term Liverpool 08 is only used when specifically discussing the brand dimension of the programme.

- Liverpool City Council (the governing and administrative body for the city) was the commissioner of Impacts 08, and set up the Liverpool Culture Company.
- The Liverpool Culture Company was the managing and commissioning body for the Liverpool ECoC. This organisation has been replaced by the Culture Liverpool and Tourism business units within Liverpool City Council in 2009.
- The term Liverpool ECoC events is used to include all activities delivered by, directly funded by or procured by Liverpool Culture Company, with the specific exclusion of those activities undertaken by organisations as part of their Regularly Funded Organisation (RFO) response rather than with additional Liverpool ECoC specific funding.
- Merseyside is the sub-region of the North West of England in which Liverpool is located. Merseyside includes the local authority areas of Liverpool, Knowsley, Sefton, St Helens and Wirral.
- The Liverpool City Region takes in Merseyside (above) as well as the local authority area of Halton.
- The Mersey Partnership is a public-private sector partnership with a main focus on economic development and tourism.
- The Northwest Regional Development Agency (NWDA) is one of the nine agencies established by the national government to give strategic direction to economic development in the regions of England.
- The Core Cities are the eight largest cities (outside of London) in England and are Liverpool's main comparator cities. They are Birmingham, Bristol, Leeds, Liverpool, Manchester, Nottingham, Newcastle upon Tyne and Sheffield.

The Orrery, part of the Creative Communities programme.

Liverpool in context

It is important to understand Liverpool's year as European Capital of Culture in 2008 within a wider economic, social and political context. In recent years, a renewed local political leadership has sought to re-engage with national government, and to build on local economic growth and substantial public and private investment in the city, though in the context of continuing social problems associated with more than half a century of decline. The decade immediately leading up to the Liverpool ECoC year coincided with a period of continuous economic growth in the UK, during which Liverpool's economic situation changed considerably, matching, and at times surpassing, the UK-wide growth and narrowing the historic gap in socio-economic performance between Liverpool and the rest of the country. Simultaneously there has been a development of partnership working by the leaders of Liverpool to regenerate the city (and the wider Liverpool city region), with increased investment from both the public and private sectors and significant national and European funding.



The city of Liverpool (population 439,000)¹ and its surrounding city region (population 1.5m) is one of the major conurbations of the North West of England. Following five hundred years as a rural fishing village, an exponential urbanisation and expansion of Liverpool took place in the 18th and 19th centuries, largely brought about by the city's status as a major port benefiting from trans-Atlantic trade, including the slave trade. The city's population had grown considerably from approximately 5,000 in 1700² to more than 500,000 recorded in the 1881 census.³ The population, as a legacy of the city's port, had become multi-ethnic, adding to Liverpool's claim as a cosmopolitan city and beginning the tension that characterised race relations and religious sectarianism in Liverpool throughout the 20th century. Civil life was led by entrepreneurial merchants whose involvement in political life not only resulted in municipal investment in commercial schemes such as the docks, but also in the establishment of many of Liverpool's institutions including the University, the Walker Art gallery, the Liverpool Philharmonic Society, the two football clubs and the city's many botanic gardens and parks.

As the 20th century progressed Liverpool entered a period of economic and social decline and, by the late 1970s and early 1980s the city was suffering the effects of national recession with high unemployment, a low skilled work force and a depleted business sector. The situation was particularly acute in Liverpool as the city lost almost half of its population between 1930 and 2001. Within the Liverpool city region there were marked economic, social and spatial disparities with particular neighbourhoods experiencing multiple deprivations of low income and economic inactivity, poor educational achievement, poor health and high levels of crime. In 1994 Merseyside qualified for European Structural Funding targeted at underperforming regions as it had an average gross domestic product below 75% of the European Union average.

Despite the economic decline, many of the cultural institutions established in the Victorian period survived and, although suffering from a lack of investment, remained a source of civic pride. The city's two football clubs had considerable success from the 1950s onwards, increasing Liverpool's prominence in Europe and globally. At the same time Liverpool has always had a grass-roots and independent creative community. The city's music scene promoted Liverpool as a major cultural centre in the 1960s. Other facets of the city's cultural life included a poetry scene cultivated in the cafe culture of the time, as well as avant-garde presentations by organisations such as the Everyman and Unity Theatres, and the Bluecoat Centre for Arts. This cultural mix remained after the 'Beatles era' and the city's home grown music scene has continued to interact with the arts sector producing the fanzines and independent music of the 1970s through to the establishment of Liverpool's Biennial in 1999.

¹ Office of National Statistics (ONS) draft Mid Year Estimate 2008 – revised mid year population estimate.

² Longmore J, *Civic Liverpool 1680-1800 in Liverpool 800* ed. Belchem (Liverpool University Press) 2006.

³ Census data taken from Online Historical Population Reports <http://www.histpop.org/ohpr/servelet/> (viewed Jan 2010).

A number of indicators suggest an absolute improvement in Liverpool's situation since the turn of the millennium, although the rate of change is often not great enough to close the gap with comparator areas.

- **Population:** from 2002 onwards Liverpool's post war population decline has slowed significantly. The latest estimates⁴ indicate a 0.3% fall between 2002 and 2008.
- **Economic Growth:** over the period 1995 and 2007, while UK GVA⁵ rose by 90.5%, Liverpool's GVA rose by 83.7%, slightly better than the average for the Core Cities⁶ which grew by 83.2%.
- **Job Creation:** the total number of jobs in Liverpool rose by 25,100 (12.4%) between 1998 and 2008, well above the national (9.5%), regional (7.7%) and Core City average (9.5%) rates, though this was achieved from a relatively lower base and Liverpool's total number of jobs remains below the Core City average.⁷
- **Business Volume:** from 1998-2008, the total number of business units in Liverpool rose by 1,700. Over this period, Liverpool's growth rate (13.7%) has been above the Core Cities average (9.5%) but below the Great Britain [GB] (18.6%) and North West (17.1%) averages.⁸
- **Business Density:** Liverpool's business density⁹ is 329, which is substantially lower than the Core Cities (364) and GB (467) rate, though Liverpool's business density has increased at a higher rate than almost all comparator areas between 2004 and 2008.
- **Business Demography:** in 2008 Liverpool's business start-up rate was 42 new businesses¹⁰ per 10,000 people aged 16+, which is below the Core Cities average of 45.6 and the GB average of 54.6. Between 2004 and 2008 the start-up rate fell by 3% in Liverpool which is below the Core Cities (-5.1%) and GB (-6.8%) averages. The survival rate of Liverpool businesses compares well to Core Cities and GB rates.



⁴ ONS draft Mid Year Estimate 2008 – revised mid year population estimate.

⁵ Gross value added (GVA) is the difference between the value of goods and services produced and the cost of raw materials and other inputs which are used up in production. GVA data is currently only available up until 2007.

⁶ The Core Cities of England are the largest 8 outside London and are Liverpool's main comparator cities.

⁷ Annual Business Inquiry, ONS (Nomis) December 2009.

⁸ Ibid.

⁹ Businesses per 10,000 residents aged 16+.

¹⁰ ONS business demography data – (MAT registrations per 10,000 residents 16+).



- **House Prices:** there was a significant rise in house prices in Liverpool from mid 2003 to early 2005, which some commentators ascribed to a 'European Capital of Culture effect'. A much more complex range of factors is likely to have been involved, including the fact that prices in Liverpool had failed to raise in the late 1990s, at a time when there was growth on average across the rest of the UK.
- **Physical Infrastructure Investment:** between 2000 and the end of 2008, Liverpool city centre witnessed up to £4bn of investment in its physical infrastructure. 2008 marked a peak in major developments, with around £1.5bn worth being completed during the year.¹¹ The majority of this investment came from the private sector but European, regional and local public funding also played a significant role in numerous projects.

Despite over a decade of economic growth and, in some areas, a narrowing of the gap between Liverpool and the rest of the UK, the city still has some progress to make in order to overcome the legacy of decades of socio-economic decline.

- **Skills Levels:** Liverpool remains well behind other comparator cities. Despite a reduction in 2007, Liverpool remains the worst performing Core City in terms of the percentage of the working age population with no qualifications, at 40% higher than the Core Cities average, and 70% higher than the national average. Liverpool is also the Core City with the lowest percentage of population with NVQ 4+ equivalent,¹² well behind all other comparator cities and showing no sign of catching up. Among children the picture is changing as, in 2007, Liverpool's percentage gaining five GCSEs or above¹³ was 66.1%, well above the Core Cities average of 61.3% and above the England average of 65.3%.
- **Employment Rate:** despite a sharp increase between 2003 and 2007, Liverpool remains lower than the national, regional, sub-regional or Core Cities average rate. Current indications suggest Liverpool will remain below these comparators, rather than rise to meet them.
- **Household Income:** rose 40% over the decade 1997-2007, but Liverpool as a whole remains among the poorest cities in the country and is ranked most deprived district in England for average deprivation score in both the 2004 and 2007 Index of Multiple Deprivation (IMD).¹⁴
- **Crime:** has been a constant issue in terms of the external and internal image of Liverpool, but has been dropping year on year, with the overall crime rate in Liverpool dropping at a much faster rate than the national average.

Any analysis of the Liverpool ECoC needs to take into account not only the context above, but also the fact that the UK entered a deep recession in late 2008 which lasted until the final quarter of 2009.

Economic indicators used in this report are not yet available for 2009 and onwards so this is not yet fully reflected in the published data, but any onward impact analysis would need to take the local effects of the recession into account.

¹¹ For further information see Liverpool Vision's *Development Update* series and the publication *Make No Little Plans - The regeneration of Liverpool City Centre 1999-2008*.

¹² According to Department for Children, Schools and Families the National Vocational Qualification (NVQ) level 4 is equivalent to first degree level study.

¹³ General Certificate of Secondary Education (GCSE) is a subject-based qualification taken by students age 14-16. The number of students achieving 5 or more GCSEs is used as a national comparator.

¹⁴ Indices of Deprivation, Department of Communities and Local Government.

Liverpool as European

Liverpool's European Capital of Culture 2008 Vision

- To positively reposition Liverpool to a national and international audience and to encourage more visitors to the city and the North West
- To encourage and increase participation in cultural activity by people from communities across Merseyside and the wider region
- To create a legacy of long-term growth and sustainability in the city's cultural sector
- To develop greater recognition, nationally and internationally, for the role of arts and culture in making our cities better places to live, work and visit

Source: Liverpool Culture Company European Capital of Culture Vision Document (2006)

The Liverpool European Capital of Culture

Background

The European Capital of Culture (ECoC) is an initiative which was launched by the European Union in 1985, with the title awarded every year and on a rotating basis to respective European Union member states. The first UK city to hold the title (then termed 'European City of Culture') was Glasgow in 1990. Glasgow's experience and subsequent development became a keystone in arguments for culture-led urban regeneration, an aspiration which has since become central for title holders.

With the UK nominated as ECoC host for 2008, a national competition was held and Liverpool, alongside 12 other UK cities, bid for the title and was selected as ECoC 2008 in June 2003. The European Commission also nominated Norway as the non-EU host for 2008, and Stavanger was the chosen Norwegian ECoC title holder.

Defining the Liverpool ECoC

An ECoC programme tends to operate on multiple levels, particularly in the context of broad urban regeneration aspirations from local and regional stakeholders who see the title as a potential catalyst for long-term economic and social change. In Liverpool, the aspiration to regenerate and reposition the city was placed at the heart of the ECoC vision, which has had important implications for Impacts 08 as a research programme and for the definition of the core object of study.

The Liverpool ECoC was a programme of activity with at least three levels of operation:

- 1) The main branded programme of events - 'Liverpool 08' - and related activity, co-ordinated by the Liverpool Culture Company with a wide range of stakeholders over six themed years, with a budget of £129.9million.
- 2) The intersection with the wider city regeneration and re-imaging programme, which emerged out of public and private partnerships and was funded mainly by private capital to a value of £4billion over eight years.

Capital of Culture



Image courtesy of Liverpool City Council

3) The broader European context involving European Commission (EC) guidelines and engagement with ECoC stakeholders from the rest of Europe. Liverpool received discrete funding of just over £800k from the EC to support directly the European dimension of the Liverpool ECoC.

Impacts 08 has focused on the first level of operation in assessing the impacts of the Liverpool ECoC. The research programme has attempted to capture the impacts of the nomination, as well as the actual delivery of activity, over the following period:

- 2000-2002: Liverpool ECoC bid preparations
- 2003: Year of Learning and official nomination
- 2004: Year of Faith
- 2005: Year of the Sea
- 2006: Year of Performance
- 2007: Year of Heritage, Liverpool's 800th Anniversary
- 2008: European Capital of Culture Year

Liverpool programmed themed years in advance of its official ECoC year and has retained them post 2008, with 2009 being branded 'Year of the Environment' and 2010 'Year of Health, Well-Being and Innovation'. Impacts 08 has focused on the study of the Liverpool ECoC and its impacts up until early 2009, and does not incorporate analysis of any themed year post 2008. The findings presented in this report include data from the six years of operation of the Liverpool Culture Company, as well as data relating to the artistic and events programmes over four years. Analysis concludes in 2008 as a calendar year, or in 2008/9 as a financial year.

Activities

Events and related activities

The official count of ECoC events and activities tends to vary widely from host city to host city. The 2004 European Commission funded review of ECoC cities noted that the average number of events is approximately 500, but counts are often not strictly comparable with each other as cities use different approaches in accounting for their activities.¹⁵

There are a number of different measures that can be used to determine the total number of events presented as the Liverpool ECoC programme.

- 276 highlight events in 2008 were listed in the official Liverpool 08 Yearbook.¹⁶
- 830 events in 2008 were listed on the Liverpool 08 website (as well as 315 in 2007 and 77 in 2006). The website allowed associated organisations to upload details about their own programmes, resulting in listings for cultural activities which were not explicitly branded as 'Liverpool 08' or directly funded through the Liverpool ECoC, although they were often associated with or inspired by the ECoC.

Utilising data from monitoring returns, the full Liverpool ECoC programme (including not only full events, but also total performance days, exhibition days, training and educational workshops either delivered by the Liverpool Culture Company or arising from direct grants or procurement) totalled over 7,000 activities in 2008 and over 41,000 activities across four years (2005-2008). Around half of these activities were workshops, education sessions or training days.¹⁷

Up to 15,000 activities were directly delivered by, procured by or arose from large grants from Liverpool Culture Company and 26,000 arose from the small cultural grants programme, mostly involving small arts and community organisations.

Artists and artistic activity

In total, grants and in-house activity funded or part-funded by the Liverpool Culture Company created over 66,000 days of artist work in 2008 and 123,000 over the four year programme. This is equivalent to an average of 140 full-time artists' jobs for a period of four years. Of the artists and performers involved in work put on or directly commissioned by Liverpool Culture Company, around 70% were unpaid in 2007, and 50% were unpaid in 2008, reflecting the volume of involvement of young people and local amateur performers.

Of the artists and performers in the programme procured, delivered or large grant funded by the Liverpool Culture Company about whom information is known (about a third), 32% were from a Black and Minority Ethnic background, which is substantially higher than the Liverpool or UK population average. In terms of age, artists and performers (including those who were not paid) broadly match the Liverpool population profile apart from a noticeably smaller number of people aged 65 or above.

Up to 50% of professional artists employed as part of the programme for the Liverpool ECoC were locally based. This was complemented by 30% national and 20% overseas based artists.

¹⁵ Palmer Rae (2004) *European Cities and Capitals of Culture (Part II)* p.15.

¹⁶ The Liverpool 08 Yearbook was publicly available and produced by Liverpool Culture Company as a guide to Liverpool ECoC 2008 activities.

¹⁷ Please note that due to the complexity of assigning activities, artist days and audiences across co-funded events caution has been exercised in estimating numbers and these figures should be read as the lowest end of the margin of error. In addition, these calculations do not include activities which were part of the regular programmes which cultural organisations in the city delivered during this period, and which were supported by the Liverpool Culture Company through their administration of revenue funding for Liverpool City Council but not supported by specific and dedicated 'Liverpool 08' funding or procurement. It is worth noting that a number of organisations were required to display the 'Liverpool 08' brand alongside the Liverpool City Council brand in general acknowledgements of revenue funding, leading up to and during 2008.

Management

Structure

The Liverpool Culture Company was set up by Liverpool City Council as a company limited by guarantee to co-ordinate the bid for European Capital of Culture 2008 and subsequently to deliver the ECoC activity. All funding received for delivery of the Liverpool ECoC was managed by Liverpool City Council, which acted as the accountable body for Liverpool Culture Company. In addition, all staff were employed by Liverpool City Council, and the Liverpool Culture Company included a number of staff who were 'internal secondments' from within Liverpool City Council structures for the duration of the Company's existence.

The initial bid team consisted of 15 people, a number of whom were co-opted from departments within the Liverpool City Council. Following nomination, a structure was established by mid-2005, and posts and personnel remained in the Liverpool Culture Company until it wound up in early 2009. Liverpool Culture Company consisted of just under 100 members of staff, of whom about half were new appointments/posts, and about half were secondments, mainly from elsewhere in Liverpool City Council. There were also secondments from the Learning and Skills Council, the Mersey Partnership, Liverpool Primary Care Trust (NHS) and Northwest Regional Development Agency.

The structure brought together functions including: artistic programming; the programming and delivery of the Creative Communities programme; events delivery; investment in the arts infrastructure (including both regular and project grant streams); heritage; tourism (including the development of the '08 Welcome' programme and the volunteers programme); international relations around the Liverpool ECoC; commercial activities, such as gaining sponsorship from the private sector and income from merchandising; marketing, communications and media relations; programme funding and monitoring; finance; and administration.



Four corners launch in 2007, part of Creative Communities programme.

The Creative Communities programme was an £11m public and community arts scheme, operating from 2004 to 2008 as the strand dedicated to local participation in the Liverpool ECoC.



Phil Redmond, Creative Director of Liverpool Culture Company at the closing of the UK wide youth and heritage project, Portrait of a Nation.

Governance

The board of the Liverpool Culture Company was initially set up in 2000 to oversee the bidding process, with Prof. Peter Toyne (at the time Vice Chancellor of Liverpool John Moores University) as chair. Other members of the 14-strong board included the Leader of the Council and the Leader of the Opposition, a local Member of Parliament, and senior figures from business, local media, and educational and cultural institutions. With some small changes, this board continued until September 2003, when significant additions took the number of members up to 21 (including Company Secretary and one observer), and included national, regional and local stakeholders from the media, culture, tourism, higher education and economic development sectors,¹⁸ as well as a significant international private sector appointment and an observer from the Department of Culture, Media and Sport (DCMS).

In May 2005 the board was re-organised, taking the membership to 28. New additions included the Chair of Culture North West, the Countess of Derby, leaders from two of the Merseyside local authorities, the Chief Constable of Merseyside Police, and representation from the BBC. The structure of the board's activity changed, with the establishment of sub-groups in eight areas, chaired by board members, and an executive group.

In November 2006 the board was reduced considerably to 14 members, and reduced again in September 2007 to seven, reflecting the 'delivery' phase that the Company was in. Significant new appointments in 2006 were Roger Phillips, BBC Radio Merseyside presenter, and Phil Redmond, creator of Brookside, Grange Hill and Hollyoaks television programmes. Redmond was originally appointed as Deputy Chair, responsible for Creative Direction, and was later named Creative Director of Liverpool Culture Company in September 2007.

Overall income and expenditure

Figures 1 and 2 show the income and expenditure of the Liverpool Culture Company over its six years of operation. The Company's budget includes the 'transfer' of existing budgets and staff from Liverpool City Council, including the events team and budget, arts unit team and funding of external organisations, and the tourism team and information centres. Expenditure is predominantly shown by activity area across the six years.

¹⁸ These included: Classic FM radio station, Granada television, English Heritage, the Tate, North West Disability Arts Forum, Northwest Regional Development Agency, The Mersey Partnership, and the University of Liverpool.

Figure 1: Liverpool Culture Company income by source 2003/4 to 2008/9

Income (£000s)	2003/4	2004/5	2005/6	2006/7	2007/8	2008/9	Total
Liverpool City Council	6,520	8,178	9,063	12,146	14,981	23,923	74,811
ACE & DCMS ¹⁹	0	71	5,319	3,316	1,283	539	10,528
ERDF ²⁰ funding via Objective							
One status	987	1,502	1,680	2,966	4,186	2,945	14,268
EU funding via ECoC status	0	0	0	0	0	809	809
Other Public Sources	23	239	304	45	1,655	846	3,112
Earned Income	0	136	213	393	744	2,584	4,070
Sponsorship - in cash	0	1,098	2,788	2,873	3,542	4,442	14,743
Sponsorship - in kind	0	0	904	1,372	2,613	2,658	7,546
Total	7,530	11,225	20,271	23,111	29,004	38,746	129,887

Source: Liverpool Culture Company

Figure 2: Liverpool Culture Company expenditure by activity 2003/4 to 2008/9

Expenditure (£000s)	2003/4	2004/5	2005/6	2006/7	2007/8	2008/9	Total
Programme	5,678	6,295	9,983	12,847	16,816	26,301	77,920
Marketing	467	2,906	4,931	5,096	6,485	5,027	24,912
Administration	1,385	2,023	4,453	3,796	3,091	4,761	19,509
In kind	0	0	904	1,372	2,613	2,658	7,546
Total	7,530	11,224	20,271	23,111	29,005	38,747	129,887

Source: Liverpool Culture Company

Liverpool as ECoC city has attracted the highest absolute amount of sponsorship and earned income in the title's 25 year history (almost £26.4m over five years).²¹ Sponsors (listed below) signed up to the official 'Liverpool 08' sponsorship structure, which offered a tiered level involvement with different levels of investment:

- **Partners:** Hill Dickinson, United Utilities, Radio City, Enterprise Ltd, Northwest Regional Development Agency (NWDA),²² Alliance & Leicester Commercial Bank, Sayers, Trinity Mirror Newspapers, Merseytravel, BT, and Virgin Trains.
- **Supporters:** Northern Rail, Merseyrail, Transpennine Express and EMI.
- **Suppliers:** Cains, Arriva, Liverpool John Lennon Airport, Ethel Austin Retail, Merseysound, Land Securities, English Partnerships.
- **Friends:** Ethel Austin Properties, John Lewis, Beetham Organisation, Mando Group, Royal Liver Assurance.

¹⁹ Special funding from Arts Council England and Department of Culture, Media and Sport.

²⁰ European Regional Development Funding.

²¹ Please note that the in kind income and expenditure from sponsors is shown separately from the cash income/expenditure above.

²² Please note that NWDA committed funding through both sponsorship and direct grants for specific activity. In Figure 1 NWDA's contribution has been apportioned appropriately between the categories 'Other Public Sources' and 'Sponsorship - in cash'.

1 Cultural access and participation

Engaging with a wide range of audiences and participants was a central aim of Liverpool's initial bid to become European Capital of Culture. Throughout the build-up to and delivery of the programme, the Liverpool Culture Company and Liverpool City Council placed a continued emphasis on the role of the ECoC title in broadening access and engagement in culture, as well as culture's potential role in social cohesion and community change. The existence of the Creative Communities team, and its work across the communities of Liverpool from 2005 onwards was partly aimed at broadening the wider programme audience in 2008 itself. This section looks at the activities that took place as part of the Liverpool ECoC, the volume of audience, the volunteers and the audience experience, as well as impacts on cultural engagement in Liverpool as a whole.



La Princesse (designed and operated by La Machine, brought to the UK by Artichoke) tours Liverpool City Centre, watched by 400,000 onlookers.

1.1 The Liverpool ECoC audience

The Liverpool ECoC generated a total audience²³ of nearly 10 million²⁴ in 2008 and over 18 million across the four years of the programme (2005-2008). Levels of attendance were maintained across the years with events in 2008 having an audience which, on average, was substantially larger than events in the previous years.

Figure 3: Estimated audience numbers – total audience size²⁵

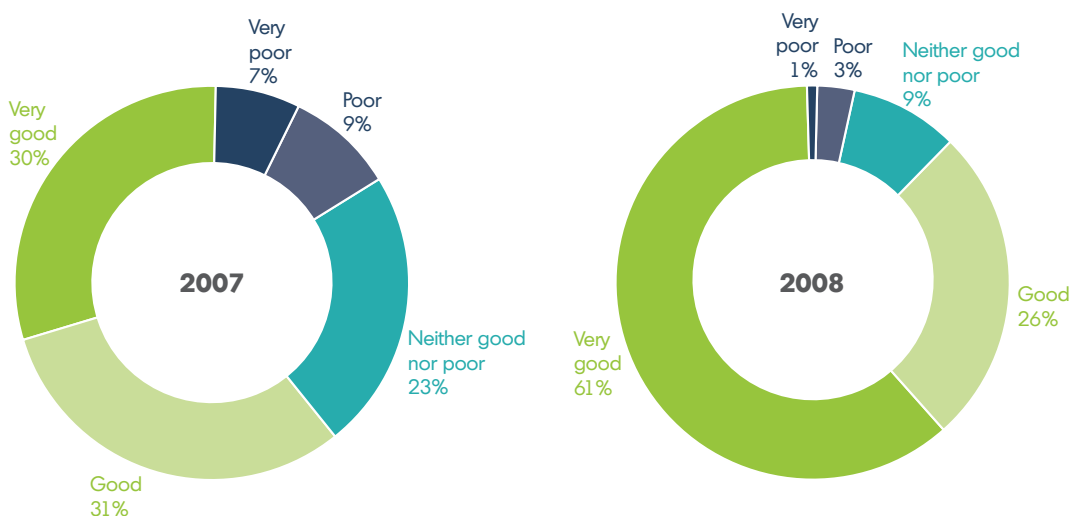
Measure	2005	2006	2007	2008	Total
Culture company delivered, procured and large grant funded events ²⁶	1,578,104	1,654,091	1,878,623	9,516,675	14,627,493
Small grants programme funded events	1,939,270	718,245	772,459	288,109	3,718,083
Estimated total audience	3,517,374	2,372,336	2,651,082	9,804,784	18,345,576

Source: Liverpool Culture Company

Audience Satisfaction

Audience satisfaction with events was high in 2007 and higher still in 2008 with over 80% of audience members thinking that the event they had attended was ‘good’ or ‘very good’.

Figure 4: Audience views on Liverpool ECoC events (%)



Source: Liverpool Culture Company

²³ The term ‘audience’ is used here to cover both audiences and visitors to Liverpool ECoC events, exhibitions and performances. Total audience in this report is calculated by summing the total audience of every event, both ticketed and non-ticketed. For this reason an individual might figure as an audience number multiple times, and indeed does, as can be seen by the total Liverpool audience for 2008 of 3.3m, over seven times the total population of Liverpool. This shows that many people went to several events, a fact further evidenced by responses to the Impacts 08’s local area studies research Neighbourhood Watch (see report listing at the end of this report).

²⁴ Note that 10 million is the audience attending Liverpool ECoC events in 2008. Other reports published at the end of 2008 referred to 15 million people “attending a cultural event or attraction” in 2008. This involves activity beyond the official ECoC programme.

²⁵ Please note that some of this data is only available for financial rather than calendar years. Recalculations have been made as far as possible to establish a calendar year comparison in the lead-up to 2008.

²⁶ Note that the audience figure given does not include press, radio, broadcast and internet (PRBI) audience or some of the less easily verifiable audiences for public art events.

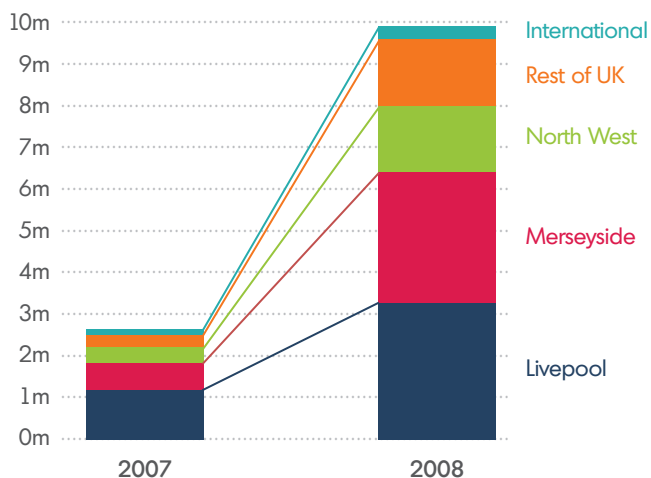
Audience breakdown

Audience Origin

Liverpool ECoC events attracted a wide audience from Liverpool, Merseyside, the UK and abroad (see Figure 5). From 2007 to 2008, there was a growth in overall numbers and significant increases in both the national and international audience numbers, so that in 2008 there was a national audience of over 1.5m and an international audience of around 0.3m. In 2008, 3% of the total audience was international, which compares well to Manchester International Festival (1% international audience)²⁷ and the long established Edinburgh Festival (15% international audience).²⁸

However, events still attracted a large local audience of over 3.3 million, who came from across Liverpool's neighbourhoods, though with a weighting towards the South Liverpool and the South Central areas of the city.

Figure 5: Audience origin at Liverpool ECoC events



Source: Liverpool Culture Company and Impacts 08

Audience demographics

Impacts 08 worked with the Liverpool Culture Company to develop an audience survey, carried out by the 08 Volunteer team. This exercise provided high quality data on audience demographics, specifically regarding the percentage of the audience who came from traditionally excluded groups.²⁹ Black and Minority Ethnic (BME) attendance across all Liverpool ECoC events was slightly lower than the Liverpool city population proportion (5.6% in comparison to 8%), though it is interesting to note that at events within the 'artistic programme', the proportion of BME audiences was slightly higher (6.4%).

²⁷ *The Ascent of Manchester - An independent evaluation of the first Manchester International Festival: 28 June-15 July 2007*, Morris Hargreaves McIntyre, January 2008.

²⁸ *Edinburgh's Year Round Festivals 2004-2005 - Economic Impact Study*, SQW Ltd and TNS Travel and Tourism, September 2005.

²⁹ Using DCMS Public Service Agreement target groups as a definition of exclusion. Please note there are a number of issues in audience measurement of this sort, Impacts 08 has addressed these at length elsewhere but these indicative findings are useful for policy makers.



The Liverpool Chinese New Year celebrations.

In 2008, one third of the Liverpool ECoC audience was local, one sixth from beyond the region and nearly 5% international.

The proportion of the audience who defined themselves as disabled was considerably lower than the city and national comparator but was the same as that of East Midlands Festivals audience, (see Figure 6 below) the only UK comparator data on disability attendance at festivals available.

The demographic in which Liverpool ECoC audiences differed the most from other UK cultural events and festivals was the percentage of people from lower socio-economic groups,³⁰ where the audience profile matched the city's profile in this. There was, however, considerable variance between event programmes: in the Creative Communities programme 51% of the audience classified themselves as manual workers, unemployed or retired, while this was between 33 and 35% in the rest of the programme.

Figure 6: Audience demographics

08 Audience demographic breakdown	Liverpool 08	Chester Festivals ³¹	East Midland Festivals ³²	Edinburgh's Summer Festivals ³³	Liverpool Population	UK Population
Black and minority ethnic	5.6%	3.1%	16%	-	8%	13%
Disabled/Limiting long-term illness	7% ³⁴	-	7%	-	25%	18%
Lower socio-economic groups	34%	-	-	23%	34%	32%
In full-time employment	48%	46%	-	-	33%	44%
Aged 16-24	11%	9%	13.5%	15%	15%	11%
Aged over 65	13%	18%	17.1%	11%	15%	16%

Source Liverpool Culture Company, Office for National Statistics (ONS) and references within footnotes.

³⁰ Classified as C2DE, i.e. from households where the main earner works in a manual job, is unemployed, or retired.

³¹ Chester Festivals 2008, Visitor and Economic Impact Assessment, Arts About Manchester, February 2009.

³² The Economic And Social Impact Of Cultural Festivals In The East Midlands of England, Maughan & Bianchini, De Montfort University, December 2004.

³³ Edinburgh's Year Round Festivals 2004-2005 - Economic Impact Study, SQW Ltd and TNS Travel and Tourism, September 2005 – average totals from all festivals.

³⁴ Please note that although this figure is a good comparator in terms of the question asked, what it represents is not simply lower disabled attendance at Liverpool ECoC events but lower disabled attendance at the arts generally. Arts Council England's Disability equality scheme annual report 2008/09 reports that 54% of the population with a limiting disability attended at least one arts event. This compares to 71% of the population without a limiting disability or illness.

1.2. Volunteering in Liverpool ECoC

The Liverpool Culture Company presented a four year 08Volunteer programme which attracted over 4,000 registrations of interest. Over the 2005-2008 period, there were 971 active volunteers,³⁵ of whom 15% considered themselves to be Black or Minority Ethnic (BME) and 6.1% disabled. Overall they gave 5,611 days of volunteering in 2008 and 6,974 days over the four year programme, a value equivalent to over £0.3m.³⁶ This input was complemented by an in kind contribution from sponsors and partners bringing the total additionally contributed to the 08Volunteer programme to an estimated £1m.³⁷

Research showed that being an 08Volunteer gave people the opportunity to reach out to others and make connections and friendships. Volunteers also gained great satisfaction from the feeling that they were making a positive contribution to the rehabilitation of Liverpool's reputation nationally and internationally, through their personal contact with visitors. Volunteers had also experienced a range of more tangible outcomes as a result of their participation. They had greatly increased their knowledge of Liverpool's history, heritage and cultural offer, and developed their confidence and the skills in dealing with members of the public.³⁸

As well as 08Volunteers, by the end of 2008 8,770 people had signed up online to be 08Ambassadors who pledged to promote Liverpool and Liverpool ECoC among their family and locality and received a badge and regular news briefings on events.

1.3 Interest in culture and cultural engagement in Liverpool

Cultural Interest

People in Liverpool claim to have a considerably higher interest in going to museums and galleries than people elsewhere in the UK, and particularly than those in the North West. This difference remained over the 2005-2008 Liverpool ECoC period. In terms of other areas of culture, Liverpool residents report broadly similar (or slightly higher) levels of interest than those in the UK as a whole. Indeed, in unprompted questions about Liverpool's main attractions, over the three years from 2006-2008, residents mentioned Tate Liverpool, various museums (by name), and the Walker Gallery above 'shopping', and more people mentioned theatres than pubs, clubs and other nightlife.³⁹

In addition, local area research⁴⁰ shows that there was a drop from 2007-2009 in the percentage of people who state that they are 'not at all interested' in different forms of cultural activity (see Figure 7), which suggests that the Liverpool ECoC had some success in promoting Liverpool's cultural offer to new audiences.

³⁵ This figure includes 851 active volunteers in the main programme plus an additional 120 volunteer liaison officers recruited specifically to help with the Tall Ships Festival in July 2008. The statistics which follow relate to the main programme for which more data is available.

³⁶ Calculating cost at a minimum wage of £5.73 per hour.

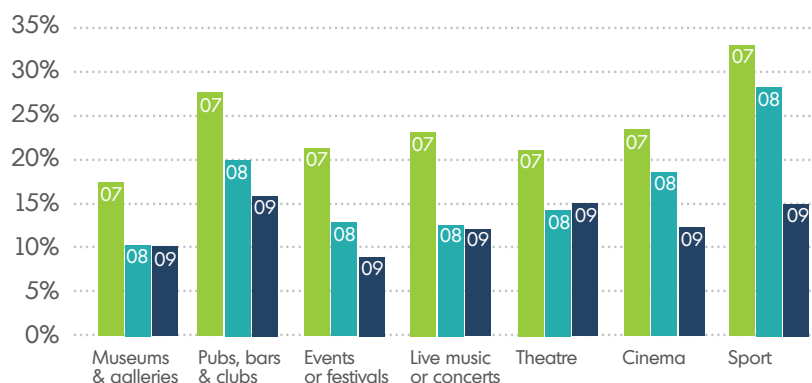
³⁷ This included the secondment of Volunteer Management from the Learning and Skills Council, as well as support from sponsors in the form of provision of uniforms by Ethel Austin, meals and refreshment vouchers from Sayers and the provision of training facilities by United Utilities.

³⁸ Impacts 08 has produced a full report on the 08Volunteers experience *Volunteering for Culture*.

³⁹ GRNOP research, commissioned by Liverpool Culture Company 2005-08.

⁴⁰ *Neighbourhood Watch (2010) Impacts08*.

Figure 7: Percentage of respondents 'not at all interested' in different types of cultural activity



Source: Impacts 08 research

The link between this change and the Liverpool ECoC is further evidenced by the fact that nearly a third (30.3%) of respondents to the 2009 survey responded positively to the question: 'are you more interested in any of these activities following Liverpool's year as European Capital of Culture?'. This suggests that the Liverpool ECoC has been a significant factor in changing attitudes to cultural activity amongst a sizeable minority of local residents. The figure was considerably higher in the city centre neighbourhood (55.1%) than in outlying areas such as Kirkdale (18.3%) or Knotty Ash (19.2%).⁴¹

Cultural Participation

In general, Liverpool's cultural attendance patterns have matched national, rather than North West, levels, and tended to be higher than average. In 2008, a higher percentage of people in Liverpool reported going to a museum, an art gallery, or a nightclub than in the rest of the UK. In addition, the percentage of Liverpool residents who claimed to have attended a gallery or museum over the previous year rose between 2005 and 2008 (from 60% and 42% to 69% and 52% respectively). Theatre going also rose in Liverpool in 2008 from 2006 levels.

On a regional basis, 60% of North West residents think that there are more cultural activities and opportunities in the region in 2008 than previously, and only 10% thought this was not the case.⁴² While this cannot be linked to Liverpool ECoC activity alone, the awareness raised about cultural access might have contributed to this.

From local area research,⁴³ there is evidence that there was good engagement in Liverpool ECoC across the city: 61.1% of residents stated that they had taken part in at least one ECoC event during 2008, and 11% agreed that they had done something new, such as visiting a cultural venue they had never been to before or attending a different type of event.

CORRECTION: FIRST PRINT OF THIS REPORT CONTAINS AN ERROR IN THE ABOVE SENTENCE WHICH IS CORRECTED HERE.

⁴¹ Respectively about 3 miles and 6 miles from city centre. For more information about the areas and the research project please see the Impacts 08 Neighbourhood Watch report (listed at the end of this report).

⁴² From 2009 MORI IPSOS Research for NWDA, *Perceptions of the North West*, note that the report's authors do credit this to ECoC to some degree.

⁴³ See the Impacts 08 Neighbourhood Watch report.

2 Economy and tourism

Attracting more visitors to the city was a key aim of the Liverpool ECoC. The ambition was to use tourism as a driver for economic development, both directly through visitor spend and the subsequent growth of the visitor economy, and indirectly through changing the image of the city in order to attract inward investment and emphasise the quality of the city's offer for potential residents. This section explores visitors who came to the city directly as a result of the Liverpool ECoC activity and title, and tourism trends in Liverpool and Merseyside as a whole, where change was also likely to be affected to some extent by the Liverpool ECoC designation. It also looks at changes in the tourism infrastructure leading up to and throughout 2008, and at the response to, and perceptions of, the Liverpool ECoC from related stakeholders.



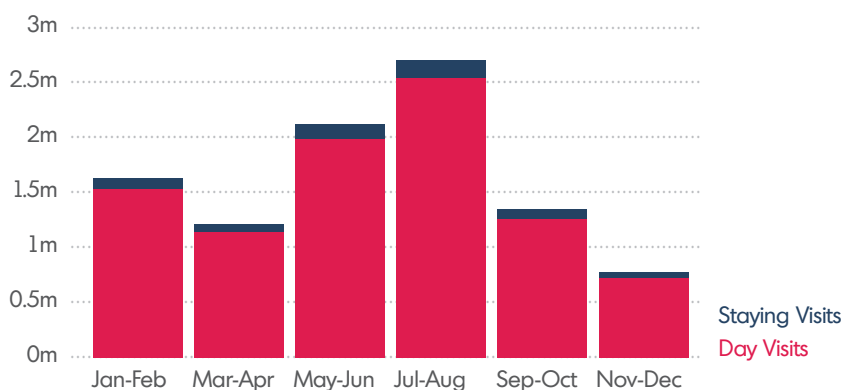
2.1. Visiting Liverpool as ECoC

Visits motivated by the ECoC title

In 2008, 35% of all visits to Liverpool were influenced by the ECoC title and would not have taken place otherwise. Amongst visits being made for the first time to Liverpool, 33% were influenced by the ECoC title and again would not have taken place otherwise. In total, 9.7m visits to Liverpool were motivated by the Liverpool ECoC in 2008. This generated an economic impact of £753.8m (based on estimated direct spend) attributable directly to the Liverpool ECoC title and events programme. The majority of this spend occurred within the city and city region, and the remainder within the North West region.⁴⁴

As can be seen from Figure 8 below, these visits were spread across the year with a peak in the early part of 2008 (when the total number of visits was lower), as well as the peak in the summer which coincided more with the profile of total visits. There was a noticeable drop off towards the end of the year, both in total visits (likely to be connected partly to the recession as well as seasonal issues) as well as in the proportion of visits related to the Liverpool ECoC specifically. From September onwards, 40% of all visits to Liverpool were for a 'special shopping trip' coinciding with both Christmas shopping and the phased opening of the new Liverpool ONE shopping development.

Figure 8: Number of visits to Liverpool in 2008 created directly by the Liverpool ECoC



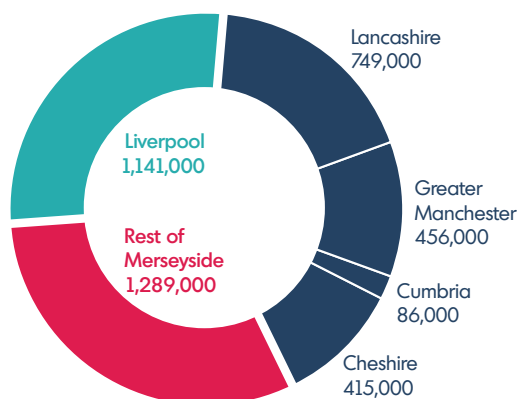
Source: Impacts 08 research

The ECoC title and events programme were a particular driver for a first visit to Liverpool for international visitors and those from outside the North West. Of the almost 3m Liverpool ECoC motivated visits made from UK regions beyond the North West, 86% were visits being made for the first time. The results show particularly good penetration into the target London and South East of England markets, as these areas each account for 10-15% of first time visits influenced by the ECoC. The Liverpool ECoC was also a key motivator for an estimated 2.6m additional international visits, of which 1.58m came from beyond Europe. 97% of European and international visits were from first-time visitors to the city.

⁴⁴ For further information see *The Economic Impact of Visits Influenced by the Liverpool ECoC in 2008* (2010) Impacts 08.

It is estimated that the Liverpool ECoC generated 2.16m staying visitor nights in Liverpool itself, 1.14m of these being in hotels and other serviced accommodation.⁴⁵ There were an additional 1.29m hotel nights in the rest of Merseyside, and 1.7m hotel nights in the rest of the North West, split as shown in Figure 9 below.⁴⁶

Figure 9: Estimated hotel nights in the North West created by the Liverpool ECoC



Source: Impacts 08 research

International delegations

Overall there were 291 official international delegations visiting Liverpool in the lead up to and during its ECoC year (2005-2008) in order to learn about the city's approach to culture-led regeneration and its experience of hosting the ECoC programme. 117 of these delegations visited the city during 2008.



9.7m visits to Liverpool were motivated by the ECoC. This generated an additional economic impact of £753.8m.

⁴⁵ Other serviced accommodation includes bed and breakfast, hostels and youth hostels. This is simplified to 'hotels' throughout the rest of this report.

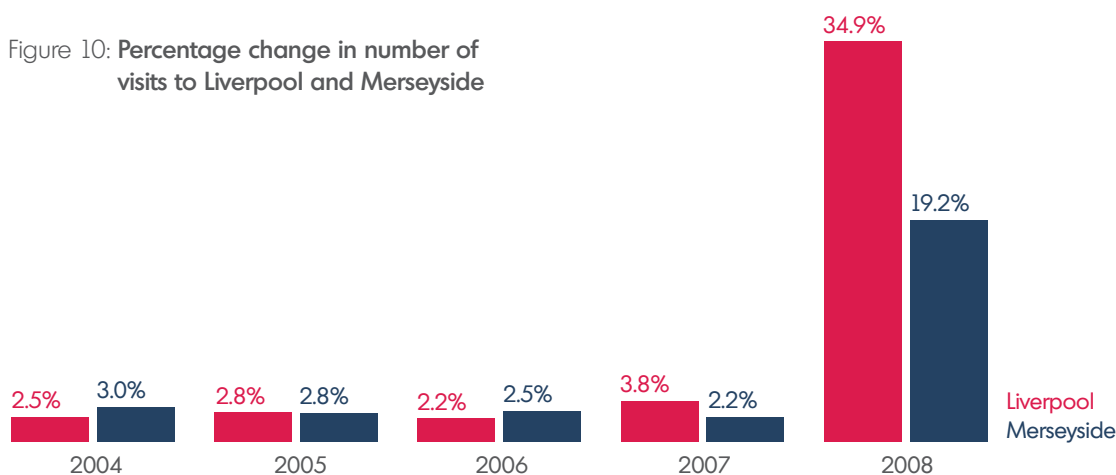
⁴⁶ It is worth noting, that despite the growth in serviced accommodation available in Liverpool during 2008, a high level of occupancy was maintained throughout the year, and therefore some visitors may have stayed outside the city by necessity because Liverpool's serviced accommodation was at capacity during peak times.

2.2. Liverpool and Merseyside Tourism

Visitor numbers

In 2008 there were an estimated 277m visits to Liverpool and 75.1m visits to Merseyside (including Liverpool), a significant 34% and 19% rise on the previous year.⁴⁷ Total visitor spend is estimated at £617million for Liverpool and £1.6 billion for Merseyside.⁴⁸

Figure 10: Percentage change in number of visits to Liverpool and Merseyside



Source: STEAM via The Mersey Partnership

Hotel stock, occupancy and revenue

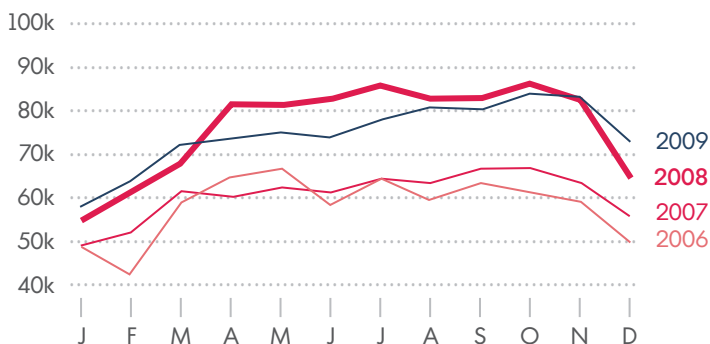
The Liverpool ECoC coincided with a substantial increase in the hotel room stock with over 600 new rooms opening in Liverpool in 2008 alone and an increase of over 1,200 rooms between 2006 and the end of 2009. Demand met the supply with hotel occupancy averaging 86% at weekends and 76% overall (a slight rise on 84% and 71% in 2007). Despite the recession, occupancy rates remained high in 2009 staying between 54% and 77% overall and reaching 90% at weekends.

In 2008 there were near to one million room nights sold in Liverpool, a rise of 26% on 2007. In 2009, despite a slight drop (4%) the number of rooms sold did not return to 2007 levels and by November, had reached parity with the comparable period in 2008, having shown a steady increase throughout the year.

⁴⁷ These figures take in both business and leisure visits. The Mersey Partnership's 2008 Destination Benchmarking estimates that 4% of all visits to Liverpool in the year were 'business tourism'. Due to the sampling methodologies utilised by STEAM (Scarborough Tourism Economic Activity Monitor), there is the possibility of underestimation of the actual volume of business tourism.

⁴⁸ The source for both the volume and value of overall tourism to Liverpool and Merseyside in 2008 is STEAM. It is important to note that the methodology that is utilised by STEAM to calculate the total visitor spend for Liverpool and Merseyside does not currently utilise locally collected data on day visitors' spend. The methodology employed by Impacts 08 to estimate the additional visitor spend created by the Liverpool ECoC did utilise locally collected data on both day and staying visitor's spend (see Impacts 08 published reports listing in the last page). The overall estimations for the size of the sub-region's visitor economy, presented here, are therefore not absolutely comparable with the estimation of economic impact from the Liverpool ECoC which has emerged from Impacts 08's research.

Figure 11: Liverpool hotel room nights sold 2006-2009



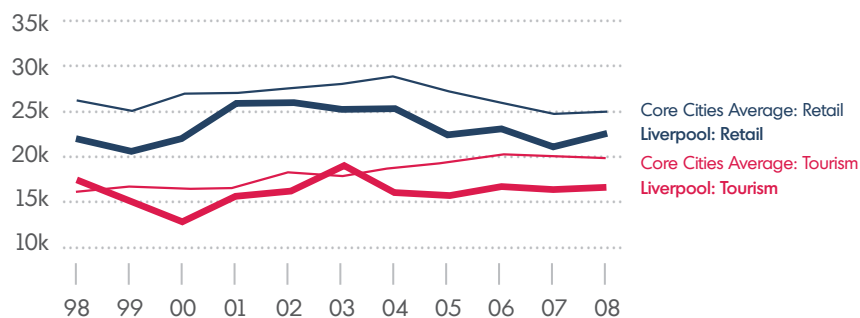
Source: IJ Forecaster / The Mersey Partnership

The average room rate in 2008 was £72, a 5% rise on 2007 and a 21% rise since 2001. In 2009 the average room rate dropped to £65 but remained 9% above 2001 levels. The financial return on all available rooms⁴⁹ for 2008 was £56, compared with £49 in 2007 and £46 for Jan-Nov 2009.

Sector Employment

Over the 10 year period to 2008, both retail and tourism employment in Liverpool followed Core City average trends. There were above average rises in 2008 but it is still too early to establish whether this was a result of the Liverpool ECoC, the Liverpool ONE retail development, or other factors.⁵⁰

Figure 12: Employment volume in retail and tourism in Liverpool and Core Cities⁵¹



Source: ONS Annual Business Inquiry (ABI)

⁴⁹ Know as yield or REVPAR.

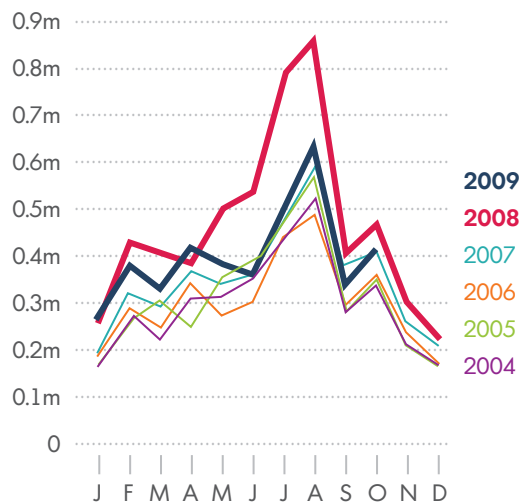
⁵⁰ Please note the following proviso from ONS: the 2008 results are provisional and will be subject to revision in December 2010. Also, ABI data pre-2006 and post 2006 is discontinuous due to changes in methodology and so is not directly comparable. This is also true pre and post 2003.

⁵¹ For information on how Impacts 08 defined these sectors see *Doing Business in the European Capital of Culture Part I and Part II*, Impacts 08.

2.3. Major City Attractions

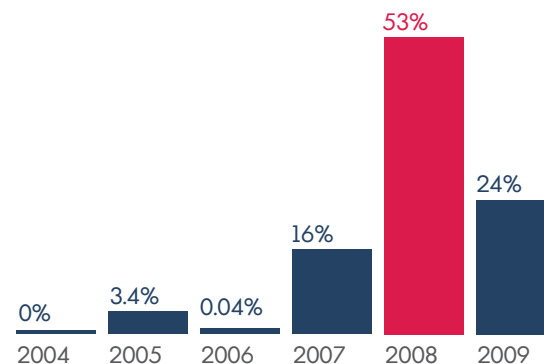
The total number of visits to Merseyside’s seven largest attractions⁵² topped 5.5m in 2008, a rise of over 50% on 2004 figures. As can be seen from Figure 13 below there were increased attendances throughout 2008, but particularly in the summer period. Representatives from the attractions themselves attribute this to the Liverpool ECoC. Impacts 08’s local area research suggests that this trend reflects increased attendance from the local population as well as external visitors. Figures from the first 10 months of 2009 show a fall on 2008 figures but remaining around 25% up on 2004.

Figure 13: Attractions panel attendance, 2004-2009



Source: The Mersey Partnership

Figure 14: Attractions panel annual attendance, % rise on 2004 figures



Source: The Mersey Partnership

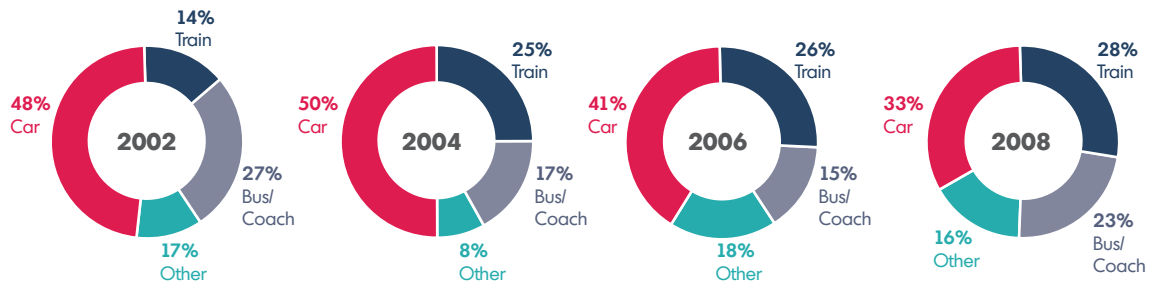
2.4. Travel to Liverpool

Travel Mode

In 2008, the prevalent form of transport for visitors to reach Liverpool was car, followed by train then bus/coach. Surveys do, however, show car use decreasing, and the use of trains increasing (see Figure 15). In a 2008 survey, several respondents had arrived via cruise liner, docking at the recently opened Cruise Liner Terminal, a development closely linked to, and timed to open during, the Liverpool ECoC year. It is not possible to say to what extent the mode of travel was affected by the Liverpool ECoC, however there were efforts made to encourage greater usage of public transport to visit and attend events; in particular through the partnerships and sponsorship arrangements with Merseytravel (the local transport co-ordinator), Virgin Trains (who run the London to Liverpool mainline service), Northern Rail and Transpennine Express (other mainline rail providers), Merseyrail (the local rail service) and Arriva (one of the local bus providers).

⁵² These attractions are: National Museums Liverpool, Tate Liverpool, Liverpool Cathedral, World of Glass, Southport Pier, Beatles Story and Mersey Ferries.

Figure 15: % share of travel mode 2002-2008



Source: Destination Benchmarking Survey, The Mersey Partnership

Train travel volume

Virgin Trains, the provider of the mainline service from London to Liverpool, noted a 6.2% increase in passenger figures in 2008 from 2007, with an 8.4% increase in the first six months of the year (19% among first class passengers). This route showed higher growth rates than the network overall from August 2008 onwards, which Virgin Trains believed was partly linked to Liverpool ECoC and Virgin’s role as a sponsor of Liverpool 08. This above average growth continued into 2009.

Figure 16: % Growth in journeys, London-Liverpool compared with Virgins Trains Total Network⁵³



Source: Lennon data analysis, provided by Virgin Trains 2009

Flights volume

The number of flights into and out of Liverpool John Lennon Airport (LJLA) fell in 2008 from 2007 figures (5.4m from 5.5m). However it is likely that this is related to the recession and the national fall in air passenger numbers, as is clear from Figure 17 showing a greater than usual dip in the winter of 2008/9. In addition, VisitBritain data shows a slight (1.7%) rise in international visitors to Liverpool in 2008, in comparison to a fall in numbers to London, Edinburgh and Glasgow in that year.⁵⁴ Further evidence that the fall in air passenger numbers may be in outbound UK travellers comes from the fact that the proportion of passengers to LJLA which were international (i.e. those travelling to Liverpool and the North West) rose year on year from around 13% of total visitors in 2005 to 18% in 2007 and 24% in 2009.⁵⁵

⁵³ Note that there were extensive rail infrastructure works taking place from late 2007 onwards on the London-Liverpool route which may have affected rail use over this period.

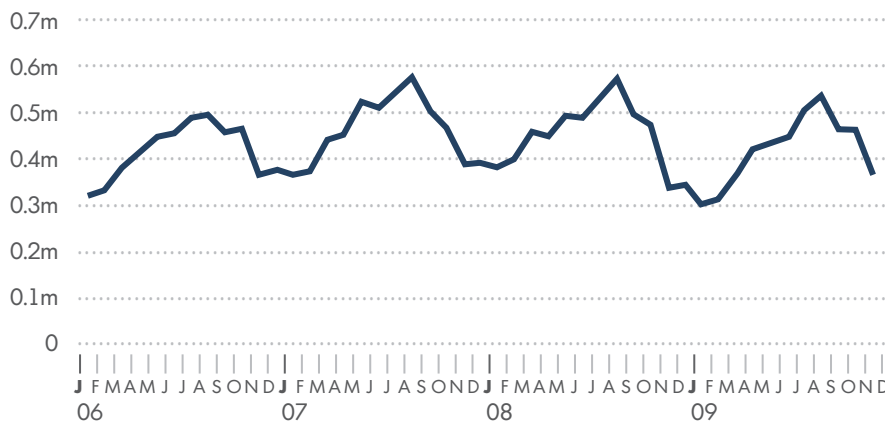
⁵⁴ International Passenger Survey data, please note that the error margin for this data is unknown so results are treated with caution.

⁵⁵ Data from Liverpool John Lennon Airport Gateway Survey, The Mersey Partnership.



Liverpool ONE retail and leisure development.

Figure 17: Number of passengers passing through Liverpool John Lennon Airport 2006-2009



Source: Liverpool John Lennon Airport and The Mersey Partnership

2.5. Business impacts of the Liverpool ECoC

Research into the perceptions of the Liverpool ECoC by small and medium enterprises working in the tourism sector in Merseyside showed that businesses were overwhelmingly positive about the Liverpool ECoC. There was a higher concentration of positive responses from Liverpool than from the other local authority areas, and from businesses with 10 or more employees than from smaller businesses. The most commonly identified positive impact of the Liverpool ECoC was the change in the perceptions of Liverpool and the sub-region, but most businesses also cited a positive impact on their turnover as a result of the Liverpool ECoC (again, with a concentration of positive experiences in Liverpool, and among larger businesses).⁵⁶

Research commissioned by NWDA among a wider cross section of businesses both in the North West and in Britain as a whole (not limited to the tourism sector) appears to agree with these findings, with 88% of businesses in Great Britain being aware of Liverpool ECoC and 68% believing it had a positive impact on Liverpool's image. The North West region as a whole is seen as a better place to do business, with only 15% of North West businesses seeing it as a poor place to do business in 2009, compared with 40% in 2001. While much of this may be due to other factors over this period, 8% of opinion leaders did cite the Liverpool ECoC as a reason for this improvement as a business location.⁵⁷

⁵⁶ Impacts 08 has produced *Tourism and the Business of Culture* (2009) a report focusing on the experiences of small and medium enterprises in Merseyside. Find it listed at the end of this report.

⁵⁷ From 2009 MORI IPSOS Research for NWDA, *Perceptions of the North West*.

3 Cultural vibrancy and sustainability

When Liverpool received the ECoC title in 2003, it already had an established cultural sector with a range of outstanding assets, including its widely recognised popular music scene, its museums and galleries, and a strong tradition of independent visual arts. In addition, there were performing arts organisations which were beginning to re-emerge as nationally significant; a regular events and festivals programme; strong community arts delivery; and a small but developing creative industries sector. The Liverpool ECoC vision placed an emphasis on improving the sustainability of the sector as well as developing greater national and international recognition for the city's cultural offer. This section explores the impacts of the Liverpool ECoC on the sector through analysis of the sector in lead-up to 2008 and the year itself, as well as reflecting findings from qualitative and quantitative research into media and peer perceptions on the quality and significance of the city's cultural offer, and the views of the sector itself on the effects of hosting the ECoC title.

3.1. Liverpool's Arts Sector

Size and Growth

Gaining any comprehensive measurement of the arts sector in any city is hard due to the fragmentary nature and relative informality of the sector. For this reason Impacts 08 has carried out research with the largest eight maintained arts organisations in Liverpool (known collectively as LARC)⁵⁸ to look at their turnover, audiences and delivery over time. Overall data shows that the sector's turnover has grown over the 2006-2008 period. Some of the growth is likely to be related to the receipt of specific Liverpool ECoC programme funding and will, therefore, be time-limited. However, the fact that earned income has remained a steady proportion over the period is a positive indication of the sector's capacity to match increases in public investment with ticket receipts, income from shops and catering outlets and other earned sources.

Audience⁵⁹

In total the LARC audience for 2008/9 was over 5.6 million. The highest proportion of this consisted of visits to museums, galleries and visual arts exhibitions amounting to 5.2 million in 2008/9 and representing a rise of 73.9% on 2007/8 which in itself was a rise of 7% on 2006/7. The known audience at performances rose by approximately 22% between 2006/7 and 2008/9, with a total performing arts audience in 2008/9 of 430,000. The 2008/9 film audience of nearly 25,000 was a rise of 191% on 2007/8 figures.

Income

The total income of LARC organisations was £73m in 2008/9, a rise of 26% on 2006/7. This partly reflects increased funding arising specifically from Liverpool ECoC project funding and procurement. However, the proportion of total income that was earned from other sources also increased (a rise from 13.7% in 2007/8 to 16.4% in 2008/9) which suggests organisations are continuing to gain income from a range of sources as well as short-term, specific programme related funding.

Liverpool City Council increased its funding of the local arts and cultural sector's 'core activity'⁶⁰ by 84% between 2002/3 and 2008/9. The majority of the rise (79%) was in place by 2006/7, giving the sector £3.7m-£3.8m per year (a total of £19m over the six-year ECoC period) to support not only development and delivery of activity during the Liverpool ECoC but the ongoing sustainability of Liverpool's cultural sector.⁶¹

Arts Council England's regional body – then North West Arts Board – identified Liverpool as a priority area for growth prior to Liverpool submitting its bid to be ECoC. In this context, and in the context of Liverpool City Council's increases in Regularly Funded Organisation (RFO) funding (both in the number of organisations nominated as RFOs and in the overall level of investment) as part of Liverpool building its capacity towards 2008, Arts Council England (ACE) RFO funding to organisations in Liverpool rose from 15 organisations and £2.7m in 2003/4 to 24 organisations and almost £7.5m in 2008/9. This increase of 176% is substantially higher than the rise in ACE's overall RFO investment in England, which was 30% over the same period.

⁵⁸ This comprises: The Bluecoat, FACT (Foundation for Arts and Creative Technology), Liverpool Biennial, Liverpool Everyman and Playhouse, National Museums Liverpool, Royal Liverpool Philharmonic, Tate Liverpool and Unity Theatre.

⁵⁹ The term 'audience' here is used as a proxy for both audience numbers for performances, including film showings, and visits to museums, galleries and visual arts exhibitions. It is important to note that the audience figures may include multiple attendances at different performances from a single attendee and multiple visits from a single visitor on different occasions.

⁶⁰ This is funding provided under regular funded organisation (RFO) agreements for general operation and development of the organisations rather than funding allocated to specific or special programming or activity. The group of organisations receiving this RFO funding range from most of the members of LARC (larger organisations) to much smaller arts organisations. Over 50 organisations received 'core funding' at some point during the six year period, with 27 receiving a three-year funding agreement in 2006.

⁶¹ It is worth noting that some of these organisations were also in receipt of funding from other local authorities in the city region, but that Liverpool City Council provided, by far, the highest level of local authority funding.

Activity

In terms of artistic output, 129 new works were commissioned by LARC in 2008/9, compared to 49 in 2007/8 and 93 in 2006/7 (reflecting the cyclical pattern of Liverpool Biennial's commissioning). In 2008/9 LARC organisations had a total of 1,081 permanent staff (a rise of 9% from 2007/8) and in addition provided employment for at least 1,383 contractors, an increase of over 90% on 2006/7.

Media and peer perceptions

Media Profile

Liverpool's arts and cultural sector has played a critical role in the city's image renaissance over the last decade. National press coverage on Liverpool was traditionally dominated by football and social issues stories, with the latter being mainly negative and focusing on crime and violence. However, since the ECoC title was awarded in 2003, stories on the city's cultural offer have grown exponentially and became the dominant area of coverage (after football) in 2008. Overall, the number of arts and culture related stories has more than trebled in just over a decade (211% growth between 1996 and end of 2008, 57% growth between 2003 and end of 2008). This suggests that the city's cultural offer has become a key dimension of the city's contemporary profile nationwide. In 2008, 90% of stories on the cultural offer were positive or neutral, the thematic area attracting the largest percentage of positive coverage, which has contributed to the overall impression of city renaissance. Of national stories on the Liverpool cultural offer in this period, only 11% have been directly related to or mentioned the ECoC title explicitly, thus suggesting that the trend can be sustained beyond 2008, as was the case in Glasgow after its year as European City of Culture in 1990.

The ECoC title has had some direct impact on the way Liverpool culture stories are profiled in the media and thus on perceptions of the sector. Traditionally, most coverage on Liverpool culture has focused on the city's popular music scene and established icons such as the Beatles and their legacy. Since 2000, this has diversified to incorporate a consistently larger volume of visual arts stories, partly triggered by the growth of the Liverpool Biennial as well as the successful positioning of Tate Liverpool. Since the award of the ECoC title, the greatest change has been in the volume of performing arts⁶² stories (100% growth), which was the art form with the greatest proportion of national coverage in 2008, surpassing popular music and visual arts stories. Liverpool arts institutions which attracted the greatest volume of coverage nationally were National Museums Liverpool and Tate Liverpool, followed by the Royal Liverpool Philharmonic.

In terms of Liverpool event coverage, the media understandably focused on Liverpool ECoC related activity in 2007 and 2008, but with a different emphasis nationally and locally. In 2008, the national press focused mainly on mainstream popular events⁶³ followed by 'high arts' events⁶⁴ and dedicated less coverage to community events. In contrast, the local press dedicated the largest amount of coverage to community events, followed by mainstream popular events⁶⁵, while the proportion of coverage dedicated to high arts events specifically was much lower.

⁶² Performing arts stories here refers to theatre, dance and music (other than popular music) as well as comedy and musicals.

⁶³ The Liverpool ECoC branded cultural event which attracted the most coverage nationally was the Opening Weekend, followed by the Paul McCartney concert and the mass participation event La Princesse (a giant mechanical spider toured the city over five days).

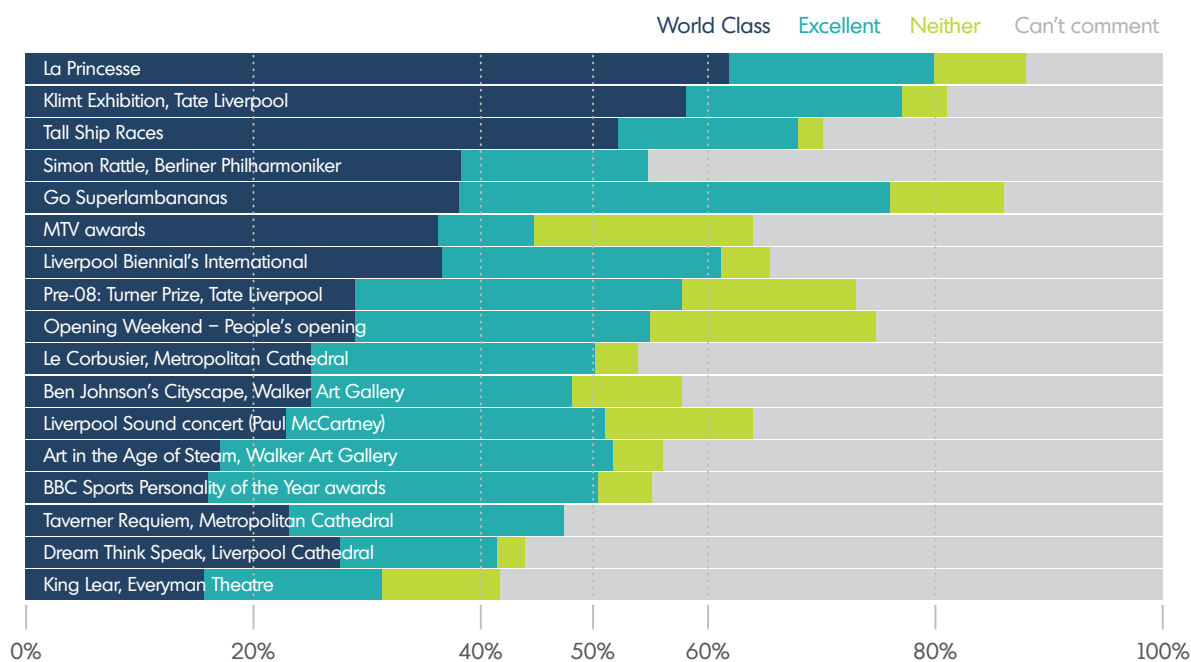
⁶⁴ The single arts events attracting the highest volume of national coverage were the Klimt exhibition, followed by the Taverner Requiem, the two combined concerts by Sir Simon Rattle, the performance of *King Lear*, the film *Of time and the city*, and the theatre/installation piece by Dream Think Speak.

⁶⁵ The local press concentrated most coverage on the Opening Weekend – particularly the 'People's opening' taking place in the open air, the Superlambanana parade and all Creative Communities events combined. Other events attracting high volume of local stories included the McCartney concert, the arrival of the Tall Ships and events that were well established before the ECoC title such as the BBC Sports Personality of the Year Award and the MTV awards.

Peer Perceptions

By early 2009, 51% of arts representatives, promoters and funders in Liverpool and selected national peers considered that the city had achieved its aspiration to reposition itself as a ‘world class city’, while 30% agreed that the city had undergone a positive renaissance but considered that the term ‘world class’ was inappropriate or too ambiguous. 19% of consulted peers disagreed with either of these claims. The single event receiving highest praise as a ‘world class’ moment was the mass participation event La Princesse (62% of respondents), followed by the Klimt exhibition at Tate Liverpool (58%). The music, visual arts and street programmes were the strands of activity most likely to be designated as ‘world class’, led by the events noted above, then by the Tall Ship Races, Simon Rattle and the Berliner Philharmoniker concert and the Liverpool Biennial. Interestingly, high profile media events such as the MTV awards, the Turner Prize, the Opening Weekend and the Paul McCartney/Liverpool Sound concert received over 50% praise as ‘world class’ or excellent, but also a noticeable proportion of claims to be ‘neither’. The theatre events receiving highest praise were the piece by Dream Think Speak⁶⁶ (considered by 28% to be ‘world class’, and by 42% to be either ‘world class’ or excellent), followed by *King Lear*. However, a large proportion of the consulted peers felt unable to comment about specific theatre performances, which may reflect the number of respondents who were able to attend these events or engage in the media debate surrounding them.

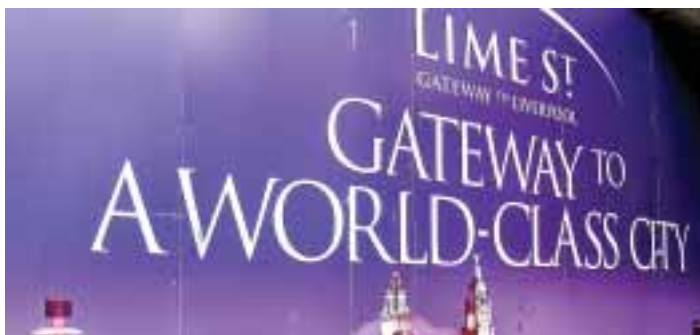
Figure 18: Liverpool ECoC events praised as ‘world class’ or excellent by over 50% of sector peers⁶⁷



Source: Impacts 08 research

⁶⁶ One Step Forward, One Step Back a site-specific theatre piece designed for Liverpool Cathedral by Dream Think Speak Company.

⁶⁷ Dream Think Speak and King Lear have been included in this graph because they are the theatre events receiving the highest consulted peer praise.



51% of local cultural sector peers agreed that by the end of its ECoC year, Liverpool had been repositioned as a ‘world class city’.

Other areas of the city’s cultural offer pre-dating the ECoC title and considered ‘world class’ included ongoing events such as the Liverpool Biennial and the Grand National, public art such as *Another Place* and *Turning the Place Over*, and new or refurbished physical infrastructure such as St George’s Hall, Arena and Convention Centre Liverpool and the Liverpool ONE shopping development. Overall, arts peers and critics judged that Liverpool had an above-average range of ‘world class’ cultural assets, particularly considering its size, and that the ECoC title had assisted in making them more visible and widely recognised.

Perceived impacts of Liverpool ECoC on artists and arts organisations

For the arts sector the Liverpool ECoC was viewed as a success in terms of raising the profile of the city, the profile of the arts and cultural offer of the city, and in bringing visitors and the local population in to enjoy this offer. There were a number of arts and cultural organisations who cited, as a particular highlight and benefit of the additional programme funding, the opportunity to bring in internationally significant artists to work with their organisations as part of Liverpool ECoC. As might be expected given the significant additional programming and the range of delivery partners involved in the Liverpool ECoC, some individual artists expressed concern about the use of ‘external contractors’ to deliver work they felt they could have delivered themselves.

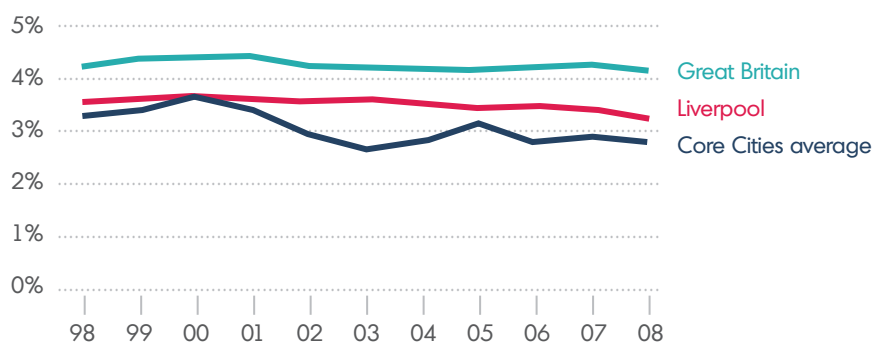
A new grants process was introduced by Liverpool City Council in late 2008, for 2009/10 and 2010/11 financial years, which included significant infrastructural investment (through regular funding commitments and other programmes) in a number of arts and cultural organisations. This was praised by some of the arts sector as being an improved process in comparison to the frustrations which some participants had expressed around the way funding, commissioning and tendering processes had been handled by Liverpool Culture Company in the lead up to 2008. Whilst organisations and artists who benefited directly from additional programme funding unreservedly felt its impact to be positive, some organisations noted the ‘hangover’ which would occur in 2009 when such levels of programme funding would no longer be available. This highlights the tension between temporary interventions and long-term sustainability which is by no means unique to Liverpool ECoC but is rather the perennial issue of large-scale, time-limited interventions.

3.2. The Creative Industries Sector

Size and Growth

In 2008 there were 1,683 creative industry enterprises in Liverpool employing 10,987 employees, around three to four percent of the overall workforce.⁶⁸ This represents a growth of 8% in the number of enterprises over the 2004-2008 period.⁶⁹ This increase was particularly apparent in enterprises in the size bands of between 1 to 5 employees and between 6 to 10 employees. Liverpool and Merseyside have a smaller creative industry base per capita than other Core Cities or than the national average. Analysis indicates however that the Liverpool city region has a sustained base of creative industries enterprises, and that the area is considered a viable context for new start-up businesses.

Figure 19: Creative industry employment as % of total employment⁷⁰



Source: NOMIS official labour market statistics and ABI

Impacts of Liverpool ECoC on the Creative Industries Sector

Research into perceptions of the Liverpool ECoC within the city region's creative industries sector revealed a number of impacts. The Liverpool ECoC was thought to have improved the city's profile, and particularly external perceptions of Liverpool. The sector felt that the Liverpool ECoC had improved the 'local morale' of the sector in the city region, as well as helping to increase the credibility of Liverpool city region's creative industries offer. The sector also felt that, particularly around marketing and profile raising activity, the Liverpool ECoC had focussed on the 'cultural' and 'tourism' offers, but that this did not necessarily extend to creative industries. A limited number of participants in the research suggested that they had seen increases in their client base which they felt could be partly attributed to the Liverpool ECoC. Finally, following 2008, nearly three-quarters of creative industries enterprises who took part in the research felt that the Liverpool ECoC would create long-term, positive impacts for their businesses.

⁶⁸ Using BETA model and Impacts 08 definition of the creative industries as well as weighting for sector and self-employment. For information on the Impacts 08 methodology see *Liverpool's Creative Industries: understanding the impact of Liverpool ECoC on the city region's creative industries* (2009) listed at the end of this report.

⁶⁹ Using a sample of creative industries and BETA Model data following the Impacts 08 methodology.

⁷⁰ Please note that for comparison reasons ABI data is used for this chart – hence any difference with data above.

4 Image and perceptions

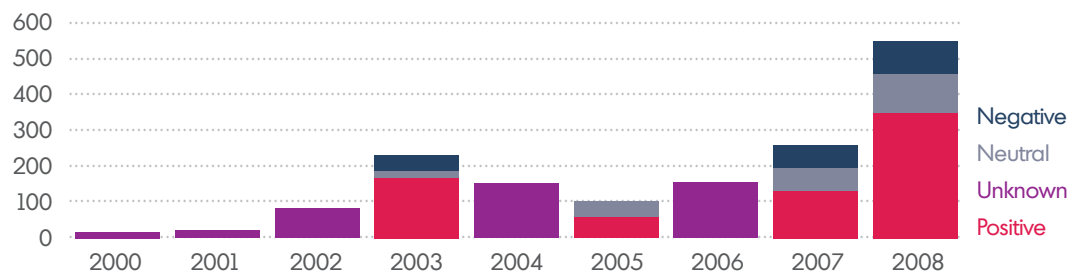
The city of Liverpool attracted very high levels of negative UK national media coverage for most of the second half of the 20th Century, which was also reflected in negative pre-conceptions of the city at a national level. However, since the ECoC title award in 2003, there have been some remarkable changing trends in the approach to media coverage about the city and in national as well as local perceptions. This section offers an overview of trends in media coverage about Liverpool since the mid 1990s, long before the city decided to bid for the ECoC title, as well as an overview of Liverpool ECoC specific coverage since the award year in 2003. An analysis of newspaper coverage is provided, as well as an indication of online media discussions, particularly within social media (user-led) environments. This is complemented by an assessment of trends in popular opinions of Liverpool and levels of awareness of Liverpool ECoC title between 2005 and 2008.

4.1. Media coverage of Liverpool ECoC

National and Local Press

The volume of national coverage on the Liverpool ECoC shows a peak at the time of the bid and announcement in 2003, decreased until 2005 and increased consistently, almost doubling year on year, from 2006 onwards. From an attitudinal perspective, positive coverage has dominated nationally, particularly in 2003 when it accounted for 74% of all stories.

Figure 20: Number and tone of national press articles mentioning the Liverpool ECoC

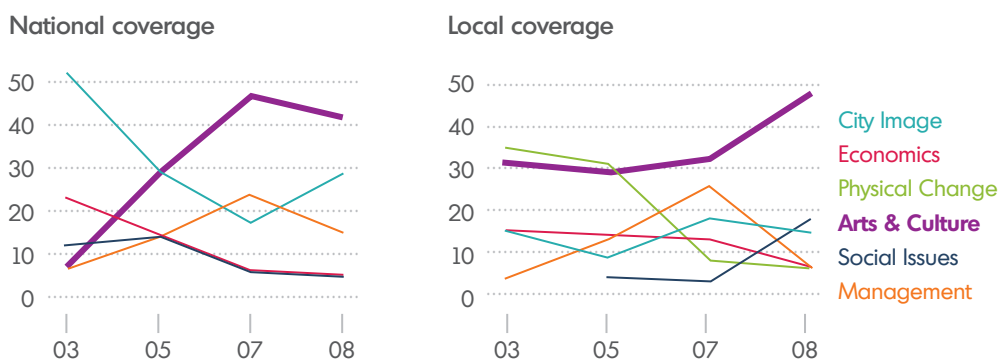


Source: Impacts 08 research

The most dramatic change in thematic focus for national Liverpool ECoC specific stories involved a switch from an emphasis mainly on the ECoC as a catalyst for image renaissance in 2003, to absolute dominance of coverage about the events programme and related arts and culture stories.⁷¹ Discussion on the economic impact of the Liverpool ECoC was more dominant in 2003 than subsequent years, as was an emphasis on the case for the ECoC social dimensions (including coverage on access and inclusion), while management and policy or political stories peaked in 2007, in the context of major organisational and leadership changes, and fell again in 2008. Discussion on physical impact or the wider structural regeneration effects of the Liverpool ECoC, which dominated local coverage at the bid and award stage as well as in 2005, were proportionally insignificant at a national level. Locally, arts and culture stories were also the thematic area that increased the most, while discussion on governance and political issues related to the Liverpool ECoC increased considerably between 2003 and 2007, to fall again in 2008. In 2008, 48% of all national ECoC coverage was on the year's arts and cultural offer.

⁷¹ Impacts 08 has conducted a sampled longitudinal analysis of all national and local press coverage mentioning Liverpool as well as coverage specifically referring to the Liverpool ECoC. In this analysis which, for manageability purposes excludes stories about football (accounting for over 75% of all national stories on Liverpool), six main thematic categories have been identified. Detailed explanations of the methodology and qualitative findings are available in separate media content analysis reports, published online and listed at the end of this report.

Figure 21: Percentage of thematic focus of national and local coverage on Liverpool as ECoC



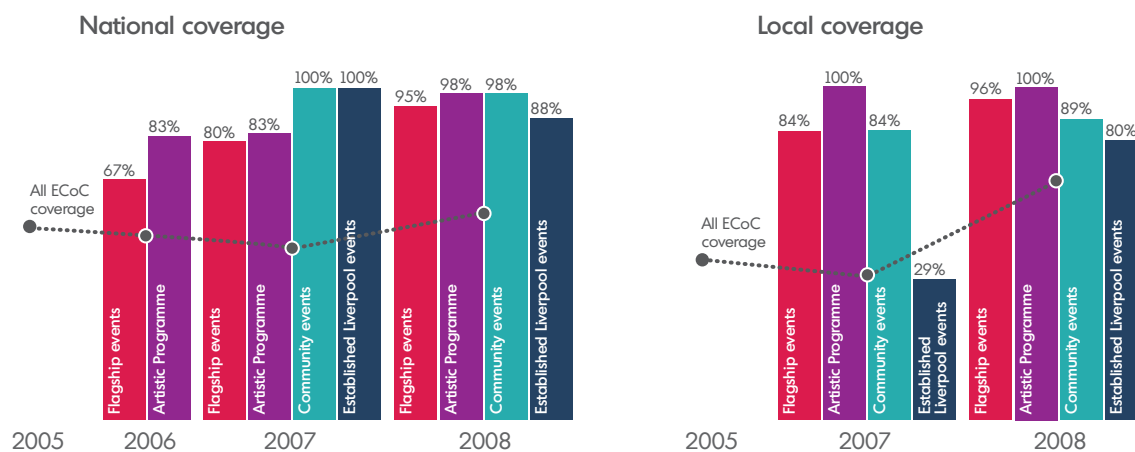
Source: Impacts 08 research

A closer look at the Liverpool ECoC programme coverage and, in particular, the official branded Liverpool ECoC events, reveals a clear dominance of positive and neutral stories. There was a consistent growth in the percentage of positive or neutral stories about Liverpool ECoC flagship events (key VIP and press announcements, opening and closing events, etc.) as well as for the artistic programme (the latter showed a particularly marked rise from 2007 to 2008 nationally, while locally coverage remained 100% positive or neutral). The community programme (Creative Communities) retained similar levels of positive coverage in 2007 and 2008, but attracted far fewer stories than the other two programmes at a national level. In contrast, free community Liverpool ECoC events attracted a higher volume of total coverage locally than the ticketed artistic highlight events. The established city programme, involving annual events in Liverpool that predated the ECoC title, attracted a slightly lower percentage of positive or neutral stories than the new Liverpool ECoC events programme and, locally, it was dominated by negative coverage in 2007 due to a marked controversy over the cancellation of the open air strand of the Mathew Street Festival (an annual festival celebrating Liverpool's popular musical heritage). This dip was not noticeable at a national level and, by 2008, local coverage on established city events was 80% positive or neutral.



Liverpool ECoC events received 90% positive or neutral coverage between 2007 and 2008. In 2008, national papers produced 71% more positive stories about Liverpool than in 2007.

Figure 22: Press coverage of Liverpool ECoC events – % positive or neutral



Source: Impacts 08 research

Online coverage

Online media environments with Web 2.0 functions are playing an increasingly significant role in the positioning of large scale events, particularly as they allow local communities to appropriate the narrative and become ‘citizen journalists’, thus sharing their own experiences with the wider world. The Liverpool ECoC became a prominent feature within locally-led social media environments such as Facebook, Flickr and YouTube in the years leading up to and during 2008.⁷² Online user-led representations of Liverpool in 2008 were largely related to the Liverpool ECoC experience. Local mainstream media, in particular the Liverpool Daily Post newspaper, actively promoted online engagement via photo sharing on Flickr. During the Liverpool ECoC year there was also greater social media usage across established arts institutions in the city, many of which created their first Facebook groups and Twitter accounts during 2008.⁷³ Overall, 500 Facebook pages, groups and events were created around Liverpool ECoC content, some of which utilised the Liverpool 08 logo to identify their community. These groups together engaged over 13,000 members. Over 50,000 photographs with ECoC related tags were uploaded to Flickr during 2008, indicating a growth of up to 23% in activity over the year. In YouTube, over 2,200 video clips were uploaded with a specific reference to the Liverpool ECoC, generating over 2.5m views throughout the year.

⁷² Impacts 08 has published a separate report on the online impact of Liverpool ECoC activities, which explains in more detail the nature and outreach capacities of all social media special platforms listed here. Find details at the end of this report.

⁷³ The use of Facebook as a social interaction platform reached the mainstream worldwide in the mid to late part of 2007. In Liverpool, the usage of this platform within arts and cultural environments grew most rapidly during 2008 itself. This cannot be seen as an exclusively Liverpool ECoC motivated phenomenon. However, the ECoC programme had some degree of influence stimulating the growth of this and related online platforms within Liverpool-based arts and culture environments as there was a higher than average demand to share images and written experiences about the ECoC programme.



The Go Superlambanana Parade involved 125 replicas of an established public art piece, decorated by artists and communities and scattered throughout the city.

The events that became most prominent within social media environments were mostly mass participation open air events which provided many opportunities for taking pictures or videos. The Go Superlambananas Parade (125 replicas of the public art work Superlambanana, decorated by artists and communities and placed mainly around the city) dominated online engagement across platforms. *La Princesse* (a 50 foot mechanical spider that travelled around the city centre for five days) was particularly prominent in YouTube and Flickr. The Mathew Street Festival and Liverpool Summer Pops Music Festival, as well as high profile and well established international media events such as the MTV awards, also generated high volumes of online content including a 'Liverpool' and/or 'ECoC' tag, mainly through the sharing of televised clips via YouTube. Further, the Liverpool ECoC Opening and Closing events created the highest peaks in volume of Google searches using the term 'Liverpool' and/or 'ECoC 2008', locally and internationally. This reinforces the importance of these moments as key markers in a year-long programme, largely as media events.

Over the 2008 period, key searches to interrupt the dominance of football and football related searches within Google were the phrase 'Liverpool 2008' (referring to the Liverpool ECoC programme at large), the opening of the Liverpool Echo Arena (which also marked the launch of the Liverpool ECoC year), the opening of the Liverpool ONE shopping complex, and high profile Liverpool ECoC events such as the Liverpool Sound (McCartney concert), the Tall Ships (an international regatta), the Klimt Exhibition at Tate Liverpool, and *La Princesse*. Interestingly, the MTV awards did not generate content unique to Liverpool nor strong associations with the Liverpool ECoC specifically, but did create important associations with the city

of Liverpool online, renewing interest in its contemporary music scene. Google searches did not indicate any cross-fertilisation of audience participation between Liverpool 2008 and Stavanger 2008 (the Norway-based ECoC), though they did suggest that Liverpool 2008 dominated the worldwide English-speaking searches for European Capital of Culture-related content in 2008.

Although most Liverpool ECoC online content was generated by locally based organisations, there was a range of major national organisations that gave significant amounts of online profile to the Liverpool ECoC, including interactive platforms. These included the BBC, Arts Council England and the Department of Culture, Media and Sport. The BBC site was the environment most likely to reach out to an international online audience.

4.2. Awareness of Liverpool as ECoC

Awareness that Liverpool was ECoC in 2008 (implying both awareness of Liverpool and of the European Capital of Culture title or Liverpool 08 brand) rose noticeably among the public both regionally, and in particular, nationally between 2005 and 2008, so that by 2008 over 60% of the UK knew about the Liverpool ECoC. In addition, the percentage of people who felt they knew about Liverpool ECoC rose to nearly 70% of the local population, and this not only implies successful awareness raising by Liverpool Culture Company, but also some local confidence in the messages that were being put out, which had been a challenge for the Liverpool Culture Company in aiming for inclusion of all Liverpool residents. Levels of knowledge nationally were lower, but it is interesting to note that nearly a quarter of the North West and North Wales public felt they knew a ‘great deal’ or ‘a fair amount’ about Liverpool ECoC.

Figure 23: Unprompted awareness of Liverpool as ECoC

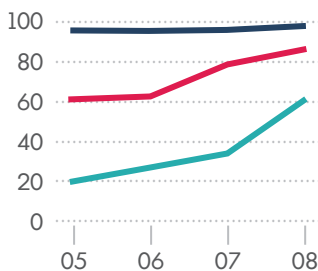
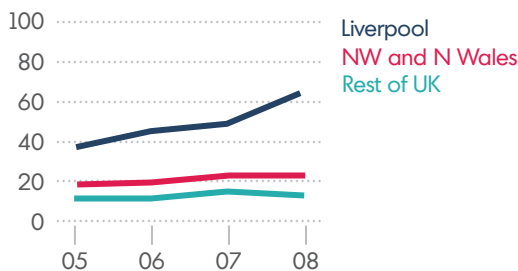


Figure 24: Know ‘a great deal’ or ‘a fair amount’ about Liverpool ECoC (%)



Source: NOP annual perception surveys

These findings correspond closely to findings from Northwest Regional Development Agency research which found that 65% of UK residents were aware of the Liverpool ECoC in 2008/9, a rise from 46% in 2006. People had heard about it via television news (55%), local press (25%), television documentaries (13%), other television (15%) and radio news (11%).⁷⁴

⁷⁴ From 2009 MORI IPSOS Research for NWDA, *Perceptions of the North West*. Note that this survey did not include a specific question about online media, thus this data is not available.

4.3. Press Coverage of Liverpool

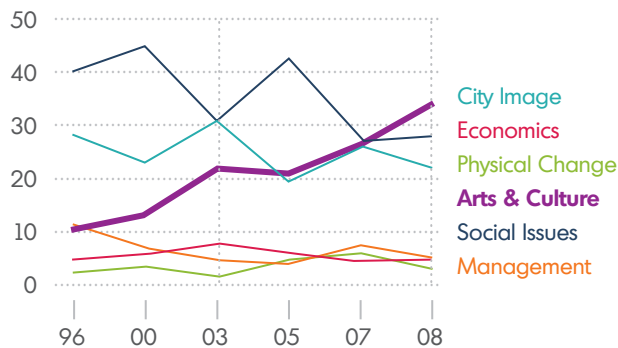
General coverage about the city of Liverpool, independently of any specific reference to the ECoC title, saw a remarkable change from the mid 1990s to end of 2008. Such a change in trends suggests that the ECoC title award has had a degree of influence on the wider media narrative (particularly at a national level).

National Media

In the period from 1996 to January 2009, national coverage of the city of Liverpool saw major fluctuations in the split between positive, negative and neutral stories. In 1996, coverage was quite polarised, with a slight dominance of negative stories and a very low percentage of neutral stories. This was followed by a peak in positive coverage (46%) in 2003 (the year of ECoC title award) and a drop in negative stories, a trend which was completely reverted in 2005. The volume of positive stories diminished significantly between the end of 2003 and 2007, but reverted to 2005 levels in 2008, when percentages of positive, negative and neutral stories are more or less equal (with slight dominance of positive stories). This suggests that coverage on Liverpool has become less polarised along positive or negative lines and involves a wider spectrum of stories and levels of analysis.

The largest change in press coverage of Liverpool relates to the share of coverage given to different 'themes', with a 211% growth in stories about the city's arts and cultural scene. In contrast, discussion on social issues, which was clearly the dominant theme in the mid 1990s, in 2000 and in 2005, has become secondary to arts and culture in 2008. This suggests a clear reverse of approach nationally: from an emphasis on (mostly negative) social issues in the mid and late 1990s to (mostly positive) cultural stories from 2003 onwards. Liverpool's image renaissance has also attracted a high volume of national coverage throughout this period, while the city's economy, physical change and political issues have produced a far lower percentage of articles. The emphasis on (positive) culture and image stories can be associated with the ECoC title and early trends in 2009 indicate that such predominance will continue beyond 2008, thus becoming a sustained symbolic legacy of the city's ECoC status.

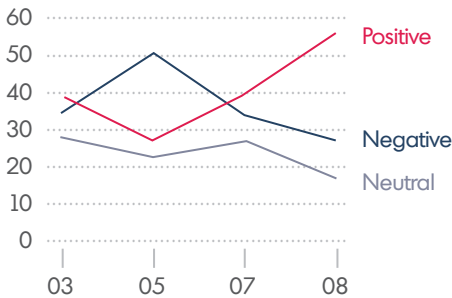
Figure 25: Percentage of thematic focus on Liverpool national press stories 1996 - 2008



Source: Impacts 08 research

Local Media

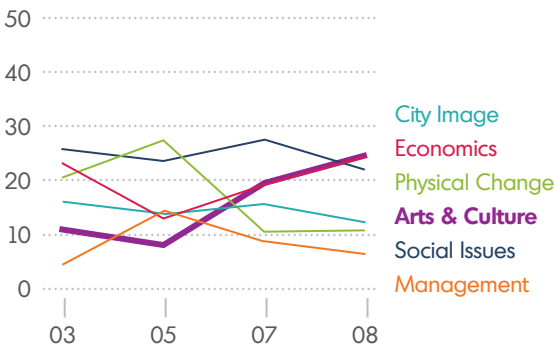
Figure 26: Percentage of local press attitudes 2003-2008



Source: Impacts 08 research

In contrast with national trends, local papers have become less neutral or descriptive about Liverpool since 2003, and show an extremely marked growth in total positive coverage from that year on, from 39% positive stories in 2003 to 56% in 2008. There have been no drops in levels of positive coverage (apart from in 2005), while negative coverage, which increased markedly between 2003 and 2005, dropped again in 2007 and 2008.

Figure 27: Percentage of thematic focus in Liverpool local press 2003 - 2008



Source: Impacts 08 research

As in the case of the national press, the most marked change in thematic focus was the growth in arts and culture stories (from just over 10% to 25%). There was also a noticeable drop in stories about the city's physical or environmental change, which dominated in 2003 and 2005 but remained around 10% in subsequent years. Stories on the city's economy saw a marked fluctuation, from representing over 23% of all coverage in 2003, to 14% in 2005 and back to near 25% in 2008, a similar proportion to arts and culture stories. In contrast with the national scene, coverage on the city's social issues remained stable and dominant throughout, always around the 25% mark.

4.4. Perceptions of Liverpool

National Opinion

Over the four years from 2005 to 2008 overall positive impressions of Liverpool increased amongst all groups surveyed,⁷⁵ with a statistically significant rise in the national population outside the North West (from 53% to 60% reporting positive impressions). Perhaps more importantly for Liverpool the percentage of those with a negative view dropped, with a 'rest of UK' fall from 20% to 14% and the percentage of those with a very positive impression rose from 18% to 23%. In the same period, among the same sample, 'very positive' impressions of Manchester and Glasgow remained the same or declined. In addition, more people felt Liverpool was a place they wanted to go to (64%, a rise from 58% in 2005) and less felt it was a place they didn't want to go to (26% from 32% in 2005).

The top things mentioned when people in the rest of the UK were asked 'what are the good things about Liverpool?' remained fairly consistent between 2005 and 2008 and were (in approximate ranking order): the people/characters; football/sport; buildings/heritage; the waterfront and also, that it was 'interesting', with 'lots to do' and/or 'a good nightlife'. References to 'shopping' rose slightly as a response over this period. However, the percentage of people who said 'nothing' was good also rose. Regardless of the latter, the percentage of people who indicated they 'did not know anything good' about Liverpool declined. A few people spontaneously mentioned the Liverpool ECoC, around 4% in 2008.


In terms of 'bad things about Liverpool', again there was general consistency between 2005 and 2008, with by far the biggest proportion who identified anything bad saying 'crime', then 'decay/urban decline'. It is worth noting that although around 20% of people outside the North West felt Liverpool was worse than the rest of the UK for crime, around 45% consistently felt it was much the same. The percentage of people saying there was nothing bad about Liverpool rose from 19% to 26%.

These overall findings of Liverpool's national profile correspond with the NWDA research finding that Liverpool is the second most spontaneously cited North West asset after the Lake District among the British population.⁷⁶ In the North West itself, Liverpool was seen as a strength of the region by 47% of residents, a rise of nine percentage points from 2001; however it was still seen as a weakness by 12% (although less so than four other regional towns/cities).

There was some increase in recognition of Merseyside too, with both North West and British residents seeing it more favourably in 2008/9 than in 2001. This change in perception brought it in line with, or slightly ahead of, Greater Manchester.

⁷⁵ Results based on annual survey carried out for Liverpool Culture Company by GfK/NOP, with samples in Liverpool, the rest of the North West/North Wales, and the rest of the UK – with a weighting to the South East. Results are significant at 6%-7% shifts.

⁷⁶ From 2009 MORI IPSOS Research for NWDA, *Perceptions of the North West*.



The people and characters of Liverpool were perceived as one of the highest ranking 'good things' about the city.

Visitor Opinion

Overall, visitor satisfaction with Liverpool as a tourist destination improved across a wide range of measures. Visitors from the region, the UK as a whole and internationally rated the city more highly than in 2006 and than other benchmark towns and cities.⁷⁷

Particularly relevant to Liverpool, given that crime was cited as the top problem with the city in national polls (above), the 'feeling of safety from crime' rose between 2006 and 2008, meaning that 90% of visitors in 2008 felt positive about safety from crime. This is more or less level with views about other cities (average 89% positive) and it is apparent that the visit itself helped to shape this improved perception as 77% of respondents felt Liverpool was 'safer than I expected'.

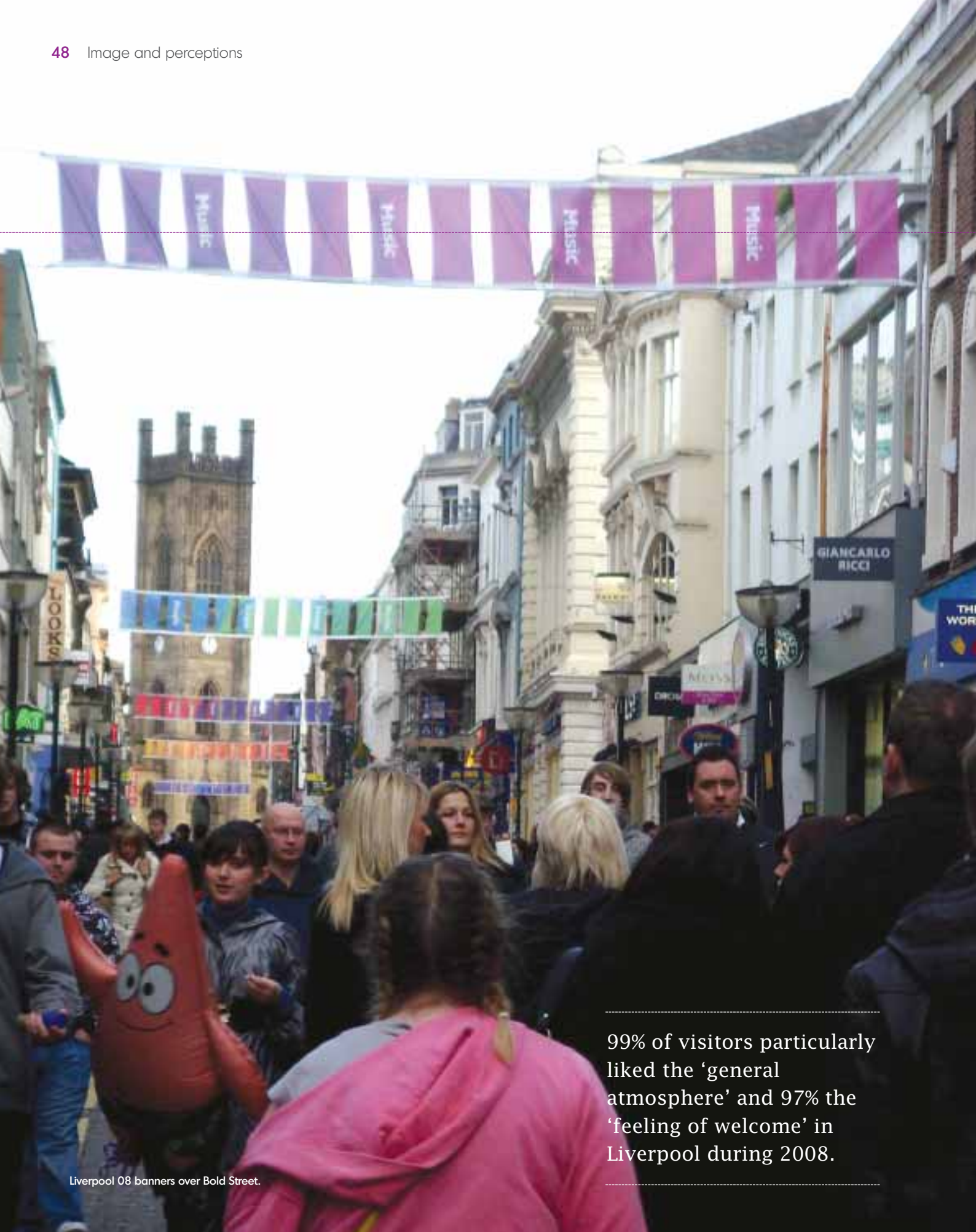
Overall views on Liverpool remained far more positive than on other cities and rose between 2006 and 2008, with 99% of respondents feeling positive about the 'general atmosphere' (compared to 91% in 2006 and 89% in other cities) and 97% feeling positive about the 'feeling of welcome' (compared with 88% in 2006 and 87% in other cities).

Views on attractions (range, quality of service and value for money) ranged between 86% and 95% positive in 2008 compared with 'all cities' averages of 73% - 82% positive in 2008, and showed a rise from Liverpool scores of 77%-85% positive in 2006. Similarly views on places to eat and drink and on shopping (in particular on range and quality of service) were both well above the benchmark of other cities and also showed a significant improvement on previous years. These results probably reflected the opening of a number of new bars and restaurants as well as the partial opening (at time of survey) of the Liverpool ONE development. 95% of respondents replied positively to questions on the range of shops.

In terms of the signage and finding one's way around the city, although there were clear levels of net satisfaction (60-69% positive), satisfaction levels did not rise as much as in other areas such as attractions, retail and eating/drinking. There are three types of findings related to signage:

- Road signage showed an improvement in satisfaction, to the point where it was comparable to that for other cities (whereas previously Liverpool was behind).
- Pedestrian signage showed little change in satisfaction scores (although note that over this period, comparator cities typically showed a drop in this regard. It is also felt that Liverpool's result may be 'tainted' to some extent by the continuing construction work in the city over this period.)
- There was a significant reduction in satisfaction with display maps and information boards (although, again, there was a drop - albeit smaller - in satisfaction with these in other cities too).

⁷⁷ Results in this section come from the Liverpool Destination Benchmarking Survey, undertaken by England's Northwest Research Service (ENWRS), with pan-UK comparative data provided by Tourism Southeast. Destination Benchmarking surveys are designed to update information from previous surveys on the profile, behaviour and opinions of tourists in Liverpool in order to identify emerging trends and benchmark against a group of other large towns/cities. Data collection was carried out from June - Oct 2008. Scores were assigned from very good to very poor on a 5=very good, 1= very poor, so that a score of 3 is neutral.



99% of visitors particularly liked the 'general atmosphere' and 97% the 'feeling of welcome' in Liverpool during 2008.

Local Opinion

Local opinion of Liverpool in the period 2005 to 2008 was generally positive, with around 60% of people having a very positive impression of Liverpool (remaining more or less the same over the Liverpool ECoC period) and those with a negative opinion remaining at around 5% of the total population. Good things about Liverpool were felt to be the people (60%), followed by buildings, the waterfront, nightlife and museums and galleries. In 2008 there was a significant rise in the percentage of local people who mentioned both shopping and that Liverpool was 'an interesting place, with lots to do'. The ECoC title as a spontaneous response rose consistently year on year from 4% in 2005 to 10% in 2008.

In line with opinions within the rest of the UK, bad things about Liverpool were felt to be crime, decay/urban decline as well as the people. However, local people placed greater importance on litter and on Liverpool's poor reputation/negative media reporting, as issues of concern.

The opinion that changed most over time was how local people felt Liverpool compared to other cities, with the percentage of people thinking Liverpool was better for hotels, music, galleries and particularly shopping increasing significantly between 2005 and 2008.

From Impacts 08's own research, it was apparent that local residents tended to have a view that external impressions of Liverpool were more negative than was the reality. In 2007, the majority of respondents (53%) felt that people outside Liverpool generally tended to view the city negatively. However, only 5% felt that this situation was getting worse, while 64% felt it was improving. By 2009, the percentage of respondents who felt that people outside Liverpool had a negative view of the city had dropped to 38%, a drop of 15% on previous years, with those thinking the situation was improving rising to 69%. This improvement was, in the main, seen as the result of new city centre developments and publicity arising from the Liverpool ECoC, and from the positive word of mouth being spread by visitors to the city and students. However a minority of respondents felt that attitudes to Liverpool outside the city were entrenched and efforts to improve Liverpool's image were undermined by continuing high levels of poverty and unemployment, and by Liverpool's history of racial division.



Over 60% of Liverpool residents had a very positive impression of the city. Good things were felt to be the people, followed by buildings, the waterfront, the nightlife and museums and galleries.

5 Governance and delivery process

A key ambition of the Impacts 08 programme has been to assess and document not only the outcomes and impacts of delivering an ECoC, but also to explore the operational management of this process. Past research suggests that one of the most valuable and sustainable legacies of hosting a large scale event is the opportunity to establish new joint working practices across sectors and new forms of stakeholder partnerships. This section provides an overview of Impacts 08's analysis of Liverpool's approach to ECoC governance and the philosophy behind this process. It starts by reflecting the high levels of commitment to the Liverpool ECoC in funding terms, as well as providing an overview of the approach to building partnerships. The section ends with an assessment of how this process was viewed by key local and international stakeholders, as well as the levels of confidence held by the local and regional population in Liverpool's ability to deliver the ECoC and maximise its potential positive impacts.

5.1. Liverpool ECoC Income and Expenditure

Liverpool ECoC's total income was considerably higher than that of most recent ECoCs, and was the highest single income of an ECoC to date.⁷⁸ Its sponsorship and earned income of almost £26.4m was the highest for any ECoC, as was the total amount provided by the local authority.

For the purposes of comparison in Figure 28 the income and expenditure of other recent ECoCs has been allocated against headings which have been chosen for their relevance to Liverpool's situation. The results show that Liverpool City Council put a higher than average (of the sample of ECoCs) percentage of the total funding into Liverpool ECoC, with other public sector grants forming a lower percentage than average of Liverpool's income.

Figure 28: Comparative income sources Liverpool and other ECoCs

Income Sources of ECoC	Liverpool 2008 ⁷⁹	Linz 2009	Stavanger 2008 ⁸⁰	Sibiu 2007	Lux'bourg 2007	Lille 2004	Glasgow 1990
Sponsors and Earned Income	20%	11%	28%	16%	8%	18%	11%
City Council	58%	58%	37%	51%	22%	30%	66%
Other Public Sectors	22%	31%	34%	33%	70%	52%	23%
Total Income	£129.9 €155.4	£62.4 €68.7	£30.8 €36.9	£12.1 €16.9	£41.1 €57.5	£51.6 €73.7	£68.1 €81.5

Source: Various⁸¹

In terms of expenditure, any comparison should be made advisedly, in particular as Liverpool's expenditure on the ECoC covered a six year period, whereas most other ECoCs restricted delivery to between one and three years, hence the decision to give two sets of figures overleaf for Liverpool's expenditure.

⁷⁸ Please note that any comparison between the income and income sources of different ECoCs should be treated with caution due to differing governance structures, management models and local definitions used. In general, funding from the city and its immediate region is denoted 'city council' as most comparable to Liverpool's case. Sponsorship and earned income includes trusts and foundations funding where that was received, e.g. in Sibiu. The conversion rate, from EUR into GBP and (in the case of Liverpool) GBP into EUR, that is used here is that published by the European Commission in December of the respective ECoC year, see <http://ec.europa.eu/budget/inf/foreuro/> (accessed Jan 2010). The total income (£40m) for Glasgow (Myerscough J. *Monitoring Glasgow 1990*, Published Glasgow City Council, 1991) was recalculated subject to inflation to December 2008 to enable comparison with Liverpool. See <http://www.bankofengland.co.uk/education/inflation/calculator/flash/index.htm> (accessed Jan 2010). A conversion from GBP into EUR was applied at the rate given for December 2008 as above.

⁷⁹ Income for entire operating period of Liverpool Culture Company: Apr 2003-Mar 2009.

⁸⁰ It is important to note that the total income for Stavanger exceeded total expenditure. A surplus of €788,288 (£658,851) was made 'which will be returned to the owners Stavanger, Sandes and the Region to sustain funding for culture'. Stavanger 2008 Our Story (2009) p252 available from http://www.stavanger2008.no/docs/Publikasjoner/2008_eng_web.pdf (accessed Jan 2010).

⁸¹ Income and expenditure distribution for Liverpool 2008 was obtained directly from Liverpool Culture Company. Glasgow figures were obtained from Myerscough (1991); Lille from Palmer and Richards *European Cultural Capital Report*, Amhem The Netherlands: ATLAS (2007); Luxembourg from Tourism Research and Marketing, *Luxembourg and Greater region, European Capital of Culture 2007, Final Report* (2008) available from http://mcesr.public.lu/presse/annee_culturelle_2007; Linz from press release available from <http://www.linz09.at/en/detailseite/presse/information/presse-information/289776.html>; Vilnius from Vilnius ECoC team, Dec 2009; Stavanger as in note 80 above; Sibiu from Nistor S, Sibiu, *Capital. Cultural. European. 2007* (2008).



20% of all Liverpool ECoC income was from sponsorship and earned income. The total sponsorship gained, £22.3m, was the highest amount ever attracted by an ECoC.

Figure 29: Comparative expenditure Liverpool and other ECoCs

	Liverpool 2008 (2003-9)	Liverpool 2008 (2008/9 only)	Linz 2009	Stavanger 2008	Lux'bourg 2007	Lille 2004
ECoC Expenditure						
Programming	64%	73%	62%	66%	71%	80%
Promotion and Marketing	20%	14%	19%	21%	18%	10%
Overheads/administration	16%	13%	19%	13%	11%	10%

Source: Various, as for Figure 28.

5.2. Mitigating environmental impact

Large scale cultural events can impact negatively on the environment, and with this in mind Liverpool Culture Company employed an officer with an environmental remit (covering both programming within an environment theme, particularly in the 2009 Year of the Environment, and enhancing environmental sustainability). This post was not created at a senior level so commitment did not always permeate through the whole organisation; however there was considerable good practice. For example, there was consistent publicity about public transport options to attend events produced in partnership with sponsors Merseytravel, Virgin Trains, Northern Rail, Transpennine Express and Arriva. For the 2008 People's Opening Event, which was the official launch to the year, 40% of the audience travelled to the event by local rail.⁸² The Liverpool Culture Company also took a lead within the Liverpool City Council in terms of environmental policy, and achieved ISO140001 status in April 2008.⁸³ As part of this process, there was a weighting towards environmentally friendly measures in contract tendering (e.g. for event catering) and regular promotion of environmental awareness at events.

⁸² Merseyrail reported 15,000 extra journeys that night, while the total audience is estimated at 38,000. (This does not account for those audience members who may have used buses, cycled or walked).

⁸³ The international environmental management standard ISO 14001 is a voluntary initiative aimed at improving company environmental performance.

5.3. Building the Partnership

Statutory, Private and Third Sector links

One of the key features of the governance and process of delivering the Liverpool ECoC was the involvement of stakeholders, both structurally and less formally, and the development of partnerships. Stakeholder management as an activity featured in a number of the governance structure iterations, and, for a time, Liverpool Culture Company had a dedicated member of staff with the role of Relationship Manager. It is also worth noting the secondment in 2006 of the then Chief Executive of the Royal Liverpool Philharmonic to the post of Associate Cultural Director within the Company. His role was to advise the creative team on planning, on relationships with cultural organisations and practitioners in Liverpool and links with the Department of Culture, Media and Sport and Arts Council England. This post was created in the particular context of the resignation of the Liverpool ECoC Artistic Director earlier in that year, and indicates something of a response to concerns from a range of stakeholders, particularly DCMS, ACE and the cultural sector.

Public sector engagement was evident through board membership, which included stakeholders and expertise from local, regional and national sources; and through secondments – for example, from the Learning and Skills Council and Liverpool Primary Care Trust. Other examples of stakeholder engagement included the ‘Countdown Group’, which was set up in April 2007 to co-ordinate activities in Liverpool to ensure that the city was prepared for the ECoC year. The group was chaired by the Chief Executive of Liverpool Vision, the city’s economic development company, and members included the Project Director for the Liverpool ONE development, as well as other public and private sector stakeholders and decision-makers. Agencies such as Merseyside Police nominated senior individuals to lead, internally and externally, on their involvement with the Liverpool ECoC.

The Creative Communities Sub-Group of the Board, chaired by the Creative Director of the North West Disability Arts Forum, had the remit of supporting the specific work of the Creative Communities Programme in engaging with a wide range of public and third sector stakeholders. Membership included senior officers from the local health trusts, police force, neighbourhood management, housing, as well as faith and voluntary networks and the media. This group had a strong coherence, continuing to meet throughout the process until the Board was reduced in size, when it became involved with the development of Liverpool’s Cultural Strategy and the Cultural Task Force of the Local Strategic Partnership.⁸⁴ Outcomes of this work included a noticeable change in the way culture was viewed in Liverpool amongst the statutory sector and the level of interest in and commitment to culture as a delivery and change tool held by group members, partly as a result of their time on the sub-group. Liverpool’s Cultural Strategy, published at the end of 2008, arose from a cross-sectoral consultation process with which health, regeneration and community safety professionals engaged very strongly.

The relationship between the cultural sector and Liverpool Culture Company was particularly focused by the development of, and engagement with, the Liverpool Arts Regeneration Consortium (LARC) and Small and Medium Arts Collective (SMAC) during the lead up to the Liverpool ECoC, as well as through the existing Arts and Culture Network (ACN), a sub-group of the Liverpool Community Network. LARC’s development and success is particularly interesting, as it emerged from an early alliance of the ‘Big Four/Five’ cultural institutions who occasionally met together in the late 1990s and, since 2006,

⁸⁴ Local Strategic Partnerships (LSPs) are non-statutory, multi-agency partnerships, which match local authority boundaries. Their work is constituted by Local Area Agreements (LAAs) which are three-year contracts between central government and local authorities that are intended to state how key priorities of local people are delivered within their neighbourhoods.

encompasses eight institutions which now meet at the most senior level every two weeks, and have gained almost £6million of investment collectively since 2005, including national government programmes such as Find Your Talent and Creative Apprenticeships, as well as the largest award from the Arts Council's Thrive! programme.

Sponsorship and Commercial Support

Private sector engagement in Liverpool's ECoC was constantly maintained through Liverpool Culture Company board membership, and was also the subject of sponsorship development activity. As noted earlier in this report, there were four levels of possible sponsorship designed by Liverpool Culture Company: Official Partner, Official Supporter, Supplier and Friend. This resulted in a total sponsorship income of £22.3m, including £7.5m of in kind support. Liverpool 08 Sponsors felt committed to the city and motivated to support the Liverpool ECoC, building on their established relationship with Liverpool.⁸⁵

In addition, Liverpool Chamber of Commerce worked with the Company to set up 08businessconnect, which still has an active website, supporting business engagement with the Liverpool ECoC through tender opportunities, business to business relationships and business to culture relationships.

Figure 30: Sponsorship and business support

	2004	2005	2006	2007	2008
Measure					
Organisational Members of 08businessconnect (cumulative)		542	2,096	3,529	4,679
Number of sponsors (cumulative)	1	9	11	26	32
Cash income from sponsors (financial year £000s)	1,098	2,788	2,873	3,542	4,442
In kind income from sponsors (financial yr £000s)	0	904	1,372	2,613	2,658
Total income from sponsors (financial yr £000s)	1,098	3,692	4,245	6,155	7,100

Source: Liverpool Culture Company

⁸⁵ A more detailed assessment of Liverpool 08 sponsors as key Liverpool ECoC stakeholders is available in a separate Impacts 08 report, listed at the end of this report.

5.4. Stakeholders' Views on Liverpool ECoC

Local stakeholders

Views of key stakeholders around the city, including individuals from the statutory and voluntary sectors, local investors and developers, of the impacts of Liverpool ECoC centred around three main points:

- that hosting the ECoC in Liverpool was seen as a success;
- that the Liverpool ECoC had added value to existing programmes and trends already taking place in Liverpool since the end of the 1990s; and
- that there was great potential, but also great risk, associated with the legacy of the Liverpool ECoC.

The first of these points emerged as a universal response from stakeholders, and was felt to be manifest in a number of different ways: the raising of aspirations and confidence within Liverpool; the transformation of external perceptions of Liverpool, particularly within the UK; the quality of events and experiences during 2008; the legacy of infrastructural changes – mostly physical – which took place at the same time, particularly the new Arena and Convention Centre Liverpool; and the influence of the Liverpool ECoC in supporting Liverpool's response to the economic downturn and potential for alleviating the impact of the recession in late 2008 and into 2009.

The second point was by no means universally defined and agreed upon. Some stakeholders stressed the importance of the Liverpool ECoC to the city's physical regeneration, seeing it as a crucial factor in focusing the completion of developments, with particular reference to the Arena and Convention Centre Liverpool and the Liverpool ONE complex. Other stakeholders felt that the Liverpool ECoC had added value to, but not driven regeneration programmes, and saw regeneration programmes as being largely unconnected to the Liverpool ECoC.

In considering the legacy of the Liverpool ECoC, stakeholders referenced the strength of the infrastructure and cultural life of the city, and the way in which the Liverpool ECoC had affected the image of the city and had now caused culture to be much more strongly associated with the city's 'brand'. There were some doubts, however, about the best way of capitalising on the Liverpool ECoC and some confusion as to what plans were being made for the future, particularly amongst stakeholders who did not have a close connection to Liverpool First, the Local Strategic Partnership. In early 2009 Liverpool launched a new brand for the city, building on the Liverpool 08 brand experience and pursuing an explicit 'cultural' angle. Local stakeholder reactions to this brand have not yet been assessed, beyond some mixed reactions within the local media, but this initiative is an indication of the city's ongoing commitment to build on the momentum generated by the Liverpool ECoC and the need to maintain wider stakeholder engagement to develop a credible and distinct city narrative.



Children doing a dance routine to celebrate Tate Liverpool's 20th Birthday. In the background construction advances on the new Museum of Liverpool.

International stakeholders

Internationally, the Liverpool ECoC has been perceived as a relevant point of reference for other cities aspiring to host the ECoC title in coming years. This has been accentuated by the establishment of a network of ECoC hosts and cities designate, originally led by representatives from Liverpool and Stavanger, which has focused on sharing knowledge and lessons learnt. Liverpool initiatives that have attracted particular attention were its 08Welcome, 08Volunteers and Creative Communities programmes,⁸⁶ as well as the level of commitment to research and evaluation as reflected in the commissioning and delivery of the Impacts 08 programme over five years.⁸⁷

5.5. Local Views on the Liverpool ECoC

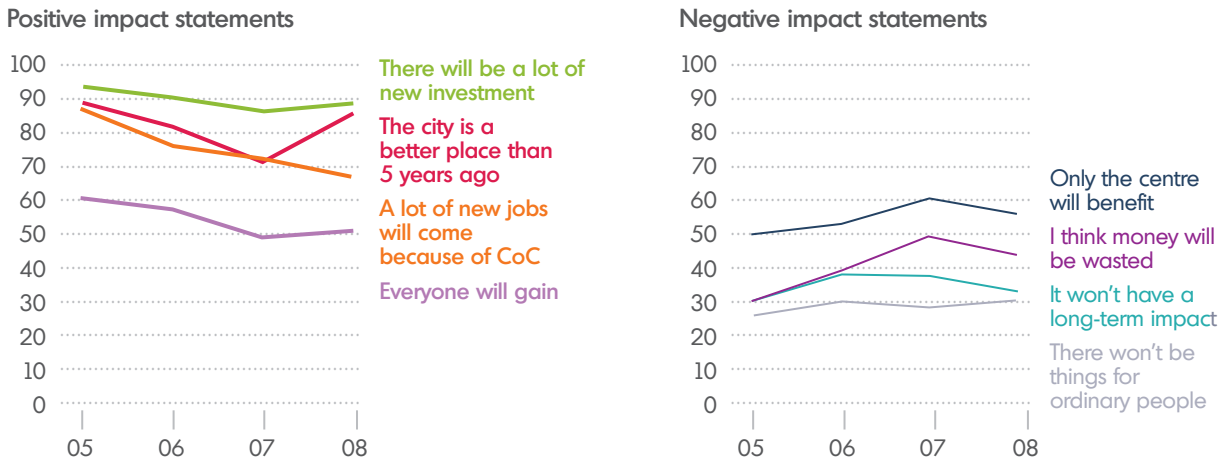
Liverpool Residents

In the aftermath of the ECoC title award in 2003, which generated significant levels of enthusiasm and expectations across Liverpool, the local population tended to have increasingly mixed views about the potential impacts of the Liverpool ECoC on their community. This lasted until the end of 2007. Concerns related in particular to the possibility that the expected positive change might not spread beyond the city centre and that the Liverpool ECoC might not impact on their neighbourhoods or on 'ordinary people'. To some degree this could have been influenced by the considerable volume of negative local media coverage on Liverpool ECoC management issues in 2005, 2006 and 2007. There might also have been a natural disappointment resulting from the levels of expectation raised by the ECoC nomination in 2003. As shown in Figure 31 these negative opinion trends were reversed during 2008 itself, showing a more optimistic view appearing by late 2008 when the latest survey took place. Indeed the only positive statement where agreement continues to fall regards jobs, probably responding to the beginning of the global recession.

⁸⁶ See European Commission (2009) Guide to European Capital of Culture Candidate Cities.

⁸⁷ The European Commission has agreed to fund a new European policy grouping throughout late 2009 and 2010 to build on the learning of the Impacts 08 programme and Liverpool ECoC delivery.

Figure 31: Local perceptions of Liverpool ECoC (percentage of people who agree or greatly agree with statement)



Source:GfK NOP via Liverpool Culture Company

North West Residents

Amongst North West residents⁸⁸ there was a feeling by late 2008 that the Liverpool ECoC had been of great benefit to Liverpool. 78% agreed that the city had benefited from the title, and 50% asserted it had 'benefited a great deal'. When asked about benefits to the rest of the region, 69% felt it had benefited Merseyside (still positive but a drop from 82% in 2006), and 50% felt it had benefited the North West, with 15% feeling it had greatly benefited the region (a drop from 32% in 2003). It is worth noting that the benefit levels are still high considering that this was a city-based event and the survey population covered the whole North West from southern Cheshire to the border with Scotland in Cumbria.



Banners within the Liverpool Vision building in 2007.

⁸⁸ All figures in this paragraph are from 2009 MORI IPSOS Research for NWDA, Perceptions of the North West.

Conclusion

This report is a summary of the overall findings of the Impacts 08 research programme. As such it does not reflect the full complexity of the programme, which has comprised over 30 qualitative and quantitative research projects, a series of in depth stakeholder interviews, and the development, collection and assessment of a broad range of data. For a more nuanced analysis of the findings outlined in this report, as well as an overview of Impacts 08's methodological approach and the opportunities for research framework replication see the Impacts 08 methodological reports, reports on individual projects and literature reviews which can be accessed at www.impacts08.net.



Short-term impacts and outcomes of Liverpool's European Capital of Culture

As has been highlighted throughout this report, there is evidence of clear and immediate Liverpool ECoC outputs and outcomes one year on from 2008:

- The Liverpool ECoC presented a very wide range of events showcasing the wealth of local talent as well as national and internationally acclaimed work; it reached out to a significant variety of audiences with very strong levels of local engagement spread across socio-economic groups, and the programme achieved very high satisfaction levels, particularly during 2008 itself.
- The city has undergone a remarkable image renaissance locally, nationally and internationally. Local opinion leaders give more credibility to the city's cultural assets and to the cultural sector as a source of civic leadership; national media in the mainstream, as well as in specialist domains, have got used to presenting a richer picture of Liverpool as a multi-faceted and contemporary city with 'world class' assets and an ability to build on them; internationally, the city has been rediscovered as a tourist destination beyond football and the Beatles, and its approach to ECoC delivery is held as a key reference by other European cities to maximise citizen participation.
- Levels of confidence have been raised across the city, particularly in the areas of culture and tourism. Strong partnerships have been developed, have continued post 2008 and may bring greater opportunities to retain local talent, bring in new ideas and approaches, attract external investment and further develop the range and quality of the city's offer.
- Culture is more widely accepted as a driver for economic change, health and social inclusion. The cultural sector took the opportunity to play a larger role in the city's leadership in the lead up to 2008, demonstrating that they had a contribution to make across a number of city agendas. As a result, one year on, there is ongoing commitment to ensure that the sector continues to contribute in areas as diverse as community safety, tourism development, health or city centre management.

These outputs and outcomes must, however, be understood within a wider context and their interpretation must take into account the particular challenges surrounding any attempt at assessing an ECoC programme unfolding over six years.



The Liverpool ECoC presented a wide range of events showcasing the wealth of local talent as well as nationally and internationally acclaimed work.

Understanding the ECoC hosting process

One of the great opportunities, as well as challenges, of hosting an ECoC title is that, compared with other one-off events (particularly in the sporting arena), it is an event that does not involve overly restrictive guidelines or fixed frameworks for delivery. This means that host cities can shape the title according to their priorities and preferences and, effectively, re-define what an ECoC can be and achieve. In Liverpool, this freedom to define the remit of the title led to a particularly ambitious approach that blurred the boundaries between new ECoC large scale events and artistic programming, the ongoing indigenous cultural offer, and wider city transformation. This has had a bearing on the approach that Impacts 08 has taken to research and evaluation:

- **Expectation management** – Liverpool had very high aspirations for its ECoC year and made ambitious promises at the bid stage, including a strong emphasis on economic and social regeneration goals. This led many to judge the city's ability to deliver the ECoC, and success in doing so, on the basis of measures that were far beyond what is realistic to expect from a programme of cultural events. The ongoing physical transformation in the city was often directly identified with the ECoC, and the programme's benefit to the city was often judged against areas as diverse as job creation, maintenance of the public realm or reduction of anti-social behaviour. Impacts 08 has captured trends in opinion across most of these wide areas but this and other reports attempt a clear distinction between areas that can be appropriately associated with the ECoC delivery process and can be directly impacted by it, and those that would arise from a range of factors, of which the ECoC title is only one.
- **Building on crisis points as catalysts for change** – the lack of an established blueprint for ECoC delivery means that structures of management must be built anew in each city, with little opportunity to learn from previous experience. Liverpool was reluctant to focus on a single artistic vision as it saw the ECoC title as a far broader celebration of the city and its ways of life, and an opportunity for repositioning the city. This resulted in a complex framework for operations, involving a wide range of stakeholders with often conflicting demands. The loss of the artistic director in 2006 and the dramatic impact of city-wide physical transformation on public realm event management (which culminated in the well publicised cancellation of the open air concerts within the Mathew Street Festival in 2007) were two particularly controversial moments that generated negative media narratives and endangered public confidence. However, these moments can also be understood as key catalysts for positive change: the first led to far greater arts sector involvement and leadership in the programme and hence to a potentially more sustainable collective approach to culture in the city; the second led to a streamlining of governance which included the appointment of a locally supported and nationally recognised individual as creative director, who speeded up decision making and facilitated the media narrative for the year.



- **Understanding timeframes** – Liverpool’s decision to embed the ECoC in a much wider and ongoing regeneration narrative, as well as the ambition for a truly locally owned programme, involving communities from across the city, resulted in a programme of activity that extended over several years. Determining what was or was not part of ‘Liverpool 08’ as a brand or the ECoC as a wider concept throughout this period posed a complex challenge in establishing the boundaries for impact assessment. This was accentuated by the need to account for the time it takes for initiatives to have a measurable effect on their environment. In early 2010, it is possible to offer a robust overview of the impact of gaining the title, as there has been an opportunity to test changes in city perceptions and their impact on areas such as resident and business confidence over six years. However, to understand the full impact and legacy of hosting the ECoC in 2008 will require ongoing measurement and analysis in the years to come in order to disaggregate direct Liverpool ECoC impacts from the impacts of other local and global trends. In Glasgow, host of the 1990 European City of Culture title, it took over a decade to understand what aspects of the programme led to impacts that have sustained in the long-term.

Moving forward

Impacts 08’s role in documenting, interrogating and widely assessing the Liverpool ECoC over five years has provided unprecedented opportunities for knowledge exchange across academia, policy and industry:

- Locally, a strong relationship has been established between university academics and the cultural sector resulting in ongoing research collaboration and data sharing, which is strengthening the local and regional evidence-base of cultural impact.
- Nationally, Liverpool has become a key referent for major event impact research and the framework developed here is informing the evaluation strategy for the London 2012 Olympic Games and four year Cultural Olympiad, and for the new UK City of Culture programme.
- Internationally, key learning points from the Impacts 08 programme are being passed on to future ECoC hosts via a European Commission funded policy grouping involving Liverpool as well as Stavanger, Marseille and Turku as core partners, and a growing range of associates throughout the rest of Europe.

These opportunities for collaboration are set to continue growing over the coming years and are, in their own right, an important additional legacy emerging out of the Liverpool ECoC hosting process with a tangible impact on local, national and international research discourses around culture-led regeneration.



Published reports and acknowledgements

Impacts 08 has published programme overviews as well project specific reports from 2006 onwards. They are organised by thematic area as follows:

Programme overview reports

- Impacts 08 Baseline Findings 2006-2007 (2007)
- Measuring the Impacts of Large Scale Cultural Events: a literature review (2009)
- Impacts 08: methodological framework and recommendations for future research (2010)

1. Cultural access and participation

- Volunteering for Culture: exploring the impact of being an 08Volunteer (2010)
- Neighbourhood Watch: a longitudinal research study into the impact of the Liverpool ECoC on local residents (2010)
- Impacts of Culture on Quality of Life: a pilot toolkit (2010)

2. Economy and tourism

- Doing Business in the European Capital of Culture (Part I): baseline indicators (2007)
- Doing Business in the European Capital of Culture (Part II): a profile and initial assessment of impact on the Merseyside and North West business base (2008)
- European Capital of Culture and Liverpool's Developer Market: impacts and interactions (2008)
- Tourism and the Business of Culture: the views of small and medium-sized tourism businesses (2010)
- The Economic Impact of Visits Influenced by the Liverpool ECoC in 2008 (2010)

Background papers

- Estimating the Economic Benefits of Event Tourism: a review of research methodologies (2008)
- Considering the Economic Impacts of the Liverpool ECoC: a review on the literature concerning 'economic multiplier' effects (2008)
- Methodology for Measuring the Economic Impact of Visits Influenced by the Liverpool ECoC (2009)

3. Cultural vibrancy and sustainability

- Liverpool's Creative Industries. Understanding the impact of the Liverpool ECoC on the city region's creative industries (2009)
- Liverpool's Arts Sector. Sustainability and Experience: how artists and arts organisations engaged with the Liverpool ECoC (2009)

4. Image and perceptions

- Media Impact Assessment (Part I): baseline findings on Liverpool press coverage before the ECoC (2006)
- Re-telling the City: exploring local narratives of Liverpool (2007)
- Liverpool 08 Centre of the Online Universe: the impact of the Liverpool ECoC within social media environments (2009)
- The Look of the City: the impact of the Liverpool ECoC on the city's public realm (2010)
- Media Impact Assessment (Part II): evolving press and broadcast narratives on Liverpool from 1996 to 2008 (2010)

5. Governance and delivery process

- Who Pays the Piper? Understanding the experience of organisations sponsoring the Liverpool ECoC (2008)
- Liverpool on the map again. Liverpool stakeholders' reflections on the Liverpool ECoC (2010)

Reports available at www.impacts08.net

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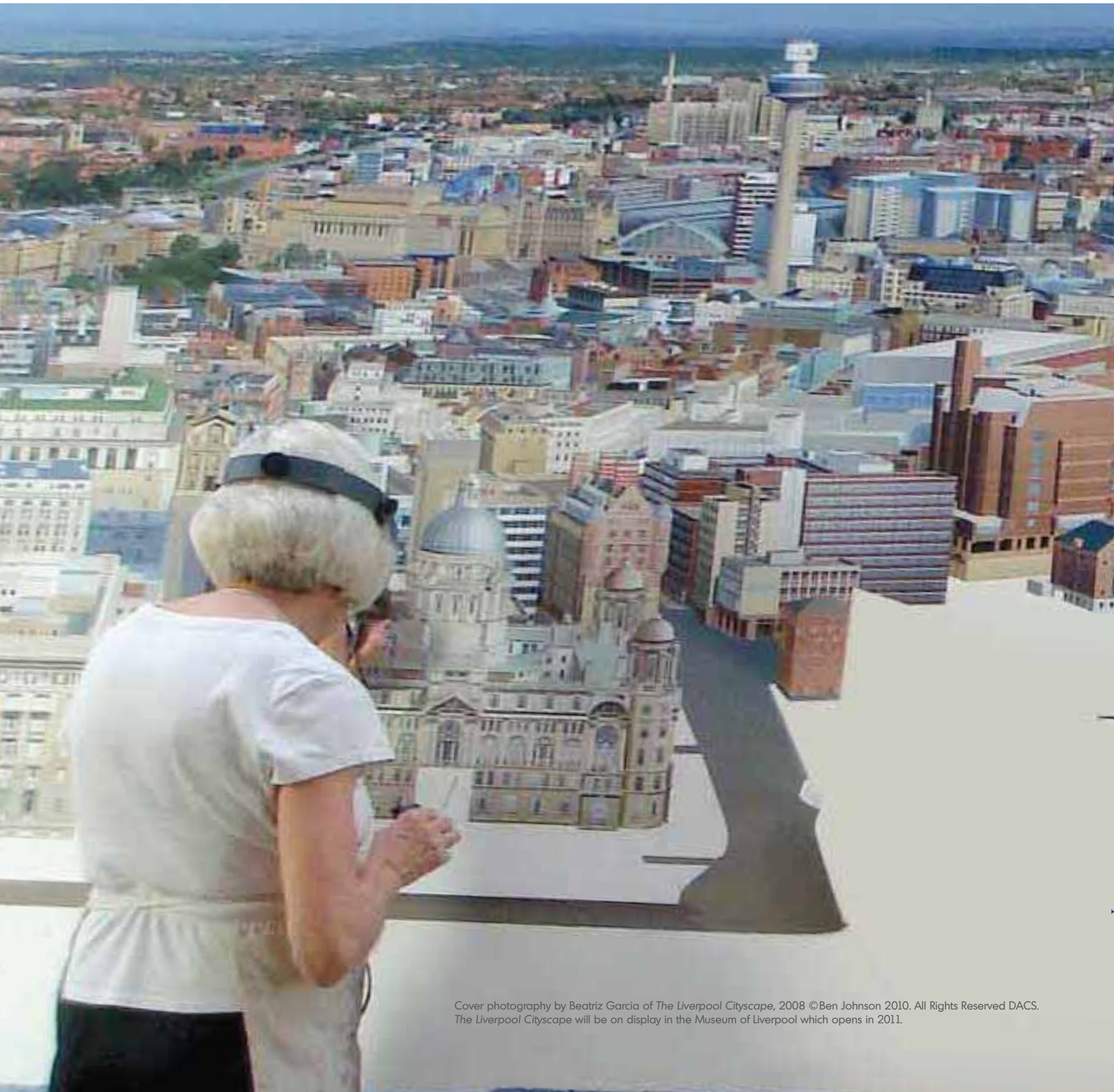
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Impacts 08: The Liverpool Model

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The Liverpool Cityscape will be on display in the Museum of Liverpool which opens in 2011.