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Urban Tourism in Liverpool; Evidence from Providers

Rachel Macdonald

PhD Thesis
Department of Geography
University of Durham
1996

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- 3 JUL 1997

Rachel Macdonald
PhD Thesis Department of Geography, University of Durham 1996

ABSTRACT

Urban Tourism in Liverpool; Evidence from Providers

Tourism, once dismissed as the 'candyfloss industry', is increasingly being recognised by governments (both national and local) as one capable of regenerating declining urban economies. Encouraged by positive media coverage of schemes such as those in Boston and Baltimore many UK cities have adopted a policy for tourism. The economies of these cities are being bargained on the perceived impacts of the tourism industry; job creation, image change, environmental improvements and attracting investment.

This thesis, using a case study area of Liverpool in Merseyside, takes each of these perceived impacts in turn and attempts to qualify them. The approach is unusual in that, unlike in many national surveys, it takes the view of providers to the industry. This facilitates a comparison between the sources of information; those such as the Census of Employment, BTA/ETB data, and independent surveys.

The first two chapters present the theoretical debate, an introduction to the case study area of Liverpool post code districts L1-L3, and relevant tourism policy. Chapters 3 and 4 look in turn at the geography of tourism facilities and the type of tourist attracted to them. Following this, Chapter 5 is a comprehensive survey of the amount and nature of tourism-related employment in the city, interesting in its comparison with national tourist-related trends and Census of Employment data. Before concluding Chapter 6 examines the image changing potential of tourism, questioning whether the industry is an impetus to environmental improvements or is capable of attracting investment from outside the Merseyside area.

The result is a holistic survey of the tourism industry in the city of Liverpool, one which questions many previous assertions about the nature of the industry and it regeneration potential.

ACKNOWLEDGEMENTS

July 1992 should have been an exciting time for me. As a new graduate, I should have been looking forward to the future. Unfortunately, I had a difficult decision to make - do a Ph.D or become a lawyer? Whatever decision I made, I had no funding. The reason I state this is to illustrate the role which my parents have played by offering money for me to fulfill my ambition. Thankfully their financial situation recovered a year later when I was awarded an ESRC award. Mum and Dad's help has however been far more than this, it is emotional and moral, indeed in many ways they deserve this award more than I do. It is hard to put my gratitude into words, but hopefully, Mum won't get so many crisis panic phone calls. Thanks are also due to Alistair for his moral support and level-headed talking about the *real world.*

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DECLARATION

None of the material offered in this thesis has previously been submitted for a degree in this or any university.

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CHAPTER 1: INTRODUCTION

> "In the 1980s many Britons were amazed to discover that older industrial cities, like Bradford, were promoting themselves as tourist centres. By the end of the decade and the beginning of the 1990's nearly every British city could boast of at least one new major tourism resource" (Law, 1992, p.599).

This chapter will question why these older industrial cities are adopting tourism in strategies for regeneration and how the perceived impacts are articulated into urban policy, both at a national and a local scale.

1.1: The "urban problem" and its tourism potential.

The issue of tourism in regeneration is currently of prime importance to city planners and policy makers. As a tool it is thought to directly address *urban problems*. The current urban problem in Great Britain is not so much a problem as a series of problems. By way of explanation, Gregory and Martin (1988) consider that "the core areas of our cities are characterised by complex patterns of demographic change and industrial decline, manifested in concentrations of poverty, deprivation and general malaise" (p.237).

Authors such as Bovaird (1994, p.9) see British urban decline as accentuated through the "polarisation of wealth towards the south" and, within regions, through the decentralisation of wealth away from the traditional manufacturing locations in the inner metropolitan areas and larger cities. However, the Audit Commission (1988) are of the belief that "problems are not confined to the inner cities; nor to areas on the wrong side of the north-south divide" (p.43), recognising that the inner city exists in two dimensions, the spatial and the social, both of which must be considered when examining the causes of and solutions to the "urban problem".

An extensive literature introduces the causes of an urban problem, noting amongst other issues globalisation, decentralisation and deindustrialisation (Lawless and Brown, 1986; Robson *et al*, 1994). The definition of decline is made more apparent in the model of causation. Middleton (1991) presents a five stage model of urban decline which, although possessing a tendency to simplify the processes, outlines the main forces at work (Figure 1.1).

Figure 1.1: The conditions of urban decline.

STAGE	**FEATURES**
1. Absence of job opportunities	▸ Concentrated poverty. In many cities additional desperation is leant by immigrant workers and ethnic minorities who find it more difficult to find employment
2. Declining services	▸ Fewer buses, schools and clinics ▸ Roads, pavements, houses and parks decay ▸ Shops, cafés etc. go down market and finally fall out of business ▸ Discourages investment and disappearing jobs are not renewed
3. Increased crime rates	▸ Increased vandalism, muggings and maybe riot, arson and looting caused by boredom, bitterness and frustration, occasionally from real need.
4. Outwards migration of population	▸ Younger and more skilled seek employment elsewhere ▸ Those who can afford seek accommodation in more desirable areas ▸ Traders and small business have insufficient turnover to support inner-city rent and rates
5. Descending spiral of decline	▸ Empty property results in plummeting revenue from local taxes; a time when public authorities need revenues for social work, policing, health care, housing repairs.

Source: Adapted from Middleton, 1991, pp.15-16.

More specifically, it is considered that the current problems of Britain's inner cities have their roots in the shifting nature of Britain's industrial base, the loss of manufacturing jobs, and the bulk of service sector employment growth now being found in small and medium sized towns. The inner areas of large cities have also lost service sector jobs in utilities, transport, distribution and facilities for declining local populations (The Audit Commission, 1989, p.9). In addition, cities tend to attract displaced workers from elsewhere, migrants and rootless young people. Thus the high population density is accompanied by social and environmental problems of a different order. Sources such as the Audit Commission (1989) suggest leading indicators of a malfunctioning urban economy to be high unemployment and a substantial area of derelict land (p.9).

It may thus be suggested that the main forces generating urban change are commercial and residential decentralisation, de-industrialisation and accompanying employment trends (Cheshire, 1988). It is fundamental that these trends are not specific to the UK economy. In a review of urban economic development in the UK, Western Europe, United States of America, Japan and Australia, Bovaird (1994, p.15) highlights a number of key changes and trends in the urban economics of deindustrialized countries during the 1980's:

- the rapid decline of manufacturing employment relative to service employment.
- the suburbanisation and ruralisation of employment especially in the manufacturing sector.
- the longterm continuance of derelict and under-use sites in inner city areas, at the same time as major growth and development in other parts of the same city.
- the increasing role of small and medium enterprises (SME's) in employment creation.
- the tendency for male job losses and longer-term unemployment to be much more severe than female.

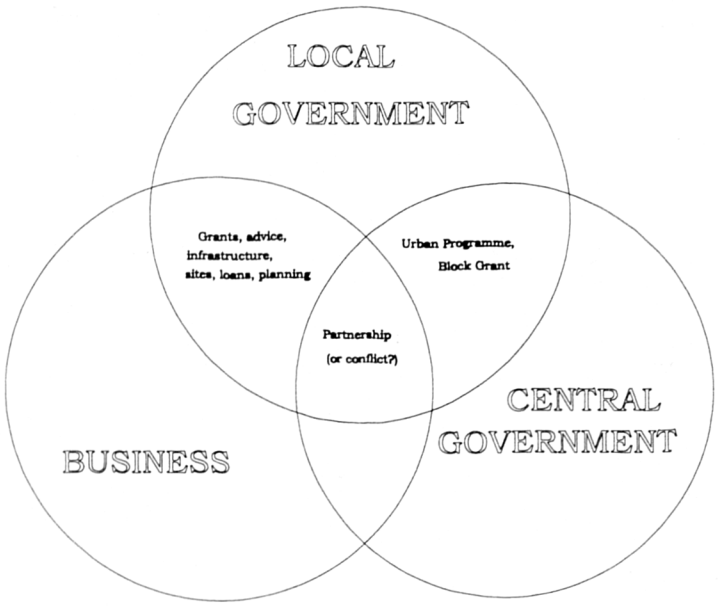
- the longer term persistence of low wage and high unemployment rates in specific social groups and even in particular families in local areas.

These features may be used as a basis against which the possible role of tourism in local economic development may be analysed. The introduction of tourism to the local economy will if successful create new jobs for local residents. Although there is a reasonable presumption that the employment will be female dominated, there will be some employment for males previously employed in the manufacturing sector. Thus the new industry will help to replace the lost manufacturing jobs. The ability to create male employment and permanent, well paid jobs remains questionable.

Often tourist sites make use of derelict land, either by new building or the regeneration of old sites (e.g. Gmex, Manchester; Wigan Pier, Wigan), removing public eye-sores in the process. Tourism is thus seen to have the potential to reverse the spiral of dereliction. In addition there is a suggestion that tourism provides a mechanism to attract other new investment particularly of service sector industry. Thus tourism is possibly an incentive for small and medium sized enterprises to invest in that particular city.

Thus the issue of urban decline features prominently in both local and central government initiatives. In addition, the business community are increasingly involved in regeneration initiatives, particularly via partnerships (Figure 1.2). To be successful, urban regeneration, in its widest sense, must be concerned with both social and economic issues. The penultimate section of this chapter will consider central government initiatives and the relative position of tourism schemes.

Figure 1.2: The Regenerative Partners



The role here is primarily one of facilitator; local authorities may contribute directly to urban regeneration and economic development as a planning authority, as a provider of infrastructure and services and as the major deliverer of education and training. Their role is thus often central to tourism development. On the other hand, there is also a suggestion that local authorities unwittingly contributed to the urban problem through high rates and over-restrictive planning policies, perceived by the private sector as creating an unhealthy business climate (The Audit Commission, 1989, p.3).

The first sign that national government was seeking to persuade all towns and local authorities to take an interest in tourism development came in 1979. A Circular from the Department of the Environment (13/79, 1979) entitled "Local Government and the Development of Tourism" asked local authorities to consider whether "they should do more by the redeployment of resources to realise the full potential of tourism to create and sustain jobs and to produce income in their locality". However it was still left to individual local authorities

to "have regard to the importance of tourism in their particular area in forming their policy". Essentially, "this allowed authorities indifferent or antagonistic to tourism developments to continue ignoring tourism issues" (as quoted in Richards and Wilkes, 1990, p.7).

Nevertheless local authorities generally take an interest in tourism development even though the structure of involvement varies considerably from place to place, as do job titles. Richards and Wilkes (1990) note that "the diverse nature of the tourist industry does not make it easy for tourism development and promotion functions to fit into existing local authority structures" (p.13). Indeed Richards and Wilkes (1990) conducted a survey of non-metropolitan local authorities during 1988 (to repeat a similar survey of 1984). The findings (Table 1.1) illustrate that tourism was most frequently located in the Chief Executive's Department (21 respondents), Leisure or Leisure and Recreation Departments (18) or tourist departments (17).

> "However, significant changes in departmental responsibility are evident between 1984 and 1988. The number of departments including *tourism* in the title increased from 12 to 17. Tourism was located in eight departments concerned with economic development in 1988, compared with none in 1984" (Richards and Wilkes, 1990, p.14).

These changes in departmental responsibility suggest that tourism is gaining a higher profile within local authorities and that the job and income creation potential of tourism are being increasingly emphasized.

Table 1.1: Departmental Responsibility for tourism in Local Authorities 1987/88
(Based on a questionnaire survey of non-metropolitan councils of England and Wales)

DEPARTMENT	No. AUTHORITIES
Town Clerk / Chief	21
Leisure Services	18
Tourism / Resort Services	17
Planning	10
Mixed	9
Economic Development	8

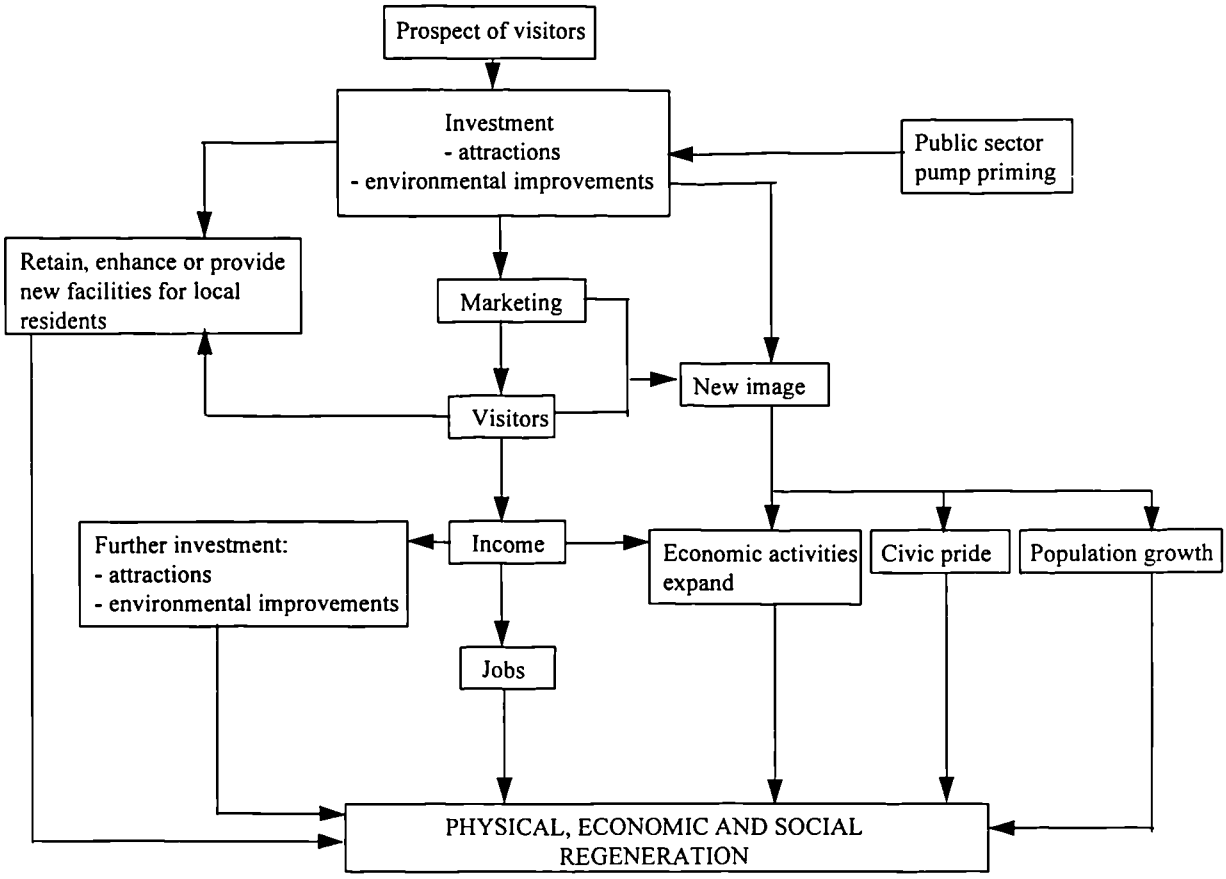
Source: Richards and Wilkes, 1990, p.14.

1.2: Aims and objectives of urban tourism.

Perhaps the most commonly accepted prescription for urban tourism is that given by Law (1993, p.29) (Figure 1.3). Law suggests that investment in attractions and environmental improvements which are then marketed to visitors can have a number of positive impacts on the local economy. The assumption is that there will be more money spent (i.e. a greater income for the local economy brought about through tourism as an export industry). This income may allow for further investment into attractions and environmental improvements and the expansion of other economic activities. The result is therefore considered to comprise not only prospects for further expansion within the tourist industry but prospects for physical, economic and social regeneration in a city/region wide context. The initial and indeed following rounds of investment into attractions and environmental improvements may have two further possible "regeneration" impacts; the environment will be enhanced - thus creating a space which is a nicer place in which to live, work and visit and, in so doing, a new image of the city/region may be perceived. This concept of image change is particularly important, if one was to follow the

Law (1993) hypothesis, as this could attract new industry to the area, increase civic pride and attract in-migration of population, thus slowing population decline or possibly creating population growth.

Figure 1.3: The strategy of urban tourism



Source: Law, 1993, p.29

Among other writers, Jansen-Verbeke (1986) recognises how tourism is often considered to be "the goose that lays the golden egg - a source of income, and a stimulus for more employment" (p.81). Martin and Mason (1988) similarly see it as a source of economic growth and job creation which "can, at least in part, fill the gaps left by declines in older, more traditional industries", noting that "as such it may be the key to the resolution of the social problems caused by

the economic decay of inner cities and old industrial towns and rural areas" (p.75).

Mitchell (1990), in considering the role of cultural tourism, interestingly considers the economic significance of development:

> "the process of economic development traditionally has involved the recruitment of export-oriented manufacturing firms to generate income and employment opportunities. This type of strategy is grounded in the export-base approach to economic development which focuses on the export sector of the regional economy as the most important determinal of economic growth" (p.125).

Although research to examine the regenerative impact of urban tourism is relatively recent (Williams and Shaw, 1994), urban tourism research in general has a longer history. As long ago as 1964, Stansfield pointed out that there was "an inherent opposition between two environments, urban and non-urban" (1964, p.198). Following this, substantial urban tourism research focused on tourism to the historical city or the capital city, often to the neglect of considerations of it as a regenerative tool.

Current literature on this issue has been more forthcoming, with a number of texts concentrating solely on this issue (Law, 1994; Page, 1994). In 1990, the Polytechnic of Central London *et al,* in a Department of Environment report, note how the concept of tourism as an appropriate activity for inner city areas is relatively recent, stating that

> "aspects of tourism most appropriate to urban areas, such as business tourism, short-breaks and day visits are likely to grow in importance. This contrasts with many other activities traditionally associated with inner city areas" (p.S2).

Prior to this, in 1985, tourism's economic role was promoted in three key reports which do not necessarily concentrate on the urban context (Banks, 1985; Confederation of British Industries, 1985; Young, 1985), but do stress three key elements important to any study of tourism's regenerative ability; its labour intensive nature, its strong local economic multiplier effect, and the low capital cost of jobs created (often less than half of other economic sectors) (Shaw and Williams, 1994). Now tourism has become more acceptable to politicians and urban planners, "seen as an economic revitalisation tool leading to new investment, employment and tax contributions" (Morrison and Anderson, 1994, p.32).

Although the majority of literature on the issue of tourism as a regenerative tool considers the potential positive outcome, Haywood (1992) takes a more cautious stand, noting that "tourism is touted as being a virtually recession proof industry that can be instrumental in enhancing employment opportunities, image and civic pride" (p.10). Hence he recognises that many city officials "mesmerised by the pursuit of growth" are goaded into tourism development - "investments whose returns, economically and socially, are questionable" (p.9).

The problem identified is that urban planners and economic development specialists are often not sufficiently knowledgeable or involved with tourism to understand the ramifications or implications for cities. Boniface and Fowler (1993) also see the comparative lack of knowledge as a problem;

> "a new strategic plan for urban core areas as an integrative framework for recreational and tourism development is obviously one of trial and error, of ad hoc decisions and short-term views; it is a process which is unfolding" (p.233).

Nevertheless, in 1989 the English Tourist Board (ETB) launched a five year

"Vision for Cities" campaign which reaffirmed faith in tourism to regenerate urban areas. This formalised links with the central government "Action for Cities" programme, as well as introducing four key elements for urban tourism development. Shaw and Williams (1994, p.218) list these as:

- to bring together partnerships of key public and private personalities.
- to prepare an agreed comprehensive development framework.
- to bring forward key development projects within the agreed framework, and
- to undertake a concentrated and co-ordinated action programme of environmental and infrastructure improvements.

However, in a number of cases the inspiration for adopting tourism in strategies for urban regeneration has not originated solely from academic literature but from the experience of American cities, most notably Boston and Baltimore (Beioley, 1981; Law, 1985). This is possibly following the trend towards the globalisation of politics boosted by the co-operation between the Thatcher and Reagan administrations.

The American input.

It has been recognized that "American cities are being regenerated with an enthusiasm, flair and speed which has captured the imagination of many European politicians and planners" (Stevens, 1988a, p.54). In this Boston might claim pre-eminence insofar as its waterfront revitalisation is both multi-faceted and intricately interwoven with probably the most successful inner-city revitalisation in the USA (Tunbridge, 1988, p.80). Much of the tourism-based redevelopment of this city took place during the early 1970's, well in advance of any such schemes in the UK. This experience provides an opportunity for critical analysis recognizing that this overseas experience is illuminating rather than defining, limiting or binding. Indeed a number of cities including Liverpool have used the Boston example when formulating their own approach to urban

tourism. Meyer, (1991) briefly examines one other motive; "the absence of an overt language barrier appears to facilitate the search for innovation and insights on the other side of the Anglo-American axis" (p.383).

American examples of urban development through tourism are wider than this: academic literature commonly selects places including Miami Beach, Pittsburgh, Halifax, Lowell and San Fancisco. To illustrate the lessons of the US redevelopments, Baltimore will be used to highlight some of the main features.

In Baltimore, the physical transformation of the port and industrial city has received worldwide acclaim. The Guardian (Brummer, 1987) called this "the triumph of energy over despondency". Central Baltimore has reportedly been transformed from a dying industrial urban centre into a thriving commercial, mercantile and tourist centre based primarily upon its imaginative "Charles-Street Inner Harbor" redevelopment programme. In 1965 the structure and vehicle of partnership was created in Baltimore. A contract was signed by the city allowing the "Charles Centre-Inner Harbor Management Inc." (CCIHMI), a non-profit making corporation, to manage the downtown redevelopment under the guidance of the city's "Urban Renewal and Housing Commission". The aim of redevelopment was to marry old structures which are tastefully restored, with high-tech to challenge the observer - at all times making bold statements about the confidence of the city.

Having established its partnership network the city began to publicise its ability to mobilize and harness three further elements: pride, tradition and geography. The Baltimore experience has focused on a number of key issues in its success. Academic institutions have had a central role, not simply as part of the overall marketing profiting of the city, but as a base for research and innovation. The relocation of certain academic institutions in the revitalized

downtown area has also been important; they bring a population of young people into the area and keep them there through day and night. There has been a general acceptance that there needs to be a mixed development which embraces leisure, festival shopping, accommodation, a centre for health care, and academic institutions. Finally, in Baltimore the Visitor and Convention Bureau and Office of Promotion have reportedly created unique pride amongst Baltimore people which "spills over in an inescapable way to its visitors" (Stevens, 1988b, p. 56).

Stevens (1988b) also reports numerous findings pertaining to the nature of tourism in the city (collected by Beekhvis and Co., 1987, for the Baltimore Office of Promotion). It is acknowledged that the majority of visitors come for the day (57 percent), and that two-thirds have been to the inner-harbour before; attracted by an ever changing scene and range of events. Indeed, 93 percent of visitors suggested that they would return to the area. The focus of the inner harbour was sightseeing, yet the most popular activities are eating and drinking (94 percent of visitors), sightseeing (76 percent), shopping (66 percent) and festivals and events (28 percent). Finally, due to retailing being an integral part of leisure activity, visitor spend is higher than would be expected. Stevens (1988, p.61) outlines how in Britain various economic impact studies have shown that day-visitor spend in resorts, whilst obviously variable according to a number of criteria, rarely exceed $13 (£8) per person (1987 prices). In Baltimore, the average 1987 spend per head amongst day visitors exceeds $22 (£14).

Although they are generally hailed as a success by both the press and in academic literature, the US redevelopment schemes have been accompanied by some criticism. The focus here is towards the remaining slum outside of the areas of redevelopment. The approach to regeneration is thus seen as space specific, with any real change or improvement located within a selective area.

As such it is recognised that government involvement in tourism at the level of federal/state provision stems from concern over its economic significance; facility development (museums, sports stadiums) is aided through the provision of grants and subsidies in an effort to counteract the problems of industrial fragmentation. Thus "governments are taking a more proactive stance towards development with less emphasis on the physical outcome of a well developed community" (Haywood, 1992, p.12).

As Barnekov and Hart (1993) emphasize, few would deny that American urban economic approaches have been influential in Britain;

> "the idea of joint public, private partnerships; the importance of selectively targeting funds; the use of public money to stimulate private investment, all have become part of the conventional wisdom for regenerating urban areas in Britain" (p.1470).

Many of the American approaches to urban economic development found a favourable reception in the UK. At the scale of this case study there were press reports on the potential for Liverpool to regenerate itself through tourism and in so doing be as successful as places such as Boston and Baltimore.

On a national scale one may examine the transfer of urban policy; but before doing so, it should be recognised that the use of tourism as a regenerative tool has now widened its geographical scope. Policy makers have been made aware of the high profile general improvements and seen potential in their own city. For an example of this one should look to Dunedin in New Zealand where "the basic strategy that was devised drew from the experience of such cities as Glasgow and Newcastle in the United Kingdom and Baltimore and Pittsburgh in the United States" (Kearsley, 1994, p.4).

The most notable example of transatlantic policy transfer is the *Urban Development Action Grant* (UDAG) which in the United Kingdom has been

translated into the Urban Development Grant. Similarly the idea of Urban Development Corporations was predominantly of American origin. The UDAG was launched in 1977 to stimulate private investment in severely distressed communities by providing a capital subsidy for projects which had a firm commitment of private resources. It proved one of the most efficient methods ever devised by the US government to lever private investment into economic development. By September 1987, there had been 2,860 projects approved in 1,180 communities, representing a planned total public and private investment of $35 billion. This represented a leverage in the ratio of 6.5 private sector to 1 public sector (Barnekov, Hart and Benfer, 1990).

During the early 1980's the Conservatives in Britain argued that urban change should result primarily from the unplanned decisions of the market. The Government reaffirmed its commitment to urban areas. It outlined the aim to make these places where people wanted to live and work and where the private investor is prepared to put his money. To succeed, the concept of leverage was placed in the fore of policy; hence in 1982, the *Urban Development Grant* (UDG) was introduced to Britain.

UDG is generally considered to be 'funder of last resort'. It is a capital grant or loan intended to provide just enough subsidy to a developer to enable an approved scheme to go ahead in locations where it would not normally be able, the aim being to promote the economic and physical regeneration of inner city areas by levering in private sector investment. Department of the Environment research (Public Sector Management Research Unit, 1988) recognised a number of impacts of UDG. It was generally considered that UDG attracted a substantial amount of private sector investment in inner city areas which would otherwise not have taken place, either through private means or with the aid of other policy instruments. These UDG projects were associated with a substantial number of both permanent and construction jobs. However, on

average, one-third of the jobs were new to the Local Authority areas concerned and three-quarters were new jobs to the national economy. Nevertheless two-thirds of the permanent jobs were not new jobs. The jobs associated with UDG projects varied in type, skill and wage level. They were filled by people living in, or near inner city areas. Yet, only 18 percent of jobs associated with the programmes were filled by previously unemployed people. UDG projects have been seen to have enhanced the physical environment by removal of derelict, vacant or underused land and the refurbishment of buildings, either listed or of historic interest. Unfortunately, the Department of the Environment publication concludes that "very few UDG projects have, on their own, the potential to promote the regeneration of substantial areas within an inner city, though some have demonstrated that with UDG assistance it is possible to overcome particular market difficulties or localised problems, especially if implicated in combination with other initiatives" (Public Sector Management Research Unit, 1988, p.16).

The English Urban Development Corporations (UDCs) were built on the US example of partnership and the central control of policy, in addition to taking the concept of partnership more seriously (Barnekov, Boyle and Rich, 1989). Part XVI of the 1980 Local Government Planning and Land Act allowed for the creation of UDCs and by 1984 two had been created (London Docklands and Merseyside). Essentially these are appointed development organisations with wide powers to acquire, reclaim, sell or develop land. Urban Development Corporations were established in large part to resolve the difficulties of co-ordination and negotiation. By 1989 there were ten UDCs and by the end of the financial year 1988-89 cumulative spending on them was over £1 billion. It is central to the operations of UDCs that greater sums would be forthcoming from the private sector through leverage.

To some the creation of corporations was unpopular as they caused

administrative problems in assimilating some but not all local authority functions, and they were seen as secretive and determined to pursue policies that might not assist the economic, housing and social needs of local residents; their need has indeed been questioned. There are similarly arguments which suggest that UDCs are an appropriate vehicle within which urban regeneration can be guided. In theory they are able to operate more quickly with less bureaucracy than local authorities working in a democratic way. In addition they are able to bring attitudes and skills from the private sector to produce demand led policies which may attract and guide the public sector (Lawless, 1989).

The above has illustrated how urban policy has been adapted to the UK context. However, it is evident that the US policy is not always without criticism, and UK Governments, desperate to act upon urban programmes, have thus adopted policy which is only partially successful. Notwithstanding their common features in both the United States and Britain, these examples illustrate the difficulties of cross-national policy implementation, let alone programme transfers; "policy objectives and program-operations and impacts are shaped by institutional traditions and the associated metaphors for government intervention and development efforts within which they are implemented" (Meyer, 1991, p.394).

There are a number of political and institutional differences between government in the United States and that in Britain which should be considered in making an assessment of urban policy. Meyer (1991), suggests that although real differences between the US and UK context could be elaborated at great length, they can be reduced to three "critical sets"; (i) political or institutional, (ii) legal, and (iii) economic (p.384).

In explaining the comparisons, Goldstein (1987, p.5) suggests that the British

policy makers are implementing an *industrial policy*, concerning themselves with "beggar-thy-neighbour" policies more than do Americans in pursuing local economic development. The UK political debate over local versus national control of economic development efforts is focused on avoidance of the negatives of competition. US commentary on development strategy and prospects shows little concern for this downside. Small area Chambers of Commerce in the USA, whose territories are most likely to lose from "beggar-thy -neighbour policies, "exist to foster the common economic development .... as the retention, expansion and attraction of business to create jobs and increase tax base" (Kinsella, 1989, p.13). The absence of other economic development groups in most small towns and rural areas, combined with this narrow vision from the chambers, virtually assures competition for business attraction and retention (Meyer, 1991, p.389).

Before proceeding further one must clarify the interpretation of "*tourism*".

1.3: Definitions of tourism.

Defining tourism is an arid moment of analysis. Discussions have abounded about whether it is an industry, market, amalgam of industries or a social phenomenon or even a distinct or a multi/interdisciplinary area of academic enquiry. Technical definitions, such as those of the World Tourist Organization (WTO) or British Tourist Authority (BTA), tend to focus on statistical matters; for example, WTO consider that a "tourist" is a person who must be away from his/her place of residence for a period of more than one day and less than one year and not in receipt of renumeration for the journey (Gilbert, 1990). They do suggest more than the popular perception of tourism as "holidaymaking"; including activities such as cultural visits, business conferences or visits to friends and relatives (Baty and Richards, 1991; Ryan, 1991). A definition may be taken from one of at least four viewpoints; the economic, technical, holistic and experiential (Ryan, 1991, p.6).

It is thus generally considered that "the lack of consistent and accepted definitions is a continuing source of frustrations for tourism planners and analysts" (Smith, 1989, p.17). Often such definitions are too embracing, for example Gunn (1988) considers tourism to include all travelling except commuting, or they are too vague; for example Kelly's (1985) definition of tourism as recreation on the move - an activity away from the home in which travel is at least part of the satisfaction sought.

To further complicate matters, a United Nations Conference on International Travel and Tourism (1963) drew a distinction between *tourists* as those who stayed for more than 24 hours and *visitors* who stayed for less than 24 hours. Similar distinctions have been made, for example by IUOTO (International Union of Official Travel Organisations) in 1959, between *tourists* and *excursionists.* Similarly *tourists* and *day visitors* have been defined for the leisure day visits survey 1988-89 (Baty and Richards, 1991).

The tourist industry is also a production system constituted of a range of private and public institutions. As Sessa (1983) defines it, "tourism supply is the result of all those productive activities that involve the provision of goods and services required to meet tourism demand which are expressed in tourism consumption" (p.59). As some activities, such as visits to leisure activities, are clearly of a tourist nature, confusion arises because there are many, such as a visit to a public house or to a hypermarket, which might sometimes be so, and more often not. The most simplistic, but superficial definition is articulated by Morrison and Anderson (1994); "Essentially, tourism occurs when people travel, and return home. The facilities/services and activities they partake enroute to and from and at the destination encompass the tourism industry" (p.4).

For the purpose of this study of urban tourism, the definition of tourism needs

to be more specific in terms of the people concerned, but simultaneously more inclusive in reference to the production system. This thesis adoptes the view of Jansen-Verbeke (1989, p.217) when she suggests that

> "the inner city tourist needs to be identified amongst a large group of inner city visitors. Two distinct criteria have been applied; first the place of residence of the respondent, secondly the set of motives for a visit to the inner city. A tourist in the inner city is thus a visitor coming from outside the functional catchment area of the city and visiting the inner city for reasons which are predominantly leisure oriented".

Beioley (1981) considers a tourism development to refer to "any project that would attract some use or interest from visitors whether they are on day trips or staying overnight" (para. 1.3). He further recognises that, in the urban context, most tourism developments are also extensively used by local people. "It is important to see tourism not in isolation but as an activity which complements and interacts with other activities taking place in the city".

With reference to "tourism-related employment", the Government definition, as detailed in the Employment Gazette (now Labour Market Trends), is that which will be commonly referred to in this thesis. Spread over parts of two Divisions of the Standard Industrial Classifications 1980 it includes the headings listed in Table 1.2.

Table 1.2: Office of National Statistics, standard definitions of "tourism-related employment", Table 1.5 to September, 1995.

SIC	Definition
661	Restaurants, snack bars, cafés etc.
662	Public houses / bars
663	Night clubs / licensed clubs
665	Hotel trade
667	Other tourist / short stay accommodation
977	Libraries, museums, art galleries, etc.
979	Sport / other recreational services

Note: a similar definition now applies based on SIC 1990

Although this grouping will be used throughout, it carries a number of qualifications. Some facilities which are listed are of course used by both residents and visitors, the employment data being incapable of distinguishing between the two kinds of user. Prime examples of this would be restaurant, night club, and library users. It is equally probable that tourists will also use a number of urban facilities not included within this definition. Prime examples are the leisure aspect of shopping and, particularly with the tendency towards cultural tourism, visitors who use theatres and cinemas. In this respect both of these activities will also be included within the discussions presented here.

Not all shopping is a leisure pursuit and it certainly does not all constitute a tourist activity. Although it has commonly been accepted that tourists will tend to return home with souvenirs, more recently shopping has been seen as a leisure activity. Made more apparent by the popularity of the car boot sale and craft fairs and the marketing of shopping malls such as Meadowhall and the Metro Centre, urban areas, keen to attract tourists, are developing retail outlets and promoting and improving existing retail facility. The result is an activity which is often, but not always, secondary to the purpose of the visit. The exclusion of shopping from the standard definition (Table 1.2) is understandable: in most instances the activity is not tourism-related. However, often the tourist use can be geographically specific; located in and around the main tourist areas. Thus tourism-related retail activity will be included for shops in particular tourist developments.

The tourist use of cinemas and theatres is less easily distinguished by geographical area, yet it is commonly acknowledged that people do travel around the country to see particular shows or concerts. Theatre fans will travel to Stratford to see the Royal Shakespeare Company perform, musical fans will travel to London to see shows like Starlight Express or Cats, and supporters of particular bands or comedians will travel, like football fans, to see their

'stars' perform at locations such as the NEC in Birmingham. For this reason it would be right to presume that people travel to cities such as Liverpool to hear the Royal Liverpool Philharmonic Orchestra (RLPO), or to Manchester to the Halle orchestra.

In the Liverpool based study preliminary research suggested that, as with other tourist attractions in the city, theatres were eligible for Arts Council funding. In addition, theatres such as the Unity and Neptune gain funding from the Leisure Services Directorate of the City Council, as do attractions such as Merseyferries, Central Libraries and Mersey Sports Centre. This information suggested that theatres did have a tourism element, which could, in some cases, exceed that of a large number of pubs, clubs and restaurants in the city; these are also included within the Census of Employment definition and are often secondary to the main purpose of a tourists visit. For this reason, it was considered that a complete study of tourism-related employment should also include theatres.

Prior to considering the way in which the impact of urban tourism will be examined, the following section provides a brief introduction to some of the more important mechanisms through which tourism has been incorported into urban policy.

1.4: Central Government initiatives.

In 1988 the Thatcher Government in Britain announced that its basic urban policy was "to deal with the effects of long term changes in the economic structure of our cities by restoring confidence, initiative, enterprise and choice" (HM Treasury, 1988, p.164). Indeed, any policy for inner cities must deal directly with the economic, social, financial and political factors already discussed.

The above followed an academic view that: "successive British Governments have been, at best, ambivalent in their attitude towards the tourism industry; grateful to accept the industry's contribution to the economy at large but lacking a comprehensive or coherent policy towards the industry" (Goodall, 1987b, p.109). This author continued that the "tourism industry is widely recognized by Government as an 'industry capable of supporting itself', therefore tourism does not figure prominently in governments economic, social and environmental policies" (p.10).

There are, however, a number of national urban regeneration schemes which have been applied to tourism-related projects. During the most productive period of growth in urban tourism, the most important sources of funding came from City Grant (now abolished); via Urban Development Grant (UDG) and Urban Programme (UP). Lawless (1988) recognises that

> "there is little doubt that inner urban policy has begun to figure more prominently in central government's evaluation of national problems .... the last decade has seen an increase in a range of urban developments in many cities" (p.540).

This author is however suitably sceptical, recognising that "any overall assessment of the policy must remain critical" (p.540).

Following is a discussion of some of the main government initiatives which have had some influence on tourism schemes and which will later be related to the thesis case study area.

Urban Development Grant (UDG) was targeted at the private sector and was paid by local authorities to developers to enable a development in circumstances where normal commercial consideration would have ruled out such a development. The value of the grant had to be the minimum amount required to enable the development to go ahead, and could not be more than

the private sector contribution. Central Government reimbursed 75 percent of the grant aid to local authorities and priority was given to designated districts. UDG was later replaced by City Grant.

The Polytechnic of Central London *et al* (1990) conducted a survey on behalf of the Department of Environment on the impact of grant assisted tourism projects. Of all 299 UDG projects approved as at April 1988, 26 (nine percent) of the total were for tourism; this represents a total investment of £25.9 million UDG and £144.5 million private investment (16 percent total UDG, 25 percent of total private investment). Of the 26 projects for which UDG was awarded, 12 were hotels, seven leisure (including regional sports facilities, pubs, restaurants and clubs with an outside visitor attraction) and four were shopping (including regional and craft shopping developments). Hotels are thus the most important type of UDG tourism projects, representing 55 percent of projects (if shopping is excluded). Nevertheless, they account for 80 percent of grant assistance and 88 percent of private investment generated, but only 66 percent of permanent jobs.

The allocation of UDG is also spatially polarised towards northern regions. Of the 26 projects, eight are located in the North West (two of which are in Merseyside). The Midlands received nine UDG tourism projects and London just four.

The Department of the Environment Research (Public Sector Management Research Unit, 1988) recognized that tourism was increasingly playing a larger role in UDG assisted projects and was gaining greater leverage than in other schemes. The UDG assisted projects have been successful in a number of other respects. Generally they are larger in terms of total project size than other UDG assisted projects and require less grant; the projects have a high rate of additionality and a lower proportion of grant aid than other inner city grants

(Polytechnic of Central London, 1990, p.9).

Urban Programme (UP) can, in contrast, be discussed under two broad headings; environmental and economic impact. UP environmental resources gave the opportunity to further develop plans and other planning proposals because planning departments did not normally have substantial main programme budgets for environmental projects. The UP allowed for numerous different types of projects to be implemented, such as landscaping, improvements to parks, open spaces and walkways, built fabric improvements, general area based environmental improvements and direct support to firms and building owners. In terms of economic development UP resources similarly had potential. Although UP has been seen as a major reason for attracting large investment into the inner area, the UP projects generally induced investments from entrepreneurs, small firms and existing firms in the inner areas. However, one of the greatest economic impacts of UP was that of employment, as UP was thought to have provided a more secure base for firms.

The Urban Programme refers to the financial support made available to Partnerships, Programme Authorities and other Designated Districts. Eligible local authorities made an annual bid for funds in the form of an Inner Area Programme which set out the overall objectives for the area and a list of projects for which funding was required. The Government reimbursed 75 percent of local authority spending on approved schemes, the emphasis being on capital projects rather than revenue support.

The precise relationship to urban tourism is that UP was commonly used to develop leisure. Indeed it has been noted that expenditure on recreation projects (parks, open spaces, walkways) has had the widest benefits (JURUE, 1986). Large UP grants were often given for conversion of buildings into commercial, leisure, tourism or cultural usages. Yet tourism has never been

the essential motivator of UP assistance. The UP (1985) states (in Polytechnic of Central London *et al*, 1990, p.7) that

> "tourism is never likely to be a dominant component of the Urban Programme. In the right location, however, it can play a significant part in creating jobs and bringing income into the local economy. Projects designed to attract visitors often involve environmental improvements. They can provide opportunities for the growth of small business serving the needs of tourists".

Indeed in research commissioned by the Department of the Environment Inner Cities Directorate (Polytechnic of Central London *et al*, 1990) a sample survey of 25 percent of authorities eligible for UP assistance in 1983 found that only about five percent of projects might be classified as tourist projects; however they conclude "there is some indication that interest in tourism is likely to increase in the future and that other types of projects may be increasingly defined as having a tourism dimension" (p.52).

Table 1.3 illustrates the relative importance of tourism within Urban Programme expenditure during 1983-87. Most authorities in the sample see tourism as an integral part of economic regeneration methods; tourism was often mixed with other regenerative activities such as environmental improvements.

Additionally, projects which began with environmental or social objectives are now seen as tourism-related, exemplified in Birmingham's programme of canal improvements.

Table 1.3: Urban Programme expenditure on tourism projects, in a sample of authorities, 1983-87.

AUTHORITY	Total UP £mill.	Tourism Projects implemented No.	UP Expenditure £mill.	% Total UP %
PARTNERSHIPS				
Birmingham	136.6	2	1.4	1
Manchester/Salford	117.2	4	12.3	11
Newcastle/Gateshead	103.3	3	8.2	8
PROGRAMME				
Wolverhampton	26.3	0	0.0	0
Leicester	28.2	0	0.0	0
Bolton	19.4	3	1.1	6
South Tyneside	26.8	4	2.3	9
OTHER DESIGNATED DISTRICTS				
Ealing	1.0	0	0.0	0
Sefton	3.5	0	0.0	0
Langbaurgh	4.5	0	0.0	0

Source: Polytechnic of Central London *et al*, 1990, p.10.

A further source of income for tourist related projects was Derelict Land Grant (DLG). Vacant land has been regarded as both a symptom and a cause of urban malaise. Since the 1970's, vacant and derelict urban land has been a policy concern; it is considered an inefficient use of resources, an environmental wasteland and a cause of many of the social ills of the cities. Eligible categories of expenditure included land acquisition, reclamation work and treatment, demolition of buildings and in some cases provision of infrastructure. There are no cases where DLG has been used in isolation to support tourism projects. The grant is often combined with UP finance, cases of note being the Hull Marina, Ellesmere Port Boat Museum and two cases in Dudley local authority; the Cavern Heritage Display and the Black Country Museum.

It is also pertinent to note the perceived role of garden festivals; places such as Glasgow, Gateshead and Liverpool began their tourism career through this mechanism. Garden festivals are commonly considered as valuable additional instruments to be included in any regeneration strategy; they are an image building exercise which may attract visitors and business to an area. The objectives of the festivals are thus three-fold: attracting reclamation gains, environmental improvement and economic benefits. Often the reclamation and much of the capital development would have taken place anyway, but in terms of tourism it is recognised that "whatever emerges will potentially have major implications for the development of the areas as tourist destinations (PA Cambridge Economic Consultants *et al*, 1990, p.21). Indeed permanent buildings may be used at a later date to hold indoor exhibitions, for example the Festival Hall at Liverpool; although the Stoke and Glasgow festivals were designed to be more temporary. In essence, garden festivals are perceived as high quality redevelopments, with locally based organisers. In Liverpool this was Merseyside Development Corporation (MDC), in Stoke on Trent, the local authority. Chetwynd (1984) sees the events as "a shop window and higher standards for horticultural producers, landscape designers and associated traders; a new park, increased tourism and an image boost for the city" (p.24-25).

With the demise of City Grant (1991) came the rise of City Challenge, a more systematic, scheme based regeneration strategy. The City Challenge System at its inception was unique in its concept of competition. The Department of Environment considers that City Challenge offers local authorities from Urban Programme Areas opportunity to "compete for inner city and housing resources to tackle a wide range of economic and social problems, with funds being made available to winners over a period of five years". The aim is "to provide major impetus to area improvement, leading to self-sustaining economic regeneration" (Department of the Environment, 1993, p.55).

City Challenge has superseded Urban Programme (UP) grant aid which has been discontinued following the Chancellor of the Exchequer's Autumn Statement on 12th November 1992 (however, provision has been made to honour all commitments agreed upto that date). Yet, as with UP, it is a partnership between community and business where, although the Local Authority presents the bid, it is just one of the partners over the ensuing years. Similarly, as with UP, leverage is also a key concept. In City Challenge there are both winners and losers. Any authority which is not a recipient of City Challenge will lose other funding; in addition to replacing UP, other grants have been 'top sliced' to provide for this scheme. The concept of partnership and leverage is indeed being continued in more recent urban policies, including the Single Regeneration Budget.

In conclusion therefore, over the last decade or two, there has been a commitment and recognition from Government of a need for the regeneration of our inner cities. The policies which have followed have been varied and wide ranging and include a number of aspects of relevance to regeneration through urban tourism.

Finally, there is one specific tourism related initiative worthy of mention. Here local authorities have been heavily involved. The Tourism Development Action Programmes (TDAP's) were initiatives aimed at developing tourism in both city and rural area. Established as a partnership between the English Tourist Board (ETB), the local authority and the private sector, the aim was to "generate a new momentum, and set new directions through a burst of concentrated action and involvement" (Davies, 1987, p.168). The programme consisted of a package of development, marketing and research initiatives, capable of being implemented in the short term. Each programme was of limited duration (two or three years) after which the lead devolved back to the local authority. The first TDAP was established in Bristol (started August,

1984), other notable examples being Bradford, Tyne and Wear, Portsmouth and Gosport.

Although no longer available, the work of TDAPs was considered valuable. Geoff Broome of ETB reportedly saw the importance of TDAP's as "they lift the profile of tourism within an area .... they legitimise tourism and produce a more corporate approach within the authority" (as quoted in Davies, 1987, p.171). The same source reports ETB as saying of TDAPs "these programmes have already proved to be a powerful mechanism for inspiring vision, concentrating the minds of local authorities and developers alike and achieving action on the ground" (p.171).

1.5: Summary

Tourism, once defined, is viewed as an industry well suited to an urban economy. It is a job creator, and image changer which, with the right backing, has the potential to redevelop decaying urban sites. Taking success stories from across the Atlantic, numerous UK cities have directed their activities towards tourism and leisure.

In theory, these are success stories in the making. The ideas and tourism schemes appear to fit within the central government framework for urban regeneration. Monies have been made available for schemes such as UP, DLG and UDG. Additional policies, such as the introduction of Garden Festivals, have further enhanced the potential. As a knock-on from central government encouragement, local authorities have taken the challenge and created new initiatives and offices with the sole purpose of tourism management and development.

This introduction has illustrated not only the diverse nature of urban tourism, but also the historical and policy background for the study of this subject.

Additionally it is hoped that the reader will have recognised the need for further research into a number of the perceived impacts of the industry. Evidence presented highlights how governments, both national and local, have been and are investing heavily into an industry where benefits are perceived to occur almost immediately, without substantial knowledge of the longer term effects.

The arguments of this thesis will be related to what have emerged as the key impacts of urban tourism; employment, investment, image and environmental change. These features are supported by an examination of the organisation of a tourist industry, both through the formal mechanisms mentioned in this and following chapters and via the private sector. The key thrusts of this project are to examine the ways in which tourism can be beneficial to the economy of ex-industrial cities, as well as to establish the position of the industry in the minds of those involved with city regeneration.

1.6: Outline of approach

In order to study the impacts of tourism one needs to analyse the range of methods which can be applied, and decide upon a focus for the study. In outline we can say that policy makers, tourists and providers to the tourist industry can all be identified as possible primary information sources; existing policy documents, and surveys of visitors can be regarded in practical terms as the available secondary sources.

The secondary sources of information on tourism for Liverpool thus comprise either policy documents such as Liverpool City Council's (1987) Tourism Strategy for Liverpool, Merseyside 2000's submission for European Regional Development Funds (1993) or surveys such as the Merseyside Information Services (MIS) Visitors to Merseyside Survey (1991), which examines visitor attitudes and experiences and complements sources such as annual ETB/BTA reports detailing, amongst other data, visitor numbers to attractions and hotel

occupancy.

As the rest of this thesis will illustrate, both of these secondary types of sources provide useful information regarding the nature of tourism in the city. However there are limitations to them. Policy documents tend to argue issues of relevance to the particular initiative in hand. The Merseyside 2000 statement (1993) was a tool to attract substantial funding from the European Community. As such it articulated an end state, outlining potential aims and objectives for the region. These are not what will necessarily materialise. Tourism strategies again only relate to what is anticipated, without necessarily much analysis of present conditions; these sources may be further charged with promoting '*boosterism*' or the vested interests of parts of the private sector. Survey results similarly have limitations. Despite presenting detailed statistics about the nature of the industry, those available for Liverpool were restricted by the motivations of the study for which they were commissioned. The tourist questionnaire surveys often provide restricted data - nearly all of which is in a table format, lacking any academic interpretation of a qualitative kind. Given the development of contemporary human geography research, away from the discipline's strong quantitative emphasis of the 1960s and 1970s, there is a need for a greater discussion of both qualitative and quantitative impacts.

These and other failings accentuate the usual need to conduct primary research investigations. The range of possible interviews is wide. These may be in the form of contacts with key informants and policy makers, such as Merseyside Development Corporation, the City Council or Tourist Board, with tourists or tourist facility users or with the actual providers of the facilities. Information from such sources may be ascertained in varying forms to suit the research question. This may be collated through structured surveys or other questionnaire surveys, or through unstructured interviews and focus groups.

In light of all the preparatory work, the view chosen, presented and analysed here is that of providers to the tourist industry. One reason for this choice is the scarcity of information in the literature relating to their views and opinions about the issues. These are the people who experience the ups and the downs of the industry over an extended time frame. They are also those to whom the economic, social and physical regeneration should be most apparent. Providers are able to give qualitative and quantitative information about the nature of change in the industry, the type and number of visitors, and employment characteristics and future developments, all of which can be compared to academic and political assertions and on occasion with existing statistical data. Limiting the focus to one broad group also allowed a thorough survey to be completed in the timescale available. Taking this approach also allows a comparison with published visitor surveys, particularly the MIS Visitors to Merseyside survey (1991).

This approach is however not without weaknesses. There are important issues which will be considered throughout this thesis relating to selective non-response to questions and requests for interviews, often worsened by the ignorance of new managers of the history of business development or even the recent changes which have been experienced in Liverpool and Merseyside. Adding to this, one has to be conscious of boosterism not only in promotional literature; many managers may have been over emphasising the prospects for the industry and region. Additionally, within this area of research there is only a limited ability to verify what is being said. Finally, one also had to recognise that much of the information being requested might be confidential and thus difficult to obtain even with appropriate assurances from the researcher, but similarly this problem may occur due to managers' reluctance to spend time finding it.

The result is nonetheless a piece in which the view of providers to the tourist

industry is balanced alongside viable secondary sources of policy documents and visitor surveys, substantiated with interviews with key informants such as Merseyside Tourism and Convention Bureau, the Albert Dock Company, Liverpool City Council (Leisure Services and Planning Department), City Challenge, Liverpool Task Force, Merseyside Development Corporation and the City Centre Partnership.

In order to evaluate the role of providers it is first necessary to define them. Providers can be defined as those people who are directly involved in the functioning of the tourist industry. Based on the *Labour Market Trends* (HMSO) definition using the Standard Industrial Classification (1980) " tourism-related activity" comprises hotels and other accommodation, "attractions" in the shape of libraries, museums, art galleries, sport and eating and drinking facilities (restaurants, bars, cafés, clubs, pubs). Additionally, theatres and cinemas and a sample of shops located in key tourist areas are also included, but sports and similar facilities were excluded due to their scarcity in the case study area (the specificities of these surveys are discussed inSection 2.6).

The research method thus consisted of structured interviews with 117 key informants and managers of tourist facilities and questionnaire surveys of 46 workers within the industry. The precise nature of these questions differed depending upon the sectors of the industry and are discussed at appropriate places throughout the thesis.

CHAPTER 2: CHARACTERISTICS OF THE CASE STUDY

2.1: Merits of the Case Study approach.

In order to study the impact of urban tourism it is important to not only designate the motives of the study, but also a clear methodological approach. The approach taken here is that of a case study. The source of information being predominantly detailed interviews with tourism providers.

Despite the availability of substantial information from literature and NOMIS (National Online Manpower Information System) detailed field research was necessary. Much of the available information pertaining to the nature and impacts of urban tourism appears to concentrate on media coverage, marketing surveys, positive feedback from providers, or assertions from data sources such as NOMIS. This thesis takes the view of providers and its strength lies in its ability to capture all aspects of an industry, thus questioning media hype and academic assertions. The hope is to identify (if appropriate) a formula for the success of urban tourism based on the experience of a number of cities.

Initially the thesis aim was to study four cities in detail so that comparisons could be made between them. However, due to the amount of detail necessary for this type of research, it was possible to study only one city within the available time frame. With hindsight this does not detract from the value of this research. One indepth study which attempts to cover all linkages to other aspects of city life is possibly of more value in this instance than a number of superficial studies of particular aspects of the industry in a number of different cities. It creates a holistic study which allows us to further substantiate assertions previously made.

Within this framework research was conducted mainly in the form of interviews with key policy-makers and providers, questionnaires with workers in the

tourist industry and visual observations. All interviews were conducted on a face-to-face basis in order to glean as much information as possible, as well as allowing reaction, personal insights and opinions to be accounted for.

2.2 Deciding the Case Study area

The aim of the research presented here is to consider the role of tourism as a regenerative tool, particularly in ex-industrial cities of northern England. Three heads of selection were used, to include the following types of place:

1. Cities of ex-metropolitan counties with a minimum population of 100,000. Ashworth and Tunbridge (1990, p.243) consider most beneficiaries of urban revitalisation through tourism to be medium sized cities with between 100,000 and one million population.

2. Places with a decline in traditional industry, and an increase in tourism related employment. Ashworth and Tunbridge (1990, p.245) noted that the type of cities favoured for urban regeneration through tourism are "usually declining industrial 'coke towns' with negative, tourist repellent images."

3. Urban areas which contain the dominant share of all attractions in that metropolitan county.

Recognition of the characteristics of an industrial conurbation is provided by the definition of metropolitan counties, established in 1974, leading to consideration of the individual metropolitan boroughs (which continue unaffected by the demise of counties themselves in 1985 and by the present process of government reform). This selection of ex-metropolitan boroughs as the initial framework adopts units which in every case meet Ashworth and Tunbridge's criterion of a population of between 100,000 and one million (1990, p.243) (Appendix 1).

The only other districts with over 100,000 population in Northern England are: Chester and five other free-standing districts in Cheshire; three districts of Cleveland; South Lakeland in Cumbria; six districts of Lancashire; and in North Yorkshire, Harrogate, Scarborough and York. Obviously most of the towns in other non-metropolitan counties are free-standing units which have rarely been treated as parts of conurbations. Equally the tourist towns which they do include - such as Blackpool, Lancaster, Chester and York - clearly belong to the categories of seaside tourism and historic cities.

All of the metropolitan boroughs in the north of England have shown a sharp decline in the number of people employed in manufacturing. At the time of selecting case studies this ranged from a loss of 27,000 jobs (1981-91) in Sheffield to one of just 800 in Sunderland, the average job loss for all metropolitan counties in Northern England being 11,000, a rate of 28% (1981-1991) (Appendix 2). Employment in services in these areas is generally increasing, the only net job losses in this employment sector (1981-1991) being in Manchester (400), South Tyneside (100) and Liverpool (24,900); this last loss to the service industry is only half that in manufacturing. Indeed in the 1981-91 period the only sector of employment in Liverpool showing any gain was (1980) Standard Industrial Classification Division 8 (Banking, finance, insurance, leasing etc.) with a 12.5 percent increase.

Clearly, including the whole of the hotel, restaurant, public house, arts and museums sector heavily overstates the amount of tourist activity in any area. Nonetheless, excesses of employment in an area, or marked increases of employment numbers in an area of declining population, may well reflect genuine tourist jobs. To select potential case study areas it was concluded that the places with the largest increase in numbers employed in tourism related industries would be used (as defined in Table 1.2). This resulted in the selection of Liverpool, Sheffield, Bradford, Wigan, and Newcastle-upon-Tyne.

Table 2.1 Tourism-related employment* (Change 1981-91) Metropolitan Boroughs, Northern England.

SOUTH YORKSHIRE	Change	% Change
Sheffield	**4100**	**38.9**
Rotherham	1700	43.0
Doncaster	1400	26.7
Barnsley	300	7.4
WEST YORKSHIRE	Change	% Change
Bradford	**2900**	**39.6**
Leeds	2800	17.5
Kirklees	2700	50.3
Wakefield	1900	36.7
Calderdale	1400	46.3
GREATER MANCHESTER	Change	% Change
Wigan	**2100**	**41.9**
Bolton	1800	36.4
Bury	1300	72.7
Oldham	1200	32.9
Manchester	1000	6.6
Salford	500	11.8
Trafford	400	8.4
Tameside	400	10.7
Rochdale	200	7.0
Stockport	-100	-1.4
MERSEYSIDE	Change	% Change
Liverpool	**1700**	**9.9**
Wirral	400	5.4
Sefton	300	4.9
St Helens	300	8.3
Knowsley	200	7.4
TYNE & WEAR	Change	% Change
Newcastle-upon-Tyne	**1300**	**13.7**
Gateshead	1000	21.7
Sunderland	400	5.5
North Tyneside	100	1.9
South Tyneside	400	-10.7

Source: NOMIS, 1993.

* Comprising the following classes of SIC 1980;
SIC: 661, 662, 663, 665, 667, 977, 979.

This calculation (Table 2.1) was based on numerical rather than percentage increase, on the basis that the base figure will include non-tourism employment and that it is the volume of employment increase which is critical when considering possible tourism growth in the context of urban residential depopulation.

Using BTA/ETB "Visits to Attractions" data (1991) it was possible to indicate the importance of urban tourism in each metropolitan district in Northern England. Results show that in Greater Manchester, Merseyside and Tyne and Wear over 40 percent of attractions are located in the principal cities of Manchester, Liverpool and Newcastle-upon-Tyne (Appendix 3).

In West Yorkshire there are two large urban centres, Leeds and Bradford, both of which attract many visitors, Bradford having more attractions than Leeds. "Tourism" in South Yorkshire comprises a relatively large number of country parks which attract many visitors. With a total of only five attractions in the city of Sheffield the case for studying urban tourism is less strong here. The results of Table 2.2 are in conflict with the employment data for Greater Manchester. Wigan shows a greater increase in tourism related employment than Manchester. Yet only one tourist attraction of Greater Manchester is located in the Wigan area, that being Wigan Pier, introduced with the sole intention of regenerating one area of Wigan but coinciding with this increase in tourism related employment. Since this time the shopping core of Wigan has been transformed by the opening of a new shopping complex and market place. The recorded employment increase appears to relate to its element of bars and public houses.

Visitor numbers to attractions in the metropolitan boroughs have also been calculated (Appendix 3). It appears that, in line with the employment data, the largest numbers of attractions and the largest numbers of visitors per borough

are to: Liverpool in Merseyside, Manchester in Greater Manchester, Leeds and Bradford in West Yorkshire, Sheffield in South Yorkshire and Newcastle in Tyne and Wear (Table 2.2).

Table 2.2: Attraction and visitor numbers - Metropolitan boroughs in the north of England

	Total	Historic	Museums & Galleries	Other	Miscell-aneous
SOUTH YORKSHIRE Total	19 2 417 996	4 127 773	9 913 696	4 1 303 527	2 73 000
Barnsley	4 351 891	1 28 891	0 -	1 250 000	2 73 000
Doncaster	4 413 829	1 22 027	2 241 802	1 150 000	0 -
Rotherham	4 976 575	0 -	2 73 048	2 903 527	0 -
Sheffield	**7** **675 701**	**2** **76 855**	**5** **598 846**	**0** **-**	**0** **-**
WEST YORKSHIRE Total	48 5 993 449	10 593 494	26 2 485 406	5 2 575 154	7 339 395
Bradford	**14** **1 770 309**	**2** **197 944**	**9** **1 289 970**	**1** **200 000**	**2** **82 395**
Calderdale	6 374 101	1 21 601	1 50 500	1 125 000	3 177 000
Kirklees	8 268 392	2 50 043	5 178 349	0 -	1 40 000
Leeds	**12** **2 589 461**	**3** **255 359**	**6** **393 948**	**1** **1 900 154**	**1** **40 000**
Wakefield	8 991 186	2 68 547	5 572 639	1 350 000	0 -

	Total	Historic	Museums & Galleries	Other	Miscell-aneous
TYNE & WEAR Total	18 218 303	6 222 525	11 795 778	0 -	1 200 000
Gateshead	2 236 994	0 -	1 36 994	0 -	1 200 000
Newcastle	**8** **412 154**	**2** **47 212**	**6** **364 942**	**0** **-**	**0** **-**
N. Tyneside	2 101 796	2 101 796	0 -	0 -	0 -
S. Tyneside	4 288 340	2 73 517	2 225 823	0 -	0 -
Sunderland	2 168 019	0 -	2 168 019	0 -	0 -

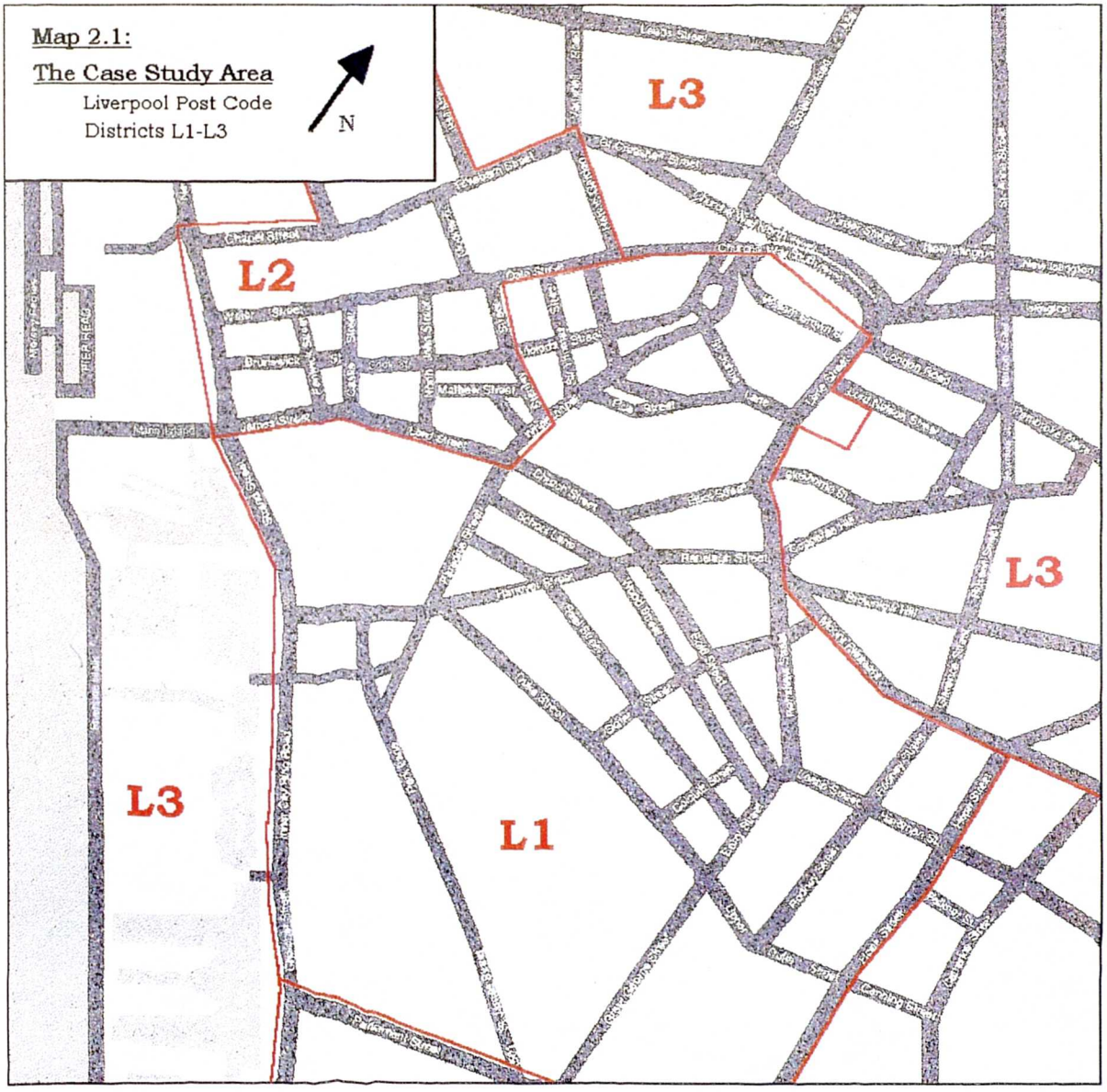
MERSEYSIDE Total	21 11 002 286	2 131 336	12 1 879 767	4 2 947 700	3 6 043 843
Knowsley	3 458 264	1 117 625	1 20 639	1 320 000	0 -
Liverpool	**9** **8 387 330**	**0** **-**	**6** **1 706 181**	**1** **750 000**	**2** **5 931 149**
St Helens	1 33 000	0 -	1 33 000	0 -	0 -
Sefton	4 1 929 281	0 -	2 66 947	1 1 750 000	1 112 334
Wirral	3 194 411	1 13 711	1 53 000	1 127 700	0 -

	Total	Historic	Museums & Galleries	Other	Miscell-aneous
GREATER MANCHESTER Total	19 3 809 228	1 46 287	10 2 019 316	5 509 625	3 1 234 000
Bolton	1 253 000	0 -	1 253 100	0 -	0 -
Bury	1 107 000	0 -	0 -	1 107 000	0 -
Manchester	**11** **2 453 561**	**0** **-**	**7** **1 234 561**	**0** **-**	**2** **1 159 000**
Oldham	2 97 663	0 -	1 22 663	0 -	1 75 000
Rochdale	0 -	0 -	0 -	0 -	0 -
Salford	0 -	0 -	0 -	0 -	0 -
Stockport	1 300 000	0 -	0 -	1 300 000	0 -
Tameside	2 97 912	1 46 287	0 -	1 57 625	0 -
Trafford	0 -	0 -	0 -	0 -	0 -
Wigan	1 500 000	0 -	1 500 000	0 -	0 -

Source: Visits to Tourist Attractions 1991 (BTA/ETB, 1992)

In the light of the data, preliminary interviews were conducted in each of Wigan, Bradford, Manchester, Newcastle-upon-Tyne and Liverpool. As a result of this there were strong substantive reasons for Liverpool to merit prime attention. As later sections of this chapter will exemplify, Liverpool has some of, what have widely been considered, the worst urban problems. The history of government concern for urban areas and regional policy has since the 1930s included aid for Liverpool and the wider Merseyside borough (Lawton and Pooley, 1986). For these reasons Liverpool will be the focus for this study. In

practice, nearly all tourism focuses around central Liverpool. In order to further delimit the case study area, specific examples and field studies will be concentrated within the post code districts of L1, L2 and L3 (see Map 2.1).The basis for this choice is that this area contains the city centre, including most tourist attractions such as the Albert Dock, Walker Art Gallery and a large proportion of hotels. Post code boundaries have been used to delimit the area because this definition is geographically satisfactory and yields data available via NOMIS and the Liverpool Business Directory.



2.3: Economic Structure

Historical Perspective

The growth of Liverpool was entirely due to its role as a port. In 1207 King John, in looking for somewhere new as a place of embarcation to Ireland, granted a royal charter to the town of 'Liverpul'. John's charter was very unusual in that there was only a handful of primitive dwellings and the borough had effectively been created from nothing.

By the late 1600's, Daniel Defoe considered Liverpool to be one of the wonders of Britain (Aughton, 1990). Although there were plenty of poor and underprivileged in Queen Anne's Liverpool, but the local council was wealthy and very progressive. By 1751 Liverpool was rated the sixth largest town in England, boasting a population of around 23,000 people. From about this date onwards Merseyside saw a massive population growth rising from 34,000 in 1773 to over 200,000 in 1831; by 1881 it had reached 818,000 (Lawton and Pooley, 1986).

Many reasons have been given for the rapid expansion of Liverpool during the first half of the eighteenth century, particularly the expansion of trade. One reason which is suggested (Aughton, 1990) is the competitive advantage of security of passage through the Irish Sea, which meant that the Liverpool merchants could dispense with part of their insurance premiums. Another important factor was certainly the quality of the Manchester textiles that were in demand on the West Indian markets, but Bristol too was expanding very rapidly, and was almost as well supplied with textiles by the Cotswold woollen industry. One advantage enjoyed by Liverpool was the choice of passage to and from North America via the north or the south of Ireland. Growth was fuelled primarily by overseas trade, especially with the New World. Tobacco and sugar began to be imported in large quantities, whilst cotton later became a principal raw material import of great value to the town. Liverpool's export growth

reflected the growth of trade generally and especially of its Lancashire hinterland. Import processing industries such as metalworking and sugar refining were also crucial for the town, employing increasing numbers. There was a great 're-exporting' trade and Liverpool became by far the most important entrepot after London and Bristol.

In the mid-Victorian period the city's economy remained focused on the port. Liverpool was second only to London in trade and exceeded it in exports in the late nineteenth and early twentieth centuries (Hyde, 1971). Employment was dominated by heavy unskilled jobs: in 1881, 38.5% of Liverpool's male workforce were employed on the docks, in transport and warehouses, or as general labourers (Lawton and Pooley, 1986). In the late 1890's and 1900's the economic heart of Merseyside was still in the commercial and shipping quarter of central Liverpool and the Mersey docks. This is represented in Liverpool's architectural heritage. The Liver Building (1911) and Cunard Building (1913) were built at this time. The turn of the century also saw the development of Liverpool's public service quarter on the periphery of the central business district, including the cathedrals, Royal Infirmary and the University. Liverpool was one of the "Great Towns" with a population of 750,000 in 1901 (Lawless and Brown, 1986).

Although unemployment had always been a feature of life on the docks, the situation worsened during the inter-war depression which generated the first job creation measures through minicipal industrial estates. Many dockers averaged three days work a week and there was little chance for wives to supplement family incomes by working. Aughton (1990, p.185) reports that over a quarter and sometimes as many as a third of the insured labour force was out of work.

"The 1920's and 30's were a watershed for Merseyside" (Lawton and Pooley,

1986, p.62). Between 1919 and 1939 Liverpool's trade declined to 75 percent of the 1914 level, reflecting decline in its hinterland, especially in cotton manufacturing. Throughout this decade, unemployment was almost twice the national average.

Liverpool was severely affected by the Luftwaffe bombing of all major seaports. Nevertheless the second world war briefly revived the fortunes of Liverpool's port. This was short lived. In the following two decades a revolution in shipping, with the advent of bulk cargo and containers and a switch to mechanized handling, alongside recession, seriously reduced dock labour. Development Area status from May 1949 resulted in the creation of new industrial jobs on Merseyside, especially in the motor industry, which, during the 1960's, became symbolic of Merseyside's hoped for revival, and came close to justifying withdrawal of the area's special priority under regional policy. Employment decline however continued throughout the period in the central area, not only in the docks but also from the late 1970's in commercial, retail and wholesale activities (Lawton and Pooley, 1986).

The instability of post 1960s decline created a period of particular difficulties for Merseyside, many of which it may be argued remain. The obvious solution was to start up more local business and new enterprise; but, as Aughton (1990, p.207) notes,

> "a new business venture requires customers and people with money to spend .... Liverpool, with large areas of depressed and unattractive housing was unlikely to attract workers from the prosperous south of England".

As a result many residential areas became even more depressing and population decline continued.

Lawton and Pooley (1986) however suggest that economic regeneration was not

inhibited simply by a shortage of money. They recognise that the Merseyside Development Area as a whole received substantial funding and many new jobs since the war, but most went to new developments in greenfield sites to the neglect of the rest of the inner city. Only since the Inner Areas Act (1978) and the Urban Programme from 1979 has a new more coherent approach to the regeneration of industrial and urban premises developed (Wilson *et al*, 1977).

Nevertheless, the recession of the early 1980's and the increased criticisms of Liverpool from both media and government encouraged a growth of Militant politics in the city, culminating in the 1981 Toxteth riots. It is events such as these which have coloured the image of Liverpool, reminding us of the problems which affect the inner area, the deep seated economic and social problems which affect Merseyside as a whole. As Lawton and Pooley (1986. p.172) suggest,

> "the city and the region still have enormous potential. National strategies for economic revival must be linked to integrated regional policies on housing services and employment, which are capable of perceiving and fulfilling the needs of Merseyside as a whole rather than focusing on the most obvious and fashionable issues and area to the neglect of the rest of the region".

Throughout the 1980's and '90's Merseyside has been recognized by both central government and the European Union (EU) as a city in decline. In 1981 one of the first Urban Development Corporations (UDC), Merseyside Development Corporation (MDC) was established, along with London Docklands Development Corporation (LDDC), by parliament to regenerate 865 acres of the Mersey waterfront (since extended in November 1988 to 2,372 acres), and in 1993 the city was granted Objective One status for European funding.

Contextual background to a study of Liverpool

Before examining the precise economic structure of Merseyside, and more specifically Liverpool, it is necessary to set the context for this study and its influence on the development and functioning of a tourism industry.

Within the Liverpool economy labour issues have been an important consideration. The Merseyside region has a reputation for poor labour relations culminating in an image of an unreliable labour force with a tendency towards strike action. Some commentators suggest that this is however partly explained by the sectoral bias in the industries of Liverpool towards those renowned for militancy amongst workers; car manufacturing and docks. From the 1930s onward, Liverpool's principal manufacturing activity had been built up from the attraction of branches of national and multi-national firms.

Many of the explanations for difficulty lie in a crucial period during the late 1970s and early 1980s when a series of pressures pushed Liverpool into crisis. Parkinson (1985) lists amongst these the collapse of Liverpool's private economy as externally controlled corporations disinvested and restructured during international recession, accentuated by internal political struggle in the running of the economy and City of Liverpool (Parkinson, 1988).

As Parkinson exemplifies,

> "In the 1980s, 57 percent of manufacturing jobs were in plants employing over 1,000 workers. The national average is 29 percent .... In 1985, seven large firms controlled almost half of the manufacturing jobs in the city.... Many of these firms are externally controlled national or multinational; corporations: in 1975 the figure was 70 percent. By 1985 only one of the 20 largest firms was locally controlled" (1988, p.117).

These facts lead to the conclusion that Liverpool was losing the manufacturing

base which it had established since the 1930s. Because these national and international corporations had been attracted by local government action and central governments's regional policy, attracting branches of outside companies, often on industrial estates, they had few commitments to Liverpool. Hence the process of rationalisation and restructuring apparent during recession meant that these plants were somewhat more prone to job losses (Townsend, 1983).

Unemployment

Thus unemployment has again become a major problem in the city. During the 1970s the city's unemployment rate quadrupled from five percent to 20 percent (Parkinson, 1988, p.117). As Table 2.3 illustrates unemployment patterns in Liverpool and Merseyside have mirrored national trends. However the unemployment rates have at all time been considerably higher than national rates, often double.

Table 2.3: Liverpool, Merseyside and Great Britain Unemployment 1985-96, (thousands) (June)

Year	Liverpool City			Merseyside				Great Britain	
	Male	Female	Total	Male	Female	Total	% Rate	Total	% Rate
1985	40.7	15.1	55.8	100.0	38.4	138.4	20.8	3057.2	11.3
1986	41.6	15.0	56.5	101.0	38.3	139.3	20.6	3103.5	11.5
1987	38.7	13.6	52.3	92.1	34.0	126.0	20.0	2779.8	10.1
1988	33.8	12.1	45.9	78.3	29.3	107.6	17.4	2225.1	8.0
1989	29.5	9.3	38.8	67.0	21.8	88.7	14.3	1638.9	5.9
1990	26.4	7.9	34.3	60.1	18.7	78.7	13.4	1460.0	5.3
1991	29.7	8.2	37.9	70.2	19.5	89.7	15.8	2142.8	7.8
1992	31.2	8.2	39.4	75.2	20.1	95.3	16.7	2573.9	9.4
1993	30.5	8.1	38.6	74.6	19.9	94.5	16.7	2762.2	10.1
1994	27.9	7.9	35.8	68.0	19.9	87.8	15.6	2489.4	9.1
1995	25.7	7.0	32.7	61.6	17.1	78.7	14.3	2169.0	8.0
1996	24.4	6.7	31.1	58.6	16.4	75.0	14.1	2011.7	7.4

Source: Employment Gazette / Labour Market Trends 1985-96 Table 2.9

Examination of Liverpool unemployment (January 1996) at ward level recognises that the greatest number of claimant unemployed (January 1996) were in the wards of Granby (L8) and Kensington (L7) (1,550 claimants each) and Tuebrook (L13) (1,400). The smallest number of claimant unemployed lay in Woolton (L25), Grassendale (L19), Everton (L5) (all under 550 claimants). In all wards there has however been a significant reduction in numbers unemployed between January 1988 and 1996 (as illustrated in table 2.4). In Granby (L8) for example, the number of claimants has reduced by 1,000 in this time period. In the city as a whole the number of claimants has reduced from 50,200 to 32,100 in the 8 years, representing a 40.0 percentage change. Despite this appearing positive news for the case study area of Liverpool (post code districts L1, L2 and L3) which covers parts of the wards of Abercromby, Dingle and Granby, this is seen as a general regional phenomenon rather than a direct policy success.

As Table 2.4 illustrates, there is a 79:21 split between male:female claimants. However in some wards this ratio rises as high as 85.9% male claimants in Dingle (L8) and 27.7% female claimants in Aigburth (L17). Hence there is a clear pattern of male unemployment which needs to be addressed by any regeneration policies. Unemployment in these wards is often concentrated amongst the younger sectors of the workforce. In Kensington ward (L7) for example 52.0 percent of claimant unemployed are aged under 25, although a more realistic overall figure for the city would be about 30 percent; the lowest percentage of claimant aged under 25 is 25.9 percent in Clubmoor (L13). In almost a third of the wards of Liverpool, half the claimants have been unemployed for over a year and in 29 of 33 wards, over 40 percent of claimants have been claiming benefits for over a year. The lowest percentage claimants for over one year is 33.3% in Grassendale (L19). This suggests a static labour market in which many youngesters have little or no experience of work.

Table 2.4: Characteristics of Liverpool unemployment by ward January, 1996.

Ward	Total	Change	Percentage claimants			
		1988-96	Male	Female	Over 1 yr	Under 25
Abercromby	1150	-500	75.7	24.3	45.8	27.2
Aigburth	1100	-300	72.3	27.7	45.4	29.8
Allerton	600	-200	73.8	26.2	39.7	30.5
Anfield	1150	-600	79.7	20.3	45.6	34.8
Arundel	1300	-650	77.1	22.9	46.5	33.5
Breckfield	1150	-800	79.7	20.3	47.0	32.9
Broadgreen	1000	-350	80.1	19.9	46.5	29.6
Childwall	650	-300	74.9	25.1	35.2	30.1
Church	950	-350	74.6	25.4	45.6	33.0
Clubmoor	1100	-650	80.2	19.8	53.2	25.9
County	1000	-550	78.0	22.0	51.3	26.4
Croxteth	850	-300	73.5	26.5	42.6	27.6
Dingle	900	-600	85.9	14.1	50.0	37.7
Dovecot	1050	-900	81.3	18.7	51.6	28.9
Everton	550	-700	82.7	17.3	49.6	27.1
Fazakerly	850	-450	79.3	20.7	44.3	26.4
Gillmoss	1100	-650	80.0	20.0	49.1	28.9
Granby	1550	-1050	79.2	20.8	50.6	33.9
Grassendale	550	-150	73.1	27.9	33.3	33.9
Kensington	1550	-650	79.2	20.8	41.2	52.0
Melrose	1150	-683	80.1	19.9	47.6	31.3
Netherley	650	-500	81.2	18.8	50.7	34.2
Old Swan	950	-500	77.6	22.4	49.1	29.8
Picton	1100	-600	77.0	23.0	39.7	34.3
Pirrie	1000	-700	80.4	19.6	48.0	28.8
St. Mary's	950	-600	83.4	16.6	46.3	30.3
Smithdown	1050	-800	81.1	18.9	51.3	30.6
Speke	850	-650	82.9	17.0	54.6	34.8
Tuebrook	1400	-500	79.2	20.8	46.8	32.5
Valley	650	-550	78.1	21.9	43.6	30.4
Vauxhall	750	-550	84.7	15.3	51.0	31.9
Warbreck	1200	-600	78.8	21.2	41.0	30.4
Woolton	550	-200	72.8	27.2	43.3	26.8
TOTAL	32150	-18050	78.7	21.3	46.5	31.9

Source: NOMIS

This data illustrates the importance of the issue of unemployment in Liverpool. It is a problem which affects all sectors of the population, living in all geographic areas. The question however remains as to how the remaining job deficit be solved. Regional policy of 1980's was able to make only limited attempts to attract new investment to Liverpool which, despite some improvements in unemployment levels, has not made dramatic inroads into Liverpool's problem, and the issues are still apparent. This situation is further enhanced by Liverpool's geographic position which, due also to competition from Manchester, offers increasingly restrictive scope as an office centre. The poor reputation of the city perhaps also makes it difficult for the self-employed to flourish.

In conclusion therefore, these labour issues are important as they raise a number of questions in considering the motivations behind adopting a policy for tourism: was tourism included in a regeneration strategy for the city because, as an industry, it can be promoted by the public sector? was tourism thus a last resort because of the lack of private sector investment? does the nature of tourism-related (low investment, service-sector led) employment complement the decline in the manufacturing sector?

Politics.

In addition to labour questions it is necessary to link tourism proposals to the political situation in the city. This was a particularly important issue during the 1970s. In this decade no political party had an overall majority, there were constant hung councils, minority and coalition administrations and political confusion. "The council was unable to develop a coherent strategy for the city" (Parkinson, 1988, p.112). During this period the city had acquired very high levels of long-term capital debt which had been used to finance revenue expenditure. When the Conservatives took control of the national economy in 1979 and introduced the block grant system and further rate-capping

legislation, Liverpool argued adverse treatment. Not only was there an argument that the grant system lacked sufficient indicators of economic deprivation (Bramley, 1984), but that, given the scale of the city's population loss from 850,000 to 490,000 in 30 years and still continuing at 7,000 a year, it was virtually impossible to cut its expenditure as quickly as the grant system required (Parkinson, 1988). Thus by 1981 Militant Labour had persuaded the party that when it obtained power it should threaten to bankrupt the city. A Labour administration would set a 'deficit' budget and refuse either to increase taxes or to cut its expenditure to compensate for grant cuts, in an effort to blackmail Conservative Government into giving Liverpool more money. In addition to the direct effects, media coverage of this situation combined with the general image of strikes must have deterred investment and tourist visitors to the city.

It is interesting, in light of this political situation that Liverpool has experienced every central government inner city initiative since the original Urban Programme in the late 1960s to enterprise zones, Urban Development Corporations and Task Forces in the 1980s. Those initiatives of most relevance to Liverpool's tourism strategy will be discussed in Section 2.4.

The information presented thus far recognises that for any central government initiative to succeed it needs to offer more than just the regeneration of declining areas of the city. The revitalisation process needs to address the political, economic and social status of the city. Parkinson (1988) talks of a need for "structural economic and social modernisation" (p.126) which cannot be achieved in a short time span. As the following discussion in Section 2.4 will exemplify, as yet only Merseyside Development Corporation has any chance of offering this but it has a narrow geographical and policy remit.

Competition between cities

To add substance to this debate one should suggest how competition from other cities experiencing similar problems may influence a strategy for Liverpool. One issue is that deeper national and international recessions have impacted to varying extents on all areas of the UK, thus the processes of disinvestment and restructuring experienced in Merseyside in the 1970s and 1980s have been repeated to some extent in other cities. Regional policy continues to involve competition across the United Kingdom and European Union. The nature of urban assistance has also changed, to policies which are more literally based upon competition between cities (e.g. City Challenge, see Section 2.4.5). Additionally the nature of assistance has moved towards the concept of partnership, thus the city is forced into requiring private sector backing and leverage for regeneration or redevelopment schemes to go ahead. For all these reasons Liverpool has to compete harder for outside investment.

Harding *et al* (1994) recognise that Liverpool's situation is not unique. They see that the processes of "economic transformation" (p.3) affecting Europe's cities during the past decade are associated with changes in the global economy such as the "progressive shift towards an information or post-indutrial economy which is increasingly organised on a global rather than national basis" (p.3) and that this economic change is triggered by two interelated processes of economic globalisation and technological innovation. Because of this global competition, places are now searching for new ways of ensuring corporate profitability. One sector particularly influenced by these changes is manufacturing; European cities are now unable to compete with newly industrialised areas of the globe on the basis of labour costs and financial incentives (Harding *et al* 1994, p.4). Parkinson and Harding (1995) thus acknowledge a turn towards the service sector represented by a growth in financial and business services and, on a smaller scale, consumers and personal services "reflecting the rise in real incomes and leisure time of those

in work" (p.57).

As Loftman *et al* (1994) recognise, "placing the city firmly on the international map has become synonymous with economic survival and growth - a vital means of attracting private international jobs and tourists" (p.1). Hence, despite helping the economy at a number of scales (attracting investment from the public sector in its promotional role and from the private sector by attracting inward investment) a tourist industry needs to be analysed in relation to the market as a whole. As with any other commodity, markets are limited and can reach a saturation point. With more cities desperate to regenerate declining economies, there are more examples of urban tourism all offering similar products, for instance in the case of the north of England, Wigan, Bradford, Leeds etc. In this the geographical location of Liverpool becomes more significant. As already discussed, Liverpool grew only as an important trading port, but is for most other purposes peripheral within the UK. Also Liverpool has a coastal location, thus '*losing*' a substantial portion of its day visitor market, visitors being able to travel only from the north east and south east and east of the city.

One also needs to recognise the proximity to other major centres. For example Manchester and Liverpool compete directly against one another both for industry and tourism. Both cities experienced economic decline in the 1970s and 1980s and looked at tourism from the same angle; as a potential tool for regeneration. However, in a number of ways both cities have developed similar products. Manchester had 16 major city centre hotels in 1995, nine theatres and numerous quality restaurants and night clubs. In addition there are a number of major attractions such as Granada Studio Tours and the Castlefields area of the city. Tourists to the North West of England are made to decide which of the ex-industrial cities to visit; Liverpool, Manchester or Wigan? Manchester has the largest choice of hotels, shops, attractions and a

conference centre and is has the best transport infrastructure - an airport, rail and motorway links. It is also arguably en route for anyone passing down the west coast of England.

Thus competition is a major force in determining economic success. As Harding (1994) notes,

> ".... this scenario suggests that cities will compete vigorously with one another for investment and trade. Sophisticated urban development strategies are likely to become more important in determining winners in this competition, not least because the location factors which once tied economic activities firmly to particular areas are breaking down in the face of innovations in electronic and physical communication systems" (p. 196).

Many of the issues highlighted in this section are crucial to the themes of this research project and will be revisited at later stages. The questions raised here help interpret why tourism has been hailed as an important industry for Liverpool, and are some of those to be raised in the conclusions to this study (Chapter 7).

The changing economic structure of the wider Merseyside area

The nature of Liverpool's economy must first be placed in the context of the wider Merseyside area, which we may reasonably take as the county of the same name, containing the five boroughs of Sefton, Liverpool, Knowsley, St Helens and Wirral. Prior to this study, the only fields of recent growth in the Merseyside economy were SIC divisions 8 (banking, finance, insurance, leasing etc) and 9 (other services). Together they added in excess of 19,000 jobs to the Merseyside economy during the period 1981-91. However, in total, the picture is more gloomy; the sub-region experienced a 13.8 percent loss in employees in employment during this period, totalling almost 76,400 jobs. The greatest

decline in number was in manufacturing industries (divisions 2-4).

This decline in manufacturing and growth in service industries has been well documented (for example, Champion and Townsend, 1990) and is thus not surprising. Indeed, Stoney (1987), whilst writing about trends in service sector employment in Merseyside, has noted that "unlike the case of manufacturing, the story is not one of universal falls in employment levels" (p.27). He continued with the recognition that over the period 1981-87 as a whole falls in service sector employment over the period occurred only in energy and water supply and transport and communication; it is these two sectors which employed the lowest two proportions of workers in any of the service sectors.

Concern is focused on the unique rate of decline. During the period 1981-91 employment loss (both actual and percentage loss) has been greater in Merseyside than in any other ex-metropolitan county of Northern England (Table 2.5), and therefore than any other county of England and Wales.

Table 2.5: Change in employment - ex-metropolitan counties of Northern England 1981-91

COUNTY	Employment change (Number)	% Employment change
West Yorkshire	+ 41,700	+ 5.2
Greater Manchester	- 3,600	- 0.3
Tyne and Wear	- 17,700	- 4.0
South Yorkshire	- 46,600	- 9.3
Merseyside	- 67,600	- 12.2

Source: NOMIS

Within the five boroughs of Merseyside there has been a negative total employment change, 1981-91, in all but two, Sefton (+10.5%) and Wirral (+0.6) (Table 2.6).

Table 2.6: Employment change in the five boroughs of Merseyside 1981-91

	CHANGE (thousands)			% CHANGE		
	Manufacture 2-4	Service 6-8	Total	Manufacture 2-4	Service 6-8	Total
Knowsley	-12.4	- 0.4	-13.5	-35.9	+ 2.0	-21.5
Liverpool	-30.3	-24.9	-59.0	-54.9	-13.3	-23.3
St Helens	- 8.9	+ 1.2	-12.5	-37.8	+ 3.8	-19.3
Sefton	- 5.3	+15.1	+ 8.2	-33.5	+27.7	+10.5
Wirral	- 5.2	+ 1.1	+ 0.6	-20.2	+15.4	+ 0.6

Source: NOMIS

Sefton is a relatively affluent area, which includes within its boundary the tourist town of Southport. However, the Borough also includes areas of deprivation such as Bootle. Two contrasting pictures of manufacturing and service employment are apparent. The loss of manufacturing jobs (-33.5 percent) has probably been the result of decline in employment since the reorganization and technical revolution in the port, and the growth in service sector employment - the result of the success of establishments such as Girobank and Vernons Pools.

Similarly there was a positive percentage employment change in the borough of Wirral (+0.6 percent, 1981-91). The borough advertises itself as "the leisure peninsula", proud of its sports and athletics facilities, theatres, galleries, museums and places of historic interest. As expected, the employment profile

for this borough shows a decline in manufacturing and increase in service related industries; this difference is far less drastic than that of Sefton (-20.2 and +15.4 percent respectively). However, fortunes for Wirral may soon change. Merseyside Development Corporation (MDC) in 1988 extended its boundaries to include the Wirral waterfront. This has resulted in, as an extension of the work done in Liverpool, the regeneration of Birkenhead's waterfront, including improvements to the Mersey ferry service and some new building. One notable example of new development is the Inland Revenue's purpose built 37,000 sq.ft. office at Birkenhead which is home to 320 Inland Revenue jobs; prior to opening, it was estimated that 280 posts would be filled locally.

The loss of jobs from the Merseyside economy (1981-91) has been greatest in the remaining boroughs of Knowsley (-21.5 percent), Liverpool (-23.3 percent) and St Helens (-19.3 percent). Apart from Liverpool (which will be discussed in more detail later) Knowsley has been worst hit, represented by a small growth in service industries and a decline in manufacturing (+2.0 percent and -35.9 percent respectively). There have been numerous attempts to halt this decline, for example, the establishment of Whiston Enterprise Park and most recently, the location of News International plc in the area with its £200 million printing facility. However, many of the industries which in the past have been large employers in the area are those which have been worst hit by the national recession; Ford, GPT Plessey and Lucas Aerospace are prime examples.

Liverpool - Economic structure (1981-91)

This section will concentrate firstly on the structure of all employment in Liverpool, followed by a section addressing the particular role of tourism in the borough. The case study area of Liverpool post code districts L1, L2 and L3 will then be evaluated in terms of both their total employment structure and specific tourism-related employment.

The sources referred to in this section will primarily be employment data obtained from NOMIS (National Online Manpower Information System), supported by information from the "Liverpool Business Directory, 1993". The Directory, published by Liverpool City Council, contains information obtained from questionnaire surveys of the main private sector businesses in Liverpool. It excludes small building firms, shops, restaurants, pubs, other personal service outlets and most public sector workplaces such as schools and hospitals. There are 3,300 workplaces listed, giving name, address, fax and telephone numbers, description of activity and employment sizebands. Although the Directory does not provide a comprehensive illustration of employment in the city, it allows major employers in each SIC category to be identified by name and for the distribution of establishments by size bands to be assessed.

As already considered, Liverpool lost more jobs than any other borough of Merseyside during 1981-91: 59,000 jobs were lost, representing a 23.3 percent decline. Unlike in the other boroughs the loss of manufacturing jobs is almost matched by the loss of employment in the service sector (Table 2.6). Increases in employment occurred only in SIC 8 (banking, finance, insurance, leasing etc.) and 9 (other services). In 1984 employment in SIC 8 represented 11.1 percent of total employment in Liverpool, by 1991 this figure had increased to 14.3 percent. A similar trend applies to SIC 9 (an increase from 35.2 to 39.8 percent, 1984-91).

Manufacturing is thus becoming less and services more important. This is mirrored by a change in the nature of the workforce. Table 2.7 illustrates how, in 1984, employment in the area was split almost equally into male and female, with a larger percentage of male employees being in full-time employment than females. By 1991 the percentage of female employees had increased to 52.3 percent, the number of males decreased to 47.7 percent of the total employees.

The number of full-time males has decreased considerably, the number of part-time males, marginally. Female employment has increased, mainly in the full-time sector, but also in part-time workers, relevant to this consideration of tourism. When compared with similar figures for service and manufacturing industries the reason for this change becomes clear; manufacturing industry is dominated by full-time male workers (65.6 percent) and services by female workers, with many being in part-time employment.

Table 2.7: Percentage of male and female, full-time and part-time employees in Liverpool (1984 & 1991) and in service and manufacturing industries (1991)

	Male %	Male %	Male %	Fem. %	Fem. %	Fem. %
	Total	Full-Time	Part-Time	Total	Full-Time	Part-Time
Liverpool 1984*	50.8	47.9	2.9	49.3	27.7	21.5
Liverpool 1991	47.7	43.8	3.9	52.3	30.3	22.0
Services 1991 (SIC 2-4)	43.0	38.6	4.4	57.0	32.6	24.4
Manufacturing 1991 (SIC 6-9)	65.6	63.7	1.8	34.5	22.3	12.2

* 1984 is taken to facilitate comparison with more local data, later tables, available only from that year.

Source: NOMIS

Other sectors particularly important to Liverpool's economy are again service industries; SIC 6 (distribution, hotels/catering, repairs etc.) and 7 (transport and communications), employing 39.0 and 17.8 thousand people respectively (1991, Table 2.8). SIC 4 was also important to the city in 1984, but, between 1984 and 1991, there was a 52.6 percent decline in employment in this sector.

Table 2.8: Employment in Liverpool 1984 & 1991

	1984		1991	
SIC	Total (No)	Total (%)	Total (No)	Total (%)
1	1 700	0.8	800	0.4
2	4 300	1.9	3 000	1.5
3	12 400	5.6	9 600	4.9
4	23 400	10.4	12 300	6.3
5	8 000	3.6	6 800	3.5
6	44 500	20.3	39 000	20.1
7	23 600	10.7	17 800	9.2
8	24 400	11.1	27 900	14.3
9	77 400	35.2	77 400	39.8
TOTAL	219 600	100.0	194 700	100.0

Some totals may not sum due to rounding error.

Source: NOMIS

SIC:
1 Energy / water supply industries
2 Extraction / manufacture: minerals / metals
3 Metal goods / vehicle industries, etc.
4 Other manufacturing industries
5 Construction
6 Distribution, hotels / catering; repairs
7 Transport / communications
8 Banking, finance, insurance, leasing etc
9 Other services

Within this pattern specific tourism-related industries (Table 2.9) account for 9.5 percent of all employment (1991). Indeed, in the period 1984-91 the number of jobs in this sector increased by over 2000. Absolute figures for this sector show some decline in the number of people employed, but, when expressed as a percentage of total employment in the city, there is a steady increase (Table 2.9)

Table 2.9: Tourism-related employment - Liverpool 1984 - 1991

YEAR	Number	% Total Liverpool
1984	16 400	7.5
1987	15 700	7.8
1989	16 800	8.3
1991	18 400	9.5

Source: NOMIS

Of tourism-related jobs in Liverpool 44.0 percent are in SIC 979 (sport/other recreational services), this being by far the largest tourism-related SIC. Below this, other important sectors are SIC's 661 and 662 (restaurants, snack bars, cafes etc and public house/bars) which together contribute a further 6,000 (33.2 percent) tourism-related jobs, comparatively small employers being SIC 977 (libraries, museums, art galleries, etc) and SIC's 665 and 667 (hotels and other tourist accommodation)(Table 2.10).

Table 2.10: Tourism-related employment - Liverpool 1991

661	Restaurants, snack bars, cafes, etc.	2 200
662	Public houses / bars	3 900
663	Night clubs / licensed clubs	1 800
665	Hotel trade	1 400
667	Other tourist / short stay accommodation	0
977	Libraries, museums, art galleries, etc.	900
979	Sport / other recreational services	8 000
TOTAL		18 400

Source: NOMIS

Within the post code districts (L1, L2 and L3) service industries dominate (SIC 6-9) employing 91.3 percent of the employee workforce in this area. This situation is increasing as in 1984 service industries constituted just 87.4 percent of all jobs. As a result of an overall decline in employment (1984-91) these service industries are becoming increasingly important employers, hence, percentage employment in this sector has increased. The only numerical increase in employees (from 1984-1991) occurs in SIC 8 (banking, finance, insurance, leasing etc.). Elsewhere the numbers of employees in each SIC have consistently reduced, producing an overall decline from 74,100 to 68,400 (Appendix 4).

As context for the study of tourism, this section will now consider the nature of each employment sector, both in the total area of L1, L2 and L3, and in each individual post code district, recognizing specific areas of employment and the size of these employers. This will be followed by a similar evaluation of tourism-related employment in the case study area.

SIC 1-5 Industrial work in the inner city

In the extraction and manufacture of minerals and metals (SIC 2) there are only 200 people employed in L1, L2 and L3, four out of five being full-time male workers. Since 1984, decline has been considerable, indeed, by 1991 L2 had no employees working in this sector, and L1 had lost over 200 jobs. The 'Business Directory' suggests that most employment in this sector is in small firms (size bands A-C, 1-14 employees).

A similar picture can be recognised in other manufacturing industry. In L1, L2 and L3 employment in SIC 3 (manufacture of metal goods, engineering and vehicle industries) contributes 2.5 percent of all employment in the case study area, compared to 4.9 percent of all employment in Liverpool. Most of this employment is in L3, where the 'Business Directory' lists 61.8 percent of all

related establishments. This may be linked to the proponderance of engineering industry; the 'Business Directory' lists the largest of these employers as J.F. Foorde Ltd, a firm of electrical engineers (size band I, 200-499 employees).

The other manufacturing industries (SIC 4) have also shown decline in L1, L2 and L3. In 1984 this sector contributed 6.6 percent of all employment in this area; by 1991 this had declined to just 4.1 percent. Employment in all manufacturing industry is predominantly male and full-time (56.5 percent male full-time) with only 31.1 percent being female full-time. Evidence suggests that most industry in this sector is located in L3 (the peripheral urban area and eastern docks), closely followed by L1 (dockside sites to the west of the urban core and urban area). Almost 75 percent of it is in small firms (size bands A-C, <15 employees). However, as with SIC 3, there are some large employers. In L1, Gold Crown Foods (importers, blenders and distributers of tea and coffee) employ 200-499 employees (band I), in L3, there are two employers in size band H (100-199 employees) including; C. Williams & Co. (stamp manufacturers), and W. Karp & Son (clothing manufacturers).

It is thus apparent that manufacturing remains in Liverpool, although its position is much reduced, it now constitutes a low proportion of total employment in the city. There is little industry to reflect the old port function of the city, the possible exception being Gold Crown Food.

SIC 6: Distribution, hotels/catering, repairs

This employment sector is important to the theme of the thesis, thus many of the individual sectors included within SIC 6 will be considered in greater detail in Chapters Three and Four. Here the nature of all employment in SIC 6 will be addressed.

Employment in this sector is particularly interesting; in L1, L2 and L3 total

employment (SIC 6) has experienced a decline (1984-91), both as a percentage of total employment, and numerically. However, in L2 and L3 the percentage of employment in this sector 1984-91 rose, despite a numerical decline in L2. When this pattern is considered over the period 1984-91 it can be noted that this sector recovered after a sharp decline during 1987 and 1989, possibly due to decline after the garden festival of 1984. This position is most obvious in L2; employment in 1984 stood at 2,700; in 1987 it fell to 2,200, reaching a low point of 1,600 in 1989. By 1991, employment was creeping towards its 1984 level at 2,300, possibly due to a revival of interest in the industry brought about by the 1991 Tall Ships Race event.

In contrast to manufacturing industries, total employment in SIC 6 has a female bias (58.6 percent); however the number of full-time jobs is split in a ratio of 54:46 (male:female), hence, male full-time is predominant. Liverpool's 'Business Directory' does not provide a comprehensive list of establishments in this sector, but of those listed, the largest employer is the Britannia Adelphi Hotel, employing 200-499 people (size band I). Other large employers in this sector (size band H, 100-199 employees) are also located in L3 and include the Feathers Hotel Group (hotels and outside catering), Princes Foods Ltd. (food distributors) and Palmer and Wall Ltd. (surviving cotton traders).

SIC 7: Transport and communications

NOMIS data for these predominantly riverside post code districts L1, L2 and L3 illustrates a steady decline in transport and communications industries 1984-91, from 14,100 employees in 1984 to 10,500 in 1991. The relative importance of this sector within the economy of the three post code districts has also shown a steady decline; in 1984 it constituted 19.0 percent of all employment, by 1991, 15.3 percent.

Transport and communication industries dominate in L3, with over half of

those listed in the 'Business Directory' in this area, and the smallest number being in L1, where most are small (size bands A-D, <20 employees). Included within the largest employers (size bands I and J with 200+ employees) are; British Rail, Merseytravel, Royal Mail (Parcelforce) and Mersey Docks and Harbour Board.

SIC 8: Banking, finance, insurance, leasing and business services

Employment in this important service sector is growing, not only in Liverpool, but also in the specific post code sectors of L1, L2 and L3. Indeed this employment is more important to the economy of the case study area than it is to the economy of Liverpool as a whole; in 1991, SIC 8 represented 23.9 percent of all employment in L1-L3, compared to 14.3 percent of all employment in Liverpool. This is due to the financial core of the city being located in this area, particularly in L2, where this sector accounts for 52.3 percent of all employment. Indeed the 'Business Directory' lists nine employers in size band H (100-199 employees) in L2 alone; included within these are familiar names such as General Accident, Royal Bank of Scotland and Commercial Union Assurance.

The pattern of growth in service sector industries however, does not hold strong for the post code districts L1 and L3 where employment 1984-91 has remained almost static. Nevertheless, trends over the period 1984-91 show considerable fluctuations. Employment in this sector has a female bias (53.2 percent of all jobs), with a comparatively large number of all jobs being part-time (12.1 percent), particularly those held by females (9.0 percent).

SIC 9: Other services

As with SIC sector 8, employment in other services (including education, city and government offices, health, social services etc.) has only fluctuated slightly around a base of 18,000. Decline during 1987 and 1989 has halted and been

replaced by a growth to equal the 1984 level in 1991. SIC 9 industries thus constitute 27.1 percent of total employment in L1, L2 and L3. The post code district with the largest number of employees in other service industries is L3; this is also the only district which has experienced an overall growth 1984-91. In L1 and L2 a steep decline has been followed by growth to 1991. However, the 'Business Directory' reports two establishments in size band I (200-499 employees) one in each of L1 and L3; Hall Cleaning Services (contract cleaners) are located in L1 and Caretakers Group Ltd. (cleaning and maintenance services) in L3. These two examples illustrate a particular problem in using the 'Business Directory' to identify major employers. Many employers listed claim to employ large numbers of people, but as many are contracted out, they do not work on that site. Nevertheless, SIC 9 is an important employment sector in the case study area, particularly in L3 where it constitutes 31.8 percent of all employment.

Table 2.11: Employment in Liverpool post code districts L1, L2 and L3 (1991)

	L1		L2		L3		L1 - 3	
Division	No	%	No	%	No	%	No	%
1	0	0.3	3	0.0	-	-	100	0.1
2	0	-	-	-	200	0.6	200	0.3
3	500	2.8	200	1.1	1000	3.1	1700	2.5
4	1000	5.5	300	1.7	1500	4.8	2800	4.1
5	500	2.8	100	6.5	600	1.8	1200	1.7
6	7600	40.2	2300	11.9	7200	22.0	17100	25.0
7	1300	7.0	2400	12.6	6800	22.0	10500	15.3
8	2600	14.0	9900	52.3	3800	12.4	16400	24.0
9	5200	27.5	3500	18.6	9800	31.8	18500	27.1
Total	19000		18600		30700		68400	

Source: NOMIS

Summary

Historically, Liverpool's employment was focused on the docks, being predominantly male, full-time and manual. The 1960's were a period of expansion; with business moving away from dockside sites. The city has since retained a position as a regional centre for service sector industry, although competition with Manchester remains. The city however, is suffering from redundancies, liquidations and the consequent problems of attracting new industry; this has been further enhanced by technical revolution in the port. Liverpool's economic situation is still dire, with a -23.3 percent change in employment in the decade 1981-91. Industrial sectors most important to the economy of Liverpool are in services (SIC's 6,7,8, and 9) with manufacturing industry becoming less important; this situation has resulted in male full-time employment in manufacturing being replaced by female, and more part-time, employment.

Tourism-related employment is becoming increasingly important to the economy of Liverpool as it now employs more people than any of the manufacturing SIC's. Almost one third of tourism-related employment in Liverpool is located within the case study area of post code districts L1, L2 and L3; L3 having most. Within this restaurants, snack bars, cafes (SIC 661) and hotel trade (SIC 665) dominate, contributing almost half of all tourism-related employment in the Liverpool post code districts.

One possible mechanism to overcome decline, first suggested in the late 1950s (Pugh, 1958) was that of tourism. Since this date various policies for tourism have been initiated. Before discussing precise tourism policy, it is necessary to consider the mechanism available for regeneration through tourism. After this policy for and the precise nature of tourism in Liverpool will be discussed.

2.4: Mechanisms for tourism and regeneration

Liverpool does not have one body which is solely responsible for tourism development in all the city. Work is primarily done by Merseyside Tourism and Convention Bureau (MTCB), (formerly Merseyside Tourism Board) and Merseyside Development Corporation (MDC), but other key players include the Albert Dock Company, Government Office Merseyside (preceded by the Task Force) and Liverpool City Planning Office.

2.4.1: Merseyside Tourism and Convention Bureau (MTCB)

The origins of tourism organisation in Liverpool lie in Merseyside County Council's Tourism Department which ran from January 1974 to March 1986. Staff numbers here began at two, rising to 24 in 1984 (during the Garden Festival). Merseyside Tourism Board (MTB) was formed in April 1986 and ran until March 1993; here the staff number varied from 19 to 22. When MTB ceased trading due to changes in public sector funding, its work was continued by Merseyside Tourism and Convention Bureau (MTCB) from April 1993. In 1993 the office employed 14 staff, six of which are part-time.

The MTCB is a non profit making limited company, funded by the public and private sectors with its work guided by a Steering Committee drawn from its key funders, which represent local government officials and key players in the city's tourist industry such as accommodation, attraction and gallery owners (Appendix 5).

The activities of the bureau are funded by an annual grant from MDC (forming 27 percent of the overall budget), contributions by all Merseyside District Councils (17 percent), a commercial, corporate and associate membership scheme and the Bureau's own commercial activities (56 percent). The total budget for 1993/94 was approximately £360,000. MTCB is engaged in the two principal areas of work, marketing and promotion, and visitor services. It must

be remembered that the area of responsibility for MTCB covers all of Merseyside; therefore it includes Southport, the Wirral and St Helens. However, most publicity campaigns are focussed around Liverpool.

2.4.2: Merseyside Development Corporation (MDC)

MDC was established in 1981 as one of the country's first generation UDCs, charged by Parliament with the task of regenerating large defined tracts of Merseyside's waterfront. It is "an urban renewal agency guided by Government policy but responsive to local needs and is now widely regarded as a major driving force in the regeneration of central Merseyside" (MDC, 1990, page 6). At its inception MDC's designated area covered just 865 acres of waterfront in Liverpool. In November 1988 this was almost trebled to 2,372 acres including for the first time land on either side of the Mersey. The life expectancy of MDC is until March 1998, when Liverpool City Council will resume control of its lands, hence MDC's Area Strategies will be incorporated in the city's Unitary Development Plans.

Barnekov, Boyle and Rich (1989) describe the role of MDC:

> "The development strategy, determined and largely funded by the public sector through the Merseyside Development Corporation was to create a new and very different local economy. In place of Liverpool's historic achievements in shipbuilding, manufacturing and cargo handling, the future of the city, as defined by the Development Corporation, would lie in tourism, the leisure industry, and the service sector" (p.193).

Although MDC has experienced none of the major catastrophes of London Docklands Development Coporation (Canary Wharf, Olympia), it appears to have resorted to leisure and tourism as second alternative. In 1981 it intended to adopt a mixed landuse plan of industrial, commercial, residential and leisure developments; over half of its area was designated for industry. However,

demand for industrial uses proved weaker than anticipated, demand in the leisure area stronger.

A former MDC board member, Patrick Minford of Liverpool University, comentated widely on this shift in policy. The Observer (1988) quotes him as recognising the strategy to be "too dependent on a tourism and leisure strategy, of piecemeal utilisation of available sites, and of failing to promote manufacturing investment" (Bates, 1988, p.7). Indeed this argument developed. By 1989 Patrick Minford had called for the abolition of MDC when he saw the Development Corporation veto plans for a £250 million power station in Birkenhead in favour of mixed housing and light industrial use "a repetition of countless schemes in the region" (Curry, 1989, p.10). This in any case was sure recognition of the need for a wider strategy than leisure and tourism alone.

In 1981 Michael Heseltine gave listed building consent for the redevelopment of the Albert Dock, a development to include the Tate Gallery and Maritime Museum. In so doing he noted that this scheme built on the cultural tradition and civic pride of the city (The Times 6 May, 1981).With this in mind, the new redevelopment agency had little choice but to include tourism as part of its policy. Also it may be argued that basing the regeneration on the dock area would focus the tourists on the improvements nearer to the city centre and it was similarly recognised that at times of high unemployment sports and leisure facilities were particularly important.

Nevertheless the tourism potential of the area was demonstrated by three major initiatives, Albert Dock renovation (phase I opened in 1984), the International Garden Festival (1984), and the Tall Ships Race (1984). In this way Merseyside Development Corporation has provided an impetus to the development of tourism in Liverpool. The successful Garden Festival gave firm evidence that "the right product at the right price" could encourage people to travel some

distance to Liverpool.

The redevelopment of the Liverpool Riverside segment into a garden festival site was initially intended to regain firstly the redevelopment costs through tourism, and then retain many of the features of the site such as the festival hall, arena and Esplanade, but also include a site suitable for new technology and industries, housing and leisure developments. The housing initiative has been completed to a limited extent, but the Herculaneum Dock, intended for a business park and commercial development (MDC Development Strategy, 1990), remains undeveloped in 1997, with no technology industries located in this area.

The Liverpool South Docks segment of the designated area tells a similar story of unfulfilled dreams. This area covers the Albert Dock to Brunswick Business Park section of the riverside. The MDC Development Strategy (1989) illustrates that the Albert and Kings Dock areas were always intended to have a major leisure component including hotels, pubs, restaurants, shops, etc. Indeed there have been a number of proposals for the development of Kings and Queens Docks. The most publicised was a £45 million project to include an ice arena, multiscreen cinema and a covered shopping mall to be built in 1987 (Hope, 1986). After this in the late 1980s there was a proposal for a golf driving range and sports arena (interview with a business manager at the Albert Dock, February, 1993); by the early 1990s this was being promoted as the site for a National Museum of Sport (Colin York, Tourism Officer, February, 1993). At present however, the leisure facilities are restricted to the Albert Dock. Kings and Queens Docks remain undeveloped in 1997. Nevertheless, Coburg and Brunswick Docks have fulfilled the aim of attracting small and medium sized industries requiring warehouse accommodation and some housing (see Chapter 7 for a summary of locational factors for such industry).

What has become apparent from these discussions is that tourism has been a focus of MDC regeneration of the city side of the Mersey. As part of this there have been a couple of worthy attempts to create major flagship projects (e.g. the Albert Dock and garden festival). However, in the event, these remain symbols of MDC asserting its position as, since these initiatives, there has been little evidence of any successful new tourism initiatives. None of the proposals has progressed further than the drawing board, nor have the sites been occupied by other industries. Thus there may be an over emphasis on the importance of the few successful tourism initiatives, forgetting there have been few other achievements worthy of marketing. Alternatively this may be a result of Patrick Minford's claims about an over emphasis on leisure and tourism.

To summarise, tourism and leisure have thus always been a part of MDC's mission, illustrated by one of its first initiatives being the International Garden Festival in 1984. The £44 million restoration of Albert Dock was also partly funded by MDC and acts as a symbol of its success. It may further be suggested that the marketed success of such schemes by the Development Corporation has provided the focus for further tourist developments *elsewhere* in the city, for example the development of St Georges Hall and refurbishment of the Town Hall. The Development Corporation appears to have been successful in adopting tourism and leisure as *part* of a strategy for its designated areas. Indeed a similar approach to regeneration has been adopted at Birkenhead. However, because MDC lands only cover part of the City of Liverpool, there is a tendency, in deciding the strategy for the area, to focus on the problems of that area and to disregard the regeneration outside it (Audit Commission, 1989, p.26).

Although academic literature (Parkinson, 1988; Meegan, 1993) has generally been critical of the workings of the corporation, Stoker (1989) recognises the strong co-ordination of policy objectives:

"On the whole, the impression is of an organisation that has become well integrated into the Merseyside scene, working alongside and sharing the same approach as local authority officials and regional civil servants, and mindful of the interests and concerns of local business. This cosy, consensual approach stands in contrast to the LDDC (London Docklands Development Corporation)" (p.162).

It is difficult to analyze MDC success and failure without comparing it with LDDC; both these two first generation Development Corporations were initiated in 1981. A major criticism of MDC has been its inability to attract more than £20 million of private sector finance up to 1988 (Stoker, 1989, pp.161-62). Meegan (1993) suggests that this could result from 80 percent of the land initially designated for the MDC being derelict and unused; a reason used by MDC to fend off this relatively unfavourable balance at the end of the first six years of operation. Other suggestions include the depressed state of the local economy and local politics (Section 2.3).

Thus, although some literature is justifiably critical of the economic success of MDC, physical regeneration has certainly occurred. Its major projects have transformed the physical appearance of the docklands, and it is anticipated that the major investment of public money since 1981 has eliminated risk for the private sector and may encourage future investment (Parkinson, 1988, p.114-15). Much of this thesis is concerned with the scale of tourist activity, spending and employment which may have resulted.

2.4.3: The Albert Dock Company

The Albert Dock Company, located in the Albert Dock, was established at the outset of the redevelopment of the dock. Its role is not specifically related to tourism, but is one of maintenance - it is to care for all the developed areas within the four walls of the Albert Dock complex hence, it does not include the

upper floors of Edward and Britannia Pavilions until they have been redeveloped. Also excluded are the car parks, quayside and any water. Until developed, they are the concern of MDC. Similarly Merseyside Maritime Museum and the Tate Gallery are not included because they are Crown property with a direct lease from MDC. This leaves control of the shops and flats within the dock, along with the *Animations World* vacant site and *Beatles Story*; two other visitor attractions here. The Albert Dock Company provided the private sector finance for the restoration of the dock. It is a wholly owned subsidiary of the Arrowcroft Group based in London. The role of The Albert Dock Company does not involve the marketing of tourist attractions, but it does concern the management of attractions and the granting of leases.

2.4.4: Merseyside Task Force (MTF) (now part of Government Office Merseyside)

> "Inner City Task Forces are small teams which operate on a time limited basis in some of the most deprived urban areas. They concentrate on the economic regeneration of designated inner city areas, by improving local people's employment prospects, stimulating enterprise development and strengthening the capacity of communities to meet local needs" (Action for Cities, 1993, p.5/6).

Merseyside's Task Force (MTF) was established in 1981 by Michael Heseltine in the wake of the Toxteth Riots. It was an office of the Department of the Environment, independent in that it reported directly to London. The Task Force was involved in the whole spectrum of urban regeneration, of which tourism was inevitably included; other schemes include housing, Urban Programme, MDC, City Challenge, City Action Trusts and Derelict land. It was staffed to Director level (Civil Service level 3) and had a staff of 55.

MTF (1993) had a budget of around £200 million per year half of which was spent on housing. Additional spend was allocated to MDC (£30 mill.), City

Challenge (£20+ mill.) and derelict land improvements (£8 mill.) The area of responsibility for the Task Force was wider than any other group in Liverpool, covering the five districts of Merseyside (Sefton, Liverpool, St Helens, Wirral and Knowsley) with limited responsibility in Halton (Urban Programme) and Ellesmere Port and Neston (Derelict Land Grant and housing).

The Task Force was therefore involved in all policies for regeneration from central government; its role was perceived by Ian Urquart (interview, July 5, 1993) to be "as policies change, to put old ones to rest and adopt new ones". Although there is no mission statement for the Task Force, Ian Urquart describes its role, as to "deliver growth from urban regeneration policies in the area" (Interview, July 5, 1993).

Tourism was therefore not primary in the role of the Task Force, which had little direct responsibility for the development of and marketing of new attractions (much of this was done through related bodies eg. MDC, City Challenge). However the Task Force saw the need to link together the good attractions available in Merseyside; at present many appear isolated and do not cohere. The role of this office is now changing; with the designation of Merseyside as Objective One for European assistance, this office is working primarily in the allocation of this funding.

2.4.5: City Challenge

City Challenge is an annual competition which allows local authorities from Urban Programme Areas to "compete for inner city and housing resources to tackle a wide range of economic and social problems, with funds being made available to winners over a period of five years". The aim is "to provide major impetus to area improvement, leading to self-sustaining economic regeneration" (DoE, 1993, page 55). Emphasis is placed on proposals aimed at creating "an environment likely to attract people to live, work and invest in run-down urban

areas" (DoE, 1993, page 55). It is also hoped that the success of City Challenge will lie in its ability to concentrate resources on key areas with a time limit, to achieve results agreed in advance between the authorities, their partners and the Department (DoE, 1993, page 57).

City Challenge has superseded the Urban Programme (UP) grant aid which has been discontinued. It is particularly important to Merseyside, there being City Challenge areas in Liverpool, Wirral and Sefton. Liverpool City Challenge area represents a relatively small area known as City Centre East. It includes St Georges Hall, St John's shopping centre, Liverpool Museum and Walker Art Gallery, some of the University buildings and residential areas. City Challenge funding offers a total of £37.5 mill. over five years which can then be used to lever private sector finance, the anticipated balance for Liverpool's City Centre East being £250 mill. made up of City Challenge money plus other public finance (£70 mill.) and private sector finance of £142.5 mill.

Along with affecting the residents in the area, it is anticipated that the benefits of the City Challenge Initiatives will be felt by "those travelling through or to the city centre including leisure and business visitors, students and those visiting health facilities" (Liverpool's City Challenge, 1992, p.4). Nevertheless, the focus is primarily on economic regeneration, specifically business formation and job creation, including environmental improvements and housing.

When asked of specific tourism-related initiatives for the City Challenge area, Phil Holt, Planning and Development Manager (Interview, September 12, 1994), recognised that alongside the impact of general regeneration schemes, there was a programme to refurbish some "very important public spaces which will act as gateways to the city, designed by quality private sector architects, not the City Council". These include Williamson Square, Hardman Street, Lime Street, and China Town. The City Challenge area redevelopment will also

include a number of flagship schemes which it is anticipated will attract tourists in their own right, for example Liverpool Institute for the Performing Arts, and the Roy Castle Research Centre.

It is still too early to analyze the full success of City Challenge initiatives, but there are signs that City Challenge is providing a co-ordinated approach to the regeneration of city centre land, away from the MDC controlled riverside. This should widen the physical extent of regeneration; the difficulty may be the physical linking of schemes.

2.4.6: Local Government

Subsequent to the County Council Tourism Department of 1974-86, in Liverpool itself local government has had a comparatively minor role in the development of a tourism industry; this is probably due to the importance which central government agencies such as MDC give it, along with the existence of MTCB (on which the City Council has 2 places on its steering group). In 1986, on the abolition of Merseyside County Council, National Museums and Galleries on Merseyside (NMGM) was formed, taking the control of most of Liverpool's tourism away from the City Council.

However, tourism is included in Unitary Development Plans for the authority. Thus in the planning strategy for the city, the City Council hopes to promote Liverpool's maritime and architectural heritage. The Planning Office is at present also considering the location of camping and caravan facilities in the city and will inherit the land now controlled by MDC at the end of its life. It took until 1994 for tourism to gain a significant position in City Council affairs. A restructuring of 1992 had led to the appointment of a Tourism Officer to work within the Policy and Research Office of the newly formed Tourism, Arts and Heritage section. A diminishing capital programme, alongside the success of MDC tourism initiatives, has necessitated a renewed City Council interest

in this sector. The Tourism Office (interview of Colin York, February 7, 1994) sees opportunity to exploit the present tourism resources and to create original linkages between them. For example, during 1994, a PIEDA study was commissioned to examine potential mechanisms to link the riverfront tourist sites to those in the city centre. Indeed, the City Council is working alongside MDC on a project to develop a National Museum of Sport at Kings Dock. It is however too early to analyze the effects of the changed structure of the City Council.

The Liverpool City Centre Partnership, formed in late 1992, is one aimed at uniting all the agencies which exist in the city (public and private sector) as a group of individuals with the common interest of improving the city's image. Although this group has no powers for regeneration, it is a sub-committee of the City Council with the objectives of improving security and its perception, maintenance of the environment, organised street cleaning, developing a positive image and promoting street festivals to bring life back into the city. As such many schemes initiated by this group will be discussed in the thesis.

Summary

In conclusion it appears that the key players in the tourist industry are numerous, even prior to counting hotel consortia and other such smaller groups. The variety of institutions both within the case study areas and between areas leads to confusion and the lack of a consistent and recognized strategy for overall development for tourism within the area. A result of this is that funding for schemes comes from numerous sources and through many mechanisms.

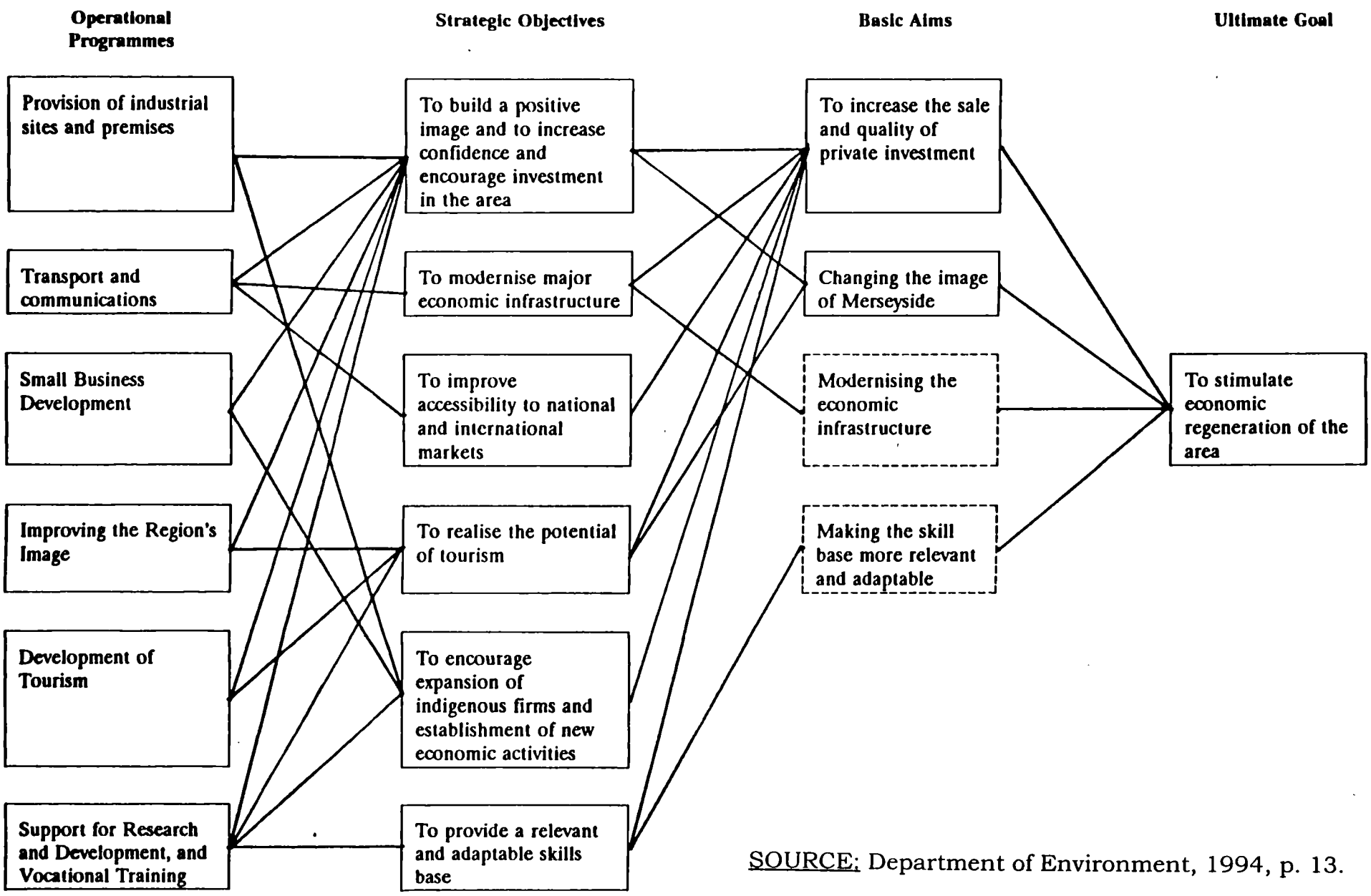
One common theme in funding is the accepted need for partnership between public and private sectors, the public sector levering private sector funds. This is of particular importance in City Challenge and UDC areas. The nature of

central government funding has already been mentioned in the previous chapter together with its role in tourism development. However, we have not previously considered European Union funding, which will be of prime importance now Liverpool has been granted Objective One status.

These structural funds were established as a mechanism to reduce regional disparities, thus strengthening the economic and social cohesion of Europe. However, in Liverpool they have been allocated in recognition of the worsening situation since the main support for the area began in 1989. In this time Merseyside has gained financial support through regional development programmes supported by the European Regional Development Fund (ERDF) and European Social Fund (ESF). The first phase of support, through Objective Two of the Structural Funds, was for the three-year period 1989-91. This was followed by a two-year phase in 1992-93. These phases are known as the Merseyside Integrated Development Operation Phases I and II (i.e. MIDO I and MIDO II).

MIDO I and MIDO II outlined six priorities: Economic Development, Communication, Business Development, Environment, Tourism and Employment Support. As Figure 2.1 illustrates, MIDO began with an agenda appropriate to this present research project in recognising tourism as a tool for regeneration. European funds have to date been applied to a number of tourism related projects. Of note, MIDO I provided a grant of over £2 million to Merseyside Passenger and Transport Executive for the revitalization of Mersey Ferries (Department of Environment, 1994, p.102) and £1.4 million (45 percent of the total cost) was awarded to Liverpool City Council for the refurbishment of St Georges Hall, achieving 20 jobs. In stating this, however, many more funds have been allocated to Wirral based attractions, thus promoting tourism on both sides of the Mersey linked by Mersey Ferries.

Figure 2.1: Structure of MIDO Framework



SOURCE: Department of Environment, 1994, p. 13.

The early evaluation of these projects has formed the basis for Objective One funding post 1994. Findings of the evaluation of MIDO I and II (Department of Environment, 1994) suggest the need for more precise targets to be set, for evaluation based on visitor numbers and direct and indirect job creation. Nevertheless, the tourism programmes "displayed a strong element of project synergy" (Department of Environment, 1994, p.128). Indeed in the Single Programming document for Merseyside 1994-1999 one evaluation of Objective Two states

> "Investment in tourism was considered to have considerable scope for expansion with a need to build towards a critical mass in the region. Further investment however, would need to be balanced by a properly demonstrated flow of benefits" (p.15).

Thus Liverpool is now eligible for funds from Europe worth around £1 billion, which will be matched by money from central government (the exact amount depending on grant rates), over six years 1994-1999, i.e. funding of £200/300 million a year, starting from January 1994. Tourism and leisure feature prominently in the strategy for spending (Merseyside 2000, 1993). This strategy for Merseyside is of great importance in the development of tourism; it is the first time in which an end state for Merseyside has been articulated. The strategy is also the result of collaboration between all those involved and interested in planning for Merseyside's future.

2.5: Liverpool's Tourism Strategy in the context of urban research

In 1958 John Pugh, writing in the Liverpool Daily Post, offered the suggestion that "Liverpool could be a tourist mecca", noting that "a few moments reflection will show that with imagination, courage and hard work, Liverpool could win for itself a new industry - tourism"(26 August, 1958, p.32). Potential resources suggested were an arts festival (to rival that of Edinburgh; see also Evans, 1958), promotion of the city's theatres and cinemas, and sports provision for

tourism.

This article also recognises the economic importance of the industry, noting that "tourism would create work and reduce the numbers on labour exchange dole lists". Similarly the requirement for improvements to attract tourists were also recognised at this time. "If Liverpool wants to earn itself the new industry, Liverpool must brighten itself up - for, to be honest, at the moment it would not attract a swarm of locusts, let alone a swarm of tourists" (Pugh, 1958, p.32).

It is necessary at this stage to review the context of previous Liverpool research to assess whether tourism policy had any basis. Although Liverpool is recognised to have many of the worst urban problems in the UK, there has been surprisingly little academic research into its regenerative policies. Academic staff at Liverpool and John Moores Universities are predominant amongst those to write about recent issues (Meegan, 1993; Parkinson, 1988 most of which concentrate upon one specific issue, the Development Corporation). Nevertheless, Liverpool or Merseyside are often quoted as examples of inner city policy in more general texts (for example, Lawless and Brown, 1986; Barnekov, Boyle and Rich, 1989).

Still the most comprehensive, but now outdated, study of Liverpool is the Inner Area Study of the 1970's conducted in September 1972 (Wilson *et al.*, 1977). A full Inner Area Study was started in July 1973 and completed three years later. The remit was "to look at the needs of the (inner) areas from the point of view of the people living in them" (Wilson *et al.*, 1977, p.vii). The report, which suggested a total approach for inner areas, covered issues such as housing provision, economic decline (including the lack of industrial investment and employment issues), life in the inner city (for both adults and youngsters needing education), and issues associated with people and government; concluding with suggestions for the regeneration of inner Liverpool. Leisure and

tourism were not included in the proposals presented here, which include halting the economic decline of the inner area through industrial promotion and encouraging local enterprise, raising levels of skill, improving housing opportunities and channelling resources into areas of greatest social need.

There have been two comprehensive studies of Liverpool tourism itself. In 1986 DRV Research published "An Economic impact study of tourist and associated arts development in Merseyside: The Tourism study". Commissioned in 1985 by the European Commission, Merseyside County Council, Merseyside Arts and Merseyside Development Corporation, the study had the objectives of: a) increasing the level and understanding of the pattern and value of tourism in Merseyside, and b) providing information relevant to the assessment of future action in Merseyside in respect of the development, management and promotion of tourism.

In 1990 a further study was commissioned to update and enhance the research carried out in 1985. This study was funded by nine bodies and aimed to bring up to date the kind of information obtained from the 1985 research, and in particular the information concerning the image of Merseyside and the economic effects of tourism. The results to both of these studies provide valuable information relating to the type of and purpose of visits to Merseyside (many of which will be referred to in later chapters). However, they make little attempt to analyze the impact of the results on the Merseyside economy, being a quantitative study of the motivations, opinions and activities of tourists on day and staying visits. There has been a relatively small research base to support tourism policy and action in Liverpool.

Looking back then to Pugh's thoughts of 1958, writing over a quarter of a century later Parkinson and Biancini (1994) however consider that "the story of cultural policy and urban regeneration in Liverpool is essentially one of

missed opportunities" (p.155), noting that although the city has "greater cultural potential and assets than many comparable cities", including its architecture, heritage and football, it has "done less to exploit them in a strategic way than many less favourably endowed cities" (p.155). The argument as presented blames the larger economic, cultural and political context in which decisions in the city are made. In particular they suggest that the City Council, as an important economic and political actor in the city, "exhibits a set of political and ideological characteristics which have combined to keep cultural issues off the city's policy making" (p.156).

From 1970 until the mid-1980's, the focus of political strategy was led by an unstable divided political coalition of Liberals and Conservatives. This was accompanied by deep economic decline and short-term electoral imperatives (Middleton, 1991). Competition for votes focused primarily over levels of local taxation and housing in the city. The Labour Party, which eventually took majority control, were dominated by class interests concerned primarily with issues around production and jobs for manual workers. Hence, the economic potential of activities like leisure, tourism, the arts, shopping, or even white collar service sector jobs which were concentrated in the city centre, were regarded with scepticism.

After intense political turmoil in the city a new, more moderate Labour Group emerged in 1987, with an aim to develop a new economic strategy which would make more attempt to accommodate the local private sector, and as in national policy trends this encouraged alliances between the public and private sectors. As previous sections of this chapter have discussed, the success of MDC regeneration, which has included leisure and tourism, has further fuelled a move towards a regenerative strategy which included leisure and tourism.

The present strategy for tourism

Probably the most up to date and authoritative statement of tourism policy for Liverpool is found in the Merseyside 2000 document (1993). Here for the first time an *"end state"* for the region has been articulated. It is the draft regional conversion plan for Merseyside and covers the period 1994-1999, relative to EU Structural Funds Assistance. It was prepared in partnership, chaired by Merseyside Task Force and the Department of Environment. The aim for tourism and cultural industries in Merseyside is that:

> "The image of Merseyside must be enhanced so that, as well as being an attractive location for inward investment, it is also an attractive destination for tourists and visitors. To achieve this it must not only continue to attract day visitors but must also become a substantial draw for overnight/weekend visitors, providing a comprehensive and diverse range of attractions and serving as a base for wider visiting in the North West." (Merseyside 2000, 1993, p.22)

Merseyside's Economic Strategy, Action Programme (February 1993) recognizes four key issues in relation to the further development of tourism, arts and cultural facilities on Merseyside; investment, new developments, access and a concentration of resources (pp.55-56). The strategic aim is thus:

> "to ensure that existing and new tourism, arts and cultural facilities, particularly in relation to its maritime and architectural heritage, continue to be developed to ensure that Merseyside is seen as an attractive centre for tourism, arts and culture activities." (Merseyside Economic Strategy, February 1993, p.56)

Strategic Guidance for Merseyside (October 1988) makes clear the importance of tourism and recreational facilities to the welfare of the region's inhabitants and states that provision of related facilities can also help to create jobs and to stimulate economic activity and investment. Strategic Guidance advises Local

Authorities to look for suitable opportunities for encouraging the growth of large scale tourism projects and the expansion and diversification of existing facilities, especially where these might provide relief for areas suffering from visitor pressures. It recognizes that fullest use should be made of opportunities to develop vacant and underused land in the conurbation.

As a result of this the objectives for the tourism sector of the city Unitary Development Plan (UDP) are:

> "- to encourage new tourist and visitor attractions and associated hotel development, in suitable locations of the City.
> - to promote the expansion of existing tourist and visitor attractions provided, so that such developments are compatible with maintaining the amenity enjoyed by nearby residents, creating jobs and environmental improvements.
> - need to raise public awareness of the City's attractions and in particular to improve and promote the City's image."

The implementation of these policies is best seen in the summary of Merseyside Tourism and Convention Bureau's (MTCB) Action Plan 1993/94. The hope is that the city can be promoted to a number of groups of visitors (Table 2.12)

Table 2.12: Potential visitor groups to Liverpool

- *Business and conference visitors:* (particularly medical, educational, cultural, architectural, sport and maritime related) Main activities: New conference portfolio, direct mail, selected exhibitions and visits, PR activity.
- *UK short break visitors*: Main activities: Promotion of Merseyside, Pocket Guides, selected exhibitions, familiarisation visits, PR activity, direct mail.
- *Tour operators and group visit organisers:* Main activities: Promotion of MerseyBreaks, Pocket Guide, selected shows, familiarisation visits, Great Days Out show.
- *Overseas visitors:* (particularly from Ireland, Germany, Japan, North America) Main activities: BTA standard format print in 5 language edition, Irish holiday shows, Irish shopping promotion, Advertise in North West Guide, selected overseas and familiarisation visits.
- *Merseysiders and their visiting friends and relatives:* Main activities: Local promotion of the Merseyside Welcome Centre, Local distribution of brochures, MerseyMagic Brochure, Promotion to academic community and their friends and relatives.

Source: MTCB Action Plan 1993/94

Various sources involved with the tourist industry in Liverpool have stressed further policies. Liverpool City Challenge recognized the importance of festivals and special event tourism, mentioning the importance of the Tall Ships Event (1992), Battle of the Atlantic Celebrations (1993) and the annual VisionFest held in October each year. Also mentioned were the need for a conference facility and an attempt to link the various pockets of attractions, so that the city could represent more than one day in a longer tour of the North West. It is suggested that 600 additional hotel and conference spaces are needed in the city. At present there are two proposed solutions to this problem. One makes use of existing land at the Adelphi Hotel; here an extension may be built to house a conference centre. The other proposal uses derelict land at Kings Dock, on which a new conference facility may be built.

At present there are also a number of good attractions which are not linked together in any co-ordinated way. It is hoped, once Liverpool Town Hall has re-opened, that these attractions can be linked, encouraging people to use the city as an overnight base. Ian Urquart at Merseyside Task Force imagines how visitors can walk from the Albert Dock to the Pier Head, take a ferry across the Mersey, return to the Pier Head and walk up to St Georges Hall, check into a hotel and go to the theatre or Liverpool Philharmonic in the evening. The following day the visitor may go to Liverpool Museum, the Walker Art Gallery and Cathedrals. The aim is to "encourage people to use Merseyside as a base" (Interview, July 5, 1993).

From this a number of themes relating to tourism can be readily identified. These include festival and event tourism, industrial heritage (maritime), re-use of redundant buildings, attracting national museums, encouraging short breaks, emphasizing architecture and using the waterfront as a locational advantage. Some of these themes gain understanding from comparison with other cities.

Festivals and events are important elements of tourism policy for the cities of ex-Metropolitan counties of northern England. Newcastle held the Tall Ships Race in 1993. Bradford has an annual festival to which it is suggested over 300,000 people visit or participate in festival events; an estimated 50,000 of these are from outside the region (Interview, Bradford Tourism and Conference Office, July 3, 1993). The festival launched by the City Council in 1987 now runs for three weeks, and is perceived as a successful mechanism to draw people back to the city for repeat visits and in attracting media attention. Year titles also feature prominently in the promotion of tourism in these areas. Bradford has the title "1996 - Year of Visual Arts", and Manchester recently promoted itself as "City of Drama - 1994".

Hall (1989b, p.23) considers the positive image of hallmark events on the host communities to be "increased awareness of the region as a travel/tourism destination; increased knowledge concerning the potential for investment and commercial activity in the region; creation of new accommodation at tourist attractions; increase in accessibility." However, Hall also notes negative impacts which may result should an event not be hosted properly: "acquisition of a poor reputation as a result of inadequate facilities, improper practices or inflated prices; negative reactions from existing enterprises due to the possibility of new competition for local manpower and government assistance" (p.23).

Liverpool has chosen to emphasize its industrial heritage through its maritime connections. This can be compared to Bradford's "Mill Tours". In Wigan the whole tourism industry revolves around one major attraction, the Wigan Pier Complex. Indeed Ashworth and Tunbridge (1990) note "history has become heritage, heritage has become an urban resource; and this resource supplies a major 'history industry', which shapes not merely the form but the functioning and purpose of the 'commodified' city" (pp.1-2).

Albert Dock, the flagship for Liverpool's Tourist industry, and winner of a British Urban Regeneration Award in 1993, is a prime example of the re-use of a redundant building. Gill (1988) notes how "old or redundant buildings can be put to new and attractive uses for the tourists: disused warehouses and industrial buildings can be refurbished and begin life anew as exhibition halls, museums, craft workshops, art centres, restaurants" (p.175). URBED (1988, p.4) have similarly recognized that the "recycling" of industrial buildings is a well established way of creating industrial space for new industry and other uses. They also note the potential for mixed usage, for example workspace and residential accommodation. Now in the UK the use varies - residential, recreational, commercial, TV studio, art galleries.

In contrast Bradford housed the National Museum of Photography Film and Television; the City Council offering the building, which is of no historic value, free of charge. In Wigan the Pier Complex represents, as with the Albert Dock, an award winning regeneration of un-used industrial buildings. National museums such as these focus in the strategy for both Liverpool and Bradford. Having major museums like these gives the location a national, or indeed international standing, which it is anticipated will therefore attract visitors from further afield.

Short breaks feature prominently in the strategy for most urban tourism areas. In Liverpool's strategy MerseyBreaks are all inclusive holidays, offering accommodation for two or more nights in the city. Included in these breaks are tickets for free admission to some of the attractions in the area. In a study of Inclusive Tour holidays available for tourists in the UK, France, Germany and Spain it has been found that "often 'freebies' are provided to encourage Inclusive Tour holidays eg. 'free' travelling bags, a 'free' drink on arrival and champagne and flowers for honeymooning couples" (Clewer, Peck and thea Sinclair, 1992, p.127).

One other means of promoting short-breaks in urban areas have been used. Brochures such as *Highlife Breaks* and *Rainbow Holidays* feature, amongst others, Bradford, Liverpool and Manchester. The hotels in the brochure are advertised at reduced rates and often include bargain prices for rail travel. Wigan's tourism strategy notes (p.14) that short-breaks should be encouraged through the development of packages (sports, retail and countryside). It is not surprising that this is part of tourism strategy; EIU (1992) have researched tourism spending on short breaks - findings show that "on a per night basis, short-break holidays generated an average spending of Ecu 150 against Ecu 64 for long holidays" (total expenditure by Western Europeans, p.50).

The importance of architecture in tourism strategy is particular to the strategy for Liverpool. This could result, as mentioned, from Liverpool having more listed buildings than any other city in the UK outside London. Alternatively, "architecture has the advantage of being on free, permanent display and needing no linguistic translation" (Ashworth and Tunbridge, 1990, p.18). Yet, this means that promotion of architectural heritage provides little or no additional income to the area.

Finally, the waterfront appears to be the common scene of tourism developments. Ashworth and Tunbridge (1990, p.248) note that

> "perceived as a 'windfall' resource of redeveloped land, it is an amenity to which public access should be restored, and a major heritage resource since the oldest structures in the city are commonly found there and their maritime and sometimes naval links are phasing into a past legacy to be remembered".

Water is the focus in Wigan with the canal network adding an aquatic dimension. Similarly Manchester is using the canal network to emphasize its tourism. However, water is not necessary; Bradford has no water at all in its tourism, and seems to be no less successful than elsewhere.

In Bristol regeneration has taken place along the docklands over recent years, with some tourism components, for example the maritime museum and marina. Yet, in 1990 the City Council stated "Bristol does not have a tourism strategy which forms part of its economic development policies". Indeed, a report prepared for the Tourism Forum (1989) notes that "in considering a development strategy one should be realistic about what can be achieved. Tourism is not an adequate answer to unemployment amongst redundant male workers from manufacturing industries" (p.3). This consideration is distinct from the thinking of those in Liverpool, which now considers any jobs, whoever they are for, to be beneficial to the city.

The themes for promoting tourism in Glasgow are very similar to those in Liverpool, although perhaps the markets differ. Glasgow's tourism review considers three main target markets: a day visitor market, providing family orientated visitor attractions; a conference and business market, in the hope that it may encourage additional overnight stays; finally, overseas and domestic urban tourists, mainly over 45's and young people without children; "this market is based on the city's ability to attract high quality performing arts, the quality of shopping, the range of museums and art galleries and the unique architectural heritage of the city" (Pannell, Kerr and Foster, 1984, para. 2.2(iii)).

The key thrusts which have been proposed to improve the penetration of target markets in Glasgow are variations on the themes adopted in Liverpool. For example, Glasgow sees the need for budget accommodation, whereas Liverpool is lacking in quality accommodation. The report also suggests that Glasgow "should investigate the possibility of attracting a new museum / gallery of UK standing to appeal to the urban tourist" (Pannell, Kerr and Foster, 1984, para. 2.4(ii))

2.6 Structure and aims of the research:

Thus the information presented in Chapters 1 and 2 of this thesis illustrate that the role of urban tourism in the regeneration of urban areas is indeed a very important area of study. Numerous assertions have been made about its potential and money is being heavily invested into the industry. The aim here is, using the case study of Liverpool, to examine the view from providers and those involved in the tourist industry.

The major introduction of tourism to the Liverpool economy emanated from the success of three main Development Corporation initiatives of the early 1980's (the International Garden Festival, the Albert Dock redevelopment and the Tall Ships race). As earlier sections of this chapter have illustrated, the importance

of leisure and tourism initiatives has possibly been magnified as a result of difficulties involved in attracting other private sector business and industrial investment to the city.

Large numbers of visitors attracted by the initiatives of the 1980's were seen as an indicator of the potential of this industry; an assertion enhanced by the publicity of tourism in other ex-industrial cities such as Glasgow and Bradford, and literature emphasising the success of tourism policies in American cities such as Boston and Baltimore.

As such, the policies were adopted with little knowledge of the outcomes in terms of regeneration. Academic literature, often published after tourism was positively adopted, suggests that the impacts can lie in job creation and attracting new and retaining current investment in the local economy, in terms of environmental improvements and subsequent image change. These are the topics of this thesis.

Presented in this thesis is an examination of the nature of tourism in central Liverpool (Chapters Three and Four), both the facilities available for tourists as seen by managers and providers, and the type of tourist attracted. Thus a more comprehensive picture of tourism in the city has been painted, highlighting direct impacts such as seasonality in the industry, the direct investment into tourism by both tourists and the industry itself, and the amount of investment so far as the extent to which tourism influences and impacts landuse.

Building on the results of the "Visitors to Merseyside Survey" (1990) the distribution of ownership and age of facilities within the case study area of post code districts L1, L2 and L3 have been examined. This is complemented by an analysis of the type of visitor by, amongst other indicators, home address and purpose of visit.

Chapter five makes a detailed examination of direct employment induced through tourism, comparing Census of Employment data with information provided by individual tourist-related establishments. Using both these primary and secondary sources the results provide a comprehensive analysis of many critical issues in the literature, not only the number of employees in tourism-related industry, but also the distribution by sex, the security of employment and the skill requirement and training provided by the establishments concerned. This chapter is particularly important as current academic literature on the issues of tourism-related employment rarely focus on it in the urban context; authors such as Williams and Shaw (1988) often studying the seaside resort. Similarly there is little or no research articulating the nature of employment at this detailed scale.

Chapter six then examines the perceived indirect impacts of tourism. As the literature review of Chapter One illustrates, such impacts are thought to consist of a change of image which, if positive, is particularly important in attracting new investment to Merseyside (in addition to attracting further tourists). Similarly environmental improvements in the form of new building, landscaping and renovation or demolition of derelict lands are also potential motivations for investment and image change. The methodology adopted here is primarily an examination of a recent image changing campaign and a field survey of motivations for business location in recently redeveloped office and warehouse provision within the case study area.

The approach is thus holistic. The major strengths of the research lie in its comprehensive surveys of facilities, and its analysis of a number of issues within a limited geographical area and time scale. It is now over a decade since the International Garden Festival and opening of the Albert Dock Complex; thus it seems that, with the continued time and finances being dedicated to tourism in Liverpool, and the emphasis which other major cities and industrial

areas are now placing on regeneration through tourism, research of this nature, to examine the economic impacts, whether positive, negative or regenerative, is crucial to extending our knowledge and to gaining the maximum possible from the investment made in and by the tourism industry.

Methods of approach

The general approach to empirical data collection for this study was in the form of semi-structured interviews with providers in the tourist industry (chapter one). The use of a checklist or 'hidden agenda' ensured coverage of set themes of information, but similarly allowed respondents to expand points as they felt appropriate, thus on occasion widening the debate beyond the author's pre-defined brief. In summary this meant that all managers of tourist attractions, hotels and theatres and cinemas were questioned about the themes listed below and topics related to them:

a. BACKGROUND: date opened, ownership, change of ownership, use of the building/premises, sources of funding.
b. VISITOR PROFILE: seasonality, number of visitors, home address, coach tours, opening times, purpose of visit (length of stay for hotel visitors).
c. REDEVELOPMENT: past, present and future, especially environmental improvements.
d. COMPETITION
e. RECESSION
f. SUPPLIERS AND LINKAGES
g. ROLE OF THE ALBERT DOCK / OTHER TOURIST INITIATIVES: in influencing visitor patterns and business success and failure.
h. STAFF STRUCTURE: number, gender, age, nature of contracts, staff home address, previous employment of staff, training.

In addition tourist attraction managers were asked to assess whether they considered their attractions to represent "tourism" from other areas.

Due to the larger number of shops and eating and drinking facilities in the sample, managers were asked to complete a structured questionnaire (see Appendix 8) which follows the pattern of the above interview structure.

Careful fieldwork established at an early stage that virtually all of central Liverpool's tourist facilities were contained in three post code districts. As Table 2.13 illustrates, all interviews were conducted within the Liverpool 1-3 post code districts. All tourist related attractions were identified from a thorough land-use survey of all plots of the case study area (see Chapter three). Due to the number of hotels, attractions and theatres and cinemas a full interview survey was manageable and thus attempted.

However, because of the difficulties involved in defining shops and eating and drinking facilities as 'tourist-related' and the number of these facilities, only those located in the key tourist areas of the Albert Dock, Cavern Walks and Bluecoat Chambers were surveyed (these areas are marked on Map 3.10). These areas were chosen and defined on the ground as the places where there is a high concentration of tourist attractions and a significant number of shops selling tourist type products such as souvenirs, post cards and trinkets.

Table 2.13: The sampling matrix

	Total L1-3	Number sampled	Response Number	% acceptance
Hotels	14	14	13	92.9
Attractions	9	9	9	100.0
Theatres & cinemas	11	11	10	90.9
	Total in the area	Number sampled	Response Number	% acceptance
Shops -				
Albert Dock	36	36	32	88.9
Cavern walks	15	15	13	86.7
Bluecoat	5	5	5	100.0
Eating & drinking -				
Albert Dock	16	16	14	87.5
Cavern walks	10	7	17	70.0
Bluecoat	1	1	1	100.0

In addition, a further set of interviews was conducted with key informants in the public sector - local and central government, executive agencies and QUANGOs. The themes of these interviews were both more varied and specific. Yet the theme generally related to policy and policy implementation and the role which tourism is to play or has played in this. The key question was whether the informants have considered the policy implications of tourism, whether tourism is a key policy concern or an added factor or bonus to the regeneration of the city.

These results were further enhanced by more structures questionnaire surveys of tourism-related employment (Appendix 11), student impressions of Liverpool questionnaires (Appendix 13) and a Liverpool Business Survey to examine business location and investment (Appendix 16). This research methodology will be discussed in greater depth within the relevant chapter headings.

CHAPTER 3

THE GEOGRAPHY OF TOURISM FACILITIES IN LIVERPOOL

3.1 The Location of tourism facilities

> "The city as used and recognized by tourists can be described as restricted in its selection of only a small portion of the total area; concentrated in its clustering; and contiguous in that the spatial concentrations are rarely widely separated from each other. The simple model has the tourist city overlapping both that part of the historic city selected for tourism functions, and part of the commercial city, where many of the related elements of tourist shopping, entertainment and catering can be found" (Ashworth and Tunbridge, 1990, p.67).

In light of the above a landuse survey of all tourism facilities in the selected case study area of Liverpool post code districts L1, L2 and L3 was conducted during the summer months of 1993. The purpose of this exercise was not only to facilitate a mapping and discussion of tourism-related facilities, but also to provide a data base of tourist resources for comment in this chapter which could then be used as a check-list for interview contacts.

Academic literature on the subject of location of tourism facilities suggests that "clustering" is to be expected. Indeed, Ashworth and Tunbridge recognize that during the late 1960's and early 1970's, in most countries, there was "a shift in emphasis from the individual building to ensembles and areas" (1990, p.14). Similarly the Polytechnic of Central London *et al.* (1990) suggest that "tourism projects will have greater impacts on urban policy objectives if they are grouped" (p.57). This may be exemplified in the Swansea case. Whilst suffering circumstances akin to those in Liverpool (e.g. derelict land, unpleasant appearance, and poor city image) the City Council's decision reportedly was "not simply to attempt piecemeal, small-scale remedial action, but to see the



land involved as a resource, to be planned and brought into use in a comprehensive way" (Osbourne, 1987, p.129). The result was a number of "consolidated and qualitative" improvements such as a maritime quarter, industrial park, and leisure park. These landuses are linked through a series of squares and spaces.

Church (1994) offers an alternative perspective for waterside areas

> "a cityport region will contain a complex mosaic of current and potential tourism developments which may or may not relate to each other. In addition, a range of agencies will be operating, all subject to differing political, economic and organisational influences".

In the case of Urban Development Corporations (UDCs) there have been a number of well documented successes of leisure related "flagship" projects. Although the literature is now more critical of these schemes, the initial success may be due to the holistic approach which can be taken in these restricted geographical areas for which UDCs typically have powers.

A concentration of tourism resources around Liverpool's River Mersey waterfront is to be expected. Tunbridge (1988) suggests that waterfront revitalisation has typically concentrated upon rehabilitation and redevelopment for residential, recreational and associated retail and service activities (p.69). Indeed, waterfronts are often

> "perceived as a 'windfall' resource of redeveloped land, an amenity to which public access should be restored, and a major heritage resource since the oldest structures in the city are commonly found there and their maritime and sometimes naval links are phasing into a past legacy to be remembered" (Ashworth and Tunbridge, 1990, p.248).

Similarly Smith (1983) recognizes how "water has a particular attractiveness for places, and nearly all major cities built on waterways are developing their waterfronts for tourism and recreation" (p.39). Along with waterfront

redevelopment one may also expect a growing emphasis on public water transport, for example water buses/taxis (Ashworth and Tunbridge, 1990, p.69).

3.2 Comparison with other areas

The development of a city tourist industry appears to follow a standard formula, modelled on the presumed success of American cities such as Boston and Baltimore (see Chapter One). There are a number of core elements which recur in many examples and which complement existing tourism facilities. Jansen-Verbeke (1986) is conscious that the inner city has

> "an important concentration of facilities which are usually not regarded as typical *leisure facilities* but which have, nevertheless, proven to have this function for many visitors, including the tourist, the regional visitor, and the urban resident" (p.86).

She mentions a number of functions of the inner city; these include hotel accommodation, restaurants, coffee shops, public houses, night clubs and discos, noting that "these urban functions could not be traced as main motives of a visit", calling the elements "secondary elements of the spatial leisure product" (p.89).

Martin and Mason (1988) recognise among the new developments, museums and art galleries, themed heritage attraction, speciality shopping and eating, garden festivals, major sports facilities, and international conference facilities. It is therefore not surprising that, as Church (1994) recognises

> "...the similarities between certain waterfront tourism regeneration measures are well known. Marinas, specialist shopping arcades and historic ships, original or otherwise, are common elements of port redevelopment".

Indeed Falk (1987), in an evaluation of tourism in Baltimore and Lowell, recognizes that for success there is a need to design

> "schemes that create a balance between different needs and demands. Just like a financial statement, where the assets must balance the liabilities, so successful schemes have something for everyone, and ensure that nobody loses out" (p.151)

suggesting that there is a need for a process which he calls "Balance Incremental Development" in stages that lead on from each other. Recognizing, therefore, that "it is vital to achieve the "critical mass" that is needed to take off early on, sometimes by spending money on the icing even when the cake is still in doubt" (p.151).

This perhaps explains the clustering of some of Liverpool's tourism facilities. Redevelopment schemes such as the Albert Dock have attempted to create environments like this where the approach is holistic, with facilities for necessary change and improvement in the near future. However, the concern is - how often should change and improvement take place? It is possible to create the *critical mass* needed to take off but, unless there are facilities to induce repeat visits, there is concern that the *critical mass* cannot be sustained.

In addition to tourism's use of existing urban facilities, there is a similar trend towards new tourism developments encompassing other land uses and developments. Indeed, at three of Liverpool's tourist areas examined in this thesis, there is joint occupancy by tourism and office functions and, at the Albert Dock, these two functions are complemented by residential facilities. This compares to Boston where Ashworth and Tunbridge (1990) record that

> "The tourist-historic attraction of revitalised harbour fronts does not rest purely upon historic structures. Although much waterfront revitalisation in Boston serves residential, office and other non-tourist functions, it is also being provided with a high level of tourist-leisure amenity" (p.189).

Jansen-Verbeke (1991) comments on the relatively recent concept of leisure shopping, noting that "the policy of integrating tourism attractions, historical

buildings, interesting sightseeing objects and recreational facilities into the shopping environment is common nowadays" (p.11), noting similarly that "leisure facilities and attractions are assumed to function as a magnet for the retail environment" (p.12).

Jansen-Verbeke also considers how tourist shopping may be beneficial to the local economy, suggesting that the longer a visitor tends to loiter in the shopping area, the more the leisure aspect is becoming predominant - the visit then tends to include other activities e.g. having a drink or a meal, going to the cinema or any kind of cultural activity (p.10).

Attractions similarly form an important element of urban tourism. Liverpool's key attractions include the Beatles Story, Tate Gallery, Merseyside Maritime Museum and Merseyferries, at Wigan it is the Wigan Pier Museum and, at Bradford, the National Museum of Photography, Film and Television. Not only do these attractions form the individuality in the formula for tourism development, but they are crucial in attracting visitors as "a place cannot alter its climate or natural terrain, but it can add new attractions" (Kotler *et al.*, 1993, p.122).

Yet, as Karski (1990) remarks, star attractions should be supported if possible with a variety of others of specialist and general interest for example arts, drama, sports, architecture, homes of famous people etc. Events are also an important ingredient "building up a regular programme .... and ensuring that appropriate venues are available can be a major plank of any attempt to build up urban tourism" (p.16). Attractions may also be of benefit to the resident community and be used as aids in attracting new business and industry to the region. Kotler *et al.* (1993) suggest that cities may act as "cultural meccas" which "feature great universities, museums, orchestras, ballet companies, theatre groups, and libraries" (p.127). A number of cities market themselves via

groups such as Opera North in Leeds and Birmingham Royal Ballet; other cities advertise their rich art collection, for example Liverpool where the Tate of the North is considered by many to be a valuable asset.

Another facility used by both residents and visitors are restaurants and bars (Ashworth and Tunbridge, 1990, p.65). This sector is quite difficult to measure as a tourist phenomenon as the motives of clients are often hard to distinguish. Additionally, as Smith (1983) found,

> "change in the number of restaurants is influenced more by conditions in the overall business environment than by socioeconomic conditions. Of the variables considered, high levels of employment and a favourable investment climate appear to be two of the more important factors affecting growth in the number of restaurants at provincial level" (p.529).

Yet, in 1985, the same author suggests that the availability of restaurants is an important resource for tourism because of their nature.

> "In the case of vacation travel a hundred percent of all meals are eaten away from home .... the pleasurable aspects of restaurant dining, even for business or convention meals, endow these occasions with important recreation and social qualities" (p.582).

This brief review of urban tourism facilities perhaps therefore provides evidence to support the benefits of "festival market places". As Falk (1987) explains,

> "A succession of planners, politicians and property people have gone to Baltimore to look at the Inner Harbour Area, and have come back to try to do something similar in Britain. Like many American ideas, including science parks and food courts, the Rouse Corporation's concept of 'festival market places' is now being incorporated into grand plans for reviving run-down areas" (p.145).

In Liverpool, there is indeed a clustering of facilities at the Albert Dock which forms a complex similar to a festival market place. Yet, unlike its British counterparts, such as Covent Garden in London, Albert Dock hosts special events on an infrequent basis and has little open space for people to sit and gather. Although the Bluecoat Chambers offer more space to gather, the scale is far smaller than either the Albert Dock, Covent Garden or the American Festival market places.

Festival market places and tourist complexes such as the Albert Dock do however act as magnets for night time visiting.

> "Cities also encourage the development of such downtown entertainment facilities as concert halls, stadiums and multiplex movie theatres to keep people in the area at night. Some facilities flourish; many simply fail. When central cities are unable to attract a critical mass of evening street traffic, they are often taken back by the homeless, addicts, and criminal elements. Frequently places respond by building out new enclaves for theatres, restaurants, high-rises, and entertainment, seeking to expand these through conventions and tourist promotions" (Smith, 1985, p.127).

A final point relating to the geographical location of facilities (as discussed in this chapter) is the lack of sports and recreational facilities within the centre of Liverpool. By way of an explanation Spink (1989) notes that

> "....policymakers working within the context of the inner city are likely to be faced with a restricted recreational infrastructure, due in part to the nature of historic development in these areas, their recent neglect, and their increasingly limited appeal as markets for leisure commodities" (p.201).

Liverpool does however have a strong sporting reputation; Aintree Race Course hosts the annual Grand National and Liverpool has two Premier Division football teams (Liverpool and Everton). These facilities are located outside of the

case study area. This however does not prohibit sports fans from staying in the city centre or visiting the attractions or eating and drinking facilities.

> "Sports arenas represent a large investment fraught with major risks. Good professional teams confer several advantages on a city: A winning team builds civic pride and enthusiasm. A major sports team can put a city's name on the map" (p.128).

Interestingly, proposals for the Kings Dock redevelopment, next to the Albert Dock, has included ideas for both a National Museum of Sport and a golf driving range, thus illustrating the importance of sports to the region.

3.3: Primary elements

Law (1993) following Jansen-Verbeke (1988) asserts that urban tourism economies have three "elements". Primary elements are products which attract the tourist to a place, secondary elements are "other facilities which are important for the experience of the tourist, but are unlikely to be the cause of a visitor coming to the city" (Law, 1993, p.7). Finally, additional elements are those which may make a visit to the city more pleasant. More details of these elements are outlined in Figure 3.1. The results discussed in this chapter refer predominantly to the location of primary elements and secondary elements.

Figure 3.1: The elements of Tourism

PRIMARY ELEMENTS

ACTIVITY PLACE	**LEISURE SETTING**
CULTURAL FACILITIES	PHYSICAL CHARACTERISTICS
- Theatres	- Historical street pattern
- Concert halls	- Interesting buildings
- Cinemas	- Ancient monuments and statues
- Exhibitions	- Ecclesiastical buildings
- Museums and galleries	- Parks and green areas
	- Water, canals and riverfronts
SPORTS FACILITIES	- Harbours
- Indoor and outdoor	
	SOCIO CULTURAL FACILITIES
AMUSEMENTS FACILITIES	- Liveliness
- Casinos	- Language
- Bingo halls	- Local customs and costumes
- Night clubs	- Folklore
- Organised events	- Friendliness
- Festivals	- Security

SECONDARY ELEMENTS

- Hotel and catering facilities
- Shopping facilities
- Markets

ADDITIONAL ELEMENTS

- Accessibility and parking facilities
- Tourist facilities: information offices, signposts, guides, maps and leaflets

Source: Law, 1993, p.8.

The following section of this chapter refers to maps showing the geographical location of tourism facilities in Liverpool, as illustrated on maps 3.1 - 3.9. The area studied is approximately congruous with Liverpool post code districts L1, L2 and L3. Appendix 6 provides details of street names which are excluded

from the maps presented here. These maps are discussed in order of type of facility approximately as above; the precise nature of these facilities and more details about the character of the areas are included as required.



For reasons as explained in Chapter 1, theatres and cinemas have been included in this examination of urban tourism. In central Liverpool there are three cinemas and seven theatres (Map 3.1). These entertainments are predominantly located within a cluster around Roe Street and Lime Street. The two outlying theatres are located on the edge of the case study area, along Hope Street (Neptune, Unity and Royal Liverpool Philharmonic (RLPO) Hall) nearer to a university type of catchment. Almost half of the establishments opened in

the 1930's, including both of the mainstream cinemas. However, as one cinema manager illustrated with a newspaper cutting from 1939, this is only the legacy of a much larger industry (only two from eleven still surviving; one of the cinemas opened after 1939). Many of the cinemas and concert halls have been put to new uses as shops and offices, or pulled down to make way for new development.



Tourist attractions are located on Map 3.2. Attractions can be broadly separated into libraries, museums and art galleries. In this instance Merseyferries have also been marked on the map as a museum. There are two

cores of tourist attractions; one of new attractions (in the Albert Dock area), the other consisting of older more traditional attractions (along William Brown Street). But an important location note is that there are few attractions / facilities which will lead tourists from one core to another, as the remaining three attractions are not located on the main route between the two cores. In support of the hypothesis presented earlier in the chapter, the newer attractions are located in the Albert Dock complex, along the waterfront.

A further attraction in Liverpool comprises the two cathedrals; the Anglican and Catholic (Map 3.2). Not only do these cathedrals act as landmarks by which the city is recognised, but they are tourist attractions visited by people who are interested in both their architectural and religious features. The cathedrals also attract visitors due to their additional uses as a location for graduation ceremonies and, more recently, classical music concerts (the Anglican cathedral was used during 1994-95 as the venue for the Royal Liverpool Philharmonic Orchestra whilst the Philharmonic Hall was being refurbished).

Some definitions of tourism-related industries include betting and gambling establishments and amusement arcades. These facilities have been mapped (Map 3.3). In the city centre there are ten betting and gambling establishments most of which are owned by national companies such as William Hill (three) and Stanley Racing (four). It is unlikely that these are primary tourist resources.



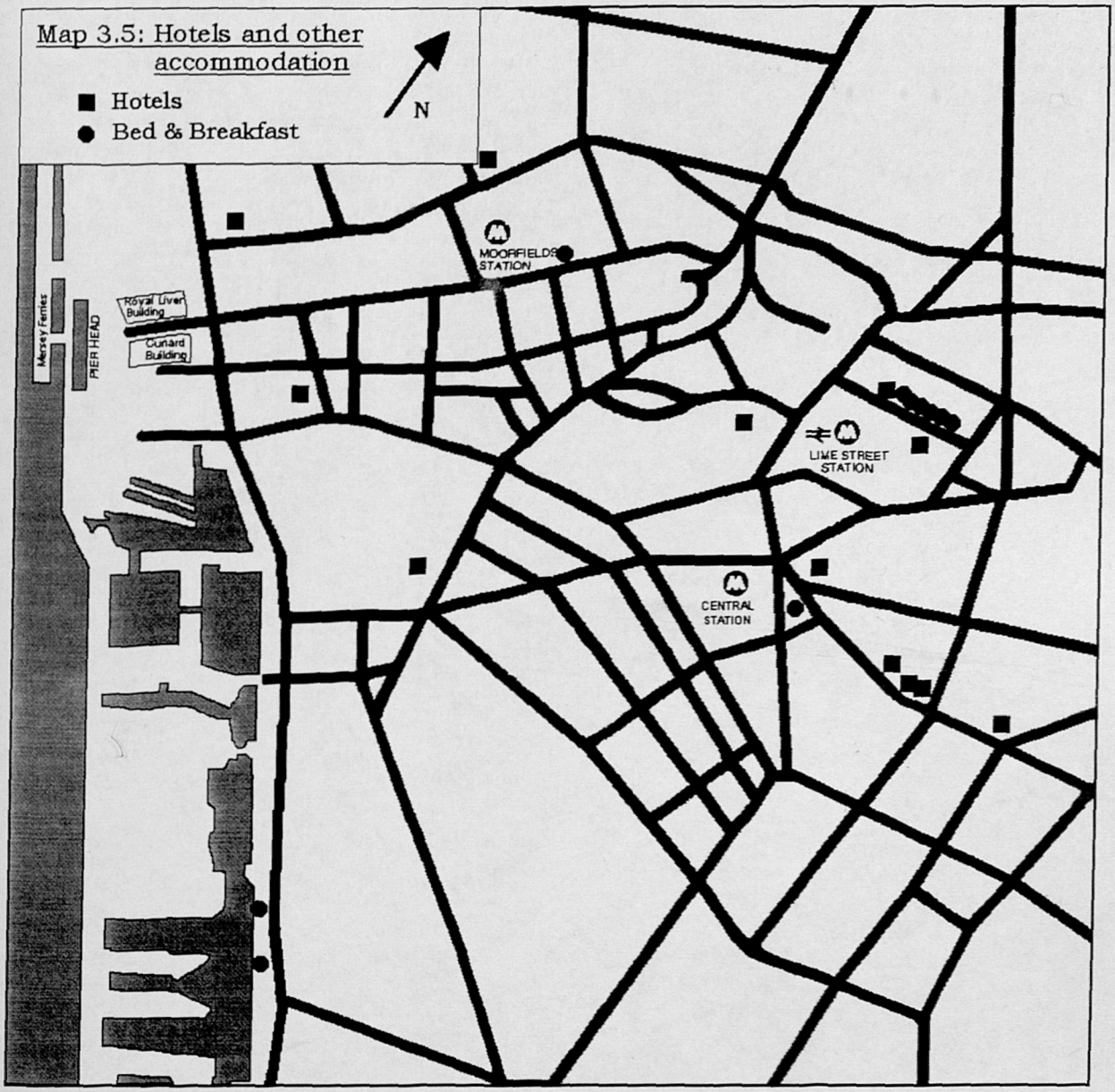
Two cores of night time entertainment are apparent (Map 3.4). One, is in a triangle bounded by Renshaw Street - Berry Street and Hanover Street - Ranelagh Street. Many of these clubs are located in disused warehouses and are not well established. Nevertheless some of them do have a good reputation which extends well beyond the Merseyside boundary. The second core is found in the north-west of the city, near to the business district, where nightclubs are evenly mixed with other clubs.



Secondary elements

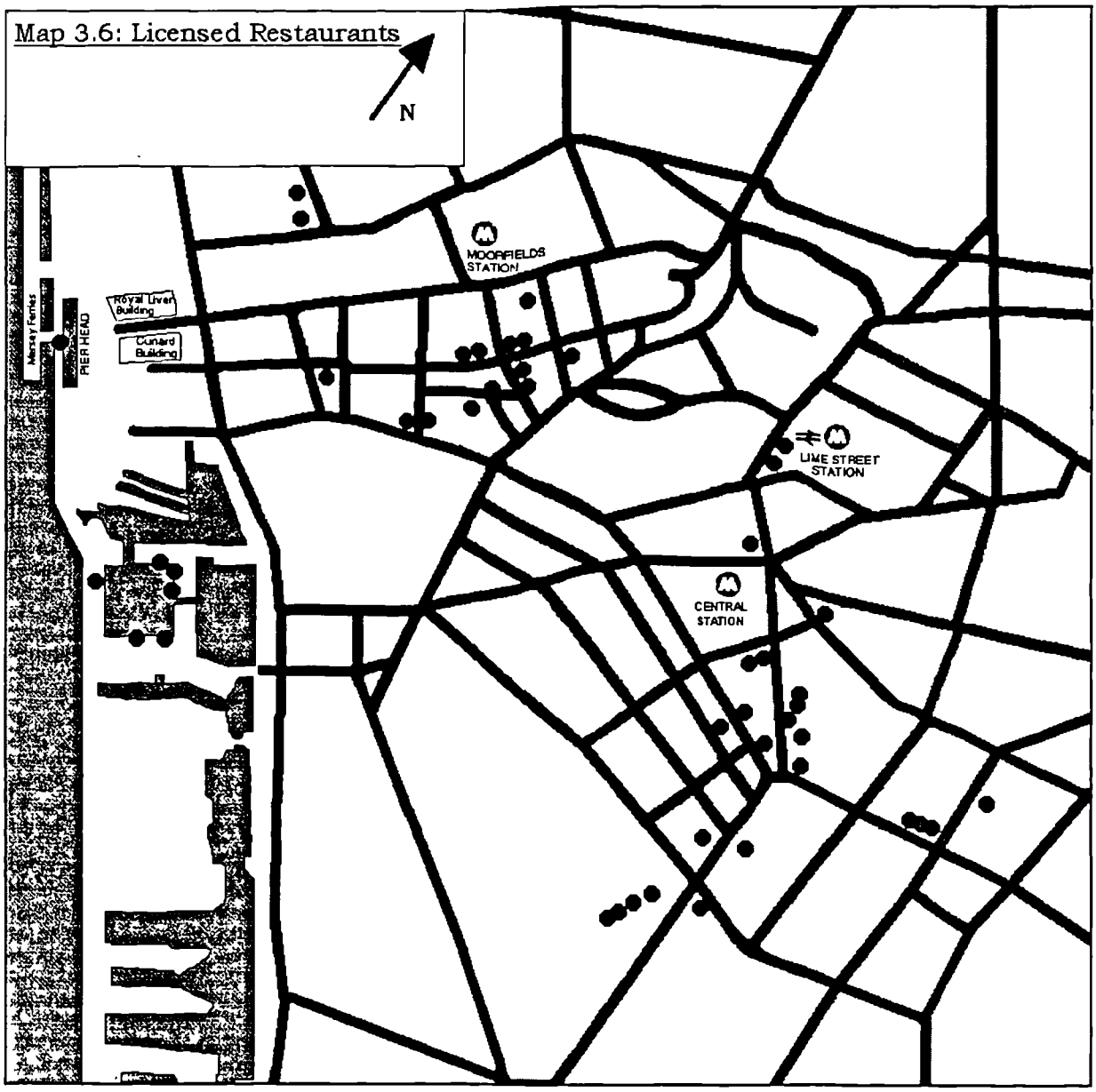
In the case study area of Liverpool there are fourteen hotels (i.e. establishments offering more than bed and breakfast) and eight bed and breakfast establishments (Map 3.5). Six of the bed and breakfast establishments are located opposite Lime Street railway station, on Lord Nelson Street, often next door to each other, in a row of Georgian terraced houses, which are in desperate need of upgrading. The area falls within the boundaries of Liverpool's City Challenge where it has been recognised that there is "potential for

improvement for hotel or office use" (Liverpool City Challenge Map, 1994). Additionally, there is a cluster of hotel development along Mount Pleasant. Again these are terraced houses which have often been joined together to make larger hotel type accommodation. These hotels are privately owned and at the cheaper end of the market. On the waterfront are two of Liverpool's newest budget hotels; the other hotels in the city are more evenly dispersed.



Map 3.6 shows the distribution of licensed restaurants. There appears to be some grouping of facilities which can be discussed under three main headings: the Albert Dock, Victoria Street and Lime Street. There are five licensed restaurants located at the Albert Dock which range in taste form Italian to Indian and French cooking. These restaurants are surrounded by unlicensed cafes and tourist shops and thus can be assumed to cater for a predominantly tourist market. The clientele at licensed restaurants in the Victoria Street cluster is likely to be different to that at the Albert Dock. There are about thirteen restaurants in the cluster around Victoria Street and the Cavern Walks area of the city. This area is the heart of the business community and home to the few Liverpool restaurants listed in the 1994 Which Good Food Guide. Almost all of these restaurants are of high quality and cater for predominantly business entertaining. The growth of the Cavern Walks area as a tourist centre suggests, however, that some of the restaurants in this area are also used by tourists (particularly during special events such as the Beatles Convention).

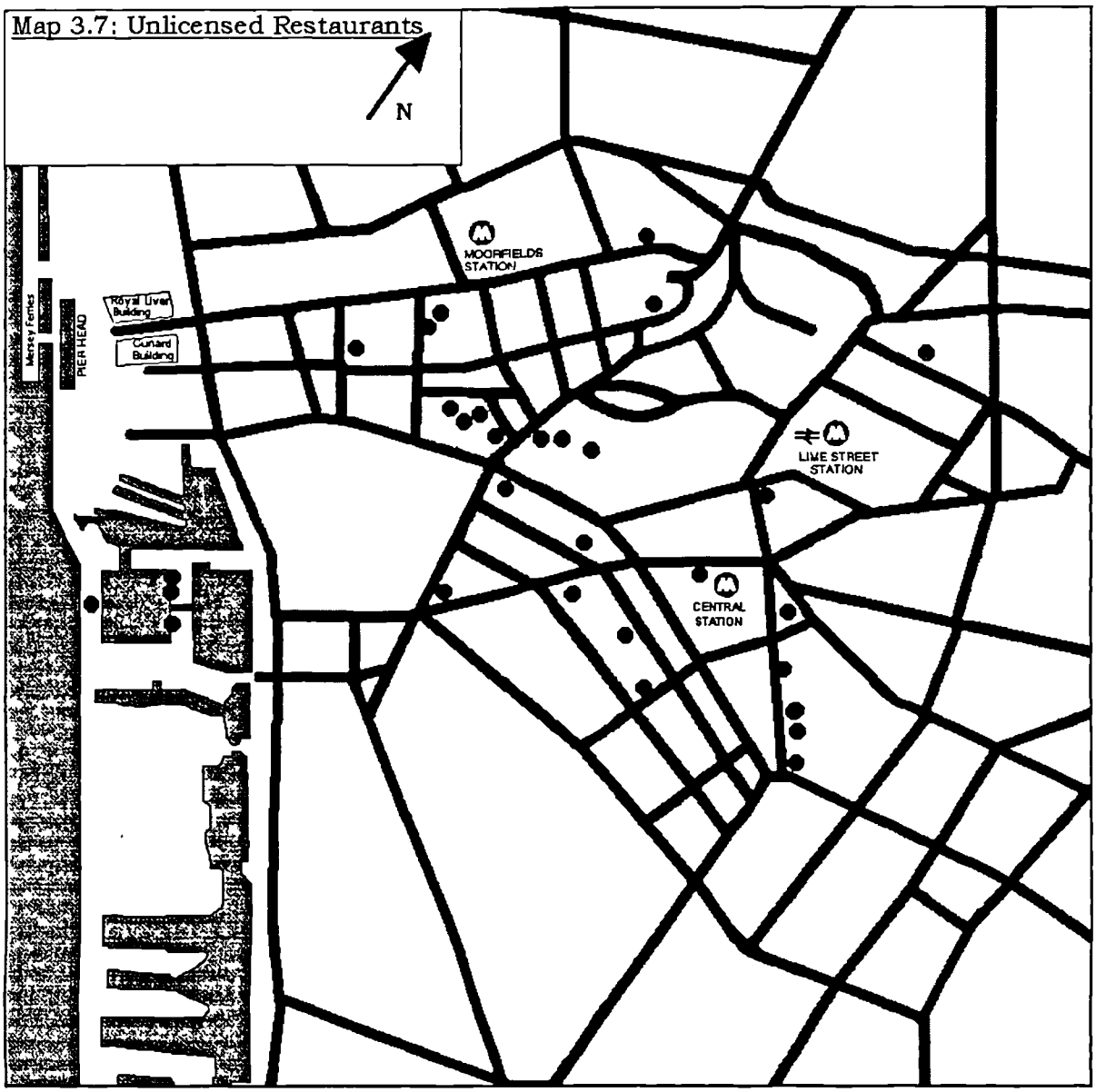
In the third group, Chinatown is an easily explicable example of clustering of restaurants. This area was, and still is, the centre of Liverpool's Chinese community. Elsewhere, the clustering may be a result of prime location for attracting target markets. Indeed, Smith (1988) recognizes that "an adage in the restaurant business (shared by a number of other retail businesses) is that the three most important factors for success are location, location and location" (p.54).

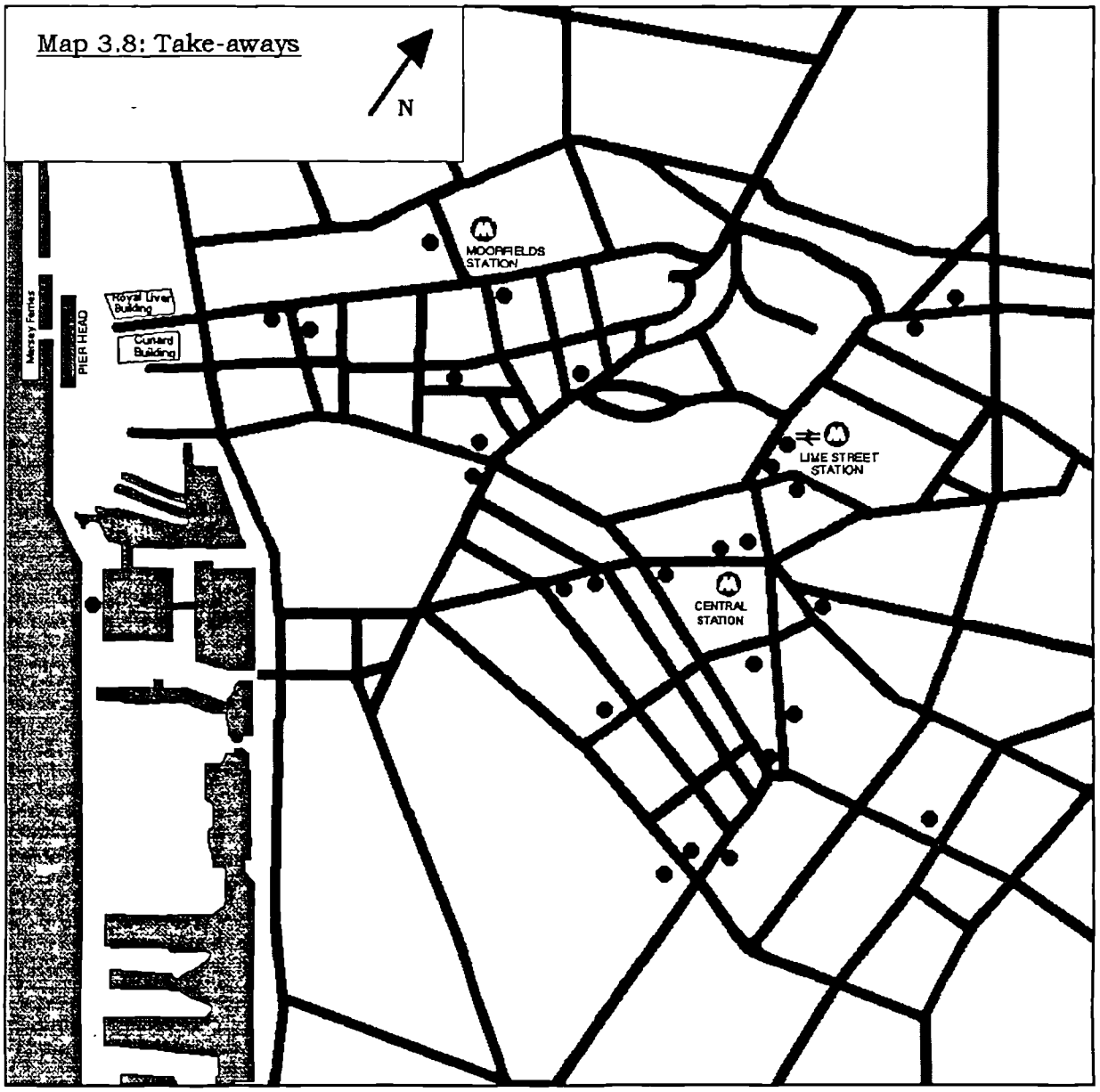


Map 3.7 illustrates those establishments classed as unlicensed restaurants, tea shops etc. This pattern is far less clustered than that for licensed restaurants. Unsurprisingly, the only cluster of these establishments is around the Albert Dock, where there are four cafes which are, undoubtedly, aimed at a tourist market. Indeed, one of these cafes is located on a boat which is permanently moored within the dock - the other three cafes here are, in theory, themed, offering traditional Liverpudlian food (Scouse House), German food and an American ice cream parlour. With the exception of the middle section of Lime

Street and the Albert Dock other unlicensed restaurants and tea shops are randomly distributed around the city centre. The distribution of take-aways (N=27) is far more dispersed than unlicensed restaurants and tea shops, there being very little evidence of clustering (Map 3.8).

Map 3.7: Unlicensed Restaurants

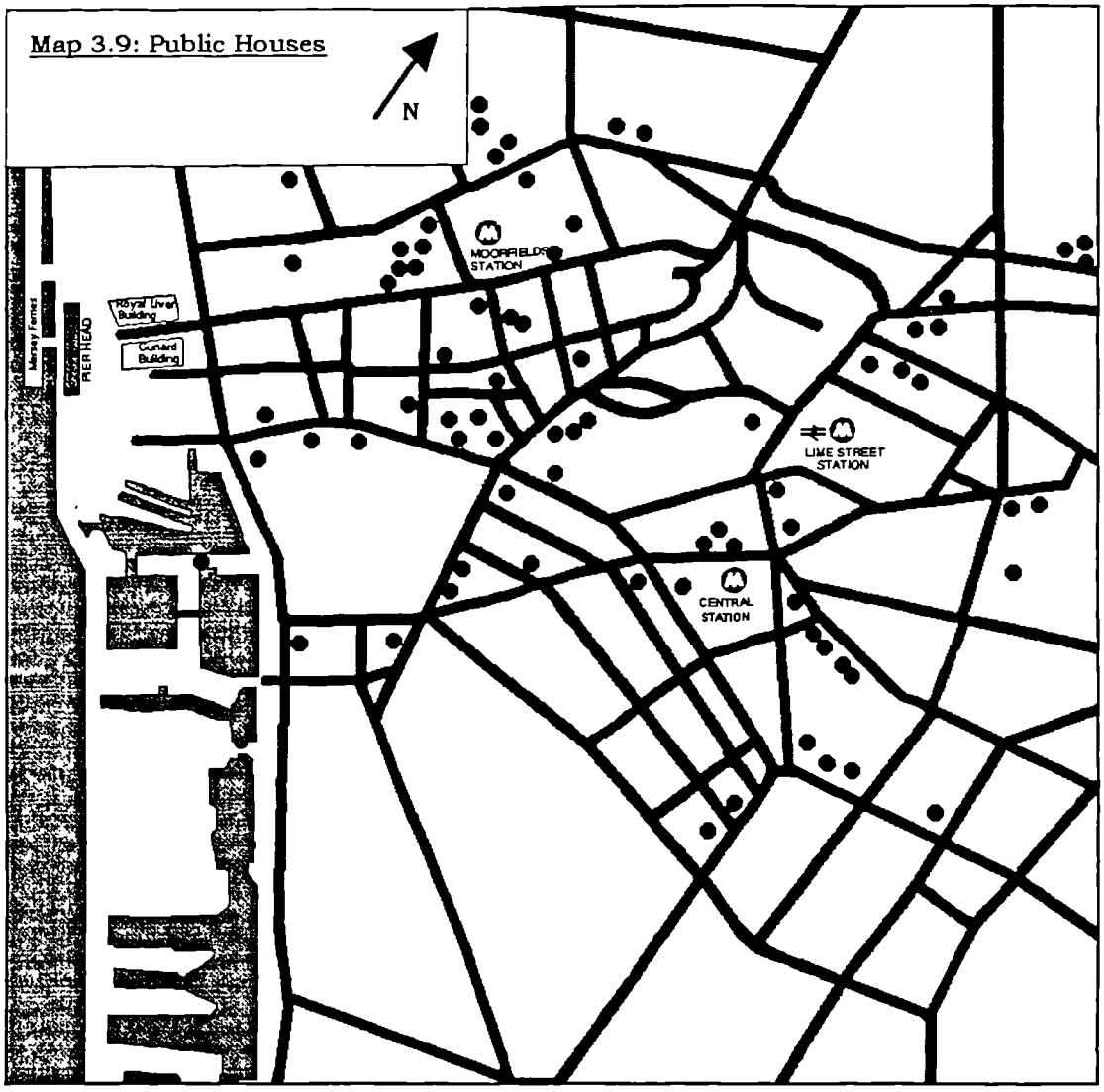




Numerically, the largest tourism-related facility in Liverpool comprises public houses (N=77). It is however unlikely that all of these establishments are used by tourists, indeed location is likely to be an important consideration when analyzing clientele. The empirical research (on public houses) discussed in this thesis relates solely to those in tourist areas. There are a large number of public houses located along and in the areas surrounding Dale Street and Victoria Street (Map 3.9). Although these establishments now cater

predominantly for office workers, their location is historical. Public houses in this area have historical names which hark back to Liverpool's shipping industry. These hotels would have been used by foreign sailors new to the port of Liverpool.

There is another clustering of public houses in the Cavern Walks area of the city. These establishments are more modern and attract a younger clientele, more likely to be using the facilities at the evening. At the Albert Dock, there is only one public house; The Pump House does however complement a number of club type establishments (which offer drink and regular entertainment (Map 3.4) and licensed restaurants (Map 3.6).



The provision of retail space is another landuse which may involve tourism. The importance of shopping as a tourism activity is increasing. Kent *et al.* (1983) note that "while shopping is seldom mentioned as a primary reason for travel, it is perhaps the most universal of tourist activities" (p.2), concluding that

> "shopping may lack the glamour of the beaches of Waikiki, but like a fictional hero, it exerts a powerful impact - here an economic one which deserves more attention. Shopping has modestly and quietly become one of the major support components of the tourism industry" (p.4).

A PIEDA report (1990) records Liverpool as having two million square feet of retail floor space, 80 percent of which is within the core retail area. The precise nature of the main retail areas of the city centre are outlined in Appendix 7.

Those areas of significant importance to tourism in the city can be identified as those offering potentially tourist-related shops or those near to tourist attractions e.g. the Albert Dock, Cavern Walks and the Bluecoat Chambers. These three areas were thus chosen as case studies because of assertions suggesting that "in all locations it is the opportunity to shop and eat and drink in *attractive surroundings*, not just the activities themselves, that draws the tourist" (Martin and Mason, 1988, p.78). The social motives of tourist shopping have similarly been studied, with the conclusion that it is not always the prime motive of a visit but inextricably tied with other issues of the leisure space.

There are also a number of other potential tourist resources which do not necessarily fit within the headings discussed above. There are two examples of exhibition space; one of these, located in Cavern Walks, housed a Beatles exhibition during the survey (free entry), the other has short term, often art, exhibitions and is located in the Albert Dock. In addition, there are two *halls*. St. Georges Hall is architecturally one of Liverpool's most impressive landmarks and is used predominantly as a conference venue, the other is Central Hall (located on Renshaw Street) and is now little used. Finally, at Albert Dock,

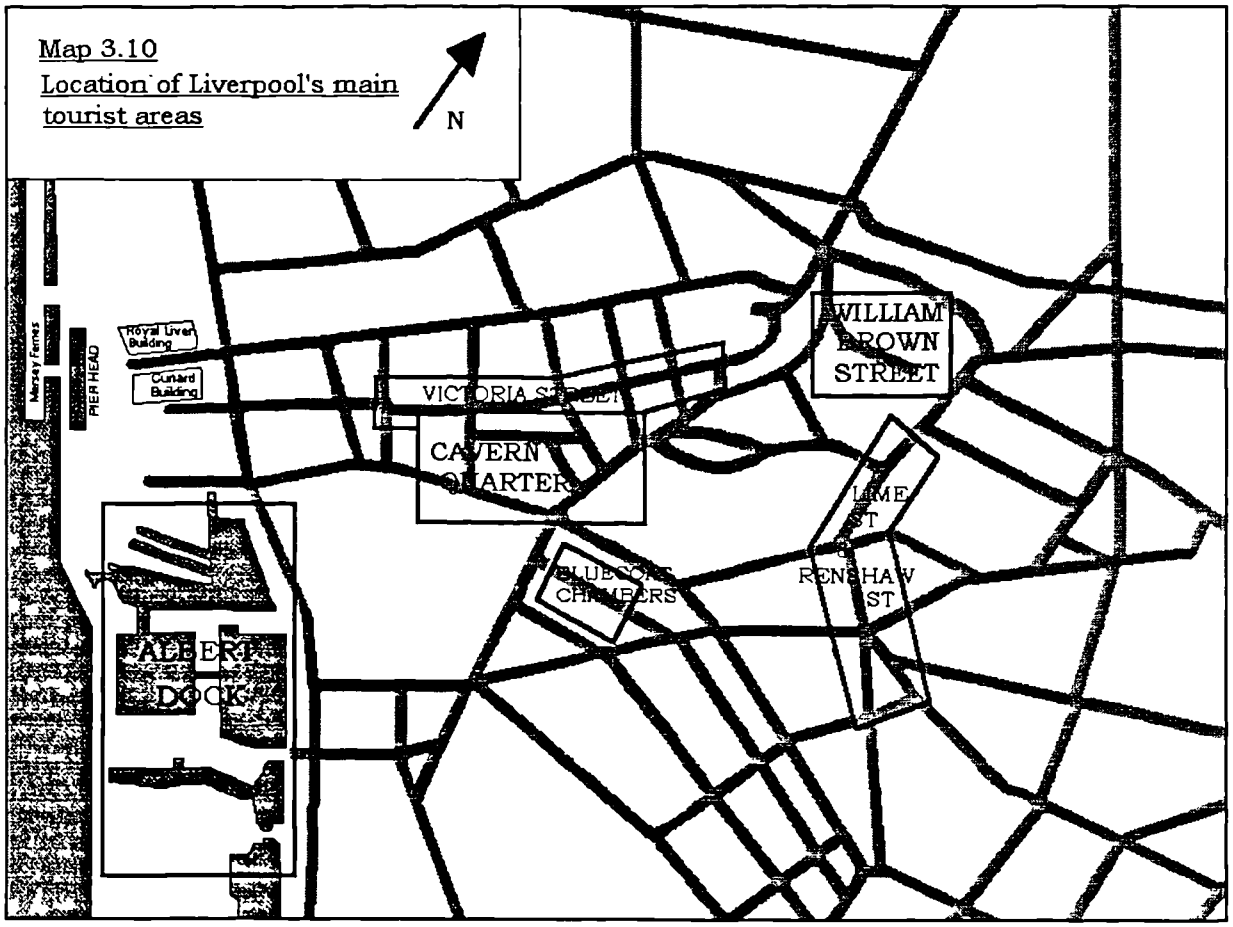
there is a small pirate ship which links tourists with the Merseyferries terminal, and provides a commentary throughout the journey.

Liverpool's wealth of architecture is well documented (see Pevsner (1969) and Hughes (1964)). Impressive architecture is often neglected as a tourist *attraction*, yet for similar reasons it "has the advantage of being on free, permanent display and needing no linguistic translation" (Ashworth and Tunbridge, 1990, p.18). However, the source of information referred to here is Liverpool City Council's Heritage Walk (Browning and Edwards, 1990). The Liverpool Heritage Walk starts and finishes at Lime Street station and has a total distance of 11.5 kilometres (seven miles). Seventy five numbered gun metal "markers" have been set into street footways and pedestrian areas. There are also City of Liverpool plaques which have been erected on walls and buildings; red plaques record buildings and sites associated with historical events and notable persons, blue plaques indicate buildings of architectural merit and the green plaques record the sites of demolished buildings. Particular buildings of architectural note are listed in Pevsner (1969 pp.140-200).

3.4: The characteristics of Liverpool's centres of tourism

This synopsis suggests that the geographical location of tourism facilities in Liverpool can be summarised as two cores of tourist attractions (Albert Dock and William Brown Street), one leisure area (mixture of shopping, eating and drinking) which is enhanced by the memories of the Cavern Club, made famous through the Beatles (the Cavern Quarter) and a couple of major routeways along which a number of facilities are located for eating and drinking (Lime Street and Victoria Street), each offering facilities which cater for different user types (see Map 3.10). These areas will now be described in more detail. Additionally, the area around Bluecoat Chamber will be described because it is a small art centre with shop units in its forecourt and is aimed at a tourist

market.



ALBERT DOCK:

"Albert Dock occupies a prominent landmark city centre location, fronting the River Mersey and immediately adjacent to the Royal Liver Building and Pier Head" (BURA, 1993, p.16). The complex, built in the 1840's, is the largest group of Grade One listed buildings in the country and, after extensive redevelopment by Merseyside Development Corporation (MDC), is Liverpool's prime tourist destination. The landuse is mixed and includes office space (mostly at a mezzanine level), leisure and residential. Leisure facilities include the Tate Gallery, Merseyside Maritime Museum and Beatles Story, numerous restaurants, bars and cafes and tourist types of shopping (small units offering speciality and novelty goods) in addition to barrows selling similar types of good. There is also good access from the site to Merseyferries and a large (free)

public car park. The daily "This Morning" Granada Television programme was (until July, 1996) also filmed from a site on the dock. MDC (1990) suggest that the Albert Dock "is now widely recognised as the symbol of the *new* Liverpool and continues to inspire business confidence in the waterfront and the city centre" (p.21). Some believe that it is through the regeneration of the docks that Liverpool is now able to market itself as a tourist destination; similarly its reported success may have inspired further tourist-related developments in the city.

However, although successful in its early years, there is some concern that the Albert Dock is unsustainable. During the summer months of 1994 a third of all retail units remained empty and many office facilities were either empty or soon to be vacated. Many tenants at the Dock consider this to be due to the management structure. There is some argument that a rapid turnover of some retail tenants is beneficial for a tourist area because changing the nature of the attractions will encourage return visits.

B. WILLIAM BROWN STREET:

William Brown Street runs east from the entrance to Queensway Tunnel, past the north end of St. Georges Hall towards Lime Street. This area has a rich architecture and is the location of some of Liverpool's older attractions; the street retains its heritage feel as it is cobbled, with restricted off street parking. Liverpool Museum and William Brown Library (Central Libraries) building, designed by Thomas Allom, were opened in 1860 and constructed as a library to house the thirteenth Earl of Derby's natural history collection which he bequeathed to the town in 1851. This area is the older core of attractions which, unlike the Albert Dock, has no shopping or eating and drinking facilities (although most of the the major theatres are within easy walking distance).

C) CAVERN QUARTER:

A mecca for Beatles fans, the site of the Cavern Club has been redeveloped by Royal Life Assurance and opened in 1984 as Cavern Walks. The building, designed by David Backhouse, contains a rebuilding of the original Cavern Club in the basement and shops, offices and an internal nine storey atrium, containing a sculpture of the Beatles. Since 1984 the night time attraction of this area has increased considerably, with numerous restaurants, public houses, bars and clubs opening. The area is also becoming a fashion shopping centre. Liverpool City Centre Partnership have also worked to improve the image and attractiveness of the area by erecting street signs which advertise this as the Cavern Quarter.

D) LIME STREET / RENSHAW STREET:

Lime Street is a busy four (and sometimes six) lane road on a number of major bus routes. Indeed, this is the first view of Liverpool for many visitors arriving at Lime Street Station. Both Lime Street and Renshaw Street have tertiary retail outlets (such as discount stores and do-it-yourself shops) and eating and drinking establishments alongside some take-aways; these establishments are all privately owned and often of low quality.

E) VICTORIA STREET:

Victoria Street was cut through this part of the City Centre from 1867 to 1868 to improve traffic flow and produce a new and impressive location for commercial development. Many of the buildings along the street date from 1800's and are of architectural merit. A number of the corner buildings were banks; recent landuse change has resulted in conversion to restaurant spaces in the ground floor and office space above. This forms the southern end of the main business district of the city.

F) BLUECOAT CHAMBERS:

The Bluecoat Chambers were originally built as a charity school in 1717, but in 1927 enthusiasts bought the building and formed the Bluecoat Society of Art which still owns the building. Recently the Society has made a conscious decision to make the front of the building more open to the public. The main building is an art gallery, concert hall, artists studios and meeting rooms. The forecourt has a cafe, bookshop, artists shop, a local history shop and a shop selling cards and picture frames. One aspiration is that the area could have more of a night time feel, encouraged by extending opening hours and more concerts held here.

3.5: Characteristics of "tourism-related" buildings

The field survey not only identified tourism-related facilities accurately, but also surveyed other characteristics of the premises. Detailed maps provided the total area occupied by business and average area per type of establishment. Buildings were also grouped by age and whether there had been any regeneration.

During the summer of 1993 there were 289 tourism-related establishments (see Table 3.1), the greatest number of these being public houses (77) and licensed restaurants (47) with significant numbers of unlicensed restaurants/cafes (31), take aways (28), clubs and nightclubs (27) and sources of accommodation (22). This equates to 214,400 m^2 of floor space occupied by tourism-related industry in Liverpool post code sectors L1, L2 and L3. The largest users of floor space are accommodation (83,500m^2) and attractions (71,100m^2), these two uses also having the highest average floor space per establishment (6,000m^2 for attractions; 4,000m^2 for accommodation). There are 15,900m^2 of floor space occupied by public houses, averaging out to just 200m^2 per establishment. Table 3.1 similarly recognises that the smallest user of land is unlicensed restaurants and cafes (average 100m^2 per establishment),

followed by public houses, restaurants and take-aways (average 200m^2 per type of facility). Indeed, the average floor space for all tourist-related activities is 800m^2. In most cases, the floor space related directly to the area occupied, as almost all examples are ground floor premises. The exceptions are accommodation (average 4.3 floors per establishment) and attractions (3.1 floors per establishment).

The buildings were categorized as pre World War One, inter-war, post World War Two or modern. There appears to be a strong preference towards locating in "historic" buildings i.e. those built before World War One (75.0 percent), with just 4.2 percent of all tourism-related being located in modern buildings (less than ten years old). Of the newer buildings occupied, 40.0 percent are unlicensed restaurants/cafes. Attractions are most likely to be located in older buildings (pre World War One (with only one exception)).

It is therefore surprising to note that very few buildings have undergone recent redevelopment, considered as landscape improvements, building upgrade / addition and improvement to the surrounding area. Just 18.0 percent (52) of all establishments are located in redeveloped areas; most of these are located at either the Cavern Quarter or the Albert Dock. Redevelopment is, not surprisingly, greatest around attractions (58.3 percent of all buildings). Licensed restaurants appear to show considerable redevelopment (46.9 percent of all buildings); this ties with the earlier statement of banks and other historic buildings being converted into "classy" restaurants.

Table 3.1: Characteristics of buildings occupied by tourism-related industry. Liverpool L1-L3, summer 1993.

	1	2	3	4	5	6	7	8	9	10	11	TOTAL
Total area '000 m^2	10.0	4.3	5.1	15.9	4.5	-	83.4	71.1	3.1	17.0	-	214.4
Average area m^2	200	100	200	200	300	-	4000	6000	200	2000	-	700
No. storey	1.0	1.0	1.0	1.2	1.1	-	4.3	3.1	1.0	1.9	-	-
Pre WW1	28	18	14	60	13	4	16	11	9	5	2	180
Interwar	1	2	1	4	3	0	0	0	0	1	0	12
Post WW2	3	4	8	9	2	3	4	0	3	3	0	39
Last 10 years	0	4	1	1	0	0	2	1	0	0	1	10
Don't know	15	3	4	3	0	20	0	0	2	0	1	48
Redeveloped - Yes	15	4	3	8	5	0	5	7	2	2	1	52
- No	32	27	25	69	13	27	17	5	12	7	3	237
TOTAL	47	31	28	77	18	27	22	12	14	9	4	289

1 = Licensed restaurants
2 = Unlicensed restaurants
3 = Take aways
4 = Public houses
5 = Bars
6 = Clubs / night clubs
7 = Accommodation
8 = Attractions
9 = Betting and gambling
10 = Theatre and cinema
11 = Other

3.6: Factors influencing the location of shopping and catering establishments in tourism areas

The data presented here refers to information given at interview with managers at various tourism-related facilities. Managers of 13 hotels (92.9 percent acceptance), ten theatres or cinemas (100 percent), and nine attractions or other tourist "attractions" (90 percent) were asked questions, during structured interviews, relating to the nature of their business; the results will be referred to in various sections of the thesis. In addition, all managers of shops and eating and drinking establishments in three key tourist areas were asked to complete a questionnaire relating to similar issues(Appendix 8). The three selected areas are the Albert Dock, Cavern Walks and the Bluecoat Chambers (see the sampling matrix in Table 2.13).

In the case of eating and drinking facilities and shopping, the preceding analysis of location can be supported by reasoned accounts for location. Tourism was an important reason for locating at the Albert Dock, a third of respondents mentioning access to tourists and a quarter wanting to be near to the attractions; other reasons include the redevelopment of the Albert Dock and the prestige which the address gives. Additionally, one respondent was conscious of the subsidised rent and rates which were made available. The Bluecoat cafe-bar was invited to locate at Bluecoat Chambers and as with the Albert Dock, eating and drinking facilities were attracted to the Cavern Quarter by potential tourism.

It is apparent that most of these establishments had a particular desire to be located specifically in their location. At the Albert Dock, only two cafes had considered locating elsewhere. Here two-thirds of establishments also saw some disadvantage to their location, the most regular comment being the seasonal nature of business. Two restaurants were also conscious of a waste ground between the Albert Dock and City Centre which many people are not willing to cross. Other comments include the lack of a community, high rent and the number of empty shops. On a more positive note, one restaurant stressed that there are no disadvantages to being on the dock as there is a good day trade from tourists as well as a regular night time clientele. At the other two case study areas, location was a problem for a few; these establishments consider themselves to be on backstreets hence, visitors need to find them and there is no passing trade.

Before discussing the location of retailing it is crucial that one appreciates the type of product which is being sold. The table below (Table 3.2) identifies all shops in the three chosen case study areas (regardless of whether the questionnaire was completed), and refers to shops in business during the summer months of 1994. These results illustrate that the most common shop

type (all three areas) was fashion, this forming most of the market at Cavern Walks, and the largest group at the Albert Dock. At Bluecoat Chambers all the shops are art-related, selling artists' materials, books and pictures. At the Albert Dock, other popular goods are sweets and souvenirs and trinkets. Yet there are also a number of other non-tourist type lease holders such as a furniture shop, folk music seller, a hair dresser and a computer retail unit (see Table 3.2).

Table 3.2: Shop tenants: The Albert Dock, Cavern Walks and Bluecoat Chambers. Summer, 1994.

	ALBERT	BLUECOAT	CAVERN	TOTAL	%
Souvenirs/Trinkets	7	-	1	8	14.8
Sweets	3	-	-	3	5.6
Fashion	8	-	11	19	35.1
Craft/art related	3	2	-	5	9.3
Jewellery	2	-	1	3	5.6
Books	3	2	-	5	9.3
Others	9*	-	2	11	20.3
Total number	35	4	15	54	100.0

Source: Authors survey.

* Includes: furniture store, music, hairdressers, nautical equipment, computers.

Again, at the Albert Dock, access to tourists was a prime motive for locating shops in this area (45.8 percent of those chosing to comment), with an additional three respondents noting the impressive tourist statistics. Similarly, the prestige associated with the Albert Dock was mentioned by two shops along with the attractiveness of the area. There were responses, however, which present a sad picture of shop closures and dissatisfaction. One manager located at the dock because of potential big business, but has since recognised

that there is no motive for tourist visits. The management of the dock is, apparently, also a cause for concern; a number of shop keepers are now conscious that all the public relations exercises which occurred when the dock was first opened have stopped and rents have increased considerably. Managers of tourist orientated shops (sweets and souvenirs) were less critical, suggesting their motives for location to be the high number of passers by and people with high disposable incomes. One owner of a music shop explained her motives as unrelated to tourism; mentioning that sign posting, reputation and access to car parking were all important factors which made the shop accessible to people who had seen advertisements in journals and might be unfamiliar with the area. At both the Bluecoat Chambers and Cavern Walks tourism was a far less important motive for location.

Desire to locate in these three case study areas is less obvious amongst shop keepers than in views expressed by managers of eating and drinking facilities. At the Albert Dock a third of the managers had thought about locating elsewhere; three of these had considered Liverpool city centre, the others mentioned other tourist areas such as Southport or Blackpool, or other city centres (e.g. Oldham or Warrington). At the Cavern Walks a quarter thought of locating elsewhere; in all cases these were city centre locations such as Manchester and Chester. One mentioned Liverpool's Clayton Square Shopping Centre.

Shop keepers were generally less aware than catering managers of disadvantages due to location. One noted that being off the beaten track "keeps the riff-raff out". At Cavern Walks, the prime concern was the limited amount of passing trade due to its "hidden location". One respondent said that the Beatles Convention made it a tourist attraction, although another was conscious that there is a disadvantage in the centre being "a tourist attraction, not a shopping centre".

At Albert Dock, over half the shopkeepers experience no disadvantage to being located in this particular part of Liverpool. Those which commented recognised mainly that custom is seasonal (five respondents) and trade is often weather dependent. Other comments relate to distance from the city centre, where there are likely to be more passers-by. It appears that Monday to Friday can be very quiet unless there are a number of coach tours. Yet, coach tours are not always beneficial to business as they are often school trips and pensioners with little or no money to spend in the shops. A couple of traders made comments which suggest that they feel rather conned by the Albert Dock Company. One mentioned that a lot of people around the Dock are "not customer traffic, they are using the free car park". A newsagent similarly mentioned "we were promised that three thousand people would work here, yet offices are closing all the time and we lose our regular customers". Whilst talking to traders it became apparent that this is often due to increased rents each time the lease is renewed and a decline in the number of visitors. Many of the traders seem to be disgruntled about the situation and are trying to end leases early and move away. The field survey was completed in summer 1993; by summer 1994, when the questionnaire was administered, ten of the original forty-four units had closed down, and none of the premises reoccupied.

3.7: History and ownership of tourism facilities

It is interesting to consider the issue of ownership of tourist facilities in order to assess the extent to which the city is providing opportunity for local entrepreneurs or attracting national or multinational corporations. How this ownership pattern has varied over recent years is also important, such an examination enables conclusions to be made about the role which various events, attraction openings and grant availability etc. may have in attracting investment to the city. Additionally these results provide some indication of internal and external support for tourism in Liverpool.

Ownership of hotels in the case study area varied considerably. Of the twelve interviewed, five are owned by multinational and national companies and four are privately owned, one by an Irishman and one by a Frenchman. The remaining three are part of privately owned, locally based chains (see Table 3.3). Interestingly, the Frenchman who owns one of the hotels is also on the board of directors of the French-based multinational Campanile chain which also has a hotel in Liverpool. This is his first privately owned hotel, which he hopes will be one of a chain that has its roots in the north west of England.

Table 3.3: Hotel ownership

PRIVATE	LOCALLY OWNED /BASED CHAIN	NATIONAL CHAIN	MULTINATIONAL
Frenchman	Inns & Leisure Ltd. (Preston)	Britannia Hotels (Manchester)	Forte Plc (2)
Irishman	Empire Hotels Group (L'Pool)	Mount Charlotte Thistle (Leeds)	Queens Moat House
Liverpool family (2)	Feathers Group (L'Pool)		Campanile (French)

Source: Author's survey.

Not surprisingly it is the multinational and national companies that are more likely to be purpose built establishments offering many more rooms. However, what is surprising is the recurrence of examples of Georgian town houses which have been converted into hotels. Often they originally constituted just one house, and have now expanded up and down the street; the largest example includes five houses. There is only one example of another type of building being reused as a hotel. In this case a former bank has been refurbished to create an exclusive 20 suite hotel (with no standard rooms) in a prime city centre location (see Table 3.4).

Table 3.4: Hotel ownership and building history matrix

	Private	Local Chain	National	Multi - national
Purpose Built	1	-	2	4
Town House	2	3	-	-
Bank	1	-	-	-
TOTAL	4	3	2	4

Source: Author's survey

From those respondents who mentioned the age of the hotel, it became apparent that there have been two periods of successful hotel development in the city. Five of the eleven responding hotels opened in the twelve years between 1962 and 1974, four of these between 1971 and 1974. The next time a new hotel opened was in 1991 with the building of the Campanile hotel on Wapping; this was followed by the Dolby which was completed in 1993. The most recent wave of hotel building is located near to the Albert Dock development, where grants are available from MDC.

The two oldest hotels are reported to date from the eighteenth century. Both were later associated with the railways. The lesser known example is the Bradford Hotel (recently reopened) which is located near to the old Moorfields Station, the other example being the Britannia Adelphi, located opposite Lime Street Station; apparently there has been an Adelphi Hotel on this site since the eighteenth century, although the present building opened in 1912. Two hotels reported opening in the early 1900's - these are both small, privately owned establishments.

The glut of hotel openings in the early 1970's cannot be explained by the opening of new attractions, but could be due to more business tourism to the

city. These four hotels are those which are now owned by national and multinational chains. None of the managers interviewed had been in the hotels long enough to be in a position to explain why the hotels opened; however, one speculation was that, until they opened, the only other large hotel in the city was the Britannia Adelphi and this dominance deserved challenge with the general growth of demand.

However, nine of the hotels have changed hands throughout their history. The maximum number of changes reported was four. It appears that most changes occurred during the 1980's. Indeed change of ownership occurred in all the large national and multinational hotels at this time. The Adelphi was bought from British Rail in 1987 by Britannia Hotels. The Gladstone, (originally a Centre Hotel) was bought by Crest (owned by Bass), Crest was bought by THF, thus creating a Forte Crest hotel, and Forte recognized that the hotel didn't fit into the definition of a Crest Hotel so the name was changed in January 1993. The Moat House Hotel opened in 1971 as a Holiday Inn, but for financial reasons it was put on the market. The Atlantic Tower has similarly seen changes during the 1980's; however, this was not necessarily due to a change of hands, but to the purchase of Scottish and Newcastle Breweries by Mount Charlotte Thistle.

Unfortunately, it has not been possible to obtain information about the demise of hotels in the city over recent years; however, the field survey of the city showed that there is no purpose built, large hotel which is unoccupied. The places most likely to have lost custom as a result of the building of purpose built hotels are those public houses which, in their history, once offered bed and breakfast facilities.

As has already been mentioned, theatres and cinemas in Liverpool are well established (see Table 3.5). The most recent theatre to be built was the

Everyman (opened in 1964); however, it is this theatre which has just recovered after going into liquidation (during 1993). The most recent cinema was built in 1974 as part of a larger complex which included a night club and restaurant.

Table 3.5: Name and ownership of theatres and cinemas in Liverpool.

NAME	DATE OPENED	PARENT OWNER
Cannon Cinema	1931	Cannon
Odeon Cinema	1934	Odeon
Robins 051 Cinema	1974	Robins
RLPO	Est.1940 Built 1939	RLPO
The Empire	1888	Apollo Leisure
Playhouse Theatre	1866	Liv. Rep. Theatre
The Everyman	1964	Everyman Bistro
The Royal Court	1939	Zoomstretch Ltd.
Neptune Theatre	?	Liv. City Council
Unity Theatre	1937	Hope Place Community Assoc.

All three cinemas are owned by national and international companies, the least familiar of these names being Robins, owner of the art house cinema, a London based international company which has two other art house cinemas, one in London and one in Leeds. The two largest theatres are also owned by national and international companies. Apollo Leisure is an Oxford based company which also owns other theatres in, for example, Bristol, Edinburgh and Manchester. Zoomstretch is a London based company which has other holdings in the entertainments business. In contrast, the smaller theatres are owned by more locally based companies, including the Everyman Bistro,

Liverpool Repertory Theatre, Liverpool City Council and Hope Place Community Association. With such long histories it is not surprising to learn that seven of the establishments have changed hands since they opened.

In considering attractions, as with the earlier research, structured interviews were attempted with managers of all establishments. Unfortunately, appointments could not be arranged with either Beatles Story or the Metropolitan Cathedral; all other attractions are included. A number of major museums and galleries in the city are represented by National Museums and Galleries on Merseyside (NMGM); it was the Assistant Director of the group who was interviewed rather than each museum. Thus results are taken from nine interviews. For reasons of confidentiality, museums and galleries are coded 1-4 and other attractions A-E.

The attractions which are located in L1, L2 and L3 postcode districts are either old, dating from the mid-1800's to early 1900's, or relatively new; since 1980. This pattern is more interesting because of the location of the attractions. The older attractions are located in the city centre, near to Lime Street Station and St Georges Hall. Since this time the area has always had some attraction for leisure visitors. The newer attractions tend to be located nearer to, or at, the waterfront around the redeveloped Albert Dock. Therefore this suggests two cores of attractions, one old central core and a more recent waterfront concentration.

Table 3.6: History and ownership of attractions in Liverpool

NAME	DATE	OWNERSHIP
City Museum	1851-1853	NMGM
Walker Art Gallery	1875	NMGM
Anglican Cathedral	1948	Anglican church
Central Libraries	1851	City Council
Mersey Ferries	1991[3]	Merseytravel
Merseyside Maritime Museum	1980	NMGM
Museum of Liverpool Life	?	NMGM
Anything to Declare?	1994	NMGM
Mersey Sports Centre	1982	MCVS[2]
Tate Gallery	May 1988	The Tate Gallery (London)
Hanover Gallery	1984	Private
Western Approaches	May 1993	Walton Commercial Group
Beatles Story	1980's	Wembley
Bluecoat	1927[1]	Private

[1] The oldest arts centre in England
[2] MCVS - Merseyside Council for Voluntary Services
[3] Marketed as a tourist attraction since this date

Source: Author survey.

Ownership of attractions varies, with a mix of privately owned, such as the Bluecoat Chambers and Hanover Gallery, City Council owned such as Central Libraries. By far the largest owner is National Museums and Galleries on Merseyside (NMGM).

NMGM was established in 1986 when metropolitan counties were abolished, at a time when Liverpool was at the peak of its financial difficulties. The 1985

Local Government Act gave provision for collections of national significance to be brought together, thus the collection reverted from City Council control to national funding. The interviewee at NMGM noted several ways in which the organization now differs from City Council controlled organizations (see Figure 3.2).

Figure 3.2: Differences between NMGM control and City Council control of art galleries and museums in Liverpool.

" - Members of the Board of Trustees are National figures.
- There is reasonably assured core funding.
- Are an exempt charity, as such are able to raise funding from private sources.
- On a par with other national museums. eg Victoria and Albert, Imperial War Museum, Museums in Edinburgh and Cardiff.
- Raises the expectations of staff, offers them good pay and conditions.
- Raises the international profile.
- Able to liaise with London colleagues. All the staff are within the same milieux and thus enjoy spin-offs in terms of scholarship and awareness.
- Enables international collections to come to Liverpool e.g. Jordan exhibition which had Liverpool as its only UK location."

Source: Interview. January, 1994.

With the exception of the NMGM case, discussed above, none of the attractions has experienced a change of ownership. However, there has been some closure of attractions over recent months. In the short period of 1994 between letters inviting participation in interviews and my telephoning to arrange appointments, Animations World, the newest visitor attraction at Albert Dock, had closed down, the explanation given being lack of visitors. Similarly Beatles Story has had difficulties which resulted in a change at management level. Additionally, it is difficult to know the survival rate of any attractions in the recent past (since before 1984). It may be only the strong attractions such as Walker Art Gallery and Liverpool Museum which remain from a longer base. Indeed since 1984 the Large Objects Collection and Museum of Labour History

have gone.

With such a wide variety of types of attractions existing in Liverpool, it came as no surprise to learn that funding comes from a number of sources. The most common source mentioned was income, either as part or total funding. Liverpool City Council is the main funder for Central Libraries and grants some monies to Merseyferries and Mersey Sports Centre. Merseyferries earns this money due to its ownership by Merseytravel. If the attraction stopped providing a commuter service, this source of funding would cease. Other funders for Merseyferries include MDC and Wirral Task Force; additional money for the creation of an aquarium at Seacombe became available from ERDF. Mersey Sports Centre has the widest range of funders, names mentioned include MDC, the Arts and Sports Foundation, TEC's, Task Forces and the Sports Council.

NMGM was the only group to mention sponsorship. Project JASON (scientific expeditions filmed and broadcast via satellite to sites in the UK, including Liverpool Museum) has been developed by the museum; plans for expanding the programme to include three or four further sites in the UK have enabled the museum to raise £60 000 sponsorship from Barclaylife in a three year agreement.

It was similarly only NMGM which mentioned money from Central Government; during the period 1993/94 the association had an income of £12/13 million in Grant in Aid. NMGM 1989 Review 1992 provides a wider view of the financial workings of the group. This detail illustrates the importance of Grant in Aid. (See Table 3.7).

Table 3.7: Summary of income and expenditure, NMGM 1991/92

INCOME	£M	%	EXPENDITURE	£M	%
Grant in Aid	12.6	75.5	Staff costs	8.3	49.3
Operating income	1.6	9.7	Other running Costs	2.8	16.8
Contribution to collection purchase fund	0.5	3.0	Building and Maintenance costs	1.6	9.4
Investment income	0.4	2.2	Purchases for the collections	1.7	10.0
Capital Receipts	0.3	1.8	Additions to fixed assets	1.4	8.4
TOTAL INCOME	15.4	91.2	TOTAL EXPENDITURE	15.9	93.9
Surplus B/F	1.5	8.8	Surplus C/F	1.0	6.1

Source: NMGM, 1992. p.145

Liverpool's Tate Gallery also gets financial support from Central Government, but indirectly. All the money for the Liverpool venture comes directly from the Tate Gallery, London; an examination of London accounts revealed that the Tate Gallery is funded primarily by Grant in Aid. "However, in recent years, to an increased extent, it has obtained funds from private sources which include donations, bequests, sponsorship and other income earned from the Gallery's own activities and those of associated fund raising charities, the Friends of the Tate Gallery and the Tate Gallery Foundation" (Tate Gallery, 1992 p.78). The Liverpool Tate is however given an income target which must be reached (£200,000 1993/94). If this money is not raised, the difference will be deducted from the money provided by the London Tate; in 1993/4 funding for the Liverpool Tate was in excess of two million pounds.

Eating and drinking facilities are used by both tourists and residents. It is therefore important to consider the extent to which these facilities are provided

for each of these groups. Additionally it is interesting to ascertain whether these facilities have been established because of the tourist market or because of a local market. This research is also important as it may lead to a questionning of the definition of "tourist-related" and thus may influence factors such as tourism-related employment.

With the exception of major breweries, most eating and drinking facilities are managed by private companies. At the Albert Dock, two-thirds of the companies were established post 1984; two companies (both of which have the Albert Dock premises as one of a chain) were established during the 1970's and one brewery was old established (in 1742). At the Cavern Quarter just three companies were formed prior to the opening of the shopping centre in 1984; two major breweries were established in the late nineteenth century and one was established in 1978. Change of hands had occurred in only two cases, both in 1990.

Indeed, at the Albert Dock, half the parent companies are Liverpool based (6), others are based elsewhere in the north west (Southport, Wirral, Knutsford), or are major breweries based nationally (Sunderland and Dunstable). The local companies are run either as family businesses, partnerships or, as in one case, as part of a small chain (three other locations). The situation is similar at the Cavern Quarter where half of the establishments are managed by Liverpool based private companies, the rest by national companies such as Boddingtons and Tetley Walker.

It is therefore apparent that most of the eating and drinking facilities in the tourist areas of Liverpool have been established since redevelopment for tourism. These establishments tend to be privately owned and are not part of national chains but are mostly locally based companies.

The average length of time (summer 1994) that shops have been in their premises was just 3.4 years. As with eating and drinking facilities, relocation is not an important issue amongst retail outlets. At Bluecoat Chambers none of the shops had relocated and just two of the Cavern Walks shops were previously located elsewhere; one from another unit in Cavern Walks and another from elsewhere in Liverpool. At the Albert Dock, a third of the respondents have relocated in their present unit. Although one came from Cornwall, six of these were previously in units elsewhere within the Albert Dock. This information is further supported by details of when the company was first established. With the exception of national companies, all companies have been established specifically for these premises. Hence, most units in the three areas were opened in the late 1980's and early 1990's. Additionally, all companies, bar three at the Albert Dock, have never changed ownership. Ownership is predominantly local based private companies (over two-thirds of the shops here are owned by Liverpool based private companies, in line with the American model of "mama and papa" family businesses in tourist area). At Bluecoat Chambers all retail units, with the exception of the craft centre (owned by Bluecoat Trust Committee) are private, Liverpool based companies. Additionally, at Cavern Walks, despite two nationally owned companies (Next and Culpepper) the majority of owners are locally based private companies (nine are based in Liverpool, two more in the north west).

Retail facilities in tourist areas are, therefore, not as secure as eating and drinking establishments. There appears to be a quick turnover of facilities. The types of shops attracted to these areas are, in most cases, locally owned private companies, one explanation being that the types of lease and floor space available are not those suited to major highstreet chains.

3.8: Conclusions

Liverpool's urban geography has a strong tourist element which consists of bars, restaurants, cafes, museums, galleries, and hotels. The facilities are however spatially concentrated in a number of specific areas. The attractions are found in two cores; one at the Albert Dock, where most of the recently developed attractions are located, the other at William Brown Street, where there is a historic gathering of museums and galleries. Eating and drinking facilities are spread wider but are concentrated on Victoria Street and the Cavern Quarter, Lime Street and The Albert Dock, and clubs are often found in the Renshaw Street - Berry Street and Hanover Street - Ranelagh Street triangle.

The provision of a clustering of facilities is very similar to that found in urban areas undergoing similar renewal policies. It is apparent that these mechanisms often work to a standard formula favouring waterfront locations and the American idea of festival market places. Although Liverpool does not have a festival market place there are a couple of locations which have a similar function where there are attractions such as museums and galleries, with a selection of cafes, bars, restaurants, and shopping around. Additionally, at three of the concentrations, tourism-related facilities share the environment with offices and, in the Albert Dock case, residential land use.

The history and ownership of tourism facilities varies considerably between sectors of the industry. National and multinational hotel companies have created a secure base of hotels, despite considerable re-ordering during the 1980s. This has been followed by an expansion during the 1990s of predominantly privately owned establishments. One explanation for this may be the increased number of and expansion of attractions of the city. However, since mid 1990s the initial success of those such as Animations World and Beatles Story appears to have dwindled. Privately owned attractions have

suffered most from declining visitor numbers. Here numbers are more crucial as there is not as much support from national funding as is available for their counterparts.

Eating and drinking facilities in tourist areas are generally privately-owned by Liverpool based entrepreneurs. However, there are exceptions. Multinational chains such as McDonalds and Pizza Hut are well represented as are national chains such as Pizza Express and the major breweries. The ownership of retail units offers a similar picture. In tourist areas the majority are privately owned by Liverpool based companies, most of which were newly established in these, their only premises.

Thus, the nature of tourist facilities in the Liverpool case study area represent an interesting pattern, concentrated around three key areas, the Albert Dock, Bluecoat Chambers and Cavern Walks, with a number of well established attractions at William Brown Street. Recent years have evidently shown an increased awareness of and support for the tourist industry, illustrated particularly by the number of new, often privately owned tourism-related establishments which often occupy renovated buildings in regenerated areas. However, these appear to be those which have suffered most from declining visitor numbers during the late 1990s, possibly due to a greater supply than demand for facilities.

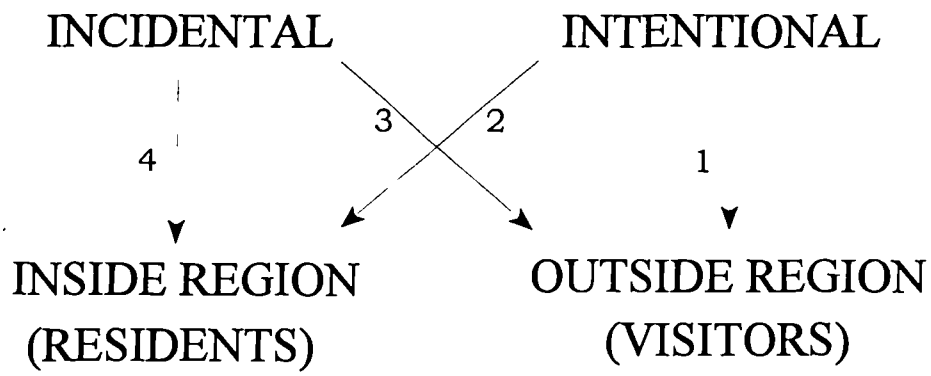
CHAPTER 4: VISITORS TO MERSEYSIDE

Urban areas are used by a variety of groups of people each with their individual purpose and motive. The situation is complicated by overlap between the multiple motives of individuals (for example business visitors who may also visit football matches, or residents who attend changing exhibitions at the Tate Gallery), and the difficulty of defining a tourist (see Chapter 1). Ashworth and Tunbridge (1990) thus recognize that,

> "Most existing taxonomies divide users into a series of simple categories based usually upon a single motive. There are thus *tourists*, *shoppers*, *workers* or *residents* each of which must be identified in isolation from the rest and then further subdivided according to a wide range of demographic, social and behavioural characteristics" (p.118).

In their study of the tourist-historic city these authors define users of facilities as either "intentional" or "incidental" (p.119) (Figure 4.1).

Figure 4.1: A typology of users of the tourist-historic city



1) Intentional users from outside the city region, who may be holiday makers staying in the city (for excursions within or outside the city) or outside it using the city for excursions (i.e. tourists)
2) Intentional users from inside the city region - recreating residents.
3) Incidental users from outside the city region, which would include most business and congress visitors and those on family visits - non-recreating visitors.
4) Incidental users from inside the city-region, the most numerous groups, being ordinary residents about their ordinary affairs - non-recreating residents.
Source: Ashworth and Tunbridge (1990, p.120).

From an urban planning standpoint the type of visitor attracted to the city is of further importance. As tourism is an export industry the money spent by visitors from outside the local area, both foreigners and people from other UK regions, is more valuable than that spent by local residents; overseas visitors and visitors staying overnight will spend more per head because of the need to pay for accommodation and food, with the possible exception of those who are visiting friends and relatives. Different visitor types also contribute differently towards issues such as seasonality and special events.

The aim of this chapter therefore is to use primary and secondary sources to consider the type of visitors to Liverpool. The approach for the primary research is unusual in that it takes the view of the providers rather than the more standard 'user' statistics.

Liverpool and the Merseyside area have a wealth of statistical information pertaining to visitors. In 1985 the European Commission, Merseyside County Council, Merseyside Arts and Merseyside Development Corporation commissioned studies of tourism and the arts in Merseyside (DRV Research, 1986). The objectives were to increase the level and understanding of the pattern and value of tourism in Merseyside and to provide information relevant to the assessment of the development, management and promotion of tourism. In 1990 a further study was commissioned to update and enhance the research of 1985. This study was funded by Merseyside Task Force, Merseyside Tourism Board, Merseyside Development Corporation, Merseytravel, Liverpool City Council and the Metropolitan Boroughs of Knowsley, Sefton, St. Helens and Wirral (Merseyside Information Services (MIS), 1991).

The focus of the survey was tourism in Merseyside. Non-Merseyside residents were interviewed in the street outside or within tourist attractions using two questionnaires; a short questionnaire conducted with all non-Merseyside

residents and an additional, more detailed questionnaire conducted with willing and eligible people. The short questionnaire was aimed at establishing the basic market profile of visitors to Merseyside. The extended interview established more detailed characteristics of both the visitor and their visit. This second methodology is preferable as it allows for the collation of qualitative data, yet within the survey report (MIS, 1991) it is often analysed in a quantitative way.

The fieldwork was conducted in two phases (during summer and autumn); the first commenced in July, 1990, and was completed by September, 1990. The interviews were conducted at 40 different locations. During this period 3,776 non-Merseyside short questionnaires and 852 of the extended questionnaires were completed. Additionally some 309 Merseyside residents' questionnaires were completed during the same period. The autumn survey commenced in September, 1990 and was completed October that year. These interviews were conducted at 27 locations. During this phase 1,277 short questionnaires and 350 extended non-Merseyside questionnaires were completed, along with 191 Merseyside residents' questionnaires.

Due to the scale and thoroughness of this research, which could not practically be repeated by this author, information presented in parts of this chapter is abstracted from the Visitors to Merseyside Survey (1990) and complemented by details given at interview with managers at tourism-related facilities.

4.1: Purpose of visits to Liverpool

Volume III of the Visitors to Merseyside Survey attempts to produce results at District level. Because of the absence of facilities away from the centre, the City of Liverpool results can be taken as equating roughly to the case study area of postcode districts L1, L2 and L3 (this area will be referred to throughout this chapter as "Liverpool city centre"). There are, however, some difficulties with

this. The results provided are based on interviews carried out at or on the street outside tourist attractions within each of the Districts of Merseyside (hence all interviewees must be those whose visit included some leisure component) and need not be to those staying in the District in which they were interviewed. The tables referred to here will therefore consider both staying visitors and day visitors as recorded around attractions in Liverpool City Centre during summer and autumn 1990.

Table 4.1: Purpose of visit to Liverpool - all visits to Liverpool City Centre in summer and autumn, 1990.

	DAY VISITS (%)		STAYING VISITS (%)	
PURPOSE	Summer (86.3%)	Autumn (84.2%)	Summer (13.7%)	Autumn (15.8%)
Pleasure visit	86	68	70	62
Business/conference	4	14	6	10
Shopping trip	6	11	2	8
Family/personal	3	2	21	6
Other	1	5	1	14
TOTAL	100	100	100	100

Source: Visitors to Merseyside: Report of the 1990 Survey.
Volume III, p.11 and 63.

It is apparent that most visitors to Liverpool attractions are on pleasure visits to the city and there is some difference in the purpose of day and staying visits[1]. These weigh less heavily relative to other visits in autumn than they do in summer and family/personal business is particularly important for staying visitors during summer months. This feature is important in the concept of urban tourism. It is anticipated that conference and business tourism will be comparatively more important than others over the autumn and winter period,

[1] a staying visit is defined as "a visit which includes a stay in any form of accommodation within Merseyside County for at least one night" (Visitors to Merseyside: Report of the 1990 survey. Volume III, p.3).

thus compensating for any loss in business due to seasonality in leisure visits. The results in Table 4.1 suggest that relatively speaking this is the case, yet the methodology adopted here is unreliable as its focus is on people visiting tourist attractions, not, for example, conference venues.

One interesting figure presented in Table 4.1 is the 21 percent of staying summer visitors who are travelling for family/personal reasons (compared to six percent reported in the autumn survey). Possible explanations include University graduations or the tendency for urban tourism to attract a large proportion of tourists who are visiting friends and relatives. The results however suggest that a higher proportion of visitors to Liverpool City Centre attractions are on day visits (i.e. on a day trip either from home or from place of residence whilst on holiday). The propensity to stay is relatively greater during autumn visits. A disaggregation of 'pleasure visits' (as above) is outlined in Table 4.2. These results, in agreement with Table 4.1, suggest that day trips from home are predominant and that inclusive package holidays are negligible.

Table 4.2: The type of pleasure visits to Liverpool City Centre - summer and autumn, 1990.

	SUMMER (%)	AUTUMN (%)
Weekend/short-break holiday	5	9
Independent holiday	6	5
Inclusive package holiday	*	*
Day trip from home	64	47
Day trip from holiday accommodation	25	39
TOTAL	100	100

Source: Visitors to Merseyside: Report of the 1990 survey. Volume III, p.12 and 64.

* = less than 0.5%

These results are unsurprising. A Leisure Day Visits Survey (1988-89) found that

> " .... spending on day trips in Great Britain covering a round trip of at least three hours, and 20 miles or more away from home, totalled £5.2 billion between April 1988 and March 1989 and involved 630 million trips. At around £5 billion, spending on domestic day trips in 1989 was over 20 percent of total tourism expenditure of £24.4 billion, and nearly 50 percent of expenditure on domestic tourism in the UK" (Baty and Richards, 1991, p.257).

Much of the current literature on urban tourism also stresses the potential of attracting independent and day visitors to city regions. Stevens (1991) using a wider definition reports that

> "In England alone the National Tourist Boards estimate that more than 900 million day-trips are made each year, the majority (67 per cent) starting from a home address .... The significance of day trips in tourism has generally been underestimated and, traditionally, little effort has been made to record or monitor the scale of this market and its characteristics" (p.106).

The results of the Leisure Day Visits survey 1988-89 further highlight some of the characteristics found in the Visitors to Merseyside survey (1990). Baty and Richards (1991, p.259) conclude that the most popular reason for leisure day visits was visiting friends and relatives, accounting for 144 million trips (over one-fifth of the total number). Following this general tours or sightseeing accounted for 66 million trips (ten percent of trips), and non-routine shopping 64 million trips. These visitors are important, particularly in terms of income injected into the local economy. For the leisure day visits (April 1988 to March 1989), the total expenditure generated was £5,212 million. The biggest item was non-routine shopping (£1,458 million; about 20 percent of the total) well ahead of visits to friends and relatives (£528 million; eleven percent) and to

restaurants or cafes (£400 million; eight percent) (Baty and Richards, 1991, p.259-261).

The Leisure Day Visits Survey embraces visits to all places, although disaggregation for the City of Liverpool is not available. Of the 630 million trips estimated for Great Britain during the survey, 54 percent (340 million trips) were thought to be to inland town or city regions - over double those to seaside towns or village beach coasts or estuaries (130 million visits, 16 percent) (Baty and Richards, 1991, p.265). The majority of day visits lasted three to six hours (315 million trips, 50 percent) (Baty and Richards, 1991, p.265).

Many definitions of *tourists* do not include day visitors (see Chapter 1), as these people do not spend money on accommodation and require fewer meals. Yet there is some economic benefit (money is spent in the local economy rather than elsewhere). The greater proportion of short break[2] and weekend holidays during the autumn survey is similarly supported by the literature. The Economic Intelligence Unit (1992) records 28 percent of all European short break holiday trips to be to city regions (p.54), the number increasing to 45 percent if business trips are included. Lohmann (1991) records that,

> "Shortbreak holiday trips have their peak in May and in December and a significant low in July, so they usually tend to be more off-season than longer holiday trips. They are a significant potential to contribute to off-season business" (p.18).

He similarly recognizes that this is often because "short trips normally do not replace longer holidays ..... most of the short break vacations were spent as

[2] "A short break holiday is characterised by the duration of the trip (up to 4 days, but at least one overnight stay) not by the length of stay in an accommodation resort or else. One may distinguish between short trips (all purposes), private short trips (excluding business travel) and short holidays (e.g. not considering visiting of friends and relatives or the participation in a special event) (Lohmann, 1991, p.15).

well as a longer holiday in the same year" (p.16).

Lohmann (1991) also suggests why cities are so attractive to the short break visitor;

> "Motives and activities of shortbreak holiday makers are different from longer vacation trips. They travel to escape the everyday routine in most cases and to have a real rest. They are eager to experience cultural events, sports or shopping and spend more money per day and person" (p.18).

The Visitors to Merseyside Survey (1990) further questions respondents about their reasons for pleasure visits (Table 4.3). During both summer and autumn, the prime motives of staying visitors were visiting friends and relatives, followed by sightseeing. For day visitors sightseeing was a far more important motive. During summer this was followed by visiting places of cultural interest and the association of Liverpool and the Beatles, whereas during autumn 23 percent of day visitors were in Liverpool "just for a change". Surprisingly, very few visitors are reported to be in the city to attend sporting events but this suggests sports fans generally do not visit the attractions where the surveys were conducted.

Table 4.3: The most important reason for pleasure visits to Liverpool City Centre - summer and autumn, 1990.

	DAY VISITS		STAYING VISITS	
	Summer 86.3%	Autumn 84.2%	Summer 13.7%	Autumn 15.8%
Visiting friends and relatives	13	12	53	58
Sightseeing	39	41	27	16
Association of Liverpool and the Beatles	14	12	9	13
Just for a change	6	23	6	6
Attend arts and other cultural events	3	6	1	3
Visit places of cultural interest open during the day	23	6	2	4
Attend sporting events	2	-	1	-
Don't know	-	-	1	-
TOTAL	100	100	100	100

Source: Visitors to Merseyside: Report of the 1990 Survey. Volume III, p.13 and 64.

Jansen-Verbeke (1986) outlines results to a similar survey conducted in the city of Deventer, Netherlands (1985) (Table 4.4). The results categorize visitors as "tourists" (people who come from beyond the city region) and "recreationalists" (coming from the city region). As with the Liverpool results, most tourists visit the city for a day out; shopping and professional visits are also major motives. For recreationalists, the main motive of visit was shopping and visiting eating and drinking facilities.

Table 4.4: Reason for a visit to the Inner City (Deventer, Netherlands). A Comparison between tourists and "recreationalists"

	Tourists[1]		Recreationalists[2]	
Reasons Given	First	Second	First	Second
A day out	29.3	3.2	3.0	1.6
Shopping	13.6	7.7	30.0	10.8
Professional	12.7	0.5	6.2	2.6
Family/friends	10.4	3.7	1.8	2.2
Sightseeing	9.1	13.6	0.5	0.1
Visit to restaurant, bar, pub, etc.	6.9	5.3	14.3	12.5
Walking around	3.2	7.5	3.4	6.3
Market visits	2.9	2.9	5.0	3.1
Daily purchases	2.7	0.8	12.3	6.4
Museum visit	1.1	1.6	2.0	1.3
Other reason and non response	9.3	53.1	20.6	53.0

[1] Expressed in % of the total number of tourists (N=375)
[2] Expressed in % of the total number of recreationalists (N=762)

Source: Survey in Deventer, Kampen, Zwolle. Jansen-Verbeke, 1986, p.89.

4.2: Field survey results

To complement the Visitors to Merseyside Survey results, the research undertaken here questioned the purpose and motive of tourist visits as perceived by managers of tourist-related facilities.

The ability of *attractions* to encourage visitors to the city is undisputed. One of the aims of the attractions research as conducted here was to examine whether visitors to these attractions come to see single or multiple attractions, or visit whilst in the city for another reason e.g. shopping and business.

It was considered pertinent to ask whether some of the attractions themselves actually consider that they offer facilities which are attractive to tourists. Although the Anglican Cathedral attracts tourists, it is keen to stress that this

must be seen as secondary to the main purpose of the establishment. "The cathedral is not apologetic about being a tourist attraction, but it has to be seen within its priority, essentially it is a place of worship....the religious leanings of those who come to visit is not our business, the aim isn't to preach at the door." There was however concern that "the cathedral is abused by the *tourist industry* and it really needs the revenue that tourism can bring....some guests do come specifically to use the restaurant; some come daily" (Interview, February, 1994).

Merseyferries still offer a commuter service which attracts about 500 commuters per day; a lot of these are either cyclists or ferry enthusiasts. Until 1989 this was the sole purpose of the service; however, it was no longer proving profitable. Conversion to what they consider to be a heritage attraction was seen as "the only way forward, if not the ferries would have closed" (interview February, 1994). As a result of £5 million spending on refurbishing the terminals and boats, the Merseyferries service was voted "best tourist attraction (1992)" by Merseyside Tourist Board. The remaining commuter service is essential to retain funding from the five local councils, even though it is the tourist service which is most popular. Similarly Central Libraries offer facilities which are for the benefit of both the resident and the visitor. Thus tourism is only a tiny element of the business. The tourist-related facilities which the library does offer are however important (see Table 4.5).

Table 4.5: Tourist use at Central Libraries

- Use of the record office to trace family trees/local history (popular with Americans and Australians). - To look at the building (Grade II* Listed). - To visit the Picton Library - popular with people who were students in the city. - To come to see and study the significant collections.

(Source: Interview. February, 1994)

Mersey Sports Centre's only apparent tourism occurs when the centre is used as a venue for competitions or for management training courses. In these instances the centre often advises customers to stay at the Dolby Hotel next door.

The educational use of attractions was recognised by five out of nine establishments, usually that of school trips. "We have three or four school parties each week" and "we have a good schools market". However, "there is no school liaison officer, but there is a questionnaire for the kids to fill in. Someone from Tatton Park is drawing up a teachers pack for the museum" and "as yet we have no education officer. There is a teachers resource pack available free to schools, including the loan of a historic video".

NMGM outline their commitment towards education in their mission statement as to "promote the public enjoyment and understanding of art, history and science by caring for, preserving and adding to collections, exhibiting collections to the public, making collections available for study and research and by other appropriate means." Collections are made available for study and research through education programmes, seminars and conferences. The Tate Gallery provides an important education programme which although not mentioned in the interview is referred to in the Biennial Report, 1988-90. "The policy and planning of educational activities is a crucial part of the exhibition programme" (p.32). The report also notes "there is already evidence that the gallery is one of the factors which attracts students to study art in Liverpool" (p.30). Educational use is also promoted at smaller attractions, for example guided tours for schools and colleges.

A Regional Railways 'Live it up in Liverpool' promotion and a MerseyBreaks promotion were by far the most common explanations of multiple visiting

although only the five establishments directly involved in the promotions mentioned them. Therefore it does not appear to have any advantage for other attractions located nearby or elsewhere in the city. The 'Live it up in Liverpool' promotion was devised by the North East department of Regional Railways in response to the success of a similar York project. The scheme runs annually from October to May and entitles any rail traveller to Liverpool to a book of discount vouchers for attractions in the city. The benefits of the scheme are two-fold; the railways have more passengers during times when business is quiet and the attractions, although they offer reduced price admission, could have higher visitor numbers and gain free advertising nationwide and in railway stations.

The MerseyBreaks promotion, mentioned by three attractions and organized by Merseyside Tourism and Conference Bureau (MTCB) and Liverpool's Historic Waterfront Consortium, covers a wider geographical area than the Regional Railways deal and offers the visitor two nights bed and breakfast at a choice of hotels, free admission to many premier tourist attractions, with a discount to more, a free guided tour of the highlights of Liverpool and a free cruise on the *Ferry 'cross the Mersey*. The brochure advertises free admission to the Albert Dock, Tate Gallery, Merseyside Maritime Museum, the Beatles Story and the Merseyferries. It is however disappointing for visitors to learn that admission to Albert Dock and the Tate Gallery is free to everyone. Reduced admission is also available for sites in Chester and Southport.

The 1994 prices for these breaks range from £82 to £49 per person per night for city centre hotels. Other hotels are located elsewhere in Liverpool, St Helens, Wirral and Southport. In contrast to the Regional Railways promotion these breaks are available all year and financial benefit occurs for both the accommodation and the attraction. Advertising for MerseyBreaks focuses on both national and American press. This is an important issue when considering

expenditure on marketing.

The Historic Waterfront Consortium has also arranged a 'Liverpool's Historic Waterfront VIP Pass' which includes entrance to the Beatles Story, Maritime Museum and *Ferry 'cross the Mersey* cruise at an all inclusive price. These tickets can be purchased at any of the participating attractions or tourist information centres. The scheme is however, not well advertised; the author only became aware of it after being given a brochure by NMGM.

The role of the Albert Dock as a potential catalyst to the expansion of attractions was also mentioned by a number of interviewees. NMGM noted, "the maritime museum was a catalyst to the Albert Dock redevelopment". Elsewhere managers were more unsure about the role of the Albert Dock. "The number of visitors has grown over the last ten years. Whether this is due to the Albert Dock, or the cathedral revitalising itself we don't know". At another attraction the manager noted "Albert Dock has no influence on business, we are a bit out of the way so few tourists are attracted." At Bluecoat Chambers there has been a recent redevelopment involving the opening of the front of the building by adding shops. Here it was considered, "the expansion in 1991 was the result of a feasibility study, all this would probably have happened regardless of the Albert Dock."

The negative impact of the Albert Dock was also noted. Merseyferries said

> "a high percentage of people visit the dock as well, but not all come down to the ferries. In some sense, the ferries are almost hampered by the Albert Dock, people may not think of the ferries because they are some distance from the dock..... overall the dock has been a good catalyst to everyone!"

It is thus evident that, although Liverpool has a number of major attractions,

there is a need to encourage visitors to use more than one of these, this is evident in the number of examples of attractions which offer reduced rate entrance fees and special offers (not all of these are necessarily throughout the year). However this may be a result of difficulties experienced in obtaining positive media coverage for the city, and it acts as an effective marketing ploy. The concern over lack of interest from art critics from national newspapers was noted by NMGM as being encouraging them to come to Liverpool, adding that the situation is made worse because "it is an uphill battle, critics aren't interested in museums". To overcome this problem a visual arts marketing group has been established in the North West with the aim of encouraging critics to come to Liverpool and Manchester, see a number of exhibitions and hopefully recognize that a visit is worthwhile.

Another example of how people may be encouraged to a number of attractions is the Historic Waterfront Consortium's VIP pass which covers all fee paying attractions, with the exception of Western Approaches. The total cost for an adult ticket (1994) to all these attractions would be £9.20, a VIP pass would cost £7.75, a total saving of £1.45. On a concessions ticket, there is no saving unless a special exhibition at the Tate Gallery is visited, even then, the saving is only 40 pence. These tickets, therefore, do represent value for money if all attractions are visited, but not if any one is missed.

In Liverpool however there is plentiful evidence of tourist attractions being marketed to and used by both visitors and residents. In establishments such as the Anglican Cathedral and Merseyferries, although the prime motive is to provide a service for local residents, the services are also strongly marketed to and visited by tourists.

The concept of *theatres and cinemas* as tourist resources is one which is heavily debated. Of the ten managers spoken with, opinions about tourist use of

cinemas and theatres were mixed; an equal number (three) noted each of i) tourists do not use the facility, ii) some of their clients were tourists, iii) no comment. One respondent stated that they did not have tourists but other places did. In recognition of the limitations of these results, one manager recognized the difficulty that "the number of people who are readily identifiable as tourists are few" (2)[3]. Similarly, managers' general perceptions of whether theatres and cinemas were tourism were diametrically opposed; more vague answers suggest that theatres and cinemas are secondary to the main attractions; "not many tourists come to Liverpool to visit the Unity" and "the cinema is not a prime attraction but it may be used to fill time." The most negative comment came from theatre E. "Generally tourists may book hotel rooms, but they don't go to the theatre, they are more likely to go to pubs and clubs."

The secondary use of this resource is illustrated by cinema 1, who are aware of people seeing a film to fill time whilst waiting for a train or ferry, giving the example of a school group from the Isle of Man who used to come over to England to play football, booked a midnight ferry crossing back and used the cinema as a stop gap in between. This manager also talked of football fans, often Irish, who come to Liverpool to see a match, stay the night in the city, and visit the cinema in the evening. Interestingly, there is linkage here as many stay in the Lord Nelson Hotel.

At The Empire I was told, "the Empire is not a tourist attraction, it is a venue used by tourists" (A). This illustrates clearly the need to distinguish between a tourist attraction and a tourist resource. These comments suggest that cinemas and theatres are a tourist resource which, unlike NEC Birmingham and the Royal Shakespeare theatre in Stratford, do not attract visitors from outside the

[3] Numbers in brackets refer to cinemas and letters to theatres, ranked in order of size (number of seats).

local area in their own right, but are used by people visiting the city. One comment recognized that theatres in Liverpool are no longer attracting tourists because of the nature of the product which they supply. "Places like the Citizens Theatre in Glasgow are tourism. If the theatres can provide a definite product people will travel to see a play, this was the case in Liverpool during the 1980's in the days of Willy Russell and Alan Bleasdale" (D).

In contrast to Liverpool's theatres and cinemas the Royal Liverpool Philharmonic Orchestra (RLPO) sees itself as inverse tourism - "The orchestra is an ambassador and flagship for Merseyside; the aim is to sell Liverpool from without and within" (Ian Archer RLPO). This is via overseas tours, sponsored by Merseyside Development Corporation where representatives of the development corporation accompany the orchestra with the role of promoting Liverpool. Only one theatre company in Liverpool may have a similar impact. This is the Liverpool Playhouse which produces most of its own work through Liverpool Repertory Theatre. Touring a production thus advertises the name of Liverpool Playhouse and the city of Liverpool which may encourage some visits to the city.

Regardless of this, it is recognized that tourists are not essential to business at theatres and cinemas. "Tourism is a tiny element, we are not dependent on it, most visitors are local" (1). The Unity Theatre similarly recognizes, "tourists are not predominant in the audience, but we are trying to attract more. Hopefully as the Unity's image grows, so will the number of tourists".

In conclusion, firstly and perhaps most importantly, some tourists do use the facilities, although few visit the city with the sole purpose of doing so. It is however possible that tourists rarely visit the city solely to eat and drink in the restaurants and bars, thus these too are secondary to the main attraction. If this is the case then theatres and cinemas could arguably be given a similar

status and should be included in the Census of Employment definition of "tourism-related".

Poor attendance by tourists does not necessarily mean that theatres could not be marketed to them. Many of the attractions are offering specialist productions, often produced by touring companies. High quality home produced works are more likely to attract the wider audience. Other ways through which these establishments can attract tourists include accommodation inclusive breaks, theatre tours and increased catering facilities. Similarly Liverpool theatres tend to close during the summer months. This does not help to encourage tourist visits during the popular months of July and August.

Secondly, there is some evidence of "inverse tourism". This illustrates how attractions can be taken out of the city and seen by potential visitors who may then be encouraged to take a holiday in the city. Inverse tourism can not only attract visitors but it can attract business investment. Tourism to theatres in Liverpool is also perceived to be diminished by a lack of media coverage of productions in the city. This could occur for one of two reasons. Either reporters are unwilling to travel to Liverpool to review plays or the type of shows in the city are not worthy of national coverage.

For twelve *hotels* in Liverpool post code districts L1, L2 and L3, the results relating to the purpose of leisure visits were varied; however, the most important recurring emphasis was on visits for sports events (which often attract repeat visits), for example football and the Grand National. Leisure breaks of two or three nights were also popular, as was using Liverpool as a national touring stop. As illustrated in Table 4.6 other reasons include the Beatles, visiting friends and relatives and dance and theatre groups which are on tour in the area.

Table 4.6: Purpose of leisure visits to Liverpool hotels (unprompted)
(number of hotel interviews in which the activity was mentioned)

PURPOSE OF VISIT	FREQUENCY
Leisure Breaks	6
Football	5
Part of a larger tour of UK	5
Grand National	4
Dance / Theatre groups	2
Liverpools' history/architecture	2
University events eg. graduation	2
Visiting friends and relatives	2
The Beatles	2
To take exams	1
Soccer city promotion	1

Source: Authors' survey

Sample = 9 out of 13
Three interviewees mentioned business guests only.

Most hotels were asked about the distinction between leisure and business visitors. Only the larger establishments were able to give actual data suggesting 60 percent business guests and 40 percent leisure visitors over the year; during June to September hotel use is split 50:50 business and leisure, however, throughout the rest of the year, leisure is just 20 percent of all use, business 80 percent. This relates to an average occupancy rate (1990) of 71.3 percent for central Liverpool hotels (MTCB, 1990, see Table 4.15). Suggesting seasonality in visitor flows, hotels being occupied by business visitors throughout the year with a reduction of business guests during the summer being compensated by holidaymakers.

Most hotels experience this multiple usage: a weekday trade of business

visitors and weekend leisure trips (eight of the ten hotels to talk about weekly occupancy) . Another smaller hotel (hotel I) reported that "workees" (labourers working away from home) use the hotel during the week. Nine of the ten hotels mentioned tourists at weekends, two of these were aware of the importance of football events in attracting visitors, and three mentioned that the purpose of these visits was to visit friends and relatives. In addition, hotel J reported that rooms are often occupied by "*celebrating couples*" at weekends; many of these are local people. This weekend leisure use is encouraged by special deals available in larger chain hotels, and made easier by computerised reservation facilities.

It therefore appears that business tourism is of considerable importance in the urban tourist market. Indeed, Owen (1992) recognizes that,

> "although badly hit in the 1991-92 recession, business tourism, sybaritic or not, remains an increasingly important contributor not only to the trade and propensity of the partaking enterprises and individuals but to the receipts and profits of those in the travel and tourism industry who service the activity" (p.224).

Indeed, the same author recognizes that 20 percent of what is spent by business travellers goes on accommodation (p.225). Owen is additionally aware that in many large cities, particularly during conferences, trade fairs and special events experience an overcrowding of hotels, which may necessitate business visitors residing at distances of up to fifty miles from where they want to be. In Liverpool, managers of hotels expressed no concern about these issues, the only evidence of fully-booked hotels emerging when managers spoke about special events such as the Grand National, Battle of the Atlantic Event and Tall Ships Race.

Apparently all tourism used to stop between September and March. However

one hotelier recognized a growth in tourism over recent years, due to the availability of reduced price weekend rates, in which chains of hotels, for example Forte, offer room only rates aimed at leisure visits for a fraction of the usual price. Forte also occasionally advertises one-off reductions on weekend room rates in the national press. Another deal available is a free Sunday night if the guest stays Friday and Saturday nights.

In discussing hotel usage, one surprising point emerged, a number of the hotels are used by visitors from the North West of England. Hotels A, F, and J mentioned that the hotel was used by local people who were celebrating, or wanted a change of scene; whilst hotels H and M are conscious of local people who stay overnight on a Friday or Saturday after they have been to night clubs in the city. The manager at hotel H stated "with the hotel being so cheap ..... people will stay over, rather than get a taxi home". This is an interesting trend which links very much with the growth of a night time entertainments industry.

Managers of *eating and drinking* establishments were asked whether there appeared to be a common motive for visits. Although these results rely upon generalisations, the most common motive, particularly at the Cavern Walks, was an interest in the Beatles. At the Albert Dock, organized tours predominate, yet, elsewhere, there was no mention of coach tours. Additionally, a number of managers were conscious of the number visiting friends and relatives (see Table 4.7). Even at restaurants included in the Which Good Food Guide, no establishment mentioned visitors coming specifically to use their facilities.

Table 4.7: Motive of tourist visits to Liverpool - as reported by managers of eating and drinking facilities (unprompted)

MOTIVE	TOTAL	ALBERT DOCK	CAVERN WALKS	BLUECOAT
Beatles	11	4	6	1
Organized tour	5	5	-	-
Albert Dock	3	2	-	1
Tate Gallery	1	1	-	-
Architecture	1	-	1	-
To see Liverpool	1	1	-	-
Friends and relatives	2	1	1	-
Other	1	1	-	-
Don't know	3	2	1	-

Source: Authors' survey - summer 1994.

Similarly at *retail unit* (Table 4.9), the attraction of the Beatles was the greatest pull, followed by organised tours. Indeed, all respondents bar one at the Cavern Walks recognized that a number of tourists visited the city just to see the general sights.

Table 4.8: Motive of tourist visits to Liverpool - as reported by managers of retail units in tourist areas (unprompted)

MOTIVE	TOTAL	ALBERT DOCK	CAVERN WALKS	BLUECOAT
Beatles	14	8	6	-
Organized tour	12	12	-	-
Day trip	4	4	-	-
Albert Dock	3	3	-	-
Liverpool	5	3	1	1
Students in the city	1	1	-	-
Tate Gallery	1	1	-	-
Friends and relatives	1	1	-	-
Holiday	1	-	-	1
Football	1	1	-	-
Don't know	14	6	6	2

Source: Authors' survey - summer 1994.

4.3: Purpose of tourist visits

The fieldwork results suggest that there are a number of purposes to tourist visits which are worthy of more attention. These include sporting events, coach based visits, conferences, and special events. Each will be discussed in turn, although the issues of sporting and special events overlap somewhat.

In Liverpool *sporting events* are particularly important to the tourist calendar. The city has two Premier Division football clubs, both with an international reputation; Liverpool Football and Everton Football Clubs. Liverpool, through its sponsors (Carling), conducted research in an attempt to establish whether attendance at matches include tourists. An informant from the Public Relations Department of the Club reported that 46 percent of supporters to a match travel from outside the Liverpool District; including Scandinavian groups of 50 or more. Although records of who tickets are sold to are not kept. Additionally, it was reported that although one tour operator attempted weekend *soccer city breaks* - these were not particularly successful.

Football supporters' use of weekend hotel accommodation was confirmed by hotel managers. Hotel C was keen to express that "football is very important (to business), last year (1993) the hotel had a very poor January and February because neither of the Liverpool teams were still in the FA cup". The same manager similarly mentioned that Liverpool football is a growing market in Norway and other Scandinavian countries. Another hotelier was of the opinion that "the biggest influence on occupancy in Liverpool is Liverpool, not Everton, playing (football) at home" (Hotel F). Similarly, as already mentioned in this chapter, one cinema manager is conscious of Irish football fans visiting the cinema on the evening after the match.

In addition to football, the Grand National is also a sporting attraction. Held at

Aintree Racecourse each year, it attracts thousands of visitors to the city during April. This event is of particular importance to hotel business, indeed four from the thirteen hoteliers interviewed consider the Grand National to be a special event. This will be further discussed in the section relating to special events.

Coach based visits to the city are apparent, mentioned mostly by hoteliers and attractions managers. Shopkeepers at the Albert Dock are aware that weekday business predominantly comprises coach tours, often school parties and pensioners. Gallery 1 noted the case of Globus Gateway who spend two nights in the city and stay at the Moat House Hotel. Attraction C reported that "we get a number of foreign coach parties which make regular visits from Easter until November, however, they only stay for twenty minutes, they don't make a donation and don't use the refectory". At D "coach tours are good business as coach travellers have a high secondary spend. The problem is, we don't get many; all the attractions need to work collectively". The hotel results are similar; six of the respondents (mainly the larger hotels) mentioned that tour operators include their hotels as part of a package.

Tour operators mentioned include multinationals, which often bring foreign visitors, such as Globus Gateway, Evan Evans, Trafalgar and Trav Co. as well as Shearings and Wallace Arnold which bring English visitors. The concern amongst hotel staff was that these visits are not always to see Liverpool itself, the city being used as a base for touring North Wales and the Lake District; Albert Dock and possible visits to Liverpool's football are occasionally included. American visitors use the city as a stop over on short tours of England. However, these tours are not always profitable for the hotels involved; "they are volume and can fill beds" (hotel B); "their additional spend is low, often they bring their own duty free so they don't spend in the bars. They are on a bed and breakfast rate anyway" (hotel A).

The geography of *conferences* is quite specific. Law (1988) recognises that

> "international conference delegates are high spenders and their meetings are held in the July-September period when national conferences are less frequent. There are at least 600 international conferences a year in Britain and overseas delegates are responsible for 20 percent of spending" (p.86).

In Liverpool conference facilities are available predominantly at the larger hotels and two universities, together with St Georges Hall, Liverpool Town Hall and Merseyside Maritime Museum. All venues provide advanced facilities with hotel A offering the most with 17 rooms which can cater for 20-800 people.

Five hotel managers reported the sale of bedrooms in conjunction with conferences. Hotel D quantified this as 500 rooms per year; similarly, hotel B recognizes that five percent of all rooms are sold through conferences. Perhaps most surprising is the sale of rooms to conferences organized by companies with offices in the city. Delegates from regional offices may book rooms to prevent the need to travel long distances early in the morning. There is also a linkage between hotels and venues without accommodation. For example hotel B mentioned linkage with the maritime museum. Other interviewees recognised that Liverpool only attracts a few national conferences.

Hotel E mentions that there has been a growth in the conference market over recent years, but is conscious that this is not necessarily due to the growth of Liverpool as a tourist destination, but due to a national growth in the number of conferences. Hence, conferences are seen as an active ingredient in the future marketing of hotels, and "a major area of growth in the future" (hotel B). At present, it is only attraction 1 which offers a conference facility as "the museum was purpose built to include a conference venue. Business here is good as the location provides an alternative to hotels....conferences are able to

support the restaurant which otherwise is not very profitable, especially during the winter season". In addition, theatre A advertises itself as a venue for seminars and cinema 3 is aware of its potential as a conference venue, although "most people who are arranging a seminar don't want to use a theatre".

The current use of conference facilities is quite small scale, the most common being for training courses (four respondents). Other uses are national conferences, use by Liverpool based companies, balls, dinner dances and weddings. Despite proposals, there is no purpose built conference centre, such as G-Mex in Manchester or the National Exhibition Centre in Birmingham. At hotel A (with the largest hotel conference facilities in the city), the manager was facing possible competition by acquiring property behind the main building with the intention of convertion into a conference venue with walkways to the hotel and a car park. To date there are no immediate plans for conversion, but, if done it "could be better than G-mex (in Manchester)". Law (1988) suggests one argument against this; "large companies organize conferences for training and sales. They prefer hotels and their conferences are generally smaller in size (p.87).

Additionally, three surveys gathered information on the opinions of delegates attending large conferences in Merseyside during 1990 (Merseyside Conference Bureau (MCB), 1990)[4]. Twenty percent of delegates took part. The survey found that delegates were particularly impressed by the Atlantic Tower Hotel, the Crest Hotel and St Georges Hotel. Some delegates from the conference on drug abuse also used the University Halls of Residence. Overall two-thirds of

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[4] The first International Conference on the Reduction of Drug Related Harm, 9th-12th April, 1990, Liverpool University (400 delegates).

Association of Metropolitan Authorities Transport Conference, 20th- 22nd June, 1990, Liverpool Town Hall (200 delegates).

Local Government Information Unit, 6th-8th July, 1990, Liverpool Town Hall (150 delegates)

delegates at all conferences thought that the setting for the conference was excellent/good, and at the University 72 percent of delegates were very impressed by parking facilities. Yet problems encountered by delegates to the Town Hall were poor car parking facilities and a poor personal address system. Yet a number if delegates commented on the unique setting of the Town Hall and the friendliness of its staff.

The Conference Bureau also obtained details relating to visitor spend, concluding that "business and conference visitors are high spenders and provide a valuable source of income for the local economy" (MCB, 1990). During the three conferences, delegates spent a total of £7,391, giving an average spend per delegate of £47. This figure does not include travelling to the venue or accommodation during the conference. The local businesses which benefitted most were shops (£1,682), pubs/wine bars (£1,543) and restaurants (£2,791).

Two of the conference delegate surveys showed that 75 percent of delegates would consider organising a conference in the area as would 57 percent of respondents to the third survey. Reported positive comments include the view that it is a nice change from the traditional seaside resorts and comments about good road access, but negative ones mentioned dereliction and the lack of a large purpose-built conference/exhibition centre in the area. Conferences are thus an important source of income to the Liverpool economy and an important area of business for some establishments.

However, in discussing the issue of conferences one needs to consider the role of competition with facilities elsewhere. Liverpool's location is not ideal. Located on a coastline, access from the west is restricted; it is found at the last junction of the motorways. This increases direct competition from facilities in other major and nearby cities such as Gmex in Manchester and NEC Birmingham.

The seaside resorts of Blackpool and Southport are also located nearby and attract a conference trade due to the cheap availability of amusements, attractions, hotels and eating and drinking facilities out of the main tourist season.

Thus in conclusion it appears that although conferences are important to providers to the tourist industry, their role is restricted by competition from nearby facilities, places with fewer image problems than Liverpool and places with better access by road, rail and air.

Liverpool is an interesting case study for examining the role of *special events*. Indeed the city launched its tourism career by hosting Britain's first International Garden Festival from May 2nd to October 18th, 1984. Since this time, there have been numerous other tourism developments, which include, for example, two new hotels and three new museums. The city has also hosted other major events such as the Tall Ships Race and Battle of the Atlantic celebrations, as well as establishing an annual festival of comedy. Before discussing the role of these events in Liverpool, one should consider the purpose of special events. This is a particularly interesting area of debate as relatively few academic studies have considered the providers view of such events.

Motivation appears to be three-fold; attracting visitors, boosting the economy and changing the image. It is presumed that the special events will attract entirely new visitors to the city thus spending in local shops, at petrol stations, on car parking, hotel accommodation and on food will increase. If the event is more than a few days, additional employment opportunities may be created. This may not only encourage return visits, but can increase local pride as well as attracting media attention and raising the profile of the area. There is also potential for attracting new industry and business to the region; "sports and

special events will offer a high-quality lifestyle which will attract professionals who are important to the new industries which cities must attract to live in the city and in turn persuade major companies that the city concerned is a good place in which to locate an establishment" (Law, 1994, p.89).

However, for events to realise these benefits they need to be well organised and successful; "evidence of failure of planning or a lack of planning on the hosting of hallmark events are seen to be costly 'white elephants' that are often left, once an event has concluded" (Hall, 1989, p.20). Regardless of this, there are numerous examples of hallmark events being considered by Government and private industry as essential for the creation of tourism opportunities, and employment and in increasing the prominence of the host community in the market place (Hall, 1987).

Like the problem of defining a tourist, the definition of special events is not easy. Almost anything can be described as an event. It may be an annual festival, a touring / one-off art exhibition, a street carnival, a week long celebration or a one-off mega-event or hallmark event. Generally speaking, the larger and longer the event, the greater the potential. Law (1993) describes special events as

- "themed events which occur infrequently or are one-off ..... typically special events are ones that occur only on an annual basis in the same locality or move from one place to another, special events may have almost any theme and take any form" (p.97).

Conversely, Ritchie (1984, p.2) defines Hallmark events as "major one-time or recurring events of limited duration, developed primarily to enhance the awareness, appeal and profitability of a tourism destination in the short and/or the long term.

The *scale* of special events can be incorporated into a three tier system; the

international, the national and the local or regional event. An international event can be considered as one which is held at one place in the world and will attract visitors, media coverage and interest from other countries; perhaps the most common type of international events are of sporting significance, for example hosts of the Olympic or Commonwealth games. Liverpool's major international event was the Garden Festival (1984), which can be ranked alongside similar events in Montreal (1980), Amsterdam (1982) and Munich (1985). The international status of such events is controlled by the Bureau Internationale des Expositions in Paris which by convention grants such status no more frequently than once in ten years to any one country (Chetwynd, 1984).

Liverpool has hosted the Tall Ships Race. Each year, about one hundred ships celebrate Christopher Columbus's 1492 voyage by racing a return journey across the Atlantic. Liverpool has now hosted the event twice, firstly in 1984 (to coincide with the garden festival) and, more recently to celebrate the quintocentenario (500th) event in 1992. To be allowed to host the race, Liverpool had to compete with other European cities, in proving that it had the facilities and ability to host such a major event. The 1993 event for example called at the European cities of Newcastle-upon-Tyne (England), Bergen (Norway), Larvik (Norway) and Esbjerg (Denmark). For this event it is not only the competition which is international, but the visitors.

A "recent innovation" (Law, 1994, p.99) in the scope of international events has been the introduction of year-long arts events which move from one city to another (e.g. European City of Culture, Glasgow, 1990). In such events, the benefit is more prestigious than financial. As a result of these European titles, the Arts Council of Great Britain has launched a similar scheme promoting cities. In this instance cities compete for a specific theme. For example, Glasgow has recently been granted the title of City of Architecture and Design,

1999, an award for which Edinburgh and Liverpool had also been shortlisted. The value of this title was discussed by Pearman (1994); "At stake is £400,000 of public money, guaranteed to lever many times that level of private sponsorship and - you never know- even change the face of the host city permanently".

There are events which are aimed more specifically at the local and regional audience. Specialist art exhibitions are a good example of this. The exhibition of a collection of paintings from art galleries around the world may, for example, tour two or three provincial cities. Because of its other UK stops, the audience is not expected to travel great distances, but anyone particularly interested in that art form would probably be willing to travel for up to two hours to visit. There are also more specifically local events which are likely to be advertised only in the immediate vicinity or even appear spontaneous. A recent Liverpool example was the Church Street festival in December 1993; this celebrated the completion of a major redevelopment of the main shopping street. The event was short-lived and involved a few people dressed as clowns and making music.

The question of *scale* is also difficult to define. The basis of definition is usually financial assistance and organization. For example, involvement from other countries makes an event international; if only the host country is involved the event is considered national. If an event is organized by a local council then it would be dubbed local or regional. This definition however does not categorise the nationality of visitors, for example, a national event does not exclude the international visitor. The same is true at a smaller scale - a regional event does not attract only local people.

To complicate matters further, many regionally organised events hope to attract a national, if not international, audience. There is such as festival in Liverpool.

The Festival of Comedy began as a local community event which was held biannually and controlled by a small board known as Liverpool Festivals Trust. It aimed to provide a comedy festival for the Merseyside region. In 1991 the organisers considered that they had managed to build a local base and should now win themselves a national profile. At this point the festival became annual and looked to attract artists of national standing such as Norman Wisdom, Ruby Wax and Jack Dee. As a result a survey by John Moores University found that in 1992 17 percent of the audience was from outside the region (Liverpool Festivals Trust, 1994). Indeed the total annual turnover for the 1993/94 festival was £250,000.

Liverpool Festival Trust are now seen as a major player in the organization of festivals in the city. Hence a number of other local and regional events have been timed to coincide with the comedy festival and are marketed in the same brochure. The 1994 brochure also included the Mersey River Festival, Africa Oye, the festival of games, New Brighton Rhythm and Blues Festival and the Summer Pops. Hence there is a higher status given to regularly organized events which otherwise could not be economically marketed to such a wide audience.

The *focus* of events is also a key element; they may be arts-based, sports-based or general. In Liverpool, the sporting event is very important. As previously established, Liverpool Football club is famous worldwide; most fans live within about an hours drive from the city, and 46 percent are considered to be from further afield. The regular matches during the football season may be described as events, indeed, one hotelier in Liverpool mentioned that his hotel was busiest during the football season when plane loads of Irish fans fly to Liverpool to watch the match. This type of regular sporting fixture is likely to attract only people who have an interest in the game; many are season ticket holders. One can debate the definition of such sporting events as "special

events," as fixtures and fans are regular and much of the audience is often local people. However, the evidence from Liverpool suggests that some visitors do stay overnight and come from outside the regional boundaries.

Liverpool also has an annual sporting event which always gains national coverage - the Grand National. The event, which lasts for four days, attracts television and press coverage from all over the world. The nature of visitors at this type of event is however different to that at football matches. Many people are from high social classes and thus may have the facility to spend on hotel accommodation, food, drink and travel. This is often linked with other money-making schemes, for example a visit by Concorde. The flight from London to Liverpool is filled with race goers (at a price of £199 per one-way ticket).

Art-based events play a different, but equally important role in attracting visitors and investment to the region. These events come in many guises including occasional art exhibitions, annual theatre company visits and annual cultural events, with the possibility of status gained through European and national titles, for example City of Drama (1994) as in the case of Manchester. This type of event tends to attract visitors from social groups A and B1. Not only is there a possibility that these are business managers who may be in a position to make an investment into the local economy, but they have higher disposable incomes.

The full potential of the arts-based event has not yet been recognized or realized in Liverpool. The city has two art galleries, both of which host touring exhibitions; however, neither has yet attracted a very important collection. National touring theatre productions rarely use Liverpool as a base, but this may be due to close competition from Manchester. The potential should be compared to Newcastle-upon-Tyne where an annual four month visit from the Royal Shakespeare Company attracts an audience from the whole of the

Northern Region of Britain. Finally, the focus of some events is more general. A good example of this type of event is the garden festival.

Throughout the previous two sections temporal terms have been used to describe the frequency of events. As Law (1993) notes, "most special events are only of short duration, lasting either a few days or even a few weeks but some last several months and even upto a year" (p.97). In Liverpool a short-term event would be, for example, the hosting of the Tall Ships Race (five days), the Grand National (four days) or even the Festival of Comedy (nine days). A long term event would be the International Garden Festival (five and a half months).

Liverpool has hosted a number of one-off events such as the Tall Ships Race event, the garden festival and more recently the fiftieth anniversary of the Battle of the Atlantic (May, 1993). The thesis has also referred to some events as being occasional, that is their timing has no regular pattern and cannot be anticipated or relied upon. This type of event includes visiting art exhibitions, pop concerts, touring theatre companies and sporting events such as stage finish in the Milk Race cycle event.

Managers of hotels, attractions, and theatres and cinemas were asked generally about their impression of special events; they were not prompted into talking about any one particular occasion as this would enforce the author's definition of a special event on to them. Results in Table 4.9 illustrate how the most recognized events are those which occur on an international or national scale, for example The Tall Ships Race and Battle of the Atlantic celebrations. Other events mentioned are often those which are particularly important to one sector of the tourist industry. For example hoteliers, unlike attraction managers, mentioned the Grand National because this event attracts more overnight stays. Similarly, many of the attraction managers spoke about smaller, local events with which they were directly involved, for example a cathedral music

festival and an Indian music festival. All hotel managers were aware of the importance of special events, not only to the economy of the hotel, but to the city of Liverpool. Six managers reported one hundred percent occupancy during the Tall Ships and Battle of the Atlantic events; four also mention increasing room rates during special events, or if not, the full room rate can be charged.

Table 4.9: Frequency of mention of special events (unprompted)

EVENT	HOTELS n=12	THEATRE/CINEMAS n=10	ATTRACTIONS n=9
Battle of the Atlantic	6	1	3
Tall Ships	5	2	3
Festival of Comedy	-	-	1
Grand National	8	-	-
Football	3	-	-
Beatles Convention	-	1	-
City of Architecture and Design	-	1	1
Moviola	-	1	1
Indian Festival	-	-	1
Cathedral Music Festival	-	-	1
QE2 Visit	-	-	1
None	-	6	4

Source: Interview survey of managers of tourist facilities in Liverpool.

An economic benefit was also evident, three managers mentioning a "massive influx of business". At one hotel the manager recognized that timing was crucial. The Battle of the Atlantic celebrations reportedly helped boost business at a very important time; "any event associated with the river has an impact .... but the true impact depends on the time of year" (interview 11th November, 1993). For another hotel this event "doubled, almost tripled, the revenue of that week during 1992" (interview 11th November, 1993), because it came at a time when the hotel was not very busy (May). In comparison, the Tall Ships Race

(held during July) came when the hotel would be busy, hence it had a less significant effect on occupancy and revenue. In addition to higher occupancy rates, the manager of another hotel recognised that "the kind of people at the hotel during special events are different - they tend to have higher disposable incomes which can be spent in the hotel and bar" (interview, 2nd November, 1993). Only one hotel had any criticism of special events, noting that, "large groups come, but they don't all pay peak rates" (interview, 17th March, 1994).

Eight of the ten theatres and cinemas in the city were also asked whether special events had brought any benefit to the establishment. Of these only half saw any benefit. For example, "they mean more people in the city, many of whom come from further afield. They do come to the cinema and they do increase audience numbers" (interview, 1st February, 1994).

A number of attractions have or have had some involvement in the organization of events. The Bluecoat Arts Centre, for example, is a ticket office for the festivals, as many of the festival organisers have their offices in the building. Central Libraries is also used as a venue for major exhibitions which relate to the events. It was however, National Museums and Galleries on Merseyside (NMGM) whose involvement was portrayed as being greatest. The role here was considered one of stimulator for the Tall Ships visit in 1984 and initiator for the visit of QE2. In addition, the role of the Maritime Museum (owned by NMGM) was thought to be a determinant for the 1992 Tall Ships Race and the Battle of the Atlantic celebrations.

Even though the events were thought to increase visitor numbers, they were not always of benefit. Western Approaches, a museum which opened in time for the Battle of the Atlantic celebration, found, "when we opened, we were very popular; since then, people think we have closed down"(interview, 7th Feb., 1994). One attraction recognised that one aim of special events was to

encourage return visits. However, the same attraction was conscious that during events, many of the visitors tend to be from the north west (i.e. local). At NMGM events "influence the number of visitors, there are more people in a short time, but many are just trudging around, especially during the Battle of the Atlantic when there was a pressure on numbers - this doesn't enhance people's enjoyment" (interview, 31st Jan., 1994).

Hence, from the tourist industry point of view, timing is crucial. Events are far more beneficial if they occur at a time when visitor numbers are low; attracting high profile events during the peak summer season gives little or no benefit. Similarly, it is important that events are well organised and not so big that they decrease enjoyment. It also appears that events do not necessarily attract audiences from a wider geographic area; they are more likely to encourage people from the region to come back to their home city. There is however little doubt that most attractions and hotels see special events as beneficial and important features of the calender; many managers would like to see more which are well organized and timed.

At each of Albert Dock, Cavern Walks and Bluecoat Chambers shop owners were asked whether they noticed any difference in the kind of customers received during events. The interviewee was then allowed to expand on the impact as they felt appropriate. Of the 33 respondents at the Albert Dock, 14 were conscious of more people, although two of them did remark that most of these were local. However, the increase in visitors did not necessarily create an increase in sales; "high numbers don't boost retail sales, although people will buy food and drink" (interview, 8th September, 1994). Another shop owner mentioned, "the recent visit of QE2 (September, 1994) was a waste of time, there were lots of people, but I have done better business today - the dock was so busy, people can't get near the shops to look" (interview 12th September, 1994). Another respondent remarked that, "there are no more people in the

shops. The Tall Ships reduced business as people watched the ships only" (interview, 4th May, 1994).

The reaction was, however, not always so pessimistic. Other shop keepers were of the opinion that special events "add quality to the product" and felt that one is needed once a year!" (interview, 21st July, 1994). Another two shop owners were sure that the people who visited bought goods and that the QE2 visit (1994), for example, brought a lot of Americans, who could afford to spend money, to the city. One possible explanation of this difference in opinion may be that not all shops are tourist orientated; "we are tourist orientated therefore we want more special events" (interview, 12th September, 1994).

Of the four respondents at the Bluecoat half considered business to be quieter during events, one respondent noting, "Grand National day is particularly quiet" (interview, 10th May, 1994). This lack of impact can be explained by geographical location; the centre is tucked away and therefore gains visitors only if the event is located there. Of the 14 respondents at Cavern Walks, only six were aware of more visitors during special events, in reference to the Beatles Convention one respondent noted, "the Beatles festival brings people from all over the world". Unfortunately, he also noted, ".... the Beatles is big business but doesn't involve shopping" (interview 6th October, 1994).

These results thus illustrate that special events are successful in attracting visitors; however, if they are focused on one part of the city, shops at other localities are likely to lose trade. Similarly, the larger, very popular event does not necessarily help trade - often the area is too congested with people. One may therefore argue that a greater number of smaller events, balanced between the various tourist areas, would, in the long term, be more beneficial for shop keepers in the city.

Non-tourist businesses were questioned in the three tourist areas already mentioned (Albert Dock, Bluecoat, Cavern Walks), along with a random sample of offices in two other relatively new office and warehouse developments. In this survey business managers were asked more directly about the role of one particular special event - The Tall Ships Race.

Of the eight respondents at the Albert Dock, only half experienced some impact. One of those to consider an influence on business noted that this was "in a big way, the Battle of the Atlantic was the same, we couldn't move, there were so many people" (interview 5th September, 1994). Of the three respondents at the Bluecoat, only one saw an impact, pointing out that this type of event could have a potential positive effect. Similarly at Cavern Walks the Tall Ships Race was perceived to have had little or no impact on business. Amongst the business community here it was considered that this sort of event has helped to improve the image of the city. Additionally these events seem to help the local business community as they met together during functions and public relations exercises which ran alongside the event.

At the non-tourist locations, the impact again was marginal. These interviews did, however, reiterate the view that this kind of event can be a useful tool in helping to raise the profile of the city, "the event was a success and any success for Merseyside must be good", (interview, 9th September, 1994) another manager noted, "it had a positive impact on the image of Merseyside, there has to be some link with investment" (interview 7th September, 1994).

4.4: Visitor numbers

A further area of study concerns visitor numbers. These are important not only in the context of the number of visitors to each attraction, but in relation to the variation between different Boroughs. Statistics relating to visitor numbers are available through officially-collated '*Visits to Tourist Attractions*' publications

(BTA/ETB Research Services, 1992). This source lists all attractions with a minimum of 5,000 visits by type of attraction (e.g. historic property, museums and galleries etc.), ownership (e.g. government, local authority, private) and provides details of admission fees (where relevant). There are however a number of disadvantages to using this source.

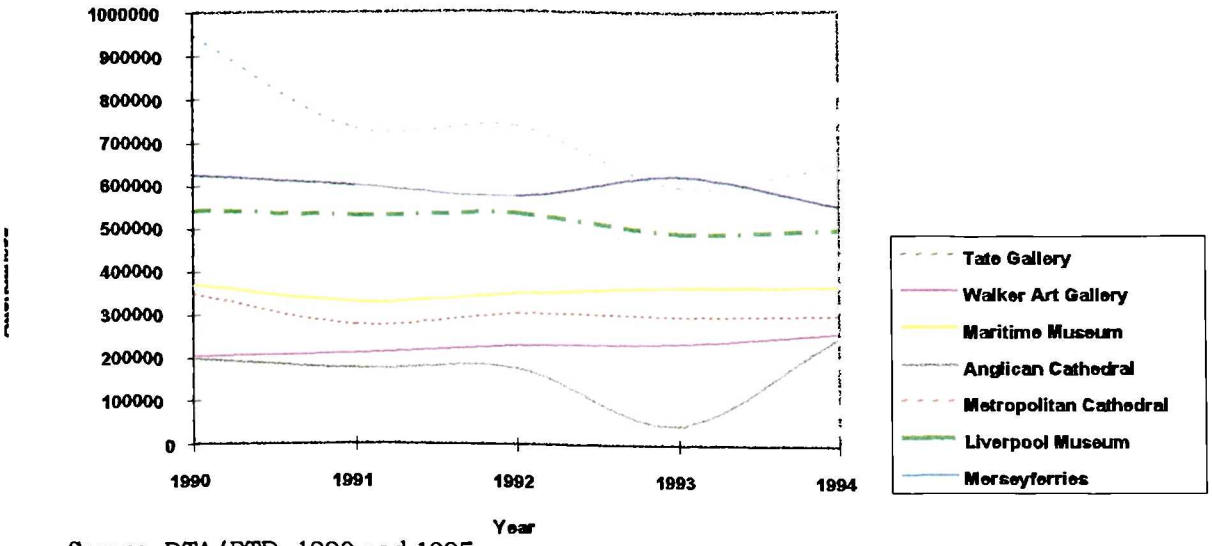
Townsend (1992) recognised how the survey has a number of omissions, most notably, "there would be a strong element of rounding and estimation in those entries which are included for free sites, such as large 'country parks'" (p.25). Similarly, "these figures inevitably combine a variety of different kinds of visitor: international tourists, national tourists, day visitors, half-day visitors and school children's group visits" (Townsend, 1990, p.25).

In the five Ex-Metropolitan Counties of northern England (South Yorkshire, West Yorkshire, Tyne and Wear, Merseyside, and Greater Manchester) there were a total of 124 attractions, drawing 24,441,300 visitors during 1991. As illustrated in Appendix 9 the greatest number of attractions are found in West Yorkshire (48), yet the largest number of visits are to Merseyside (11,002,300). When expressed as average number of visitors per attraction for each of these Boroughs, Merseyside has the most (523,918 per attraction) and Tyne and Wear the least (67,684 per attraction). Throughout these five Ex-Metropolitan Boroughs, museums and galleries are the most numerous types of attractions; commonly they represent over half of all attractions (see Appendix 9).

In Merseyside 43 percent (nine) of all attractions are located within the Liverpool Borough. In the period 1989-1991 the Merseyside area has gained four new attractions and lost five resulting in a net change of minus one. In the principal District (Liverpool), net change in the number of attractions is minus two (i.e. a gain of two and loss of four attractions). During 1991 six of these recorded attractions were museums and galleries. However, attractions only

drew 20 percent of the total number of visits; 70 percent of visits were made to the two miscellaneous attractions (the Albert Dock and Merseyferries).

Graph 4.1: Attendances at Liverpool Tourist Attractions



Source: BTA/ETB, 1993 and 1995

Graph 4.1 illustrates attendances at Liverpool's main tourist areas, these are for those attractions open for the whole period 1990-1994 and reported in BTA/ETB Regional Tourism Facts for the North West (1993 and 1995). Despite details presented here the most popular city centre attraction is the Albert Dock which, since 1985, has attracted in excess of a million visitors. This attraction is excluded from the graph for two reasons, firstly because attendances were not recorded for 1990-1993, and secondly because the 1994 figure is well beyond that for any other attraction (5.3 million). Of those attractions for which attendance figures are available, the Tate Gallery and Merseyferries have consistently shown greatest visitor numbers. However, the general trend for both of these attractions has been downwards, with The Tate Gallery showing the steepest decline. Most other attractions have an audience of between 200,000 and 400,000 visitors per year, the graph showing a steady pattern of visitor numbers. The exception to this is the Anglican Cathedral, where visitor numbers dropped dramatically in 1993, but rose again in 1994.

Table 4.10 illustrates the proportion of visits to attractions by those on pleasure visits to Liverpool (1990). The results suggest, as with the BTA/ETB survey, that the most popular all year round attraction is the Albert Dock. Liverpool Museum and Speke Hall are not represented in autumn visits, the latter due to its closure during the autumn and winter. Unsurprisingly, some attractions are more popular during the summer for example Merseyferries, Beatles Story and the Liverpool Museum. Merseyferries is an attraction which is very weather dependent. At the Beatles Story seasonality is more likely due to the popularity of this attraction amongst foreigners who take their main holiday abroad during the summer period. Liverpool Museum may be popular at this time due to its free entry and use by local people during long school holidays.

Discrepancy between summer and autumn visitors is perhaps greatest for those attractions which offer shopping facilities, most particularly Clayton Square and Cavern Walks. Similarly, both cathedrals generally attract more visitors during the autumn. These results suggest that one draw for autumn visits to urban areas is the ability to visit interesting places which are predominantly indoors.

Certain attractions are also more popular with day visitors than amongst staying visitors, for example, day visitors are more likely to visit the Maritime Museum, Beatles Story and the Tate Gallery (all located at the Albert Dock), whereas staying visitors are less likely to visit only the dock area, and may stray towards shopping facilities at Clayton Square or visit the Anglican Cathedral.

Table 4.10: The proportion of visits to attractions by those on pleasure visits to Liverpool in 1990.

	DAY VISITS (%)		STAYING VISITS (%)	
	Summer	Autumn	Summer	Autumn
Albert Dock	25	31	15	19
Maritime Museum	9	10	5	5
Beatles Story	7	6	5	5
Cavern Walks	7	8	6	7
Clayton Square	6	6	7	17
MerseyFerries	6	4	7	4
Metropolitan Cathedral	6	8	6	5
Tate Gallery	6	8	4	2
Anglican Cathedral	5	8	7	9
Liverpool Museum	4	-	4	-
Speke Hall	4	-	2	-
Walker Art gallery	3	4	4	4

Source: Visitors to Merseyside Survey, Volume III, p.40 and 92.

As illustrated in Table 4.11, the majority of visits are from within the UK, and overseas visitors mostly stay in the city - in the summer the percentage of these visitors rises as high as 40 percent of all pleasure staying visits.

Table 4.11: Region of home residence of those on a pleasure visit to Liverpool City Centre in summer and autumn, 1990

	DAY VISITS (%)		STAYING VISITS (%)	
Region of home residence	Summer	Autumn	Summer	Autumn
United Kingdom				
North West	51	37	6	2
North	1	*	4	1
Yorkshire & Humberside	6	1	5	7
Midlands	12	6	10	13
South East	4	5	6	6
Greater London	2	7	10	2
South West	2	2	5	10
Wales	4	8	3	5
Scotland	2	-	5	13
Elsewhere	1	2	6	2
TOTAL UK	85	68	60	61
Overseas				
Western Europe[1]	8	10	17	10
USA/Canada	4	12	16	15
Australia/New Zealand	2	4	4	10
Rest of the world	1	6	3	4
TOTAL OVERSEAS	15	32	40	39

Source: Visitors to Merseyside Survey, Volume III, p.15-16 and p.67-68.
* Less than 0.5 percent
[1] Including Scandinavia

During the summer of 1990 over half of all day visits to Liverpool were made by people usually resident within the North West of the United Kingdom. A similar pattern exists for day visits during autumn 1990. Of all autumn day visits 37 percent are from the North West, followed by Wales and the Midlands. One surprising result is the number of autumn day visits made from Greater London (seven percent). This may however be due to business visitors and conference attenders who also visit tourist attractions. Amongst staying summer visitors, the most common UK home addresses are the Midlands (ten percent) and Greater London (ten percent), yet during autumn staying visitors

originate from not only the Midlands (thirteen percent) but also Scotland (thirteen percent) and the South West (ten percent).

Visitors from overseas are most frequent amongst those staying in Liverpool during both summer (40 percent) and autumn (39 percent) and least apparent amongst summer day visitors (just 15 percent). Amongst day visitors overseas tourists are often from Western Europe (including Scandinavia) and USA/Canada. Overseas autumn visits are a higher proportion than of summer visits, this being particularly apparent amongst visitors from USA/Canada where, during summer, four percent of all surveyed are from this part of the world, compared to twelve percent during autumn. Staying overseas visitors again tend to be from Western Europe (including Scandinavia) and USA/Canada, but additionally during the autumn survey ten percent of interviewees staying in Liverpool were from Australia and New Zealand (perhaps to coincide with their summer vacations).

The Survey also analyzed the characteristics of personal groups on pleasure visits to Liverpool City Centre. The results (Table 4.12) vary considerably between the four columns. During the summer survey of day visits it was found that 40 percent of visitors travelled as part of a family with children; this compares to just 14 percent of autumn day visits. For both summer and autumn day visits, those travelling with groups of friends, or as part of a family without children, are important market segments.

In 25 percent of all cases staying summer visits are made by those travelling as a family with children, yet this percentage is exceeded by the 31 percent who travel as part of a group of friends. During the autumn survey, the largest percentage of staying visits (40 percent) were made by people travelling alone (again this suggests some use of tourist facilities by those travelling on business or attending conferences).

Table 4.12: Personal group characteristics of those on pleasure visits to Liverpool city centre in summer and autumn, 1990.

	DAY VISITS (% of people)		STAYING VISITS (% of people)	
Personal Group	Summer	Autumn	Summer	Autumn
On own	6	21	21	40
Family with children	40	14	25	17
Family without children	23	32	19	19
Friends	26	28	31	24
Club/association	5	5	4	*
Total	100	100	100	100

Source: Visitors to Merseyside Survey (1990), Volume III, p.18 and 70.
* Less than 0.5 percent

The survey found that in all cases, with the exception of summer staying visits, respondents are predominantly in social classes A, B and C1 (Table 4.13). The results for Liverpool (1990) thus endorse and present an exaggeration of the national trend (Baty and Richards, 1991). This may be due to the characteristics of the type of visitor attracted to urban areas. These people are interested in the arts and culture (traditionally associated with the middle classes) and are often those with high disposable incomes which facilitate short break holidays.

Table 4.13: Social grade of those on pleasure visits to Liverpool city centre in summer and autumn, 1990.

	DAY VISITS (%)		STAYING VISITS (%)		LEISURE DAY VISITS (%)
Social grade	Summer	Autumn	Summer	Autumn	(1991)
AB	47	40	30	38	59
C1	32	24	35	27	
C2	11	24	14	14	
D	-	9	8	11	41
E	10	-	4	1	
Not stated	-	3	9	9	
Total	100	100	100	100	100

Source: Visitors to Merseyside Survey (1990), Volume III, p.19 and 71.
Leisure Day Visits Survey (Baty and Richards, 1991, p.265).

The Leisure Day Visits Survey examines the scale of day trips from home in Great Britain. In addition to the information presented earlier which refers to the purpose of visit, the results give some comparative indication of the type of people who are likely to make leisure day visits. Baty and Richards (1991, p.262) report that the average distance travelled per visit, on round trips of at least three hours, was 68.4 miles, and for each of the most common trip categories - visits to attractions, to friends and relatives, and for outdoor activities - roughly a quarter of all journeys involved a round-trip distance of 100 miles or more.

In agreement with the Visitors to Merseyside Survey (1990), this survey found that most visits (271 million from 630 million - 43 percent) were made by families or lone parents (adults with at least one child aged under 17 years), followed by adult groups (131 million visits - 21 percent).

Field survey results

As explained in the earlier section of this chapter, research was undertaken with the aim of questioning managers of tourism-related facilities about the type of visitors which are perceived to use their facilities; this provides meaningful insights to the survey figures reported so far.

British visitors from the North West of England were mentioned at all sites, with Merseysiders and local people being common responses. At attraction E it was noted "the Bluecoat has an allegiance to both the community and visitors, although use is mainly the community." Indeed here the mission statement states, "we seek to provided a programme of innovative and challenging work that reflects the diversity of the different communities that live in Merseyside" (interview, February, 1994).

European visitors were poorly represented in replies but three establishments showed awarness of visitors from North America, museum 1 gave the explanation that they fly to Manchester Airport. However C noted that "the Gulf War has knocked the US market back". Other non-European countries were mentioned a little, but it was however recognized that "the Beatles are very popular in Japan, these are the biggest market for Liverpool. The Japanese will come to Liverpool for a weekend, just to see the Beatles, or Liverpool is a stop-off on a visit to the UK" (1).

Any analysis of visitor characteristics must consider the issues of seasonality and the Liverpool research suggests that there has been a need to adapt to seasonal variations in visitor numbers at some attractions. Two establishments recognized that weekends were always busiest, with establishment 2 adding that on a Bank Holiday Monday the gallery may have 8,000 visitors in one day. Three places were aware of a peak in visitor numbers during the summer and "not many winter visitors" (D). Indeed, at 3 a quiet winter season has caused

the museum to rethink its opening times, "in summer we have 200-300 visitors per day, in winter it is more like 10-150; the museum may therefore close during winter next year" (3). At Beatles Story and the Metropolitan Cathedral opening times are reduced during the winter months. Sunday openings are also common in Liverpool, one exception to the rule being the Bluecoat.

Nine of the *theatres and cinemas* were asked where visitors came from. The Unity Theatre was most specific, considering its audience to be predominantly from within a five mile radius of the theatre. Four of the interviewees mentioned students from Liverpool's two universities and the obvious hinterland of Cheshire and Chester, Wirral, Wales, Manchester and Southport.

Most of the establishments recognized that the audience type varied greatly depending upon the type of performance. The details provided (Table 4.14) recognize, as with the other establishments, that 95 percent of visitors are from the North West of England. The one anomaly is that only one percent of the audience is from Manchester, sources at the Philharmonic suggesting that this is due to competition from Manchester's Halle orchestra.

Table 4.14: Liverpool Philharmonic Audience Profile, 1993

Liverpool	28%	Chester	17%
Wirral	25%	Lancashire	5%
Sefton	14%	Wales	2%
St Helens	3%	Manchester	1%
Knowsley	2%	Elsewhere	3%
MERSEYSIDE TOTAL	72%		

This information suggests that visitors are not usually tourists. Business people are attracted by the RLPO Patrons Programme. It gives businesses the opportunity to entertain visiting clients in the evening, including visits to the Green Room, meeting performers and access to bar and catering facilities.

If it can be presumed that tourism in Liverpool is seasonal, peaking in the summer, then it will come as no surprise to learn that theatres are not recognizing a large tourism market. Four of the seven theatres "go dark" (close) for the summer period. A fifth establishment noted "we are busiest between October and February; this is out of the tourist season" (A). To compensate for seasonality the Liverpool Philharmonic go on tour and do a "summer pops" season at the Albert Dock. This is an annual event held in the car park at the docks; a tent is erected and concerts are held most nights. The hope is that this will raise the profile of the Philharmonic, making it more accessible to both the tourist and the local visitor. Future plans are to include this as an add-on to the Festival of Comedy.

Data provided by North West Tourist Board suggests *hotel occupancy* rates for the counties of North West England (1993). Hotel occupancy for Liverpool 1990, January - October is also included (Table 4.15) - more recent data is unavailable as the sample of hotels to return the ETB questionnaire was not large enough to be representative. As illustrated in the table, 1990 average room occupancy for central Liverpool was 71.3 percent - far higher than that for Cheshire, Greater Manchester, Lancashire or Merseyside in 1993 (it is also higher than that for each of these counties in 1990). Table 4.15 also includes the standard deviation for occupancy rates. This figure is lowest for Greater Manchester (5.4) and Liverpool (6.9), thus one can conclude that there is least seasonal variation in hotel occupancy in these two places. Variability of occupancy rates is greatest in Cheshire and Lancashire, where there are seasonal peaks in April and May and September and October in Cheshire, and July to October in Lancashire.

Table 4.15: Hotel occupancy by county - average room occupancy (%) - 1990

	Cheshire 1993	Greater Manchester 1993	Lancashire 1993	Merseyside 1993	Liverpool 1990*
JAN	37.2	44.0	32.1	37.1	55.7
FEB	48.7	48.1	40.1	49.2	71.7
MAR	51.9	46.4	39.6	42.3	76.3
APR	60.2	44.4	45.4	55.3	73.5
MAY	63.8	45.3	49.8	46.8	66.9
JUN	54.7	53.8	51.5	48.7	70.7
JUL	59.0	54.0	56.9	58.5	68.7
AUG	59.2	50.0	58.8	61.5	68.6
SEP	71.3	63.1	67.9	60.1	81.3
OCT	64.7	51.9	66.7	52.1	79.9
NOV	56.1	54.2	47.3	43.5	-
DEC	48.1	48.1	50.9	39.9	-
AVERAGE	**56.2**	**50.0**	**50.6**	**49.6**	**71.3**
s.d.	**8.6**	**5.4**	**10.3**	**7.7**	**6.9**

* more recent hotel occupancy is not available for Liverpool
Source: NWTB/MTB, 1991 and 1995.

To verify and interpret this information all hotels in the case study area were asked 1992, 1993 and expected 1994 occupancy rates. In one case the management apologised, saying that they could not provide detailed statistical information, and three hoteliers claimed that they did not know occupancy rates.

Average hotel occupancy in 1993, as reported to the author, varied from 43 to 90 percent, the mean estimate for the seven respondents being 63.7 percent (lower than the MTB figure - 1990. However, one of the hotels included within this sample had been open for business for only seven months of 1993). Where comparison with past occupancy was possible, there was only one case of

reduction. However, many of the hotels were able to provide details of variance in occupancy rates throughout the year.

The results illustrate that there is no definite tourist season, although some broad patterns do appear. As expected from the MTCB data. a number of hotels consider that July and August are not especially popular months, exceptions to the rule being hotels A and G. Hotel G reported very high occupancy rates all year and cater for a predominantly leisure orientated market. Hotel A is, at this time, in the midst of its coach season. Other low seasons are Christmas and early in the new year. However, many of the hotels mentioned that Christmas was still a busy time because of functions and office parties; most money is made in the bars and restaurants at this time of year. Hotel I is very dependent on football supporters, hence, the quietest time is when there are no matches.

One hotel mentioned that there was no seasonality in visitor flows because most of the visitors which use the hotel were there on business (hotel J). Indeed, hotel A expressed the opinion that the hotel was busy all year with business guests, but occupancy peaked during the coach tour season (March to September).

Two managers were able to provide statistical details of variation in room occupancy throughout the week. Hotelier D reported 90 percent occupancy on a Tuesday, Wednesday and Thursday night, falling to 70 percent on Monday and Friday, with weekend occupancy at just 50 percent. These data are supported by a comment from hotel manager C. Here, the hotel is reported to be busiest on Tuesday and Wednesday nights, with Saturday being busy during the peak season.

All the interviewees were asked to comment on the home address of visitors to

the hotel. Hotel A regarded the large number of foreign visitors to be due to the ownership of the hotel; this member of a French chain recognized that a lot of French people visited the hotel because they were familiar with the name, and knew what to expect. Two of the smaller hotels (K and L) mention the importance of Japanese students as guests. Four hotels also acknowledge American visitors, however, they often don't stay long. This is unsurprising when, apparently, they are told, either by tour operators, or by guide books that Liverpool is not a safe place to visit.

The questionnaire (Appendix 8) asked managers of eating and drinking establishments about the extent to which their business is tourism. The results illustrate that *tourists* are perceived to be more important to business at the Albert Dock than at either the Cavern Walks or Bluecoat Chambers. At the Albert Dock, the average perceived percentage of tourists is 59.4 percent, compared to just 21.3 percent at Cavern Walks. Additionally, two of the twelve Albert Dock respondents stated that tourists were more important to business during the summer months; hence supporting a hypothesis of seasonality in visiting (see Table 4.16).

Table 4.16: Perceived percentage of tourists to eating and drinking facilities at Liverpool's main tourist areas.

	ALBERT DOCK	CAVERN WALKS	BLUECOAT	TOTAL
% TOURISM				
> 80%	1	-	-	1
60-79%	6	-	-	6
40-59%	5	1	-	6
20-39%	-	1	-	1
<20%	-	4	1	5

Source: Author survey of managers

Interviewees were also asked where they considered tourists usually came from. Before discussing these results one needs to recognize a shortcoming in

the methodology. Difficulty arises firstly in the way the interviewee distinguishes who is a tourist, and secondly, how he then identifies a tourist; if the visitor is not asked directly the only distinguishing characteristic is language or accent.

These results suggest that visitors from Western Europe are most obvious, as are visitors from the USA and Canada. There is however some variation between survey locations. The majority of visits to the Cavern Walks are reportedly by tourists from the USA and Japan; this is probably due to the attraction which the Beatles have for tourists from these areas (Table 4.17).

Table 4.17: Perceived home address of visitors to eating and drinking facilities in Liverpool's three key tourist area, number of establishments.

	ALBERT DOCK	CAVERN WALKS	BLUECOAT	TOTAL
UNITED KINGDOM:				
North West	-	-	-	-
England	3	1	-	4
Scotland	2	-	-	2
Wales	1	-	-	1
Ireland	1	-	-	1
OVERSEAS:				
Western Europe	12	4	-	16
USA/Canada	4	4	-	8
Australia/New Zealand	-	-	-	-
Rest of the World	3	4	-	7
Not specified	2	2	1	5

Source: Author Survey (1994).

The same questions (Appendix 8) were also asked of managers at retail units in these three key tourist areas. The results (Table 4.18 and 4.19) suggest few differences with those for eating and drinking facilities.

Table 4.18: Perceived percentage of tourists to retail units in Liverpool's three main tourist areas.

	ALBERT DOCK	CAVERN WALKS	BLUECOAT	TOTAL
% TOURISM				
> 80%	8	-	-	8
60-79%	7	-	-	7
40-59%	6	2	1	9
20-39%	2	2	-	4
<20%	3	5	3	11

Source: Author survey of managers

Table 4.19: Perceived home address of visitors to retail units in Liverpool's three key tourist area, number of establishments.

	ALBERT DOCK	CAVERN WALKS	BLUECOAT	TOTAL
UNITED KINGDOM:				
North West	1	2	-	3
England	4	-	-	4
Scotland	3	-	-	3
Wales	3	1	-	4
Ireland	1	1	-	2
OVERSEAS:				
Western Europe	12	2	3	17
USA/Canada	18	2	3	23
Australia/New Zealand	4	-	2	6
Rest of the World	3	2	1	6
Not specified	14	2	-	16

Source: Author Survey (1994)

4.5: Summary

The results presented in this chapter highlight a number of characteristics of visitors to Liverpool, both in terms of motive of visit and type of visitor.

A large proportion of visitors to Liverpool are on day trips from home (often from within a 90 minute driving time). This market has been further encouraged by tactical marketing of attractions. Special promotions may further entice these day visits to multiple attractions. The results of the Visitors to Merseyside Survey (1990) suggest that day visitors usually travel as a group of friends or as part of a family (with or without children). Additionally, this group of visitors are more likely to visit only the Albert Dock area of the city rather than the older core of central attractions or the shopping area.

Most survey respondents visiting Liverpool are in social classes AB and working on a full-time basis. However, during the autumn Visitors to Merseyside Survey of 1990 there are a number of unemployed on day visits to the city.

The propensity for visitors to stay overnight in Merseyside was found to be at its relative greatest during the autumn months with most residential visits being of two or three nights (short-breaks), often with the purpose of visiting friends and relatives and sightseeing. One discrepancy between the Visitors to Merseyside Survey and the author survey was the frequency of mention of attending sporting events. Hotel managers were particularly conscious of the number of clients attracted not only by the annual Grand National, but also by the regular football matches. The results presented in this chapter thus suggest that tourists visiting the city to attend sporting events rarely visit the attractions, although there is some linkage with cinema attendances.

Tourist Board data (Graph 4.1) suggests that the most popular attractions in the city are the Albert Dock, MerseyFerries and the Tate Gallery. This is supported by information provided by managers of eating and drinking and retail facilities at three of Liverpool's tourist areas. For both these types of facilities tourism appears to be more important to business at the Albert Dock than either the Cavern Walks or Bluecoat Chambers. The research also

highlighted that overseas visitors are particularly attracted to the city because of the Beatles connection. At the Cavern Walks in particular, the Beatles attract many American, Japanese and German visitors.

A number of interviewees reported that, although the Albert Dock has no influence on business, it is a catalyst to development. Other catalysts for tourist visits can be identified as sporting events, special events, conferences and special arrangements for coach tour operators. As highlighted in this chapter, such developments are an important source of additional income to tourist facilities, particularly at times when business is slow. However, seasonality is not always recognised by managers at tourist facilities in the city. The city attracts a mix of business and leisure visitors, and the two markets are compatible with one another; business visitors midweek and leisure visitors at weekend. Yet, for attractions such as Merseyferries it is the weather which determines visitor numbers.

Final issues to consider here are those of competition and accessibility. As already mentioned, Liverpool is not an easily accessible location. To the west of the major M6 motorway, the city is not obviously on a route to anywhere, thus loses people who would otherwise break their journey. The nearest Liverpool comes to a stop-off point is in its role in attracting coach tours en route between the Lake District and Chester. For most domestic free independent travellers, this is not an obvious stop-off point.

Liverpool also has to compete with other cities for its tourists. As this chapter has emphasised, urban tourists are often domestic visitors travelling for short weekend breaks. In this there is a restricted market for the tourist product. Liverpool needs to be able to compete with other cities, not only those which have adopted urban tourism as a mechanism for regeneration, but those with a tradition for tourism such as historic towns and cities, seaside resorts and

capital cities. Hindered by the accessibility problem already discussed, the city needs to be sure to offer an original product which can compete; one issue in this is the role of special events, but this has to also include the basic resources such as hotels, restaurants and attractions.

This competition exists at a number of levels: regionally, nationally and internationally. At a regional level, Liverpool needs to compete with Manchester, Chester, Southport and Wigan. At a national Level one can include Leeds, Sheffield, Birmingham, Glasgow and London and internationally one may possibly include Boston. For this reason cities are marketing themselves using names and slogans, such as "Bradford's Bouncing Back" or "County Durham land of the Prince Bishops", which tells to visitor something about the location. As yet Liverpool has not adopted this type of marketing technique.

CHAPTER 5

JOB CREATION AND SUSTAINABILITY

5.1 Literature Review

Tourism-related employment

One of the main aspirations when adopting tourism as a means of urban regeneration is the provision of employment for those previously working in the more traditional industries of the region. As a result "tourism has been advocated as a major hope for employment growth in the UK at a number of different levels" (Williams and Shaw, 1988, p.81). They explain that:

> "it requires substantially less grant aid to generate jobs in tourism than in manufacturing or agriculture. Moreover, the actual numbers of jobs created by such grants usually exceeds the predictions made at the time of application. Certainly, the ratio of capital to labour in tourism is only about one half of that in other enterprises .... Tourism has not simply been seen as part of the general solution to the UK employment needs. It has also been stressed as a panacea for many different types of local economies" (pp.81-82).

Indeed, research for the Department of Environment (Polytechnic of Central London *et al*, 1990) reports the average cost per job at 20 urban tourism attractions to be just £127,000; ranging from £8,000 to £286,700 per site (p.60). The geographical spread of these projects is also wide (including Hull, Manchester, Islington and Dudley). Hudson and Townsend (1992) note;

> "in the 1980's, both central and local government perceived tourism as a growth industry, particularly in terms of employment ... some local authorities saw tourism as their principal, or even their only, prospect for job growth" (p.52).

Egan (1984) reports the reason why local authorities are adopting tourism policies; the "expectations of long-term growth, combined with the labour intensive nature of the product and the limited opportunities for capital

substitution in the foreseeable future" (p.133). He goes on to question whether all forms of tourism are equally desirable from a planning or job creation view point.

Indeed, tourism does have a reputation of providing jobs which are part-time, casual, seasonal and low paid. As such, they tend to attract a high number of female workers in addition to a young and unskilled staff. Hennessy (1994) recognized, in her study of female employment in tourism in south west England, that "it is widely held that employment in tourism is socially classified as unskilled" (p.42). Indeed, this assertion was supported by the results of her survey in Looe, Cornwall (August, 1986), which concluded that "the tourism industry in Looe might be said to absorb relatively high proportions of employees with no educational qualifications" (p.46). It is, however, often recognized that this particular feature of tourism may be beneficial to the local economy. Johnson and Thomas (1992) note that "encouragement of tourism has been seen as a particularly effective way of increasing employment opportunities, especially for unskilled workers and young people" (p.4). Egan (1984) similarly recognizes that "many of the jobs associated with the industry are suitable for those sectors of the population most severely affected by the recession, namely the young and unskilled" (p.133).

There is, however, some argument to suggest that it is the unskilled nature of, tourism employment, or the fact that many jobs are treated by employers as unskilled even if some level of skill is really called upon but not recognized, which, in most economies, keeps wages in the tourism sector low relative to other industries (Bull, 1991, p.146). This author also argues that

> "relative to other sectors, travel and tourism has often been shown to be a high employer of labour per dollar of sector income. Thus, many authorities have considered tourism development to be ideal for soaking up unemployment in regions which have little other employment

opportunities" (1991, p.145).

The problem of low pay in tourism-related industries is not only recent. Ryan (1991) recounts that

> "tourism, even in advanced economies, has been associated with low levels of pay. The Low Pay Unit in the United Kingdom reported in 1986 that nearly 40 percent of hotel and restaurant employers listed by the Government Wage Inspectorate were found to be illegally underpaying their workers" (p.81-82).

Bull (1991) agrees, that "as a result of the transitoriness of labour and weak unionisation even where a minimum wage regulation exists employers often flout them without reprisal" (p.146). Ryan continues in the argument; "the problem of low wages in the industry arguably might be a reflection of low levels of productivity and added value. There is ample evidence that in advanced economies the hotel industry is characterised by high levels of staff turnover, and small units" (p.82). This high staff turnover is probably a direct result of the part-time and seasonal nature of tourism-related employment; a view supported by Wood (1992) that ".... research by the Low Pay Unit network in Britain leaves little doubt that the hospitality industry relies to a very large extent on the reluctant labour of those people unable to gain alternative employment" (p.301).

Before going on to examine the part-time and seasonal nature of tourism-related employment it is important to review available literature relating to the employment of young staff. Wood (1992) further recognizes that "over the past 30 years there has been a trend towards increased part-time working and casualization in the British hotel and catering industry linked to the increased employment of women and other groups marginal in labour market terms, especially the young" (p.297). Hennessy's (1994) study of female employment in Looe, Cornwall found, in agreement, that "roughly three-quarters of the

women surveyed were aged 16-35 years" (p.35). Indeed, Wood (1992) offers some form of explanation about the attractiveness of young employees;

> "while there are no accurate up-to-date data it seems that there has been an increase in the number of young workers employed in hotels and catering. Certainly, it is difficult to escape the implications of government intervention in the labour market in this respect, most notably in the introduction of the 1986 Wages Act which removed under-21's from the scope of Wages Council protection" (p.298).

In many tourism areas demand for facilities is seasonal, often greatest during the summer months (winter in ski resorts), and school holidays; the level of employment tends to vary accordingly in response. As a result, "in most tourism destinations, seasonality means there are at least two labour markets; one for permanent workers throughout the year and seasonal for peak season work" (Bull, 1991, p.147). Hennessy (1994), in agreement, found seasonality to be an important characteristic of tourism-related employment. In an analysis of employment in Looe, jobs were broken down in terms of seasonal employment between those where the duration of employment was brief, i.e. 1-24 weeks per year, short-term jobs (25-40 weeks per year) and annual employment (41-52 weeks per year). "Given these definitions, roughly two-thirds of women surveyed were in seasonal or short-term employment" (p.43). The value of tourism-related employment can, therefore, be further questioned. The nature of much of this employment

> "....must raise questions as to the desirability of such seasonal employment and whether one type of unemployment (ie. seasonal) is being substituted for unemployment per se. It could be argued that seasonal unemployment is more difficult to cure than unemployment per se" (Egan, 1984, p.133).

Indeed, Hennessy (1994), in considering womens' employment, noted that

"while seasonal or short-term employment draws a lower total (annual) income than year round employment, it may also provide employment at a time which is inconvenient for women with school-going children" (p.43). The degree of seasonality within the industry does however vary. Hennessy (1994) found that "retail establishments provide a high proportion of annual jobs, while restaurants and cafes account for the greatest number of seasonal jobs" (p.43). Seasonality in employment is often considered to be dominant amongst females; Hudson and Townsend (1992) do, however, recognize that "core jobs, available all year for full-time males, are comparatively rare in the industry. Nevertheless the pattern is changing, even if this is not necessarily in the manner claimed by the industry" (p.55). This paper continues,

> ".... there does appear to be agreement from a variety of sources that seasonality in hotel and catering has been reduced to a low level, although career structures are virtually absent and employment is precarious, with 25 percent of staff in hotel and catering losing or leaving their job each year" (p.55).

Although seasonality is one cause of part-time and casual employment, Bull (1991) notes two more. As with other fixed capacity enterprises, using part-time and casual labour enables employers to alter some of their labour costs from fixed to variable. Secondly, the nature of most travel and tourism activity requires 24 hour working or at least work beyond normal business hours; this, in turn, means split shifts and/or part-time extra work (p.147). Bull also recognises that "many such workers are *moon-lighters* taking second jobs or people not normally reckoned to be in the labour force, such as students" (1991, p.147).

It is necessary to stress further the role of women in tourism related employment. In September, 1994, 59.4 percent of all tourism-related employees in the UK were female (Employment Gazette, January, 1995). Hennessy (1994)

emphasizes this point; "women accounted for 39 percent of the total labour force in Britain in 1981; however, in Looe women constitute roughly three-quarters of the workforce of a sample of businesses" (p.40) (Looe has an economy heavily dependent on tourism). One view is that women are happy to take tourism-related jobs because they are part-time, thus giving additional time for caring for children and doing housework as well as providing supplementary household incomes. Evidence presented in the Looe survey suggests that part-time employees are working in more than one establishment or working illegally.

Naylor (1994) reports an historical analysis of part-time working in Great Britain. Key findings of this report question some of the assertions made about tourism-related employment. The report recognizes that, since 1971, part-time employees' jobs have increased by 2.6 million (all sectors) and the proportion of part-time almost doubled from 15 percent in 1971 to 28 percent in 1994. Generally, part-time employees are female (86 percent) and more than half of these are over 40 years old. Yet those women working part-time with dependent children under the age of 16 are most likely to be in the 25-39 age group. However, it was found that 80 percent of female part-time workers work part-time because they do not want a full-time job; this proportion rises to 91 percent for women with a dependent child under the age of 16.

In light of these features of tourism-related employment, Egan (1984) presents a cautious approach to tourism development.

> "Encouragement of tourism employment to replace structural decline in other parts of the local economy may replace one serious problem with another equally serious but potentially more intractable one. Furthermore, if we accept that a hierarchy of employment exists, and that tourism-related employment generally falls into its lower echelons, then a cautious approach to tourist development by local authorities

appears sound advice. The importance of local authorities developing a hierarchy of employment opportunities cannot be over emphasized since funds for employment creation are limited both locally and nationally. Thus the use of funds in tourism development necessarily involves foregoing some alternative scheme of employment creation" (p.133).

Before considering more directly the nature of urban tourism-related employment, it is pertinent to mention the employment multiplier. The tourism employment multiplier works in a similar manner to the income multiplier. Holloway (1989) recognizes that, "if tourists stay at a destination, jobs are directly created in the tourism industry there. These workers and their families require their own goods, services, education and so on, giving rise to further indirectly created employment in shops, pubs, schools, hospitals" (p.175). From a broad cross-section of impact studies these employment multipliers range from 1.40 to 1.80 times the direct impact .

The benefit of tourism-employment multipliers has been frequently questioned.

"Experience of the various multipliers then suggests that at best they probably reflect an average value added compared with other sectors .... However, in some instances reference to the multiplier has an even more spurious character. In many economies, and particularly rural economies where industrial diversity is limited, it is the direct employment consequences of tourist expenditure that are important .... tourism multipliers would appear to perform averagely well in comparison with other regional multipliers. They are not consistently superior and do not warrant the special status accorded to them" (Hughes, 1982, p.172).

Hughes argument continues (1994),

"there appears to be a consensus that employment multipliers are the least reliable of all. Employment is commonly estimated by converting

expenditure into units of labour. It is assumed that the ratio of tourist employment in any one sector of the economy is equal to that between tourist and total expenditure" (p.76).

The argument also recognises that increased employment will result from an increase in expenditure/output and that it will increase in a linear form; the employment multiplier "assumes the existence of unemployment and mobile substitutable resources" (Hughes, 1994, p.76). He also suggests that it may be "unreasonable to claim that employment is due to tourism expenditure (especially short-term) as the employment may exist anyway .... the implication of multiplier analysis is that without the expenditure these jobs would not exist" (p.77).

A number of key features of tourism-related employment are therefore apparent. Most employees in this field are unskilled; as a result there are job opportunities for, what some would argue to be, those sectors of the population most in need, namely the young and unskilled. However, it is this feature which keeps wages low, thus encouraging a high staff turnover. Indeed, there is some argument to suggest that the result is a reluctant labour force made up of those unable to gain work elsewhere, with many staff losing their job each year in the absence of any real career structures.

Additionally, there is an argument that tourism-related employees are predominantly part-timers. This could be dictated by economics, as employing more part-timers enables employers to transfer some of their costs from fixed to variable. Tourism-related jobs also often require 24 hour working or work beyond normal hours, hence split-shifts and part-time working are both options to be considered. It is questionable whether the large number of female workers is a direct result of the availability of part-time work which, it is suggested, is more suited to those bringing up a family. Part-time work has

lead other authors to consider the possibility of some employees taking second jobs to supplement their income and students wishing to supplement their grants.

Urban tourism employment

Before looking in detail at specifically urban tourism-related employment, one should briefly review the general urban employment situation and highlight some of the employment initiatives which have occurred over recent years. Turok and Wannop (1990) recognize that "although there has been a generalised contraction of the economic and employment base of most older cities, the scale and nature of employment changes across different sectors have been extremely varied. Manufacturing as a whole has been the major component of urban decline, leading to a loss of full-time manual jobs" (p.6). They continue,

> "high local unemployment is often associated with localised employment decline, but is also bound up selectively in the operation of housing market processes, a lack of occupational and geographic mobility for some social groups, and discrimination and disadvantage in the job market" (p.6).

In order to combat the problems associated with urban unemployment one government initiative has been the targeting of projects. Indeed, there is reason to suggest that, prior to targeting, urban policy was not necessarily successful in reducing problems associated with urban unemployment. "Despite extensive administrative effort, there is general agreement that inner city problems have worsened throughout the past decade, particularly in respect of a key indicator - employment levels" (Gregory and Martin, 1988, p.238).

Hudson and Townsend (1992) have suggested why local authorities have seen tourism employment as an alternative to the more traditional industries;

> ".... it was the collapse of industrial employment in the UK that led many

local authorities to become more involved in formulating local economic policies. Many of them came to see tourism as a source of new jobs, both directly and indirectly via a more general promotion of their areas. To some extent, their employment creating objectives were met, although .... questions remain about the aggregate numbers or, more crucially, the type of jobs. These characteristics of tourism employment have led several more perceptive local authorities to see it as complementary to more central industries in their economy rather than a substitute for them" (p.56).

Williams and Shaw (1988), however, note

> "the problems facing these (urban) areas are complex and daunting and it would be foolish to pretend that tourism by itself can bring about their solution or compensate for the loss of whole industries. Tourism can, however, and does have a role to play; one that has up to now largely been overlooked" (p.82).

Characteristically tourism-related employment in urban areas is, in some respects, different from elsewhere. Could it not be that urban tourism offers greater potential due to the reduced impact of seasonality? Another important consideration is whether, in the older industrial cities, urban tourism is able to create employment opportunities for residents of the city who may have previously been employed in manufacturing industry. The literature on this subject is contradictory. Law (1993) states that "although some decry these types of jobs (in urban hotels), they are suitable for many inner city residents" (p.118). Alternatively, Martin (1993), in a study of conference venues in Birmingham, found that they have failed to recruit large numbers of staff from their immediate relatively poor vicinity.

Previous surveys and views

There are numerous articles which consider the nature of aggregate tourism-related employment. Unfortunately, there are comparatively few examples of intensive empirical research into the topic; one explanation may be that "the lack of studies of tourism and employment may, in part, stem from the inherent difficulties of such research. Jobs that rely directly or indirectly on tourism will be found in all parts of the service sector" (Bull and Church, 1993, p.14). The definition of tourism-related employment is, indeed, very difficult and varies between studies. Williams and Shaw (1988), for example, include the hotel trade, restaurants and cafes, pubs and bars, other tourist accommodation, tourist and other services, and libraries, museums and art galleries. Government data for "tourism-related employment" extends this definition to include sport and recreational employment. However, the work of many of the employees in these sectors is neither partly or in total tourism-related. To overcome this problem other authors propose, "if seeking a single national figure, to abstract different proportions of these various sectors, as determined by tourism's share of their overall activity" (Hudson and Townsend,1992, p.51). For example Medlik's (1988) formulation incorporates 42 percent of hotel and catering jobs and 25 percent of recreation employment with lower fractions of other sectors, including retailing.

There are, however, two different kinds of employment studies which are worthy of inclusion; the Institute of Manpower Studies (IMS) (1988) and the Polytechnic of Central London *et al.* (1990). The work of the Institute of Manpower Studies (IMS) (1988) is well summarised by Ryan (1991). Its purpose was to examine the nature of tourism-related employment by sector.

> "IMS (1988) found that 63 percent of the 170 businesses examined had less than 20 employees. Only eight percent had over 50. Because of the small size of business units, it was found that whilst the industry does have a reputation of employing part-time, seasonal labour, this was not

in fact borne out by the sample, for 68 percent of all jobs were counted as being permanent jobs" (Ryan, 1991, p.83).

In agreement with the literature presented earlier in this chapter, the survey recognized that "for many employed in the industry the career path is short, with limited opportunity for career enhancement" (Ryan, 1991, p.83). Indeed, these results suggest that hotels, restaurants and guest houses, travel agents and guides, and night clubs and public houses are most likely to employ permanent staff; temporary staff being more common in other accommodation sectors, leisure facilities, and museums and galleries (Table 5.1).

Table 5.1: Pattern of employment in tourism

	CORE OF PERMANENT STAFF			USE OF TEMPORARY STAFF		
	Large	Medium	Small	High	Medium	Low
Hotels, Restaurants, Guest houses	X				X	X
Leisure facilities		X		X	X	
Other accommodation			X	X		
Museums & Galleries		X		X		
Travel agents & Guides	X				X	
Night clubs & public houses	X					X
Cinemas and theatres		X		X		

Source: Ryan, C. (1991) Recreational Tourism p.83.
Table constructed from data in Institute of Manpower Studies Report Productivity in the Leisure Industry, (1988).

The report by the Polytechnic of Central London *et al.* (1990), commissioned by the Inner Cities Directorate of the Department of the Environment, examines the impact of tourism projects on inner city areas and, in so doing, considers the employment impact of 20 case study projects including Liverpool's Albert

Dock and Maritime Museum, Hull Marina and Manchester's Science and Industry Museum. This report recognises eight features of employment which are worthy of discussion here.

Firstly, not only the number of jobs created, but also the quality of jobs is important, although the study was unable to collect satisfactory information on this theme. The study did, however, provide details relating to the full-time and part-time nature of tourism-related employment. The report states,

> "if non seasonal jobs alone are considered, 72 per cent of jobs at the projects are full-time - very considerably higher than the industry average (46 percent). If all jobs - including seasonal employment are considered, the figure falls to 59 percent, but again, this is substantially higher than the industry average" (p.19).

Indeed, the conclusion reached by the Polytechnic of Central London *et al.* (1990) states that

> "the projects that we studied offered a much higher proportion of full-time jobs than the tourism industry generally. They thus have the potential to replace traditional full-time jobs lost in inner city areas" (p.20).

The study similarly recognizes the reputation which tourism has as an employer of predominantly female labour, noting, more particularly, that in the inner city,

> "the concern is not that jobs done by women are in some sense less important than jobs done by men, but that a problem of mismatch may occur, in that job losses may be concentrated amongst men whilst new employment opportunities are taken by women. It has, therefore, been suggested that tourism may not offer appropriate job replacement in inner city areas" (Polytechnic of Central London *et al.*, 1990, p.20).

The survey concludes that "the proportion of jobs at the project taken by men

lies midway between the proportion in the whole economy and the proportion for the tourism industry generally" (p.20) (see appendix 10). Similarly, in the inner city, the appropriateness of tourism-related jobs depends upon the type of job (manual, non-manual) and the level of skill or training required. Out of the 20 projects examined in the Polytechnic of Central London *et al.* (1990) survey "a high proportion of the jobs are in manual occupations - 63 per cent manual and 37 percent non manual", indeed, "71 per cent of the employees covered by the survey require no formal training for their job" (p.20-21) (appendix 10). The report concludes, in support of the literature, that

> "on the one hand it (the report) could be seen as confirming the view that tourism offers predominantly menial jobs. On the other, it could be seen as indicating that tourism has an advantage for inner city areas.... given the high proportion of unskilled labour amongst the unemployed in the inner city, the projects we studied may be seen as offering job opportunities which are becoming increasingly rare" (p.21).

The workforce of tourist destinations is often thought of as being relatively young (aged 16-21). "Whilst this may be seen as a benefit, in that jobs are available to young people, there is concern that certain sectors of the industry employ a higher proportion of young people to escape legislation on pay and conditions" (Polytechnic of Central London *et al.*, 1990, p.21). Yet the research in the inner city (Polytechnic of Central London *et al.*, 1990) found that "in contrast to the tourism industry in general the workforce at the projects was relatively evenly distributed by age" (p.21). The report similarly recognizes that, because jobs are created in the inner city, it does not necessarily result in employment for inner city residents. Examination of this concluded that 46 percent of workers lived in the inner city whilst 54 percent lived in the rest of the city. "Unsurprisingly, the proportions varied with occupation. 50 percent of manual workers lived in the inner city, whilst only 27 percent of non-manual workers did so" (Polytechnic of Central London *et al.*, 1990, p.21). Additionally,

workers at the projects were asked about previous economic activity, in order to discover whether the new jobs were being filled by those previously unemployed. The results of the report suggest that "about a quarter of the jobs at the projects were taken directly by the unemployed and 30 percent went to people who had not previously been employed" (Polytechnic of Central London *et al.*, 1990, p.21).

Finally, this report considers how tourism is commonly seen as a low wage industry. Only ten of the projects provided information about average weekly rates of pay in 1988; the values ranged between £139 and £215 for non-manual staff and between £96 and £127 for manual staff (Polytechnic of Central London *et al.*, 1990, p.21). It is very difficult to suggest whether these earnings are particularly high or low. The report attempts a comparison with weekly earnings outside London, suggesting about £170 for manual jobs and £200 for non-manual.

These two reports therefore, in addition to highlighting a number of potential methodological difficulties, provide evidence of particular characteristics of urban tourism employment. However, the Department of the Environment report is limited in its value as it examines only selective projects, without considering the holistic impact of tourism on the particular destinations.

Statistical data for tourism-related employment

Most writing on the tourist industry begins with a description of tourism as one of the fastest growing industries, with millions of people employed worldwide. There is, however, one crucial difficulty - rarely do these figures agree with each other and it is equally confusing when one tries to find how this figure was arrived at. As one may expect, part of the problem surrounds the question, what constitutes a tourist-related job?

In the following discussion, particular emphasis here is placed on whether sports and recreational facilities should be included, and indeed, as it has been remarked upon earlier (Chapter 1) whether theatres and cinemas are tourist attractions. For the purpose of this section, which relates to Census of Employment data (via the National On-line Manpower Information System, NOMIS), reference is made to the definition as stated in the Employment Gazette (Employment Gazette, table 8.1) (see Table 1.2).

Before examining data, the limited value of the Census of Employment for estimating levels of tourism-related employment should be recognized. This is summarised by Jeffrey (1990). Major deficiencies include the fact that employment in the tourist industry is dispersed through many other SIC headings and activities. Secondly, only "employees in employment" are recorded by the Census of Employment and self employed or working proprietors are excluded. This is a problem because, in an industry characterised by a large number of small establishments, such workers form a large proportion of the tourism-related workforce in many areas. However, it is possible that this information can be combined with other data, to provide an estimation of the number of working proprietors. Thirdly, not all seasonal workers are included as the Census is taken in September, when an unknown number of seasonal workers will have ended their annual employment before this date; there is also a problem of identifying those employed in other "non-tourist" sectors, whose jobs are either supported by, or induced by, the re-spending of revenues derived directly from tourism. Not mentioned by Jeffrey (1990), but of relevance to this study, is that because of the part-time nature of tourism employment, some workers may be counted twice.

Details from the Census of Employment (Employment Gazette, January, 1995) suggest that in September (1994) there were 1,546,000 employees in tourism-related industries in Great Britain. However, allowing for part-time

employment, by halving part-time employment and subtracting this from full-time (Townsend, 1992), this figure equates to 1,107,900 full-time equivalents (FTE's). As table 5.2 illustrates, females are the majority in this sector, yet the domination is less when examined as full time equivalents (FTE's). This suggests that part-time employment is, as the literature suggests, predominant amongst female employees. Table 5.2 also illustrates that, amongst those recorded by the Census of Employment, there are more part-time employees than full-time. However, when analyzed with a gender perspective it is apparent that males employed in tourism-related industries are more likely to work on a full-time basis. Table 5.2 does however exclude an estimation of self employed workers. Additionally, the number of workers could be further reduced by applying methods such as those used by Medlik (1988). By applying the same ratios as before, direct employees in tourism as such in Great Britain (1994) can be estimated at 954,800.

Table 5.2: Employees in tourism-related industries by type. Great Britain, 1994 (September)

	No. (000's)	FTE (000's)	%	% FTE
Male full-time	379.2	-	24.5	-
Male part-time	248.4	-	16.1	-
Total males	627.6	503.4	40.6	45.4
Female full-time	290.6	-	18.8	-
Female part-time	627.7	-	40.6	-
Total female	918.3	604.5	59.4	54.6
Total full-time	669.9	-	43.3	-
Total part-time	876.1	-	56.7	-
Total employees	1546.0	1107.9	100.0	100.0

Source: Census of Employment (Employment Gazette, January, 1995). Table 1.4.

Employment in tourism-related industries is, indeed, increasing. Over the past five years (Table 5.3) there has been a 6.2 percent increase in employees. This growth has been most substantial amongst males, more particularly among male part-time workers. This suggests that either the nature of tourism is changing in a manner which makes it more suitable for male employees or the industry has made an attempt to change its employment profile. The rate of employment growth in the industry has, however, slowed. Hudson and Townsend (1992) use similar data to illustrate a 25.9 percent increase in employees in employment (1981-1989) yet the trend was much the same; 27.8 percent increase in male employment compared to 24.7 percent females. Again male part-time employment has increased most substantially (52.7 percent).

Table 5.3: Changes in employment in tourism-related industries by type. Great Britain, 1989-94 (September).

CHANGE 1989-94		
	Number (000's)	Percentage
Male full-time	+27.4	+ 7.8
Male part-time	+30.6	+14.0
Total male	+57.8	+10.1
Female full-time	+ 8.4	+ 2.3
Female part-time	+23.4	+ 3.9
Total female	+31.8	+ 3.6
Total full-time	+35.7	+ 5.6
Total part-time	+54.0	+ 6.6
Total employees	+89.7	+ 6.2

Source: Adapted from the Census of Employment via Employment Gazette. Historical Supplement 4 and Employment Gazette, January, 1995. Table 1.4.

When disaggregated in order to allow a sectoral analysis, it is evident that the largest tourism-related employment sectors (September, 1994) are, in descending order SIC 979 (sport and other recreational services), SIC 662 (public houses/bars), and SIC 661 (restaurants, snack bars and cafes etc.). The number of employees for SIC 665/7 is also particularly high (hotels and other tourist short stay accommodation). The smallest tourism-related employer is SIC 977 (libraries, museums, art galleries etc.) (Table 5.4).

Table 5.4: Tourism-related employment by sector (1994). Great Britain, (September)

SIC	Total Number (000's)	Total %
661	314.1	20.3
662	329.7	21.3
663	132.7	8.6
665/7	341.3	22.1
977	69.4	4.5
979	358.8	23.2
Total	1546.0	100.0

Source: Census of Employment, Employment Gazette, January, 1995 (Table 1.4).

In Liverpool information from the Census of Employment (1991, via NOMIS) suggests that 18,400 people were employed in tourism-related industries. This figure represents an increase from 16,400 in 1984. In unison with the employment growth is an increase in the role of tourism expressed as a percentage of total Liverpool employment; the industry accounting for 9.5 percent of all employment (Table 5.5). Of these, 8,000 people (43.5 percent) work in SIC 979 (sport and other recreational services) and a negligible number in SIC 667 (other tourist/short stay accommodation). Other large tourism-

related employment sectors are SIC 661 (2,200) and 662 (3,900) (table 5.6).

Table 5.5: Tourism-related employment - Liverpool 1984-1991

YEAR	Number	% Total Liverpool	FTE's	% Total Liverpool FTE's
1984	16 400	7.5	12 200	6.3
1987	15 700	7.8	11 200	6.4
1989	16 800	8.3	12 300	6.9
1991	18 400	9.5	13 000	7.7

Source: Census of Employment via NOMIS, all data rounded to hundred, as per Department of Employment requirements.

Table 5.6: Tourism-related employment - Liverpool 1991

		Number	% total
661	Restaurants, snack bars, cafes, etc.	2 200	12.0
662	Public houses / bars	3 900	21.2
663	Night clubs / licensed clubs	1 800	9.8
665	Hotel trade	1 400	7.6
667	Other tourist / short stay accommodation	0	-
977	Libraries, museums, art galleries, etc.	900	4.9
979	Sport / other recreational services	8 000	43.5
TOTAL		18 400	99.0

Source: Census of Employment via NOMIS

A closer examination of tourism-related industry in the case study area (as defined in chapter 3) reveals that, during the period 1984-91, in line with the national picture, tourism-related industries have employed marginally more people. However, as with tourism-related employment for the whole of Liverpool, when expressed as a percentage of total employment, it has increased considerably, from 7.3 percent in 1984 to 8.2 percent in 1991. Yet, when expressed as FTE's (full-time equivalents), the change 1984-91 is far less; from 6.3 percent of total FTE employment in Liverpool postcode districts L1-L3 in 1984 to 6.7 percent in 1991. Of the seven classes of tourism-related employment, the largest employer is SIC 661 (restaurants, snack bars, cafes etc); in fact the case study area was home to 73.9 percent of all these types of jobs in Liverpool. Fieldwork suggests that most of these establishments are located within the main shopping centre and business district of the city, with some clustering along Lime Street and Dale Street (not necessarily serving tourists). In addition, there are a number located at the Albert Dock. Results from this fieldwork recognize that 58.3 percent of these establishments are in L1. This compares with Census of Employment data for L1, however, this source also records a greater number of jobs in L2 than in L3, suggesting that establishments in L2 employ more people than they do in L3 (Table 5.7).

Of all jobs in Liverpool in SIC 665 (hotel trade), 71.6 percent are in the case study area, in which 1,000 people are employed (1991). Most of the city's hotels, including many named chains such as Britannia, Forte plc and Moat House International occupy sites within the case study area. Employment in the hotel trade is greatest in L3, where 700 people are reportedly employed (1991) (half of Liverpool's total employment in the hotel trade). The remaining employment in this sector is in post code district L1. The Census of Employment reported no such employment in L2 (1991). Of the seven categories, sport is least represented in the case study area. Just 8.5 percent of Liverpool's sport and recreational jobs are located in the case study area

(predominantly in L1 and L3). This is probably due to the high density of landuse in the city centre, the only obvious sporting facility being Liverpool marina, a MDC development on the waterfront.

Table 5.7: Tourism-related employment - 1991

SIC	L1	L2	L3	L1-3	LIV. Total	L1	L2	L3	L1-3	LIV. Total
	TOTAL					FULL-TIME EQUIVALENTS				
TOTAL	1 900	1 200	2 500	5 600	18 400	1 400	800	2 000	4 100	13 000
661	800	600	300	1 700	2 300	600	500	200	1 200	1 700
662	300	300	300	900	3 900	200	200	200	500	2 300
663	200	100	400	700	1 800	100	0	200	400	1 100
665	300	0	700	1 000	1 400	200	0	500	900	1 000
667	-	-	-	-	0	-	-	-	-	0
977	-	-	600	600	900	-	-	600	600	800
979	300	100	300	700	8 200	300	100	200	600	6 200

Some columns may not sum due to rounding error
Source: Census of Employment via NOMIS

As with the situation for tourism-related employment in Liverpool as a whole, the employment is predominantly female (61.4 percent, 1991). However, in contrast to that for Liverpool case study area, it is split in the ratio 49:51, part-time:full-time, compared to 59:41 in Liverpool as a whole and 57:43 in Great Britain (Census of Employment, Employment Gazette, January, 1995, Table 1.4). Similarly, statistics by gender show a larger percentage of tourism-related male employment in L1-3 than in Liverpool as a total (see Table 5.8).

Table 5.8: Nature of employees in tourism-related employment (1991)

%	Liverpool 1 - 3	Liverpool Total	GB Total
Male	38.6	32.9	40.1
Female	61.4	67.1	59.9
Full-time	48.5	41.4	43.1
Part-time	51.5	58.6	56.9

Source: Census of Employment via NOMIS

5.2 Research aims and methodology

As the literature review has suggested, tourism-related employment research has, at best been scanty; often studies rely on secondary data such as the Census of Employment, or are site specific (eg. Polytechnic of Central London *et al.*, 1990). This may, however, be because "the evaluation of employment impacts is fraught with methodological difficulties" (Martin, 1993). Johnson and Thomas (1992) recognize that "counting the number of jobs ignores the wide variety that exists in the economic characteristics of jobs" (p.35), hence, it is important to avoid this approach. This particular research project, due to its limited geographical area, not only provides opportunity for a count of employees in employment (via data collection from individual tourism-related establishments) but also has the ability to measure other features of tourism-related employment, such as the proportion of married women, length of service at the establishment and possibly "black market" workers.

The approach is via the providers of tourism. The aim here is not only to verify tourism-related employment but to consider the gender of employees, the nature of contracts (seasonality is particularly important as is length of contracts and full-time/part-time characteristics), the qualifications required for particular posts in addition to the degree of training provided by the

individual establishments; alongside this, it is valuable to question the extent of previous job experience. In addition, it is recognized that at the very least "some information on where tourist workers live would also be of interest, to see whether jobs are being created in the inner city" (Law, 1993, p.161).

The method employed for collecting this information generally follows the lines of structured interviews at major tourism-related facilities. However, during the interviews with key informants at hotels, attractions, theatres and cinemas, eating and drinking establishments and shops, it was not always possible to gain information which was any more detailed than number of employees and generalisations about age, contracts, experience and training. Although this information is, in itself, valuable, particularly in enabling a comparison with Census of Employment data, it does not provide details relating to individual staff members.

To support these interview details, a staff questionnaire was constructed, for completion at selected establishments by the individual employees. This questionnaire (Appendix 11) attempted to find out more about both the nature of jobs and the employees as people. Section A questionned duties involved in the job, motivation for applying, salary, gender, length of work at the establishment, nature of contract and the frequency of multi-skilling and of flexible working - i.e. staff being used to fill-in when there is a shortage in other departments. This section also asked questions of relevance to part-time workers, such as whether these employees would like, if the opportunity arose, to take full-time employment and whether these employees work in more than one establishment. In addition, the questionnaire considered employee rights to paid sick leave and holidays. Section B of the questionnaire asked for more personal information relating to age, marital status, ethnic group and number of dependent children. Employees were also asked whether they considered themselves to be the "main wage earner". Formal qualifications, previous

employment and job training were also questioned; as was home address.

Of the establishments approached, only one allowed staff to talk directly to the interviewer, although a number of others allowed staff to complete the questionnaire on a voluntary basis. Overall, the response was disappointing but understandable as many employers argued that staff were too busy to take time filling out questionnaires. Questionnaires were returned by three hotels, one cinema, one theatre and one attraction. The attraction was one which has been called an "anomaly" and returned just five questionnaires completed by office staff only. Therefore, these details will be treated as background and not recorded in the thesis.

One hotel was, however, extremely helpful in providing access to detailed employment records for the whole staff. The details provided for this large hotel include age of staff, start date, sex, nationality, marital status, home post code and salary. Also available were details of internal promotion, schooling and qualifications, previous employment and length of stay at these jobs. This information is invaluable but as no other tourism-related establishment was willing to provide similar information comparison is not possible.

5.3 Results

This section will take the form of description and analysis under the broad headings of hotels, attractions, theatres and cinemas, eating and drinking establishments and tourism-related shopping. The details presented will be those from all of the relevant structured interviews, questionnaire surveys and employment records in each sub-sector.

5.3.1 Employment in Liverpool hotels

Structured interview results

Table 5.9 illustrates staffing levels in the 13 hotels visited. As would be expected the number of staff is greatest in the larger hotels (the letters A to L are for refernce only and rank hotels by number of rooms). However, there are a couple of apparent anomalies. Hotel M does not have the least number of staff, because, as this hotel is not yet fully open, the number of rooms is not known, thus the hotel is ranked last. Also, for the same reason, the hotel is running on a skeleton staff only. Hotel H appears to have comparatively few staff; in aiming to keep prices low staff costs are also low. In addition, this is the only hotel in which cleaning and a security guard are contracted out, hence a more comparative figure would be 14 staff, bringing it in line with the other examples.

In contrast, hotel J appears to employ a comparatively large number of staff. The explanation of this is that it is a luxury establishment which claims to offer high quality service, thus staff are needed for features such as room service and answering telephones. In addition, the hotel has a large bar and restaurant which is very popular with local people, as it has a late license at weekends; hence a large proportion of the staff are employed behind the bar.

Table 5.9 also records, where possible, the number of staff per room. Law (1993, p.118) suggests "overall, hotels employ about one person per bedroom; this is higher for the luxury end of the market and lower for the budget-priced sector". As Law suggests, in Liverpool, budget hotels have fewer staff per room, falling to 0.05 staff per room in hotel L and 0.13 in hotel H, while luxury hotels such as hotels J and A have more staff per room. However, this number only reaches one employee per room in one instance. The overall number of staff per room is 0.70, well below the expected 1.00.

Table 5.9: Staffing levels at hotels (February, 1994)

TOTAL	TOTAL STAFF	STAFF/ ROOM	FULL-TIME STAFF	PART-TIME STAFF	NOTES
A	317	0.81	c.100	c.217	Including casual
B	c.170	0.68	120	c.50	
C	92	0.41	65	27	
D	69	0.45	69	-	Plus some casual
E	56	0.36	32	24	Plus 100 casual
F	15	0.18	15	-	Casuals as required
G	20	0.24	17	3	Including 10 cleaners (separate contracts)
H	8	0.13	7	1	Plus 5 maids and 1 security (contracted)
I	17	0.29	16	1	
J	26	1.53	12	14	
K	3	0.33	3	-	
L	1	0.05	1	-	Runs business alone
M	15	-	15	-	
TOTAL	809	0.70	472	337	
%	100%		58.3%	41.7%	

Many of the larger hotels employ casual workers to accommodate the increased demand in the conference and banqueting section of business. Often there are a large number of people on the books, waiting to be asked to work, but it was reported that often these staff are on the books of more than one hotel in the city and will work wherever they are asked to.

The part-time, full-time split shows a larger percentage of full-time workers than part-time (58.3:41.7). However, the details given at interview are not

always consistent as hotel A, for example, has included casual workers, hotel B not. If hotel A is excluded from the results, for this reason, the percentage of full-time workers increases considerably to 75.6 percent. The large number of casual workers is still an important theme, as these are the individuals with the least job security and are the hardest to identify.

The Liverpool fieldwork results do little to dispel the perception of tourism-related employment as female dominated. Eight respondents gave either a percentage or a numerical split of male and female workers; these results calculated out to a weighted mean of 39.5 percent male and 60.5 percent female. Two respondents mentioned a 50:50 split of employment by sex, but these may be unreliable results as the managers may be trying to ensure that the hotel is seen to have equal opportunities for both males and females. The number of male employees exceeded the number of females in only one case (in the ratio 5:2).

Many hotels managers attempted to explain this gender distribution. Two considered that the larger number of female employees was due to many of the jobs, such as cleaning, being 'generically female' (one hotel reported that reception is also predominantly female). Two managers further recognized that, similarly, some jobs, such as portering, kitchen portering and security, are not suitable for females. There is also a perception that managers are usually male, although in one instance this perception was contested. There was frequent mention of a perception that females prefer to take part-time jobs because often they have children at home which need looking after.

Most employers were unable to comment on the nature of contracts. However, in four of the five hotels which could comment, all contracts are permanent. In one case, hotel D, 37.7 percent of labour is contracted; these staff have paid holidays, sick pay and a guaranteed number of hours per week. The remaining

62.3 percent are casual; here holidays and sickness are unpaid and the staff work as required (usually 10-40 hours per week); although most are full-time and work five days a week, the level of payment is much the same as that for contracted staff, although job security is less.

All interviewees were asked to comment on the number of staff by department, although nomenclature varied between hotels. These results are illustrated in Table 5.10. Most hotels have staff in management, housekeeping, reception and kitchens. Only the larger hotels have maintenance staff, accounts departments, restaurant and banqueting, room service and leisure club staff. Unfortunately, hotel A was unable to give a breakdown of staff by department. As the staff at this hotel represents 40 percent of all staff in the sample, it is excluded when calculating the percentage of staff at the remaining twelve hotels. The two smallest hotels (K and L) were unable to separate staff by department. These establishments are so small that all staff pull together to do all the jobs. As already mentioned, only one hotel franchises staff.

By far the greatest proportion of staff are employed in housekeeping (a female dominated sector of employment), with 21.4 percent of all employment in the ten hotels. This was followed by relatively large numbers of people employed in kitchens, restaurants and on reception. Management and banqueting are also large sectors of employment with 8.2 percent and 8.4 percent respectively, (although banqueting is only relevant to the larger hotels).

Hotel D mentioned the concept of *"multiskilling"*, a policy common to all hotels of this particular chain. In this policy, staff are encouraged to learn additional skills to those required for their present job. This scheme makes it possible for staff to be moved around the hotel to cope with peaks in demand, without the need to employ casual labour. This concept is not unique to the hotel industry, it is one which is being adopted in many other services sector industries as a

means of creating a flexible and cost effective workforce.

Table 5.10: Hotel staff by department (February, 1994)

	A	B	C	D	E	F	G	H	I	J	K	L	M	TOTAL
Not told	317	-	-	-	-	-	-	-	-	-	-	-	-	317
N/A	-	-	-	-	-	-	-	-	-	-	3	1	-	4
Reception	-	22	10	6	6	3	1	-	4	4	-	-	3	59
Porters	-	-	9	-	4	-	-	-	3	4	-	-	1	21
Kitchen	-	19	15	10	9	4	3	3	2	2	-	-	2	69
Management	-	8	8	3	2	2	4	4	2	3	-	-	3	39
Housekeeping	-	26	20	15	14	5	10	1	5	3	-	-	3	102
Bar	-	5	4	8	4	-	-	-	-	10	-	-	3	34
Maintenance	-	5	3	2	-	-	-	-	-	-	-	-	1	11
Food & Bev.	-	-	-	-	2	2	-	-	-	-	-	-	-	4
Stores	-	-	1	-	-	-	-	-	-	-	-	-	-	1
Banqueting	-	7	2	27	4	-	-	-	-	-	-	-	-	40
Office	-	-	2	-	-	-	-	-	-	-	-	-	-	2
Restaurant	-	18	18	15	6	-	2	-	-	-	-	-	-	59
Leisure Club	-	4	-	-	-	-	-	-	-	-	-	-	-	4
Room Service	-	-	4	-	-	-	-	-	-	-	-	-	-	4
Control Office	-	-	3	-	-	-	-	-	-	-	-	-	-	3
Accounts	-	6	-	3	5	-	-	-	-	-	-	-	-	14
Contracted	-	-	-	-	-	-	-	6	-	-	-	-	-	6
TOTAL	317	120	99	89	56	16	20	14	16	26	3	1	16	793

All jobs in the hotel industry are well subscribed, most managers remarking that any job advertisements get a massive response. Hence employers are able to be selective in who they employ. Despite this, issues such as qualifications and experience are not major issues in the selection process.

Staff generally do not require previous experience of work in the hotel industry,

indeed three of the respondents said that most staff have never worked in hotels before, and one said that experience was an advantage. Yet, only two of the hotels recognized that most staff had previous hotel work experience. Formal qualifications are also not necessary, (in one hotel only the chef needs to be qualified). There is some belief that anyone can be trained to be a porter or waitress, as long as they are keen and willing to work.

Recent national trends in education have lead to an increased role for industry training. As a result most hotels offer staff training, only one interviewee saying that there was none. Four managers mentioned that the training available was *"on the job"*, and five hotels have training for everyone. Of the six respondents who are members of national and international groups, only two mentioned training within the group, either for managerial staff or for those working in accounts or on reception. At one hotel, training is designed to suit the individual, and at another, staff are trained through the manager's own experience. Two hotels mentioned the need for fire, health and safety training for all staff and a requirement for all food handlers to have health and hygiene certificates. Management at hotels D and G (both members of multinational chains) remarked that staff are trained in the systems of the group, so that they can then fit into any other hotel in that chain.

Many of the managers interviewed were asked to comment on the age of staff, in the hope that patterns could be recognized. The respondents usually could find no pattern of age groups. However, hotel D mentioned that the people which they employ are not as young as in other hotels because they aim for a well established staff, ten or fifteen years service is not uncommon. This is in contrast to hotel A where the manager remarked that the average length of stay for staff is two years, with managerial staff staying slightly longer; he mentioned one manager who had been working for the company for ten years. Another manager regarded staff training to be futile because there was already

a high turnover, and more training would mean that they would only leave more quickly.

All interviewees were asked about the home address of staff in an attempt to find if jobs in hotels tend to go to local people. Only one respondent stated that all staff are local to Liverpool (hotel K). Just two hoteliers expressed a preference for local staff. At hotel J, local people are employed mainly to keep overheads low; the hotel has agreed to pay the taxi fare home for late finishers, for this reason there are a lot of students working late shifts. Similarly, hotel D mentioned that, if staff from outside the area are employed, they need to find accommodation locally, and this usually results in them staying in the hotel for some time. Hotel H also remarked that a student from one of the universities is employed as a part-time manager, while another hotel reported that there is a manager who lives in Cornwall and commutes home at weekends.

When asked about changes in staff structure over recent years, only one hotel (hotel C) mentioned a loss in staff due to redundancy, and two managers mentioned that staff are usually replaced, and there are few additional staff employed. Only one hotel has increased its staff number, creating two new positions in the twelve months prior to interview, this being due to a desire for growth in that area of business; the two new positions are a venue guarantee supervisor and a trainee manager.

As mentioned earlier in this chapter, one hotel, which, for reasons of confidentiality, must remain nameless, kindly gave access to employment records for all of its employees. This source of information is particularly valuable as it provides a profile of details such as wages, length of stay in this and previous jobs, age, gender, nationality and home address. A total of 102 employment records were made available.

Although there are slightly more female staff in this particular hotel (54.5 percent), these results are akin to those reported in the Census of Employment. These staff generally work to thirteen departments, however, a number of staff are not necessarily assigned to a particular department; the job titles for these people including night driver, room service, canteen assistant, credit controller and hotel controller ("other" in Table 5.11). As Table 5.11 illustrates, the largest departments are kitchen, housekeeping and reception with a small number of people employed in each of security, accounts, maintenance and the leisure club.

Table 5.11: Hotel staff by department (January, 1994)

DEPARTMENT	No. STAFF	% TOTAL
Kitchen	18	17.6
Housekeeping	16	15.7
Restaurant	12	11.8
Reception	11	10.8
Portering	7	6.9
Bars	6	5.9
Management	5	4.9
Accounts	4	3.9
Maintenance	4	3.9
Leisure Club	3	2.9
Conferences	3	2.9
Administration	2	2.0
Security	1	1.0
Other	10	9.8
TOTAL	102	100.0

Source: Hotel employment records (January, 1994), one anonymous hotel.

Employees at this hotel are generally quite young; the average age for employees is 32.2, with 38.8 percent of all employees in the 25-34 years age bracket. No staff are aged below 18 and four staff are aged over 55 years (Table 5.12).

Table 5.12. Age of hotel employees (January, 1994)

AGE	No. EMPLOYEES	% TOTAL
< 18	0	0.0
18-24	24	24.5
25-34	38	38.8
35-44	21	21.4
45-54	11	11.2
> 55	4	4.1
TOTAL	98	100.0

Source: Hotel employment records (January, 1994)

There is also evidence of quick turnover. As of January, 1994, over half (58.6 percent) of all employees had been working in the hotel for less than four years, 23.2 percent for four to six years and just 11.1 percent for seven to ten years. However, there is evidence to suggest that, once employees have stayed at the hotel for a number of years, their position is quite secure. There is further evidence to support the assertion of rapid job mobility. For a number of employees, information was available relating to their previous employment. For those for whom data was available, it was found that 81.8 percent had stayed in their previous job for less than three years, with just 9.1 percent having lasted over eleven years. This evidence can be supported by looking at the length of stay at the job prior to that one; here 58.8 percent of employees had stayed for up to three years. There are a number of possible explanations for this.

One possibility is that this is a comparatively young staff, made up of people who may not as yet be settled in their career. Alternatively, this may be a direct result of the increasing insecurity of employment over recent years, with fewer people on permanent contracts. It could also, however, be related to people who have previously been employed in other industries and since made unemployed attempt to either follow a new career path or take any work which is available. There is some evidence to support this third assertion. By examining the list of previous employment, it was possible to ascertain whether the previous job was relevant to the one held now. For those for whom information was available, 42.6 percent were previously employed in un-related industries. A similar situation exists when one considers the occupation prior to this one (47.2 percent in irrelevant employment). These details are outlined further in Table 5.13. It should however be noted that 15.4 percent of employees for whom data was available had never been previously employed.

Table 5.13. Employment history for hotel employees

	PREVIOUS JOB A (%) n=44	PREVIOUS JOB B (%) n=34
Relevant to job	57.4	52.8
Irrelevant to job	42.6	47.2
Length of stay:		
0-3 years	81.8	58.9
4-6 years	6.8	20.6
7-10 years	2.3	11.8
>11 years	9.1	8.8

Source: Hotel employment records (January, 1994).

The employment records also provided details of salary, expressed as gross weekly pay. For this particular hotel, the average full-time weekly salary was (January, 1994) £135.50 (median £121.50). The minimum, and indeed modal

salary (30 employees) was £114.00 per week and the maximum (one employee) was £212.21 per week (Table 5.14). These details can be translated into gross annual salaries of a minimum of £5,928, maximum £11,034.92 and average of £7,046 gross per annum. However, these results do not include the salaries of managerial staff. The employment records also did not provide particularly good information for part-time employees; although they recorded gross pay per week they rarely recorded number of hours worked. The wages recorded are £40.88, £47.00, £54.40, £58.40, and £84.00 per week. In one instance £87.60 was recorded for a 30 hour week at £2.92 per hour.

Table 5.14: Salary bands for full-time employees (January, 1994)

SALARY BAND £/week gross	No EMPLOYEES	% EMPLOYEES
114-120	37	42.0
121-140	24	27.3
141-160	9	10.2
161-180	11	12.5
181-200	5	5.7
>200	2	2.3
TOTAL	88	100.0

Source: Hotel employment records (January, 1994)

This information leads one to question educational qualifications held by staff. Of the 100 staff for whom details were available, 70 have no O level, CSE or GCSE examination passes, 18 have passed between one and five of these examinations and just 11 have more than five passes (at any grade). Passes at A level are even fewer (five percent). Of the three which do, all have passed three examinations. Just two employees have passed a university degree.

In addition to the 20 employees who have no qualifications, 37 have other

(more vocational) qualifications. Most commonly these were City and Guilds certificates (13 employees), usually in related subject areas, followed by RSA typing and word processing certificates (ten employees) usually held by reception and accountancy staff. Five employees have also passed examinations at BTec level (often courses which are not job related). In addition, three employees have health and hygiene certificates (RIPHH) and two have National Vocational Qualifications (GNVQ's) at levels one and two. There are also a number of specialist certificates and qualifications which are more job specific, for example business diplomas, sales and marketing diplomas and a certificate in kitchen and dining room French. Two employees have entered hotel work through Youth Training Schemes (YTS) and one was a trainee chef on an employment training (ET) course. Two employees have had an army education and training and one kitchen worker holds a Nautical Catering College Certificate. Thus, it is apparent that the staff, although they do not possess high level academic qualifications, are often trained through vocational training before they enter the hotel. This may explain why staff generally do not receive comprehensive training programmes.

As employment records provide the home address of employees, it was possible to record where they live (by post code) in order to question whether tourism provides employment for local people. Of the 98 people for whom details were available, just seven (7.1 percent) live outside the Liverpool area; three of these are from Preston and one is from Wigan. Further staff live in Birkenhead, Formby and Runcorn. The rest of the staff live in Liverpool post code districts L3 - L49, with at least one member of staff in each district L3 -L26. There are, however, five post code districts which are particularly populous. Thirteen employees (13.3 per cent) live in Liverpool 4 (Walton), nine (9.2 percent) live in Liverpool 8 (Toxteth) and six (6.1 percent) live in each of Liverpool 13 (Tuebrook) and Liverpool 20 (Bootle). Additionally (5.1 percent) live in Liverpool 10 (Aintree). These details suggest that employees in this hotel do live close to

their place of work.

These findings also show an interesting relationship to the geography of unemployment in the city. As Table 2.4 illustrates, Tuebrook ward for example had one of the largest numbers unemployed in January 1996 (1400). This is some indication that tourism provides employment for residents of areas of high unemployment. Although this evidence is by no means conclusive, it highlights a need to examine this relationship in more detail; perhaps by questionning the suitability of such employment.

The employment records of the hotel also note that receiving promotion within the hotel was a regular occurrence; 26.5 percent of staff had actually received promotion within their job. Of the remaining 75 employees who had not received promotion, two had been transferred from one department to another and one had been demoted. This detail suggests that lack of promotion opportunities is not the reason for the short stay of staff and could possibly be a reason why staff who have been with the hotel for some time, then stay for many years.

The literature presented earlier in this chapter recognises the part-time nature of tourism-related work. The employment records for this hotel suggest, conversely, that most hotel employees are employed on a full-time basis (6.4 percent part-time : 93.6 percent full-time). It is also suggested that part-time employment is preferred by mothers who have young children to look after, although this Liverpool hotel does not employ many working mothers. The records show that no less than 61.0 percent of all employees are single, 29.9 percent married, and 9.1 percent divorced. This distribution can probably be attributed to the relatively young age of staff at this hotel.

Hotel employee questionnaire results

Despite the thorough efforts reported above, a total of just 18 employees completed the questionnaire in the three hotels which gave permission for its circulation. The hotels which obliged are three of the larger hotels in the city. At two of the hotels respondents were from different departments, most of them in unskilled/menial type jobs. At the third hotel all the respondents were people who work in the reception area. The results presented here should, therefore, not be viewed as a representative sample of hotel employment but as providing an insight into the kinds of people who may be employed in hotels in Liverpool.

Full-time employees worked for 35-45 hours per week. In contrast, part-time employees work for an average of 19, the actual work hours stated ranging from 5 hours per week up to 34. In both male and female employment, just one third of the respondents worked on a part-time basis. There is, however, one discrepancy between the genders. Male part-time employees reported working for 23-34 hours per week, whereas females reported working five, 15 and 19 hours per week.

Of the five interviewees who work on a part-time basis, only one mentioned this being a second job. This person was a university graduate working in the hotel on a casual basis whilst also working as a "video tutor". Surprisingly, none of the part-time respondents thought that, if they were given the opportunity, they would work on a full-time basis. The explanations are varied and are actually consistent with Liverpool workers' reputation of being only interested in making just enough money to survive. Responses include; "I don't like working afternoons", "because I can't due to my husband being unemployed", "I don't wish to pursue a career in leisure" and "because the contract is crap and not worth the hassle". This is far from the anticipated response which might have included the need for mothers to be at home to look after children, having a second job or indeed people actually wanting to be in full-time

employment.

The mean age of respondents was 28 years (median 24). Only six from the eighteen respondents consider themselves to be the "main wage earner". There is no instance of wife as main wage earner. Only one of the main wage earners' careers could be classed as professional (a mother who is an accountant).

The reasons for applying for jobs were also varied. Three employees, all at the same hotel, reported applying because they particularly wanted to move back to the North West area, two expressed an interest in working with the public and two had previously worked in other departments of the hotel. Baldaccino (1994) whilst researching in Malta found that in hotels there, although officially jobs are first advertised internally and then (if not filled) externally, "external recruitment appears to depend by and large on an effective grapevine of friends and relatives which passes news of vacancies far and wide" (p.48). Here there is also evidence of recruitment through family contacts, two respondents noting that they applied for the job because other family members work in the hotel; "I was unemployed before. My mum used to work here, and I was part-time at first, filling in when porters were off". One respondent reported being head hunted from another hotel of the same chain. Half the employees reported working in the hotel (not necessarily in the same post) for between one and three years, the average length of employment to date was two and a half years. This average, although possibly due to the young age of staff, remains surprising as 13 respondents are employed on permanent contracts.

Three quarters of the 16 respondents fill in for other staff when needed with no evidence of this being more common amongst either males or females. Reception and telephone work is the most common "second job" (five from 12 respondents), followed by waiting on tables (three respondents). Both of these jobs require very little previous training. Only one respondent (Leisure Club

Supervisor) mentioned that the hotel trains staff to do other jobs (multiskilling), "over Christmas I do security - the hotel train us to do other things as well; this is a nice change".

All but one of the respondents gave details of pay. The average full-time take home weekly pay for males was £124.99 and £124.33 for females, producing an average full-time weekly take-home wage of £124.55 (£6476.60 per annum). Although this average salary level is not high, it must be considered in conjunction with the nature of the sample. Many of the staff are young people who have recently finished their education and the sample does not include managerial staff who would, no doubt, be earning considerably more. The rate of pay for casual workers was also particularly low. Where it was possible to calculate, average hourly rate of pay for casual workers was £2.87, ranging from £2.44 to £3.20 per hour. The number of hours worked per week by casual employees ranged from 32 at £2.44 per hour to just five hours at £2.92 per hour. When average hourly rates for casual workers are converted into a 40 hour week, they are lower than those for full-time workers (£114.80). In addition to better pay, full-time workers' contracts include benefits such as paid holidays and sick pay.

In recognizing the low paid nature of employment in hotels, one should also realize that many of these people are not highly qualified. Of the seventeen respondents to answer the relevant question, three have no qualifications and ten have one or more CSE, GCSE or O level passes. Only one respondent reported having a degree although three did, however, have A levels or equivalents and one respondent has a BTec Higher qualification. Four respondents have related City and Guilds qualifications and two have GNVQ's. A further six respondents mentioned certificates relating directly to their jobs, for example pool assistants have life saving qualifications, and three respondents have Red Cross first aid certificates. None of the respondents have

professional qualifications. In reference to the question regarding previous employment, a quarter of the responces to this question were from staff who are new to work, coming directly from different stages of the education system. The majority of the other respondents had previously been employed in jobs which require similar skills to those used now, not necessarily in hotels. Interestingly for the thesis, one of the remaining employees had previously been working on the docks for most of his life.

Staff working in the three hotels are generally Liverpool residents. Indeed, 14 of the 18 respondents said that they live in Liverpool. Common post code districts are Liverpool 4 (three respondents) and Liverpool 9 (two respondents), other post code districts are L3, L5, L14, L20, L21, L27 and L37. Just four respondents said that they do not live in Liverpool (one lives in Preston, one in Widnes and two in postcode sector L63). Hence ten of the 18 respondents travel up to five miles to and from work each day and only one respondent has a return journey of over twenty miles. The most common form of transport is bus (half of respondents), and only two respondents travel by car (those living furthest away). The cost of travel is thus variable, but with an average return journey to work of £1.65, or an offset of £8.25 from the suggested weekly wage of £124.55 (6.6 percent of take home pay). However, these employees generally do not originate from the Liverpool area, fourteen respondents kindly gave details about this, if relevant where they had lived before. Surprisingly, just six respondents had lived only in Liverpool.

Summary of hotel employment.

These three surveys suggest a number of themes related to hotel employment in Liverpool. As would be expected, there are more staff employed in the larger hotels, yet the number of staff per room rarely reaches the expected level of one, although luxury hotels employ more staff per room than their budget counterparts. Generally, hotels employ more full-time staff than part-time, full-

time employees working for, on average, 35-45 hours per week, part-timers about 19 hours per week, with male part-timers often working longer hours than females. Although hotel managers suggest that there is a majority female staff, they are less dominant from the examination of hotel record cards. There is also little evidence to suggest that hotel work is particularly suitable for mothers with young children at home; the staff employed in hotels are generally young, but are often still living at home with parents. This could be explained by the low wages in the industry, thus attracting a young inexperienced work force. This point is well illustrated when one considers how staff rarely work at the same hotel for more than about three years. Additionally, many of the staff have never worked before, and those who have had previous work experience have not always worked in the hotel industry.

These results also raise issues relating to the qualifications held by staff and where they live. The hotel workforce appears to be immobile in terms of workplace; often staff live relatively close to work and travel this short distance daily by bus or train. Many of the staff have previously worked, or been educated, within the Liverpool District, and in most cases Merseyside. Educational qualifications do not feature predominantly amongst workers; hardly any hold A levels or degrees. Indeed, the majority of qualifications reported are vocational, including BTec's, HND's, City and Guilds, and RSA typing and word processing certificates. Additionally, a number of staff are trained in first aid and most kitchen workers have certificates in health and hygiene.

5.3.2 Employment at Liverpool attractions

As in the hotel interviews managers at all attractions were asked about the number and type of staff. Only one, (C) was unable to give an approximate number. Table 5.15a illustrates the findings of this research.

By far the largest employer in the attractions sector is NMGM with 516 jobs (interview January 1994). The biennial report however records 546. This discrepancy causes no concerns for the research as the biennial review (1992) recognizes that "In January, 1991, agreement was reached on a reduction in attendant staff numbers through natural wastage, securing the level of public service while achieving significant savings by 1995" (page 65). Other large employers (A and D) are not museums and galleries.

At many of the attractions most staff are employed on a full-time basis, the usual exceptions to this being cleaners and temporary summer staff (usually students). At attraction A there is some jobshare although most staff work to permanent contracts (see Table 5.15b). The information provided, therefore, does not support a hypothesis of tourism-related employment as seasonal, temporary and part-time. There is only one example (D) of temporary staff being employed during the summer season. This attraction is also very weather dependent; thus employing all full-time staff may not be economically viable.

Table 5.15a: Staff numbers at attractions in Liverpool.

ATTRACTION*	TOTAL	PART-TIME	FULL-TIME
A	158	SEE BELOW	
B	9	6 CASUAL	3
C	-	-	-
D	88	TEMP. SUMMER	88
E	12 + CLEANERS	1	11
1	516	CLEANERS	?
2	69	?	?
3	3	2	1
4	3	2	1

* attractions can not be named because of assured confidentiality.

Table 5.15b: Staff details for attraction A

	FULL-TIME	JOB SHARE	PERMANENT	TEMPORARY
MALE	43	3	45	1
FEMALE	77	35	111	1
TOTAL	120	38	156	2

As suggested in the academic literature, a larger number of staff are female in three of the establishments. This is most evident at attractions 4 and A. At 4, all three staff are female and at attraction A the staff is 70.9 percent female. Table 5.15b illustrates how it is also female staff who are more likely to be involved in job share, through personal choice. At a number of places the gender division was either equally balanced or male dominated (for example 37 male, 32 female at attraction 2). Establishment E described the staff structure as "evenly spread, male dominated at the top". Another example of male domination in managerial positions and positions of responsibility occurs at B; "there is a pretty even mix, all the instructors are male and administration female". At attraction D, bias towards male staff was recognized and the reorganization of the company has brought some changes, "until three years ago the majority of staff were male; two of the six managers are now female as are a number of office staff. The boat and terminal staff however are still mainly male." It is believed that this change in staff structure occurred due to the business needing more office staff and a more sympathetic public face.

The details provided by NMGM, both at interview and in the Biennial Report give an indication of some of the issues which need considering when examining tourism-related employment. At interview it was recorded that "the management is split fifty fifty male and female; the front of house staff are predominantly male, the shop and cafe staff female". Table 5.16 illustrates how

this information appeared in the biennial report (1992).

Table 5.16: Employment structure at NMGM, 1992

DEPARTMENT/OFFICE	TOTAL number	MALE %	FEMALE %
DIRECTORS OFFICE	6	66.7	33.3
ART GALLERIES			
Curators	11	36.4	63.6
Gallery Services	68	89.7	10.3
Management Office	3	66.7	33.3
Cleaners	15	-	100.0
LIVERPOOL MUSEUM			
Curators	42	78.8	26.2
Management Office	3	33.3	66.7
Gallery Service	53	94.3	5.7
Cleaners	24	-	100.0
MARITIME MUSEUM			
Curators	18	6.1	3.9
Management Office	3	33.3	66.7
Gallery Services	64	96.9	3.1
Cleaners	23	-	100.0
CONSERVATION	36	63.9	36.1
CENTRAL SERVICES	122	47.5	52.5
NMGM ENTERPRISES (Est.1/4/92)	55	20.0	80.0
TOTAL	546	58.4	41.6
TOTAL LESS CLEANERS	484	65.9	34.1

Source: 1989 Review 1992

All the cleaning staff at all departments of the organisation are female, whereas gallery services (attendant) staff tend to be predominantly male. Central services have an even larger number of female typists and secretarial staff. NMGM enterprises employs 80.0 percent female staff, as most of the employees of the department are in catering or sales. The management offices of each museum/gallery employ only three people, however, here the manager is usually male, the other two members of staff being female assistants and secretaries. This information therefore suggests that, as with other service industries, there is male dominance in the hierarchies, female employees at secretarial levels and female cleaners. The total male:female ratio for NMGM is 58:42. If cleaners are taken from the equation (cleaners being part-time, working just 15 hours per week), the split is 66:34, a male dominated establishment. This domination arises from the large number of male attendants who are employed because they are seen as more authoritative; "attendants tend to be mature people who are able to handle themselves well, with the authority necessary; this comes with age. Indeed, many have had another career, for example, some are ex-dockers" (interview, September, 1993). It was similarly recognized that "shop and cafe staff tend to be younger and have a higher turnover than attendant jobs".

As the NMGM case illustrates, experience is not always considered necessary for many of the jobs in attractions. Mersey Sports Centre is the one example were training is essential, all instructional staff needing to be trained to senior instructor level. Elsewhere, this is not as important; at establishment E it is common for college students to be "taken on placement to do technical work, often they are later employed by the gallery". Training is however thought important by most attractions. Two attractions train in customer care, a few send staff on training courses and three have in-house training.

"The aim over the next three years is to build on this firm foundation through

improved customer care. To this end, a special training programme has been developed and the design of the uniform reviewed" (NMGM Review 1992, p.65). This view was supported at interview; "Attendants train in customer care, two percent of NMGM's budget is spent on training. It is done both in-house and sent out." Customer care is, however, not only important to NMGM. At attraction D it was noted that "reorientation of the business has meant that retraining was needed, especially in customer care. The parent company pay for day release, computer training and part-time degrees". Invigilators and management also get training at attraction 2; "Training is important, the type depends on who you are and what you do. Management go on training courses and invigilators get two hours per week which can either be in-house or bought in".

At four of the attractions, the staff employed tend to be local; "we usually try to fill the post in Liverpool" (A). At 1, local employment is considered necessary and possible only in those instances were there is a high turnover of staff. This point is reiterated by attraction 2; "a lot of invigilator staff are students, every job is advertised locally, however, senior posts are advertised nationally as well". In contrast, at establishment E it was noted that "all the staff have worked in Liverpool before, but most are not local by origin". Indeed, at the opening of the Tate Gallery it was hoped that "the greater part of the staff of up to fifty will be recruited locally" (Tate Gallery, 1986, page 23). However, this may have been due to a criteria set by MDC when they granted funding for the project.

In addition to the reduction in the number of attendant staff through natural wastage, it was noted at attraction D that "the staff numbers have actually decreased; most is due to natural wastage. At the moment we are overstaffed so jobs are not being replaced". Interestingly, there is some connection between 1 and 2 as "three or four of the curatorial staff have been lost to NMGM, this

is probably due to it being a bigger organization, therefore, there are more avenues in which to expand careers. There has been no movement in the other direction" (interview (2), February, 1994).

It is apparent, therefore, that most staff employed at attractions work on a full-time basis, with the exception of cleaners and temporary summer staff. Generally, there is an equal balance between male and female employees. These staff are of various ages, yet youngsters (18-24) are predominant. The staff have access to training courses, the issue of customer care being particularly important. Finally, many of the staff are local people.

5.3.3 Employment at theatres and cinemas in Liverpool

Structured interview results.

An examination of the theatres and cinemas revealed an interesting coincidence. Two of the people with whom I spoke had previously been employed elsewhere in the tourist industry in Liverpool. The manager at the Neptune theatre was previously employed in the Tourist Information Centre at Clayton Square and the manager at Robins 051 cinema was 'head-hunted' from Liverpool's arts marketing office (TEAM). Many of the establishments interviewed employed quite large numbers of people, the largest being 391 (G) (at October, 1993), the smallest 17 (3). However, as Table 5.17 illustrates, very few of these employees are employed on full-time and permanent contracts.

Table 5.17 also recognizes that a number of the establishments were unable to provide precise figures relating to the number of people employed. This is for two reasons; firstly, a lot of the employment is part-time or casual, and secondly the number of people varies depending upon the type of production; this point is relevant in two ways. In examples where the theatre is used as a venue hire, the number of staff varies depending upon the type of show and the expected audience numbers. In those establishments which produce their own shows, the number of staff varies depending upon the size of cast for that

performance or concert.

Table 5.17: Number and type of staff employed in theatres and cinemas in Liverpool.

CINEMAS	TOTAL	Part time	Full time	Male %	Female %
1	50	38	12	40	60
2	18	USHERETTES	?	39	61
3	17	14	3	"HEALTHYMIX"[1]	
THEATRES					
A	120	105	15	50	50[2]
B	70-100	?	HANDFUL	?	?
C	c.40	3 or 4	c.36	?	?
D	4-35	31	4	?	?
E	26	20	6	?	?
F	44	39	5	60	40
G	391	c.345	c.46	?	?

[1] Used to be all men so they introduced positive discrimination towards women.
[2] Try to have a split of one male and one female senior managerial staff.

Even though most of the staff are part-time, there is no definite bias towards male or female. In the cinemas the split is in favour of female staff; this was thought to have occurred because females are considered to be better at dealing with the public than males. Most of the theatres did not give a division but where they did this was either equal on both sides or in favour of male employment.

Permanent contracts are also quite rare. In most cases permanent staff are only evident in full-time jobs. Indeed, at theatre C the only permanent staff are those employed in the box office. It appears that any other staff are paid either

by the hour or by the show. At theatre A I was told, "most staff, paid by the show, make a good living from it, most are working almost full-time and many earn as much as me". Students also commonly do the work, although problems do occur in their controlling the rota instead of the rota controlling them, and because students are not in Liverpool during the vacations. To overcome this theatre D does not employ students but offers six month placements in jobs with some responsibility.

As with many of the tourism-related establishments in the city, access to information regarding employment details was difficult. One theatre was more forthcoming about possible reasons for this. "There is a large black market which supports the arts in Liverpool. Many workers are therefore supported through unemployment". Another example of this was given; cleaners at one establishment are not on the pay roll and are paid by cheque so that they can still claim unemployment benefits. This would similarly explain difficulties experienced in trying to ascertain details through questionnaires with present employees in the industry.

It is not surprising therefore to learn that most of the staff are local residents. Only the Royal Liverpool Philharmonic Orchestra (RLPO) mentions relocation, most of this is of members of the orchestra who will move great distances to play it. Experience and training do not feature strongly in employment in theatres and cinemas. At cinema 1 most staff are either young people who have come straight from school, students employed on a permanent basis or middle aged housewives who have this as their only job. At those establishments where the staff is small and most are full-time, it is more important for staff to be already trained in the skills needed. When theatre F was first established none of the staff had experience and were thus trained as needed. Now the general level of experience is high, any new member of staff needs to possess the equivalent knowledge. In the smaller theatres it is also harder to provide

any formal training for staff because they work with a minimum staff.

Theatre and Cinema questionnaire results

Employment questionnaires were returned at one theatre (10 respondents) and one cinema (11 respondents). At the theatre questionnaires were returned by most of the staff who are usually employed at the theatre; that is, the survey excludes all the actors and musicians who may only work in the theatre for a particular show. All the cinema questionnaires were completed by cashiers (seven) or customer services assistants (four); this is most of the front of house and office staff, and excludes managerial staff. At both the theatre and cinema, staffing is female dominated, with none of the staff at either the theatre or cinema aged over 44.

The reasons for applying for particular positions differ between the cinema and theatre. At the theatre motivation included "always interested in working in the theatre" (three respondents), and being approached by staff already employed by the theatre. In contrast, at the cinema, four employees are students working for extra money to supplement their grant. Additional comments include "I wanted to meet new friends" and "I was coming to the end of a YTS and friends mentioned the job". Interestingly one lady said that when she took the job 19.5 years ago, she wanted part-time work because she had young children at home.

In both the theatre and cinema, most contracts are permanent. Regardless of this, at both the theatre and cinema staff have commonly been in their present job for one to three years. This pattern is, however, more dominant in the theatre where three employees had worked for less than one year and the longest any employee had worked for was just three years. At the cinema the distribution was more evenly spread. Indeed, two employees had worked at the same cinema for over eleven years (21 years and 19.5 years).

Of full-time employees, the average number of hours worked per week is 47 and a number of employees mention working considerably longer, two noting that they can be working anything form 40 to 70 hours per week depending upon show commitments. Part-time workers at the theatre work for around 20 hours. In contrast, at the cinema, part-timers work between ten and 17 hours. This compares with the average 37 hours worked by full-time staff (maximum 43 hours per week).

Multiskilling is not common amongst theatre and cinema employees, involving four employees at the theatre. Jobs include cashier duties, working on the computer, cleaning and being an usherette. This could, however, be due to the very broad job titles used at this particular cinema and regular duties being, in the first instance, quite varied. At the theatre, all of the three respondents to report involvement in other tasks act as ushers.

At the cinema, only one part-time worker is also working elsewhere; as a teacher in Liverpool. Indeed, when asked whether they would actually like to work full-time, over half of part-timers (in line with many Employment Gazette findings, e.g. Naylor, 1994) said that they did not want to. Explanations for this include "I have not got the time", "this is a boring job", "the hours are already reasonable", and, "I would only work full-time if I was manager". It is also difficult to support the assertion that tourism workers prefer part-time work because they have children to look after at home; nine of the ten theatre employees are single and nine of the ten do not have children living at home.

Additionally, there is little evidence at the theatre to support the assumption that respondents enter tourism-related employment in order only to supplement the family income as most respondents are main wage earners. The situation at the cinema is different. Only two respondents consider themselves as main wage earners, all the other earners, bar one, being male relations for

example father, boyfriend and husband; the other respondent mentioned parents as being the main earners.

The questionnaire also asked respondents to note their take home pay "last week". At the cinema, two of the three full-time workers noted their pay for the week (average £107.00). Part-time employees work for between 16 and 25 hours per week (average 17.4 hours) and take home pay for the week ranges from £31.10 to £69.75. Indeed, the average hourly rate of pay is £2.85; rates of pay ranging from £2.31 per hour for a 20 hour week to £3.16 an hour for a 16 hour week. At the theatre the rate of pay for part-time employees is substantially more (average £3.72 per hour). However, most respondents here are employed on a full-time basis. The average rate of pay among the sample of 11 for full-time employees is £161.25 per week, equating to an annual salary of £8384.93. This is substantially higher than that for cinemas and hotels, although it is still not particularly high. There is also a considerable range amongst these salaries, the lowest recorded is £109.21, the highest £303.00.

Generally one would expect theatre workers to have higher salaries than cinema workers as they often hold higher qualifications. Of the ten respondents at the theatre, five hold O level or equivalent qualifications, five have A levels or Scottish 'Highers' and four hold a degree. In addition, two respondents have a Diploma in stage management studies and one employee has a BTec. Other qualifications include RSA typing certificate, City and Guilds and GNVQ. This detail compares to a similar trend amongst cinema respondents, although here two have no qualifications. Thus theatre employees tend to have slightly higher qualifications and they receive more job training. At the cinema only one respondent considered that they had been trained in their job, compared with five at the theatre. At the theatre all the training courses were held out of the place of work, usually in Liverpool. Three of the respondents have been on a "Merseyside Welcome" course aimed at training for tourism, and two have been

employed in computer training. Other specialist courses include stress management, wig design and health and safety training.

Theatre employees are also more likely to have previously been employed in related jobs than cinema employees. This is further emphasized when one considers where respondents previously lived. At the theatre employees have often moved around the country. London is the most regularly mentioned destination, most of these respondents having lived here at some time. Whilst working in Liverpool, theatre employees tend to travel further to work than cinema employees. As with hotel employees bus is the most common form of transport.

5.3.4 Employment at Liverpool's tourism-related restaurants, cafes, bars and clubs

All the information presented here comes from the results of one section of the questionnaire administered to a 100 percent sample of shops and eating and drinking establishments at three of Liverpool's prime tourist areas (Albert Dock, Cavern Walks and the Bluecoat Gallery). As each of these areas is quite different in terms of the type and number of visitors, each will initially be discussed separately. Restaurants, cafes, public houses, bars, coffee shops and night clubs will be discussed in this section under the general heading of "eating and drinking".

At the total of 22 eating and drinking establishments surveyed in the three tourism areas there are 421 employees, averaging 19.1 employees per establishment. The greatest number of establishments are found at the Albert Dock (14) where 239 staff are employed. There is just one eating and drinking establishment at the Bluecoat Gallery, employing 11 people. The number of people employed at these establishments ranges from five to 35 at the Albert Dock and nine to 58 in the Cavern Walks area; indeed, the highest average

number of employees per establishment is found in the Cavern Walks area (24.4 employees compared to 17.1 employees at the Albert Dock).

As expected from the literature presented earlier, part-time employment is, on average, more dominant than full-time. At all the three tourist areas, part-time employment dominates, with an average of 64.8 percent of employees. The part-time element is greatest at the Albert Dock (66.5 percent of employees). Similarly, female employment dominates in many of these eating and drinking facilities in Liverpool (64.1 percent) at a rate higher than that for hotels, attractions and theatres and cinemas.

The questionnaire also asked managers of eating and drinking establishments whether most of the staff employed are local to Liverpool; although this was a broad generalisation, it was found that 17 out of 22 establishments say that, where possible, they employ local (Liverpool) staff. The exceptions noted include restaurants selling foreign food who employ staff who originate in that country, for example Italians working in an Italian restaurant in the Cavern Walks area. Another recurring theme is student employees working at the bars at the Albert Dock in order to raise funds to supplement their student grant.

Training is not an issue for managers of eating and drinking facilities in Liverpool; 59.1 percent of establishments provide on the job training for staff, although mainly this occurs when a new member of staff starts work. There is also evidence suggesting that employees at eating and drinking establishments do not need either experience or specific qualifications. Only a third of establishments consider experience essential. The need for qualifications and previous experience is greatest at the Albert Dock (35.7 percent of establishments) and lowest in the Cavern Walks area (14.3 percent) (see Table 5.18).

Employment within this tourism-related sector is thus large, but dispersed through many establishments, each with on average 19 employees; geographical location does have some bearing on this, with establishments in certain areas employing comparatively more staff. Within this sector, part-time employment is more substantial than at hotels or attractions; this could, however, be a result of the unusual hours which workers in this industry need to keep. The nature of this work (i.e. often evening and weekend work) may help to explain why staff generally live locally to their place of work, yet this is probably not the only explanation. Indeed, as with hotel employment, staff are rarely highly qualified and experience is often the only pre-requisite.

Table 5.18: The nature of employment at eating and drinking facilities in Liverpool (1994)

	ALBERT	CAVERN	BLUECOAT	TOTAL
number of establishments	14	7	1	22
total no. employees	239	171	11	421
av. no. / establishment	17.1	24.4	11.0	19.1
% part-time	66.5	63.2	54.0	64.8
% full-time	33.0	38.5	46.0	33.6
% male	33.1	44.4	9.0	35.7
% female	66.6	55.4	91.0	64.1
% establishments employing local people	71.4	85.7	100.0	77.3
% est. providing training	64.3	57.1	100.0	59.1
% with no staff training	35.7	42.9	-	40.9
% requiring qualifications and experience	57.1	85.7	-	66.6
% requiring no qualifications and experience	35.7	14.3	100.0	33.3

Note: Some percentages do not sum because of inaccuracies in data provided during interviews.

5.3.5 Employment at shops in Liverpool's major tourist areas

Questionnaires were administered to a total of 50 shops in Liverpool's three major tourist areas of the Albert Dock (32 shops), Cavern Walks (13 shops) and the Bluecoat Gallery (5 shops). These shops employ a total of 176 people, most of which are at the Albert Dock (Table 5.19). The average number of employees (3.5) is, therefore, far lower than that for many of the other tourist facilities previously discussed in this chapter. Indeed, at the Albert Dock, the maximum number of people employed (part-time and full-time) is eight, the minimum, one (Table 5.19).

In contrast to the situation for eating and drinking establishments the full-time, part-time division of employees in shops is more even. The only exception to this is the Bluecoat Gallery where all the employees are employed on a full-time basis. This could possibly be explained because all the five shops here employ relatively few people. Indeed, the questionnaire results illustrate how shops will often employ all part-time or all full-time staff.

Once again, the gender of staff is female dominated. In all, 73.5 percent of staff are female. This is most evident at the Bluecoat Gallery where 93.2 percent of employees are female, and least apparent at the Albert Dock (66.1 percent female). This detail should, however, be contextualised. At the Albert Dock, in particular, many establishments are manned by the shop owner or a husband and wife team (included in Table 5.19). Indeed, at the Albert Dock, 28.1 percent of the shops find that they do not need to provide contracts for "staff" as many are owners or friends of the family. As with eating and drinking establishments, most shops consider that they employ mainly local people, although, other places of residence were occasionally mentioned. One employer also mentioned taking students as staff.

Training is, again, not a very important element of employment at tourism-

related shops. Training occurs in 42.0 percent of shops visited and is most evident at shops at the Albert Dock, where half the establishments provide staff training, and is least evident at the Bluecoat Gallery where just a quarter of employees provide training. This training is, as with eating and drinking establishments, in all instances, on the job and usually occurs when commencing employment. Qualifications and previous experience are less important in shops than in eating and drinking establishments. Indeed, three quarters of all shops in tourist areas require staff to hold no particular qualification. The need for previous experience is greatest in the Cavern Walks area (five) and least at the Albert Dock (six) (see Table 5.19).

Table 5.19: The nature of employment in shops in tourist areas of Liverpool (1994)

	ALBERT	CAVERN	BLUECOAT	TOTAL
number of establishments	32	13	5	50
total no. employees	117	45	14	176
av. no. / establishment	3.7	3.5	2.8	3.52
% part-time	53.0	51.0	0.0	47.2
% full-time	50.1	48.8	100.0	52.7
% male	30.2	15.9	6.6	24.1
% female	66.1	83.9	93.2	73.5
% establishments employing local people	90.6	84.6	80.0	88.0
% est. providing training	50.0	30.8	25.0	42.0
% with no staff training	50.0	69.2	75.0	57.1
% requiring qualifications and experience	81.3	61.5	75.0	75.5
% requiring no qualifications and experience	18.8	38.5	25.0	24.5

Note: Some percentages do not sum because of inaccuracies in data provided during interviews.

5.4 Conclusions

The results presented in this chapter go some way to question some of the assertions made earlier. Previous studies noted that many of the employees of tourism-related industries are female. Throughout the sectors of tourism-related employment examined in the thesis, female employment prevails, indeed, in the tourist shops, female employment is as high as 73.5 percent, and questionnaire respondents at theatres and cinemas are even more female. Generally, however, managers of attractions, theatres and cinemas and hotels considered there to be an even mix of male and female employment, with occasionally more females. In this instance the factual details for Liverpool compare surprisingly well with Census of Employment data (September, 1994) (see Table 5.20). As seen from Census of Employment data, there is little evidence to suggest that this industry is much different to any other in Liverpool in this respect. The Census (September, 1991, via NOMIS) suggests that in Liverpool post code districts L1-3, 48.7 percent of total employment (all sectors) is female, compared to 52.3 percent in Liverpool as a whole. The research for all sectors suggests a crude mean of 55.9 percent female compared to a Liverpool L1-3 Census of Employment (September, 1991, via NOMIS) figure of 61.4 percent.

Table 5.20: Employees in tourism-related employment by sex - A comparison of Liverpool and Great Britain (1994)

	GREAT BRITAIN CENSUS OF EMPLOYMENT 1994		LIVERPOOL 1-3 CENSUS OF EMPLOYMENT 1991		LIVERPOOL 1-3 FIELD RESEARCH 1994	
Hotels (SIC 665/667)	% male 39.4	% female 60.6	% male 36.3	% female 63.8	% male 39.3	% female 60.7
Attractions (SIC 977/979)	49.8	50.2	47.4	52.6	c.50.0	c.50.0
Eating and drinking (SIC 661/662/663)	36.4	63.6	35.8	64.2	35.7	64.1

Source: Census of Employment,via NOMIS, Employment Gazette, January, 1995 (Table 1.4).

One explanation for female dominance amongst tourism-related workers is the ability for women to take part-time jobs to supplement income and care for school aged children. In the Liverpool example, this does not seem to be an important consideration amongst employees. As Johnson and Thomas (1992) and Egan (1984) recognize, many of the workers in tourism-related industries are young (mid-twenties) (unlike Polytechnic of Central London *et al.* (1990) findings of staff evenly distributed by age). Most are unmarried, usually without children living at home and often still living with parents. It is, therefore, highly unlikely that these are working parents. Similarly, comparatively few employees are in the 25-39 year age group - that recognized by Naylor (1994, p.476) as the group most likely to have dependent children under the age of 16. There are however instances where employees are people not normally considered to be part of the labour force. On numerous occasions, in all sectors, employees are students working to supplement their grant, particularly in eating and drinking establishments and cinemas. Additionally, on at least one occasion, staff are "moonlighting" (working for cash whilst claiming social security benefits). It is also apparent that those staff working on part-time contracts do not really want to work full-time, the reason stated not usually being because of children at home. Similarly, there are only a couple of occasions when part-time staff also have another part-time job, yet hotel managers did stress that many conference and banqueting staff are also on the books of other hotels.

In all sectors examined, except for eating and drinking, cinemas, and shops, full-time employment is greater than part-time. These results do not support those in the Census of Employment (September, 1994). As Table 5.21 illustrates, the official Great Britain figures suggest a 54.8 percent full-time workforce in hotels, whereas fieldwork evidence suggests that this figure is, in the Liverpool example higher; a crude percentage, taken from the three methods used in the survey, suggests, a weighted average of 72.3 percent full-time employees. This could support the hypothesis that in the urban context,

seasonality is not as great an issue as perhaps it is in the more traditional holiday destinations. Similarly, Census of Employment data (Liverpool L1-L3) for attractions suggest a far higher percentage of full-time employees at 76.9 percent (see Table 5.21). This could be a result of the type of attractions provided, as most are art galleries and cultural attractions which will probably attract a wide range of visitors, including many locals and return visitors to special exhibitions, hence supporting an all year round staff. Other smaller attractions employ few staff, all on a full-time basis. Finally, as the Census of Employment for Great Britain suggests, in Liverpool, part-time employment is predominant amongst those employed in eating and drinking establishments (see Table 5.21). A similar situation exists in shops in Liverpool, however, this cannot be compared to Census of Employment data, as the sample used here is purely shops in tourist areas. In theatres and cinemas employment is predominantly part-time, 81.8 percent (interview results), yet this is boosted by the particularly high number of part-time employees in cinemas.

Table 5.21: Full-time, part-time split of employees in tourism-related industries. A comparison of Liverpool and Great Britain (1994).

	GREAT BRITAIN CENSUS OF EMPLOYMENT		LIVERPOOL L1-3 CENSUS OF EMPLOYMENT (1991)		LIVERPOOL L1-3 FIELD RESEARCH	
	% PT	%FT	% PT	% FT	% PT	% FT
Hotels (SIC 665/667)	45.2	54.8	43.2	86.8	27.7	72.3
Attractions (SIC 977/979)	40.5	59.5	23.1	76.9	2.4	97.6
Eating and drinking (SIC 661/662/663)	67.8	32.2	65.6	34.4	64.8	33.6

Source: Census of Employment, Employment Gazette, January, 1995. (Table 1.4)

These details thus suggest a crude average, from all the sectors examined, of 46.4 percent part-time tourism-related employment in central Liverpool. However, an examination of total employment figures for Liverpool post code sectors L1-3 (all sectors) (Census of Employment via NOMIS, September, 1991) recognizes that just 18.4 percent of total employment is part-time (25.9 percent for Liverpool as a total). In conclusion, therefore, it appears that tourism-related industries employ more part-time staff than most others. In the urban context, it also appears that, as suggested by the Polytechnic of Central London *et al.* research (1990), in cities there is more full-time employment than in the tourist industry in general. This conclusion does, however, question Hennessy's (1994) assertion that retailing provides a higher proportion of annual jobs whilst restaurants and cafes have more seasonal jobs. In Liverpool, restaurants and cafes have a greater percentage of part-time jobs than shops. In addition, the results, although they agree that theatres and cinemas provide few permanent jobs, question whether museums and galleries could be classed as employers of non-permanent staff as, in Liverpool, 97.6 percent of employees at attractions are on full-time permanent contracts.

Before drawing conclusions about the nature of urban tourism employment, it is interesting to consider the actual number of people employed in the industry. Throughout this chapter, details given at interview have been expressed as percentages in order to make comparisons easier. However, Appendix 12 illustrates the actual number of people as stated in both the Census of Employment (via NOMIS) and by grossing up (where necessary) details given at interviews with managers. It must however be noted that the details for shops cannot be compared to the Census of Employment because the survey considered only those shops which may be classed as tourism-related. Generally, the results from the two sources are similar, particularly when one considers the rounding process necessary. Indeed, total tourism-related employment for the case study area is estimated at 5550 (1994) from

field work (compared to 4900 from the Census of Employment (1991)). The greatest discrepancy in results occurs in eating and drinking establishments (SIC 661/662/663); this is the sector where it was most necessary to round up figures. These results could suggest therefore that there are comparatively more staff employed in eating and drinking facilities in tourist areas than in those elsewhere (see Appendix 12 for more details).

Throughout this sector, it is also apparent that employment, as suggested earlier (Johnson and Thomas (1992), Egan (1984), Polytechnic of Central London *et al.* (1990)), requires very little formal training because most jobs are manual. Indeed, the examination of previous employment suggests that employees have often entered the tourism industry straight from school, or have done related jobs, although not necessarily in the tourism industry. Generally, staff have not worked in the establishment for longer than three years, but, when they have, they tend to gain promotion easily and stay for a long time. These findings question the ability of tourism to employ people previously employed in other industries in the city, for example dock workers. Although there is one case of an ex-dock workers now working in a hotel, this is not commonplace. As wages in the tourism industry are low (with a crude average of £132 per week), they are probably not the main attraction to the job; the staff is also often young, probably so that wages can be low. However, the industry does not usually require staff to have had previous experience or qualifications. It is a question of economics; employers are more likely to employ younger staff who are willing to learn at a cheaper rate than mature people who are trying to change career at a late age and may need training. Indeed, many of the industries do not provide training for staff (apart from "on the job" when commencing employment). The rationals for this could be numerous: many of the younger employees already possess vocational qualifications to help them in their job, such as GNVQ, City and Guilds and YTS training; jobs are usually manual and thus require little formal training

and; training costs money and, as one employer noted, well trained staff are only more likely to move to another job more quickly.

There is ample evidence of staff staying in their job for only a few years. This could be because they enjoy a change of scene as job opportunities occur frequently in other hotels. However, this is unlikely because very few employees have previously been employed in the same type of establishment. A more likely explanation is the pull of higher wages in other industries; which could also explain the high number of young employees who still live at home with parents, as they cannot afford to pay rent and food from their wages (for example the hotel questionnaire results note that on average 6.6 percent of wages are spent on travel costs).

CHAPTER 6:

OLD, INDUSTRIAL AND DYING? - THE CHANGING IMAGE AND MOTIVES FOR INVESTMENT.

6.1: Literature

A further aim of this thesis is to review the issue of image change due to the development of tourism initiatives. To evaluate this the methodology adopted here first considers evidence relating to image change, and continues in an analysis of the role of tourism in attracting inward investment.

Introduction.

This chapter aims to evaluate whether tourism development is able to alter and improve the image of the city as perceived by residents, the business world and outsiders. Authors such as Law (1992) and Page (1994) have discussed whether investment in attractions and environmental improvements, which are marketed to visitors, will create a new image for the urban area. Presumptions are that the new image can then make a significant contribution to attracting other economic activities (and expanding existing ones), to population growth and an increase in civic pride. Each of these outcomes may contribute to physical, economic and social regeneration.

The format for this chapter places emphasis on the existing image of Liverpool and how it compares with reality. An analysis of environmental condition and improvements which have occurred will be made, in order to assess the role of tourism in stimulating environmental improvements and the role of environmental improvements in altering public perceptions. If there is a change in image, has tourism been its stimulus and what are the impacts on the economic situation? One must also question why businesses chose to locate or relocate in relevant areas and the comparative importance of economic, environmental and social factors in their choice. The aim is to establish

whether the impact of tourism is restricted economically, environmentally, and geographically. As Kotler and Haider (1993) recognize, in examining place image, there is a need to answer questions such as: what is the place's "livability" when it comes to attracting new residents? What is the place's "visitability" when it comes to attracting tourists? What is the place's "investibility" when it comes to attracting business and investment? (p.82).

The 'outsiders" image.

With reference to the Potteries area of Staffordshire, Ball and Metcalfe (1992) recognize that, "as with many old industrial areas seeking to develop a veneer of tourism, the Achilles heel ..... is its negative image to outsiders, the poor physical image of locality reflected in the smoky Stoke postcard image" (p.B19). The problem of image is not unique to Stoke: Robinson (1992, p.16) in assessing the image of Newcastle-upon-Tyne as the Tyne Bridge, Jarrow March and the Metro Centre recognizes that "the images are, in many senses, the popular images of 'outsiders'. They are very partial images. Cities are far more complex than this."

The task of city managers in these areas is thus a difficult one of re-imaging. As Kotler and Haider (1993, p.37) note,

> "images aren't easy to develop or change. They require research into how residents and outsiders currently see the place; they require identifying true and untrue elements, as well as strong and weak elements; they require inspiration and choice among contending pictures; they require elaborating the choice in a thousand ways so that the residents, businesses, and others truly express the consensual image; and they require a substantial budget from the image's dissemination".

Indeed, the same authors recognize that places are increasingly reliant on four broad strategies to attract visitors and residents, build their industrial base and increase exports. These strategies are image marketing, attractions

marketing, infrastructure marketing and people marketing. Similarly Karski (1990) recognizes that promotion is an important characteristic of city marketing, noting that "fame and prestige of the town or region are positive factors but promotion should not create an image distinct from reality" (p.15).

Before considering how urban areas are able to market an alternative image of themselves, the concept of '*image*' should be defined. Kotler and Haider (1993) define a place's image as "the sum of beliefs, ideas and impressions that a people have of a place", and an image is "a personal perception of a place that can vary from place to place" (p.141). These authors additionally recognize that "a place's image is a crucial determinant of the way citizens and businesses respond to the place" (p.141).

Urry (1990) explains the importance of image;

> "individuals do not seek satisfaction from products ..... Rather, satisfaction stems from anticipation, from imaginative pleasure-seeking. People's basic motivation for consumption is not therefore simply materialistic. It is rather that they seek to experience 'in reality' the pleasurable dramas they have already in their imagination" (p.13).

It is thus crucial that, in improving their attractiveness, "places intensify their communication expenditure and image making" and "communities try to float positive stories and ads, and prevent negative new stories describing their plight" (Kotler and Haider, 1993, p.16).

Urry (1990) recognizes that creating an image of a place is difficult. The gaze "varies by society, by social group and by historical period" (p.1), and as such it is hard to create a "cover-all" image. Thus the city makers must first identify their target groups; the place must then create an effective image for each. Kotler and Haider (1993, p.149-50) suggest a five point list of criteria for effectiveness of image, which includes validity, believability, simplicity, appeal

and distinctiveness.

Church (1995), in a study of Dover, recognizes one method by which an area may alter its image. The aim here was to develop an image that would relate to the whole region and its hinterland and thus spread the benefits of any tourism growth throughout the region. This involved renaming Dover and its hinterland as 'White Cliffs Country'. The author explains this approach as one which "seeks to give space a coherent identity, readily accessible through the existing cultural images and historical knowledge that tourists already possess". This strategy is not unique; Prentice (1994) identifies, in England and Wales, 28 tourist "counties", one tourist "city" (Beatle City - Liverpool) and one "kingdom".

Three other tools for communicating image should be discussed. Firstly, slogans, themes and positions. Slogans ("a short catchall phrase that embodies the overall vision of the place" (Kotler and Haider, 1993, p.151)) are useful in generating enthusiasm, momentum and fresh ideas; an example would be "*Bradford's bouncing back*" or "*Glasgow's miles better*". A similar tool is image positioning where the place positions itself in regional, national, and international terms as the place for a certain type of activity or as a viable alternative location/attraction. Thus "the challenge of image positioning is to develop an image that communicates benefits and unique attributes that make the place stand out amongst other places" (Kotler and Haider, 1993, p.153).

Secondly there is the role of visual symbols. Many landmark sites of places are permanently etched in the public mind. Examples obviously include the Eiffel Tower (Paris) and Big Ben (London); the Liverpool example would be the Albert Dock or the Royal Liver Building. It is thought that "a visual image, to be successful, needs to reinforce an image argument. If the visual is inconsistent with the slogan, themes or positions it undermines the places credibility" (Kotler and Haider, 1993, p.154). The third tool is events and deeds.

Once created the image needs to be marketed. Kotler and Haider (1993) suggest that place makers can use different tools to promote the place to target markets. The influences discussed are advertising, direct marketing, sales promotion, public relations and personal selling (p.166). Other tools are not all under the place's control, these can help or hurt a place and include film, television, shops, popular music, team sports and related t-shirts. Urry (1990) agrees on the need for marketing;

> "places are chosen to be gazed upon because there is an anticipation especially through daydreaming and fantasy, on intense pleasures, either on a different scale or involving different senses from those customarily encountered. Such anticipation is constructed and sustained through a variety of non-tourist practices, such as films, TV, literature, magazines, records and videos, which construct and reinforce that gaze" (p.3).

Table 6.1: Incentives for a city visit (1985) - Deventer, Kampen and Zwolle (Netherlands) (percentage of n=1137 respondents)

Incentive	% of respondents
Recommendation by family and friends	55.9
Tourist information brochure	13.5
Advertisements in newspapers/weeklies	12.6
National organization publicity	9.0
Radio and television	1.8
Other	7.2
Total	100

Source: Jansen-Verbeke (1986) p.96.

Research in the Netherlands (Jansen-Verbeke, 1985) however recognizes that, although city promoters proved to be very active in their attempts to attract visitors and sell their product, the most important incentive for a city visit was a recommendation by family and friends (55.9 percent of all visits) (see Table

6.1). The reliability of such information is questionable. For many the most apparent incentive is likely to be the more obvious stimulus of a recommendation; radio, television and newspaper advertisements may act to reinforce the recommendation and, as such, should not be dismissed as ineffective marketing tools.

Literature relating to image creation suggests that tourism is an important tool and motivation for city image change. Urry (1990) notes "one way in which a number of cities have been more successful in constructing a relatively coherent tourist image is through so-called cultural tourism" (p.118). Creating an image of what Kotler and Haider (1993) describe as a "cultural mecca" (p.127) involves featuring universities, museums, orchestras, ballet companies, theatre groups and libraries; institutions which not only delight the residents but also attract tourists and business people. The example cited by Urry (1990) is that of Glasgow;

> "mysteriously but dramatically, Glasgow has become the kind of place that people now want to visit, to see and to be seen in. It has become the preferred object of the gaze of many tourists" (p.156).

Inextricably tied with the concept of image reconstruction are the issues of environmental change and the ability to attract investment. The city usually needs to be physically as well as culturally (and economically) attractive in order to attract investment from new industry; the exception to this being issues such as the availablity of favourable grants for investment, or a cheap labour force. PA Cambridge Economic Consultants (1990) consider the role of garden festivals;

> "image building provides the link between the festival process and urban regeneration, whatever emerges will potentially have major implications for the development of the areas as tourism destinations. Urban regeneration will depend on the success of the festival park which will

have to be a demonstration for attracting inward investment" (p.3).

Each of these issues will be discussed separately, although image, environmental improvements and investment are all interlinked.

Environmental condition

Tourists wish to visit attractions and amenities in attractive surroundings. Karski (1990) recognises the reasons for visiting town centres to be "primarily for sightseeing, because of the ambience and their visually stimulating, interesting environment" (p.16-17). Nevertheless urban environmental quality is often poor; possibly caused by the high density land use and the way manufacturing industry once disregarded its environment. Indeed, the Council of Europe (1993) is aware that due to

> "the extensive ecological and environmental damage done to industrial towns - particular effort is necessary, over and above that made for other types of towns. Public places, markets, parks are important elements in the character of a city, itself an important asset in promoting economic regeneration" (p.93).

One particularly important concern is the issue of vacant and derelict land, which has been of policy concern since the 1970's. It has been described as an inefficient use of resources, an environmental wasteland and a cause of many of the social ills of the cities. Vacant land has been regarded as "both a symptom and cause of urban malaise" (Whitbread *et al*, 1991, p.1).

The perceived importance of a pleasant environment can be exemplified by the emphasis which is placed on it in formulating urban policy. Funding for exisiting environmental improvements is likely to have originated from Urban Programme (UP) and Derelict Land Grant (DLG). A quarter of all UP expenditure has been spent on environmental improvement over a range of different types of project including landscaping, improvements to parks, open

spaces and walkways, built fabric improvements and general area based improvements (JURUE, 1989). In addition environmental improvements may be absorbed into other local and national initiatives, for example Urban Development Ccorporation schemes or City Challenge initiatives. In Liverpool a further source of funding is European Regional Development Funds (ERDF), which will be referred to later in this chapter.

Button and Pearce (1989) recognize the difficulty which thus arises;

> "most schemes require funding from multiple and diverse sources, frequently including international agencies. It is often the case that without successfully obtaining a complete portfolio of budgets from several different funding bodies investment simply cannot be undertaken. These responsibilities for initiating urban infrastructure restoration projects, therefore, generally find themselves having to satisfy several masters, each with his own, quite specific objective in mind" (p.560).

By way of conclusion, Precedo (1992) suggests that the quality of the environment relies primarily on a unified and co-ordinated urban policy. Robinson (1992) however questions the virtue of tackling the issue of environmental improvements first, noting that "above all, policies must be for 'people in places', not 'policies for places'". Urry agrees, noting that, if it could, a place would first fix its fundamentals (the infrastructure) and then add attractions, raise the friendliness and skills of its people and finally broadcast a distinct image, yet often the place's infrastructure and finances are poor, thus it cannot raise the finances necessary for change; thus the place aborts to tackling image first. This, as the author explains, "is really a bootstrapping approach and often fails" (Urry, 1990, p.40).

Yet, as Sorkin (1992) notes, contemporary city centre renewal, waterfront

redevelopment and gentrification provide "urban renewal with a sinister twist, an architecture of deception which .... constantly distances itself from the most fundamental realities. The architecture .... is almost purely semiotic, playing the game of grafted signification, theme-park building" (p.xiv).

In many cases environmental improvements are conducted as a case by case scheme, often including prestige projects[1]. Critics say the impact is limited geographically, arguing for a city wide approach. However, Loftman and Nevin (1994) present numerous arguments in favour of prestige projects. These include the view that they act as a magnet for inward private sector investment, corporate office relocations, and tourist/consumer expenditure; that the projects may lead to the creation of new jobs directly and indirectly via the economic multiplier effect; that they may lead to the physical transformation of previously neglected parts of the CBD, providing a physical environment conducive to private sector investment; and that the schemes are directly linked to the well-being of all city residents and the financial costs are not disproportionately borne by the poor.

Similarly Karski (1990) notes that "facilities, attractions and environmental improvements initiated for visitor attraction reasons can, and should, be of benefit and use to the local population" (p.15), arguing that these developments generate civic pride and stimulate local initiatives and enterprise; "places that are externally perceived as important and interesting visitor destinations tend to be significantly better places to attract new businesses and industries as well as an appropriate workforce" (p.15).

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[1]Prestige projects are those such as convention centres, festival market places, and major sporting and leisure complexes primarily located within the CBD of cities. These types of projects are defined as "large scale, high profile, self contained development schemes which are primarily justified as catalysts for urban regeneration" (Loftman and Nevin, 1994, p.309)

One further aspect of environmental improvement, which is recognised by planners, is an issue of urban design. Current approaches to urban design emphasise what is environmentally compatible with existing physical and natural features which may resurrect the older character and history of places. This approach requires vision, blending old with new and appreciation that place character is a valuable asset in retaining firms and people. It is thought that "urban design makes a statement about a place because it reflects how values and decision-making combine on issues that affect development" (Kotler and Haider, 1993, p.100).

Attracting investment

Within Government policy the value of improvements in both the built and natural environments is often perceived as improving the attractiveness of areas to business. As McLaren (1984) recognised, "many urban regeneration schemes have been applauded on the basis that the return to use of derelict land is an indisputable environmental improvement and that the generation of investment by the private sector is an indisputable economic benefit" (p.103).

There is an argument that environmental quality is a significant factor in business decisions;

> "programmes of environmental and physical improvements, and better social, cultural and recreational facilities create a strong sense of community, confidence and credibility and thus help lever private investment and stimulate business investments" (Council of Europe, 1986, p.93).

The use of a comprehensive tourism policy as a mechanism for attracting investment from private sector business is an interesting concept. As Kotler and Haider (1993) note, the "choice of a two-week vacation destination involves different factors than the choice of a city to move to or a business firm's choice

of a new factory site" (p.46), yet the redevelopment for urban tourism encompasses a number of those factors which may influence business location.

A report by the Special Projects Group of Lancaster City Council (1987), in assessing Lancaster's tourism strategy, concluded that the development of tourism would "help upgrade the local environment and improve facilities which will assist industrial promotion generally" and that "the city's appearance and the range of facilities it offers are critical to the attraction of new companies to Lancaster" (para. 1.10). Further, Kotler and Haider (1993) recognise that "cities that hope to attract newer industries and professionals must make a special effort to build and promote their cultural assets" (p.127). Similarly, "employers are nowadays finding it necessary to pay more attention to the likes and dislikes of their staff, particularly the higher paid elements of their core workforce" (Champion, 1989, p.17). Thus places visited and enjoyed by managerial staff are in a stronger position than the unknown location. Additionally, the availability of cultural facilities may also aid the decision making process.

To twist the argument slightly, Church (1994) describes these processes;

> "a heritage based 'people-draw' attraction accompanied by high margin specialist shops and appropriate theme restaurants is developed initially to bring in visitors and promote investor confidence. Public money further stimulates private sector interest through site clearance, environmental improvements, new infrastructure and image reconstruction" (p.12).

There are a number of academic studies which attempt to rank places by quality of life (Findlay *et al*, 1989; Champion, 1989). These sources note that "it has long been recognised that quality of life is difficult to measure; not least because the criteria which are used by people to evaluate the benefits and costs

of a place are dependent on many disparate factors" (Findlay *et al,* 1989, p.96). The difficulties lie not only in identifying the elements of an environment which are involved in people's assessment of its quality of life, but the importance to attach to each of the elements when they are aggregated to form an overall evaluation of the quality of life.

As Kotler and Haider (1993, p.2) recognize, places can also be ranked on a number of different dimensions: where to start or locate a business or plan a retirement, where to raise a family, where to plan a vacation, hold a conference or have a meal. Each of these dimensions is likely to result in a different weighting of the importance of the various elements of the quality of life. Findlay *et al* (1989) exemplify this by calculating three indices for British cities (weighting components in different ways, the details of which are not important here). As Table 6.2 exemplifies the variations in indices can in some cases be quite apparent; for example London, ranked both 34 and four. However, for Liverpool, the rankings are similar (30, 31 and 38) and very poor.

Table 6.2: The ranking of British cities - three indices

City	Index 1	Index 2	Index 3
Edinburgh	1	1	16
Aberdeen	2	2	14
Plymouth	3	3	15
Cardiff	4	4	25
Hamilton-Motherwell	5	6	32
Bradford	6	5	28
Reading	7	7	2
Stoke on Trent	8	8	19
Middlesbrough	9	9	33
Sheffield	10	11	37
Oxford	11	14	3
Leicester	12	10	11
Brighton	13	13	8
Portsmouth	14	15	12
Southampton	15=	16	9
Southend	15=	18	5
Hull	17	12	22
Aldershot-Farnborough	18	28	1
Bristol	19	17	10
Derby	20	20	24
Norwich	21	25	13
Birkenhead-Wallasey	22	19	35
Blackpool	23	26	27
Luton	24	23	6
Glasgow	25	22	30
Bournemouth	26	32	7
Leeds	27	24	18
Sunderland	28	21	36
Bolton	29	29	29
Manchester	30	27	21
Liverpool	31	30	38
Nottingham	32	33	17
Newcastle	33	31	26
London	34	36	4
Wolverhampton	35	34	31
Coventry	36	35	20
Walsall	37	38	34
Birmingham	38	37	23

Notes: Spearman rank: Index 1 and 2 = 0.964
Index 1 and 3 = 0.219

Source: Findlay *et al* (1989)

6.2: The image of Liverpool

The image held by "outsiders"

In order to ascertain the image of Liverpool, as held by outsiders, a group of second year undergraduate students studying environmental management at University College Stockton were asked to take part in a series of questionnaires; stage one occurred prior to a compulsory field visit to Liverpool and stage two after the visit. Four questionnaires were administered to the group visiting Liverpool in April 1994 and three questionnaires were used in April 1995. This methodology was advantageous in that a large sample group could be accessed easily. The group was able to give opinions about the city which they were visiting often because they had to, rather than because they chose to. Therefore the results are not biased towards a set of visitors who would pay to visit Liverpool. This methodology additionally allowed the same respondents to give an image of the city both before and after a visit.

However, the set of respondents are all relatively well educated and, because of the course which they are studying, have an interest in their environment. Thus, the results may be more informed than if the sample had been selected on a random basis. Similarly, although respondents originate from all over the UK (one from Germany), there is a bias towards those from the north east of England. The age distribution of respondents is wide; although the 18-24 age group predominates, some respondents are in the 50 plus age group.

The questionnaire (see Appendix 13) was administered to the students before their visit to the City of Liverpool, and a similar questionnaire was administered after their visit. The aim was not only to establish details pertaining to the image and association of Liverpool, but also how these details change as a result of visiting the city.

The students were presented with nine statements and asked whether they

agreed or disagreed with the impressions. The results (Table 6.3) suggest that before their visit over half of respondents believed that there is a variety of places of interest such as museums and art galleries (86.6 percent), that Liverpool offers helpful, friendly and welcome service in shops and restaurants (76.5 percent) and that Merseyside is not a suitable place for women to visit alone (57.6 percent). Additionally, the views expressed suggest that Merseyside is not a suitable place for a family holiday with children (87.7 percent) and that Liverpool is the main centre of attraction for Merseyside (68.7 percent).

In a number of examples, the opinion of Liverpool and Merseyside differ as a result of a visit to the city. A number of respondents reported that staff in pubs and cafes had been rude when serving them, hence there is a small reduction in the number of respondents to agree with the statement related to service in shops and restaurants in Merseyside (68.9 compared to 76.5 percent). The percentage difference in opinion is greatest when respondents were asked if they agree that Liverpool is a rough, violent and depressing place. Before visiting the city 45.8 percent of respondents agreed with this statement, compared to just 9.7 percent after a visit to the city. The respondents generally, as a result of their visit, had a wider knowledge of the facilities available for tourists; more people recognized a wide variety of places of interest (98.8 percent), fewer respondents considered the only attraction of Merseyside to be its association with the Beatles (9.7 percent compared to 20.7 percent), and fewer respondents recognised friends and relatives to the city as their sole reason for a visit (19.7 percent compared to 37.8 percent). However, respondents did tend to consider Liverpool to be unsafe at night, the percentage agreeing with this statement rising from 32.9 percent before a visit to 66.1 percent after.

Table 6.3: The impression of Liverpool (1994 and 1995)

	Before Visit	After Visit
The service you get in shops, restaurants etc. in Merseyside is helpful, friendly and makes you feel welcome	76.5	68.9
Liverpool is a rough, violent and depressing place	45.8	9.7
The main attraction of Merseyside is not Liverpool but the areas around it	31.3	25.0
There is a wide variety of places of interest such as museums and art galleries	86.6	98.8
Merseyside is not a suitable place for women to visit alone	57.6	32.9
The only attraction of Merseyside is its association with the Beatles	20.7	9.7
I would only visit Liverpool because I have friends and relatives there	37.8	19.7
Merseyside is excellent for a family holiday with children	12.3	18.8
Liverpool is unsafe at night	32.9	66.1

Source: Author Survey

Note: - The survey was conducted twice during April of 1994 and April 1995.
- Respondents were given opportunity not to answer questions; the results are expressed as a percentage of those to give an opinion.

These statements were taken from the Visitors to Merseyside survey (MIS 1990) and thus can be compared to the responses of a more random selection of visitors to Merseyside. This source also records the results of a similar DVR (1985) survey. As with the purpose of visits to Liverpool (Chapter 4), these results are available for 1990 visits to Merseyside and visits more specifically to Liverpool.

As with the authors 1994/95 survey, the positive views of the region are usually retained or improved after the visit (1990 survey), the most notable example of this being the image of Liverpool as a rough, violent and depressing place; 16 percent of visitors to Merseyside agreed before their visit, compared to just four percent after. However, for the 1990 survey, there are a few anomalies. Compared to the before visit image, a smaller percentage of visitors considered that Merseyside offers good quality accommodation, that there was more to attract them than its Beatles connection and that there is so much to do that the respondent wishes they could stay longer.

There are some differences which can be observed between the different methodologies. For example, a surprisingly large number of student respondents from the 1994/95 survey consider Liverpool to be a rough, violent and depressing place, and there is comparatively more recognition of a variety of places of interest. A far higher percentage of 1994/95 respondents also consider Merseyside to be an unsuitable place for women to visit alone, similarly this group are more inclined to consider Liverpool as unsafe at night.

Although there is limited evidence for this assertion, it can be suggested that these discrepancies may be explained by the methodology. The MIS (1990) survey asked questions about the image of Liverpool before and after the visit to people whilst they were actually in Merseyside, often on holiday. It may, therefore, be possible to suggest that someone unfamiliar to the city and region may feel insecure about criticising the place to an interviewer who is comparably more knowledgeable (and possibly a citizen) of the area. These feelings may be further compounded as a result of the respondent being on holiday and having paid money to be there anyway. This is not to suggest that the 1994/95 survey has no problems in terms of the sample of respondents, but they expressed opinions in an anonymous atmosphere. Nevertheless the

temporal comparisons (Table 6.4) suggest that positive impressions were held by a much higher proportion of people before the 1990 and 1994/95 visits than was the case in 1985, and the positive impressions are still reinforced by the visit.

Table 6.4: The image of Merseyside held by those on summer day pleasure visits to Merseyside and Liverpool, 1985 and 1990

	Merseyside (1985)		Merseyside (1990)		Liverpool (1990)	
	Before	After	Before	After	Before	After
There are plenty of good shops and department stores offering plenty of variety	44	72	70	73	54	65
Liverpool is a rough, violent and depressing place	18	4	16	4	28	10
The main attraction of Merseyside is not Liverpool but the areas around it	18	26	28	31	14	12
There is a wide variety of places of interest such as museums and galleries	42	32	46	49	64	71
The areas offers the opportunity to attend a wide variety of theatrical, dance and orchestral events of high quality	14	12	16	6	25	24
Merseyside offers good quality accommodation	**	**	5	4	8	11
The only attraction of Merseyside is its association with the Beatles	**	**	7	9	17	18
There is so much to do I wish I could stay longer	26	22	34	32	53	45
I would only visit Liverpool because I have friends and relatives there	**	**	3	5	6	5
Merseyside is excellent for a family holiday with children	10	24	12	11	1	11
Liverpool is unsafe at night	**	**	7	4	8	9
The service you get in shops, restaurants etc. in Merseyside is helpful, friendly and makes you feel welcome	**	**	58	58	40	54
Merseyside is not a suitable place for a woman to visit alone	**	**	6	5	8	10
There is too much litter in the streets of Liverpool	**	**	31	27	33	33

Source: MIS (1990), p.42, Vol.I, p.29 and 31, Vol.III.
NOTE: Percentage agreeing to the statements
** Figures not available

The students (1994/95) provided additional qualitative information about their initial thoughts of Liverpool (both before and after their visit). The respondents were asked primarily "what is the first thing that you think of when someone mentions Liverpool to you?" (Appendix 14). Secondly a similar question (Table 6.5), asked more specifically about the image of Liverpool. These results offer a set of responses of which the majority are negative pre-visit, and more positive post-visit. This point is best exemplified in the other uncategorised positive aspects row (eight before visit compared to 40 after) and similarly the reduction in the negative aspects mentioned after visit. This point is further emphasised in the categories of "industrial" and football, which are non-existent in the after visit image of Liverpool, and the way in which images of clean, specific attractions, friendly people and the "better than expected" feelings are apparent after a few hours in the city. Finally, the redevelopment of the city is obvious to visitors, the number of respondents recording this image increasing from six to 16.

Table 6.5: The image of Liverpool, University College Stockton Students, April, 1994/95

	Before visit (n=90) (no. responses)	After visit (n=84) (no. responses)
Rundown	17	15
Big City	14	5
Dull/desolate	12	7
Dirty	9	3
Docks	9	9
Employment problems	7	2
Redevelopment	6	16
Industrial	5	-
Football	5	-
Lively	4	6
Brookside	3	1
Lots to do	3	1
Curly hair	3	-
Clean	-	7
Attractions	-	10
Better than expected	-	7
Friendly people	-	4
Positive aspects (<3)	8	40
Negative aspects (<3)	22	6
Other	22	5

These respondents, by way of a conclusion, were asked after their visit whether there was anything about Liverpool which had surprised them. These results are similarly hard to tabulate - there being a total of 48 broad topics mentioned. Table 6.6 recognises the common categories of response. In addition to recognizing 29 positive comments (such as the sun shining, personal opinion of the area and good shopping) and 13 negative comments (including young children swearing, rude tourists, and the accent), respondents were particularly surprised by cleanliness, architecture and particular tourist attractions. Less expected comments include surprise about the size of the River Mersey and the friendliness of the people.

Table 6.6: Surprising features of a visit to Liverpool. University College Stockton students, April 1994/95

n=54

	no. responses		no. responses
Cleanliness	18	Other positive	29
Architecture	13	Other negative	13
Tourism-related	10		
Regeneration	7		
Friendliness	5		
Size of the River Mersey	2		

A further barometer of the image of Liverpool and Merseyside is that recorded by a Merseyside Conference Bureau (1990) survey of conference delegates. These results record that 26 percent of delegates thought that Merseyside was much better than they had first expected; 40 percent of these delegates were on their first visit to Merseyside. Ten percent of first time visitors thought the area was worse than they had anticipated. Reported positive comments about the facilities in Liverpool include good infrastructure and friendly people. Negative comments recognize how efforts need to be put in to the provision of hard and soft landscaping and its maintenance, the need for better facilities for the disabled and poor night time facilities.

These results suggest that the image of Liverpool fits with the stereotype of a dull, depressing, rundown city with social and employment problems. However, a visit to the city appears to emphasize the positive features, the visitor returning with a view of Liverpool as a lively city with a number of interesting attractions. It is apparent that many of the image changes are expressed as a greater knowledge of what is available to see and do, and often do not refer to the environment being more pleasant than expected. It may also be a case of visitors justifying their expenditure to themselves.

The image held by outsiders is predominantly negative and, as many insiders would consider, outdated. One explanation for this is the media image, particularly the persistent use of Liverpool by TV and newspapers as an example of *anything bad.* For this reason the media image of the city was analyzed. Using The Times and Sunday Times, all articles relating to Liverpool and Merseyside (excluding sport) were analyzed for the years 1991-94. It is apparent that over this period the number of articles on Liverpool and Merseyside has reduced (57 in 1991; 12 in 1994), yet consistently they promote a negative view of the region, the exception being in 1992 when the negative and positive stories were equally balanced. Obviously, current affairs will determine these statistics. The murder of Jamie Bulger in Bootle occurred during 1992, yet this was accompanied by what appears to have been a deliberate positive campaign to retain a positive image of the city. Hence the Times included a major article as a focus on Merseyside (Times, July 13, 1992), promoting the tourism and regeneration of the area. Similarly in 1991, Liverpool was in the midst of strikes by refuse collectors and a campaign to encourage funding for the Liverpool Playhouse. Throughout this time period, important subject areas were crime (over half of all reports in 1990), strikes and protests (particularly in 1991 and 1993) and tourism and arts reports (the number of these have however steadily declined of the period) (Table 6.7).

Table 6.7: A media image of Liverpool

	1991	1992	1993	1994
Total number	57	27	21	12
Total positive	11	11	21	4
Total negative	40	11	3	8
Politics	19	4	1	-
Crime	5	3	7	7
Tourism/art	9	7	3	2
Environment related	1	-	1	1
Education related	2	-	1	2
Historical	-	-	1	-
Strikes/protests	10	-	4	-
Social/housing	3	2	1	-
Image	1	-	1	-
Regeneration	2	4	-	-

Source: The Times/Sunday Times 1991-91 (excluding sport)

A further examination of some of these newspaper articles highlights more of the stereotypical image of Liverpool. The opinion of these images is well expressed in a letter to the Sunday Times (23 June, 1991).

> "To show a picture of a single child and describe it as 'This England; The face of Liverpool, 1991' is as misleading as to describe a picture of someone sleeping rough under the arches in Waterloo as 'The face of London'. Liverpool has many faces; I have just returned from a four mile bike ride from our house along the riverside promenade and then through parks resplendent with rhododendrons. Last night we went to the Playhouse theatre to see a production which has just moved up from the the West End, to say nothing of the Tate Gallery, Walker Art Gallery, Everyman Theatre, the Liverpool Philharmonic and so on.
>
> We moved to Liverpool a year and a half ago, and are greatly enjoying the enhanced quality of life after Purley in the plush part of south east London. However, we are growing tired, not of Liverpool politics, but of

the constant battering that the city seems to get from the press" (Chris Peck, Liverpool).

Often the reports are of real events and occurrences, for example the recognition of Merseyside as "among Europe's poorest regions" (The Times, 25 February, 1993) and an item during the refuse collectors' strike of 1991 reporting that "dustbins remain unemptied, streets are unswept and libraries have been closed because of industrial action" (The Times, 19 May, 1991). Nevertheless reporters will play on the known image of the city in order to enhance the quality of their reporting. Indeed, what should have been a positive article (9 November, 1993) to discuss the higher education opportunities in Liverpool stresses how "men in suits have promised them (*the people of Liverpool*) the earth and then caught the evening train back to Euston".

The negative image of the city is further enhanced when the people of Liverpool stress it, this then being reported by the media. To take for example a report entitled "churches helping to unite a city of paradoxes" (The Times, 27 December, 1991);

> "a plea for greater national understanding for the people of Liverpool was made yesterday ....many of the city's poor suffered a poverty-stricken Christmas and need compassion rather than criticism which the city so often attracts ....there is no doubt that there are some deep seated problems in this city. Work opportunities are few. Levels of unemployment are quite simply unacceptable in the latter years of the twentieth century."

The image held by "insiders"

The tourist industry

Managers of tourist related facilities were not specifically asked about their personal image of Liverpool, as it was considered that generally their business was too tied to the success of positive marketing of the city for unbiased results. However, any comments about the image of the city were recorded and will be reported in this section.

Amongst hoteliers it was generally found that the city still appears to have a poor image, Australian and American tourists being warned that it is unsafe to go out at night, or even that it is unsafe to visit at all. Some hoteliers gave examples which supported this image; the manager of hotel L talked of reported incidents of theft from visitors and threats to them. Hotel A has also had a crime problem in the hotel (notably the theft of cameras), especially during the summer season. The manager of hotel K said that many people arrive in the city with a bad impression, but notes that a stay in Liverpool will often alter this. The manager at hotel B mentioned that the Toxteth riots have been forgotten, recognizing that "the hotel is improving because the city is improving". The manager of hotel B made, perhaps, the most positive comment, stating the opinion that "a real renaissance is happening in Liverpool, so much so, it could compete with Manchester".

At attraction 1 it was considered that image may act as a hindrance to tourism development, noting that "until the image of Liverpool changes, business won't come to Liverpool, things like the James Bulger case blight the image of the city". The same manager also recognised that the image "is probably due to the culture of the area, people find it easier to knock than they do to praise....surprisingly, locals have pride in the Albert Dock, they don't see it as a Thatcherite policy". Similarly, the manager of Cinema 1 talked of the image which outsiders may have of Liverpool. "I can't think why people want to visit

Liverpool. Although the people have a reputation of friendliness, they can also be devious and cunning, often they live up to that reputation, they can be horrible people... There is however an element of bad in every society."

The Public Relations Officer of Liverpool Football Club (LFC) is conscious that "the detrimental media sees Liverpool as dirty, dismal, thieves and vagabonds" (interview 4 October, 1994), adding that "despite the success of LFC, Liverpool as a place has continued on a downwards spiral towards a poor image ....I can't understand why the city has not seriously attempted to rebuild itself". Robin Tudor of Liverpool Airport noted, "Liverpool has got a terrible image; one of strikes, Derek Hatton, riots and unemployment", recognising how "we need to educate to the benefit of the region, and to upgrade the image of Liverpool ....the bad press sticks".

Quotations such as these illustrate that the perceived image focuses on unemployment, dirt and deprivation. Crime also features strongly in the image, and this is often further enhanced by tour operators. Colin York of Liverpool City Council recognises that "Chester's overspill come to Liverpool. Coach tour operators tell them not to leave their rooms because of safety and security! - we need to change this" (interview, 2 February, 1994).

Non-tourist industry

During interviews with policy makers (see Chapter 2), the local business community (see Section 6.4) and other city institutions, a number of interviewees commented on their own image of Liverpool and that perceived by outsiders.

Yet again crime features strongly, for example, the City Centre Partnership, in discussing the need to install a closed circuit television scheme, noted "crime is a symptom of every city, there is a perception that Liverpool is unsafe, having

the cameras will create a 'feel good factor'". John Wilday at MDC similarly reports, "the image of Liverpool is unfortunate. The Jamie Bulger incident is symptomatic of the problems of the area". Another theme is the character of the people in the Merseyside area. Mersey Partnership suggest that "there is a lack of self-confidence within the people of Merseyside. Part of the sense of humour of the area is based around knocking themselves. We need to encourage ambassadors who will look after the city". However, the same respondent said "Liverpool used to be used as a peg for media and broadcaster to hang stories on; they always came to this part of the world".

All bar one of the 28 respondents to the 1992 business survey commented on the image of Liverpool. When asked about outside perceptions, all respondents remarked about its poor image, commonly mentioning words such as politicized, militancy, run-down, violent, pathetic, isolationist, bolshy and strike prone. One respondent noted , "the image is not good although there may be an upturn. But, the press write their story on the train on the way up; they come to see ghettos like in Chicago. People who come to visit always look for the bad things that they have heard about". As with this comment, a number of responses (10), in recognising a poor image reinforced their statement noting "the view is confused, some see it as strike prone and bolshy, others see it as lively and positive. No one view exists". Additionally, four respondents blame the press and media for this poor image.

The actual image held by "the business community" appears to be far more positive. For example, one respondent noted

> "the city is dogged by its reputation which is not borne out in reality which is much better, the reputation is deeply rooted. The biggest problem is its image and that it is on the wrong side of the country".

The frequently mentioned positive features include the friendliness and sense of humour of Liverpool people, the rich architecture, and the liveliness of the

place. One manager, who has recently moved to the city, said

> "I'm fond of it, the city has a good heart and lots of soul. Its a friendly city of a good size - you meet people you know, its well bonded; people who live here have a different impression to those who don't - this increases bonding. These people are good folk".

Although respondents recognised the merits of living and working in Liverpool, many were keen to offer suggestions for improvement. One respondent mentioned the excellent cultural facilities but noted, "there is difficulty in finding high quality eating places. May be this is because Liverpool people are perceived as not having much money". Another problem appears to be access, one complaint being that all the motorways stop miles from the centre of the city.

Summary

It is apparent that there are two images of Liverpool, one held by those who are unfamiliar with the city and that held by people who live, work or frequent it. "Outsiders" tend to see it as a violent, dull and depressing city, whereas "insiders" stress the architecture, friendliness of the people and the way of life. Local people frequently blame the media for the cities bad reputation amongst "outsiders". There are, however, events occurring in Liverpool which reinforce the bad image, for example, the Jamie Bulger case and the strike by refuse collectors.

In contrast to all this, Liverpool City Challenge and MDC recognize issues associated with regeneration in the area; "regeneration is happening, there is now more business in the area. The fact that English Heritage have invested £1.5 million in Canning shows that it is undoubtedly happening ....I would like to see another city with so many contracts on the go" (Liverpool City Challenge, 12 September, 1994). Similarly MDC are conscious that their regeneration of

the Pier Head area of the city should change the perception of the area, noting "the Pier Head area is the international centre of Liverpool - its dereliction doesn't create confidence in the city".

The Liverpool image problem seems to be the dichotomy which exists. It appears crucial that for the image held by "outsiders" to change there needs to be some transfer of the knowledge and understanding which "insiders" have of the situation. The media perhaps need to be targeted in the hope that Liverpool is no longer used as a peg to hang bad stories, but as an example of change and improvement.

6.3 Image change

The change perceived by local business

Any attempt to change the image of Liverpool began in 1984 when 125 acres of land was transformed into the International Garden Festival site. It was in this year that Liverpool first hosted the Tall Ships Race and the Albert Dock complex opened. To most this was the first outward sign that Liverpool was attempting a renaissance. The international events, worthy of marketing in their own right, made Liverpool a potential holiday or short-break destination. Since 1984 these have been accompanied by a number of environmental improvements (see Section 6.5), and other events (e.g. Battle of the Atlantic celebrations) and a number of new attractions such as the Tate Gallery, Beatles World, Animations World (now closed) and Western Approaches opened focused around the Albert Dock. The name of Liverpool is further marketed each weekday morning with the daily This Morning television programme.

The time limitations for this piece of research have made it impossible for this author to measure the changing image of Liverpool as it happened. The business survey did however ask respondents if they had seen any change in the image of Liverpool since they had moved to their present premises (the

average length of time was five years).

The opinion amongst business managers was mixed. Of those whose answers could be categorised as yes or no, eleven respondents considered that they had seen a change in image and nine considered that there had been no change. The undecided answers are similar to one which said "the image of Liverpool is like ebb and flow, but its still a problem". One manager also stated that the "image hit rock bottom in 1993 with the Jamie Bulger case - it would happen nowhere else but Liverpool".

It was widely considered that any change was due to the redevelopment which has occurred. One respondent noted that "public image has improved. The Albert Dock has increased the appeal for outsiders; more people come to the city now". Another respondent noted, "its getting a more positive image the good is more widely appreciated. Five years ago it was only bad publicity". However, in recognising that Liverpool's image is not as acute one respondent commented that "its like taking an aspirin for a toothache - its still a joke". Only one respondent mentioned that tourism had had any impact in changing Liverpool's image, mentioning how "the Tall Ships, Battle of the Atlantic and the Beatles have put Liverpool back on the map". The perceived change in image appears to be minimal, and one must respect the business community view as this is the city in which they have invested.

Liverpool has however never marketed an image for itself. Although some refer to it as '*Beatle City*' there are no signs welcoming a visitor to a branded region such as the '*Land of the Prince Bishops*' in Durham's case. Similarly, there is no slogan to market the city as in Glasgow (Glasgow's miles better) and Bradford (Bradford's bouncing back). A number of members of the Liverpool community who were interviewed for this research project did however recognise the need for such a campaign. There are a couple of individual efforts

to promote Liverpool which have previously been discussed (Merseyside Historic Waterfront Consortium and "Live it up in Liverpool"), but these are marketing campaigns to promote a product rather than the city.

"Merseyside a pool of talent"

There is one group in Liverpool that consider that they can successfully re-image the city and has the finances necessary. The Mersey Partnership, created in 1992 and made up of public and private sector interests, are behind a scheme launched on June 14, 1995. The local Daily Post newspaper launched the campaign with the headline "We'll win a 'pool of talent" and similar articles appeared in The Times (June 14, 1995) and Financial Times (24/25 June 1995). The campaign uses the slogan "Merseyside a 'pool of talent" and seeks to reverse the worst of Merseyside stereotypes by using them as promotional devices.

As the "opinion" column of the Daily Post (14 June, 1995) notes

> "poor labour relations are an old milestone, so soccer stars Ian Rush and Robbie Fowler are a key image and 'Liverpool is down to a handful of strikers'. Harry Enfield's scousers are an extreme parody of accent and social misfortune. So one of their crew is depicted black wig and all: 'to make a Japanese worker even more productive, turn him into a scouser'"(The two posters are illustrated in Figures 6.1 and 6.2).

Figure 6.1: Mersey Partnership - Merseyside Marketing Material

"Liverpool is down to a handful of strikers"



Liverpool is down to a handful of strikers.

Time was, Liverpool was just as famous for its left - wingers as its centre forwards. But times do change.

Between 1992 and 1993, for example, Merseyside experienced a 57% decrease in working days lost to industrial action compared to a 23% increase nationally.

When you combine that sort of performance with re-training and new working practices, it all adds up to one thing.

No more own goals.

MERSEYSIDE
A'pool of talent

For more information on investment opportunities on Merseyside call 0800 22 0151

Figure 6.2: Mersey Partnership - Merseyside Marketing Material

"To make a Japanese worker even more productive, turn him into a Scouser"



To make a Japanese worker even more productive, turn him into a Scouser.

Merseyside's car industry has adopted proven Japanese production methods and working practices.

To these we've added Merseyside's greatest natural resource; the traditional enthusiasm, famous humour and can-do attitude of its people.

That's why Merseyside workers are 12% more productive than the national average.

MERSEYSIDE
A'pool of talent

For more information on investment opportunities on Merseyside call 0800 22 0151

At the launch of the campaign Chris Gibaud, Chief Executive of the Mersey Partnership, spoke about the campaign to the press. He assured the people of Liverpool that "we must not confront the darker images that linger. By doing so in a challenging way we will create an impact and demand attention. The campaign must reverse the way the world sees our people" (Daily Post, 14 June, 1995). To the Radio Four PM programme presenter Kevin Bouquet he acknowledged that

> "every city in the world that an investor would consider has got a crime problem, every city, and every investor knows that .... But it hasn't stopped London being attractive to investors, it hasn't stopped Manchester in recent years being attractive, it isn't going to stop us".

Depite the media who have reported the campaign recognizing that "on the list of the world's toughest jobs, promoting Liverpool ranks high" (Financial Times, 24/25 June, 1995. p.43), it is too early to suggest how successful this campaign may be; but the Daily Post asked a number of people to give their initial opinions. The newspaper (14 June, 1995) reports that while the sentiments of the posters met with approval, some people questioned the use of what they saw as outdated images of the region. One local business man reportedly said, "we get ribbed every time we work outside the city ....every time someone shakes our hand, someone will say 'count your fingers'". He considered that "the scouser stereotype is strong enough as it is without posters adding to it". Other members of the business community are reported to be more positive about the campaign. A commercial lawyer noted,

> "the campaign has an image with which we should all be able to identify at whatever level .... for outsiders the presentation of the achievements of Merseyside business' - then and now".

The campaign was devised by Finch, a local advertising agency; and follows some of the precedents previosly mentioned. The man who coined the phrase

"Glasgow's miles better", John Smithers, admits that the influence for this slogan was "I love New York" (Daily Post, 14 June, 1995). Although the simplicity of slogans like this is successful, there is a concern that a general "feel good" factor for Merseyside would have people responding with "no its not". The image of Merseyside seen through television programmes such as Brookside is too strong for the campaign to show only the best parts of the region. Similarly, a campaign which stressed the relatively cheap price of Merseyside would not give the intended image and perhaps, as Duncan Frazer a Finch director reportedly recognised, "we don't want to say, 'come to Liverpool for £2 a square foot' because people are going to say 'is it that much'" (reported in the Financial Times 24/25 June, 1995, p.45).

This is an approach which is different from that of Glasgow and Bradford. The slogan "Merseyside a 'pool of talent", as the Glasgow marketing campaign author notes, "does not roll of the tongue". Yet, the Financial Times (1995) does consider that the phrase "fits". "Merseyside when forced to ask where its competitive advantage lay, came up with the answer. Scousers are considered talented" (p.43).

This campaign also requires support from the people of Merseyside. On a recent visit to Glasgow, this author was made aware of the feeling of belonging which local residents have. The same thing needs to happen in Liverpool, but there is concern that in a city which uses its own misfortune as a source of humour, this may not be so easy. As the Financial Times (24/25 June, 1995, p.43) recognises "it is no use persuading chief executives to check out Liverpool if the first scouser they meet on the train from London tells them the place is a dump".

Unfortunately the campaign is, even from the first day, facing stiff competition and difficulty. For months immediately prior to the launch there were frequent

media reports of open gang warfare in Toxteth and Granby and of armed police officers on routine patrol. Additionally Glasgow have attempted something of a relaunch. The city has been successful in beating Liverpool and Edinburgh to the title of City of Architecture and Design, 1999. Alongside the prestige which such a title will provide, the city is relying again on the slogan "Glasgow's miles better" and a new campaign by Glasgow City Council which uses the slogan "*Glasgow belongs to people with imagination*" (see Figure 6.3). This campaign is along a similar theme to the Liverpool one and as such may compete directly with it.

Running alongside the poster campaign there is a leaflet which lists "Fifty great Merseyside facts". The leaflet openly admits that "the good news campaign is intended to attract additional investment to the area and create jobs for local people". The 50 facts all demonstrate that there can be successful business in Liverpool and that there has been investment in the region by national and international companies such as Kodak and News International. Thus the Liverpool campaign is aimed at attracting inward investment. The "Bradford's bouncing back" and "Glasgow's miles better" campaigns are far more suited to attracting a more general interest in the city, whether that be for leisure and recreation, business or eduction. "Merseyside a 'pool of talent'" is more directed towards encouraging prospective employers to consider a Merseyside location with a Merseyside workforce.

Figure 6.3: Glasgow City Council Marketing

"Glasgow belongs to People with Imagination"



Secure in its history, inspired for the future. Glasgow creates and reshapes itself.

GLASGOW

GLASGOW BELONGS TO PEOPLE WITH IMAGINATION

6.4: Tourism a mechanism for change

This chapter so far suggests that although aspects of the tourist sector feature in the "outsider's" image of the city, they are no more important than employment issues, worker reputations and environmental condition. This therefore questions the hypothesis that tourism can be a mechanism to attract further investment into the city. Now one should compare changed image (partly through tourism) with tourism's possible effects on income and investment in the city.

To examine the type of investment attracted and created via the tourist industry, the research methodology took three approaches. The first attempted an analysis of main suppliers to the tourist industry, and more importantly where they were based. The second and third approaches looked at business newly attracted to the case study area and the region; approach two was an examination of VAT data and approach three comprised an extensive survey of details of and reasons for location in key new developments in the city.

Suppliers to the tourist industry

In direct interviews with members of the tourist industry it was often difficult to gain information about suppliers. These problems arose either because the informer did not know the information or because the range of suppliers was too great for them all to be recalled. Nevertheless the geographical location of suppliers was requested by the interviewer. By undertaking this survey it was anticipated that some conclusions about the reinvestment of tourist money into the local economy could be made. The multiplier effect suggests that if tourist business uses local suppliers this will create income and employment for other local business, and so the chain continues. The more successful tourist industry (in income generating and retaining terms) is one in which the majority of tourist expenditure is retained within the local economy. Using suppliers from elsewhere in the country or world represents a leakage of

income.

At the four attractions questioned on the issue of suppliers only two mentioned the use of local suppliers. "If goods can be purchased locally - they are; we are involved in City Challenges' suppliers showcase'" (1). At 3 it was noted, "all souvenirs come from A&A marketing, a locally based company, and the logo for the museum is designed locally. Soon, however, we will also have airfix models and posters from the Imperial War Museum". At hotels most interviewees unfortunately were not in a position to comment on suppliers to the hotel. Those who did comment mentioned local branches of Makro and Bookers wholesalers. Another mentioned that the hotel uses company designated suppliers which supply the whole chain. At hotel I, all suppliers were local, the only exceptions being in Manchester (BookerFinch) and Birmingham (Pullman).

Similarly, it seems that most theatres and cinemas are reluctant to sell products which originate from the local area, arguing that people want to see recognizable household names such as Mars and Coca-Cola. This may also arise because some theatres and cinemas are part of national and internationally based companies which specify suppliers (two establishments). As the manager of theatre A notes "the buying powers of Apollo (*the theatre owners*) is so high that most supplies are bought cheaply; people expect to pay more at theatres than at the supermarket, so the mark-up and hence profits are high". Cinema 3 reported their suppliers to be Hollywood Express, a Preston based company, which supplies everything including toilet rolls and cleaning products to all the cinemas in the chain.

All shop managers completing the questionnaire at the Albert Dock, Bluecoat Chambers or Cavern Walks attempted questions on the nature and location of suppliers. Six of the respondents said that they didn't know their main suppliers and just five considered their suppliers to be mainly local or "local if

possible" (local referring to Liverpool and Merseyside based companies). Of these five, two, a barrow owner at the Albert Dock and a clothes shop at Cavern Walks, actually made the products themselves. These people did however not comment as to where they got their initial supplies from. Of the remaining respondents nine mentioned overseas suppliers, including clothes from Germany, France and Italy and souvenirs imported (by the manager's own importing company) from the Far East, Africa and India. Other predictable locations for suppliers include Manchester (three respondents), London (three respondents) and Scotland.

The pattern of suppliers used by eating and drinking facilities is again similar. Perhaps the greatest influence here is that of breweries; Whitbread (two respondents), Vaux and Boddingtons. Other establishments consider that they always use the cheapest suppliers irrespective of location, one saying that this means a Manchester based company is used. For those establishments selling food, two mentioned frozen food suppliers based in Oswestry, Shropshire and Runcorn, Cheshire. Only one restaurant (McDonalds) was part of a large chain; the supplier here is Golden West (a subsidiary of McDonalds). In total seven of the eating and drinking facilities used only local suppliers and a further two considered most suppliers to be locally based companies.

The results presented here thus suggest that the tourist industry in Liverpool is not particularly concerned with retaining visitor spend in the local economy, this being most apparent with national companies where suppliers are assigned by a head office based elsewhere. Retailers are often more concerned about the cost and/or quality of the product rather than the geographical location of suppliers. These results are however unsurprising. In our postmodern world we are often too concerned about branded products which signify quality and security with our everyday lives. The infrastructure and travel times are such that delivering products in bulk from almost any origin

in the country may be cheaper that buying more expensively in the home area. In the example of the tourist industry, local suppliers are more likely to be used if the shops or restaurants are selling a product by which the region is identified, examples being those such as Nottingham Lace, Scottish Haggis or Cornish clotted cream. In Liverpool, there is no such product.

Registrations for VAT

Using Central Statistical Office records of registrations for VAT, it is possible to ascertain the extent to which new companies have established in the region. By also examining the change in stock and the number of deregistration it is possible to make some judgement about the stability of business investment in the area. These figures are analysed via NOMIS (National Online Manpower Information System) for the period 1989-91, for the Liverpool District and Merseyside former county. It is not possible to acquire these details at postcode level for the specific case study area. Examining the data for both Liverpool and Merseyside as a whole will perhaps give some indication of the wider nature of business investment. The data exclude firms not registered for VAT, either because they trade mainly in exempt or zero-rated goods and services, or because they had a turnover below the registration threshold (£36,000 as of March 1992). Therefore registrations and deregistrations do not necessarily correspond to the birth and death of firms. For example, a firm may have been trading for some time before it reached the threshold.

In the period 1989-1991 the number of registrations for VAT in Liverpool have declined from 2,700 in 1989 to 2,240 in 1991, yet during this time the actual stock of business registered for VAT has risen from 17,010 in 1989 to 17,230 in 1991. Thus in 1990 there were more new registrations for VAT than in 1989. As in Table 6.8 illustrates the net change in registration for each year has altered from increases in 1989 and 1990 to a loss of 220 registrations during 1991.

Table 6.8: Liverpool VAT data 1989-1991

	1989	1990	1991
Registrations	2700	2730	2240
Deregistrations	2330	2300	2440
VAT stock	17010	17430	17230
Net change	+360	+430	-220

Source: Central Statistical Office (via NOMIS)
Note: All information is rounded to the nearest 10

The Liverpool situation is mirrored in the Merseyside results. Again, during the period 1989-91 the number of registrations for VAT declined from 8,100 in 1989 to 7,020 in 1991, yet the VAT stock rose from 48,760 in 1989 to 50,700 in 1991. Similarly, once again net change was positive during 1989 and 1990 but represented a loss in the total number of establishments in 1991 (-120) (see Table 6.9). Construction, retail and catering are again highly represented amongst new registrations in each of the three years, yet finance and related industries are far less important in the wider Merseyside sphere (suggesting an urban core concentration). Deregistrations are also higher in these three sectors, but for the retail sector the number has reduced significantly over the period (see Appendix 15).

Table 6.9: Merseyside VAT data 1989-91

	1989	1990	1991
Registrations	8100	8330	6900
Deregistrations	6170	6270	7020
VAT stock	48760	50810	50700
Net change	+1920	+2060	-120

Source: Central Statistical Office (via NOMIS)

Significant net losses in VAT registrations only occur in 1991 and are apparent for all industries with the exception of wholesale, finance and related industries and other services. The loss is particularly significant in the production, construction and motor trade industries, where new registrations are minimal. Thus the catering, construction and retail industries seem to face some insecurity in the Merseyside economy, whereas finance and related and wholesalers appear to be retaining their position. The situation is further influenced by national recession, which hit the Merseyside economy slightly later than in England as a whole.

It is therefore possible, using the limited VAT data available, to make a number of assertions about the types of industries investing in the Merseyside region and to suggest whether they are tourism induced. The results presented here suggest that catering (of which part is included in the definition of tourism-related industries) is one of the least secure industries, when compared to those such as finance and related and other services. However, until 1991 industrial activity generally was not in decline, net change was positive and new registrations outweighed deregistrations for VAT.

For the purpose of this thesis the information available is limited. The Central Statistical Office data gives no indication of the size of firms. One registration (or deregistration) may represent a handful or hundreds of jobs. The data provides no information relating to how much the firms intend to or have invested in the local economy or why the firms are located in Liverpool initially. In order to answer some of these queries a survey of businesses in some of the redeveloped areas of the case study region was conducted.

Liverpool business survey

The author's Liverpool business survey of 1994 develops a previous postal survey of April/May 1992. The aims of the survey are numerous - indeed some

aspects, such as the image of Liverpool and the role of special events have already been referred to previously in the thesis. The main aim however was to ascertain more information about the nature of business investment in key, newly-redeveloped areas of Liverpool. As the 1994 questionnaire design (see Appendix 16) suggests, the survey had five aims: to examine the activity of the company, reasons for and length of time at the location, the nature of business investment, employment and the impact of tourism (disguised under the 'image of Liverpool'). It was considered crucial that the interviewees, prior to the questionnaire, were unaware of the research aim: to examine the role of tourism. The research was introduced as a general survey of business location and investment in Liverpool, with a hidden agenda to examine the role of tourism in business location.

A total of 50 firms were selected by a stratified random sample from the Liverpool Directory (1992). These firms were located at the Albert Dock, Bluecoat Chambers and Cavern Walks (because of their tourism connection), Brunswick Business Park and Mercury Court. All of these five areas have been recently redeveloped to attract new businesses. The apparent response rate was generally poor, a number of firms having moved away from the address since the Directory (1992) was published. As such, for the Brunswick Business Park sample, five more firms were selected. In total 29 interviews were conducted; nine at the Albert Dock, three at Bluecoat Chambers, five at Cavern Walks, four at Brunswick Business Park and five at Mercury Court. In addition two interviews were conducted at firms which have now moved away from one of these areas. The 1992 survey, devised for another research project, concentrated primarily upon business location. However, these results will be used as a comparison where appropriate: this survey was posted to tenants at the Albert Dock and Brunswick Business Park.

The activity of the company

This section of the questionnaire attempts to examine the type of companies attracted to these areas of Liverpool, and builds directly upon the VAT data already discussed. The results suggest that service sectors such as architects, marketing and quantity surveyors are dominant with the financial sector in second place (six respondents). These results are thus comparable with the VAT data for Liverpool. As Table 6.10 illustrates, particular industries favour different locations. In this instance, financial industries are more noticeable at Mercury Court and Albert Dock, and "arts-related" industries are attracted to the Bluecoat Chambers.

Table 6.10: Company activity, random sample, 1994 (n=28)

	Albert	Cavern	Bluecoat	Brunswick	Mercury	Other	Total
Services	3	3	3	2	1	-	12
Financial	3	-	-	-	3	-	6
Manufacturing	1	-	-	1	-	1	3
Education & Training	-	2	-	1	-	-	3
Retail	1	-	-	-	-	1	2
Technology	-	-	-	-	-	-	-
Other	1	-	-	-	1	-	2
Total	9	5	3	4	5	2	28

Source: Author Survey (1994)

Some attempt was similarly made to establish the ownership of business. Eleven of the 29 businesses visited are branches of outside firms of which three have head quarters in London and three in Manchester. Nine of the establishments were independent companies with other sites listed as "all over the country". None of the respondents were subsidiaries. As with the activities of the company, certain business areas have an apparent clustering of business types. For example, at Mercury Court all five respondents were

branches of outside firms, in contrast to Bluecoat Chambers where all three respondents were independent companies. At Brunswick Business Park, Albert Dock and Cavern Walks the mix was more normally distributed.

For those establishments which are branches of outside firms, the question was asked as to why the organisation chose to establish a Liverpool office. The answers range from one response which noted that "this is our only office outside London, it was established in 1904 when Liverpool was the obvious place" to one shipping business which established in Liverpool because of the docks and shipping. Two architectural companies based an office in Liverpool due to the availability of work. One of these were designers for the Albert Dock redevelopment, stating "being located here is like being in a show room" and another was a company which had been involved in work for the city council and considered that they needed a Liverpool location to get more. These results show definite points of comparison with a similar survey in Edinburgh (Townsend and Macdonald, 1992).

The reasons for those establishments which were not branches of outside firms locating in Liverpool are different. Generally, this was a result of Liverpool connections. Nine of the respondents were completely new starts in Liverpool and replies commonly stated, "I live locally and this is a central location" or "it was a new start, both the partners are from Liverpool". One respondent noted that a Liverpool location was chosen because all the partners had trained at Liverpool University. Only two respondents located in Liverpool as a spin-off from an existing business.

Business location

The second section of the questionnaire considers business location. The relevant thesis aim was to question whether new business was directly or indirectly attracted to Liverpool as a result of the tourist industry. To achieve

this the respondent was asked why they chose the particular building and why they chose a Liverpool location, more particularly any advantages or disadvantages which the location had. Businesses were also asked about when they had moved to their present location, to investigate whether the timing could be linked with any key tourism initiatives. In addition, respondents were asked, if relevant, where they had previously been located. This question was asked in the anticipation that, if the respondent was not an outside company attracted to the city, the company which moved to their old premises may have been. Finally, interviewees were asked if they had recently considered moving away from their present location, and if so where and why they would move. These questions were included in the survey as a means of testing whether the tourist industry, which in many cases occurs on the same premises, had a negative impact on business or whether a Liverpool location has been successful.

At the time of the survey, the average length of time that respondents had been at their present address was five years, the longest ten years and the shortest just two weeks. This compares to the 1992 survey where the average time was three years and the longest nine. During the 1992 survey it was found that almost a third of all companies were newly established at their present address (most commonly from 1988 to 1990), this compares to around 20 percent in 1994. The more recent survey found that all companies which had relocated had previously been in Liverpool central business district. This compares well to the 1992 survey in which, although most respondents had been located in Liverpool, one had moved from London, another from Lancashire and a third from Southport. Generally, the established Liverpool companies attracted to the redeveloped areas surveyed are well established, having taken 20 years or more lease at their previous offices.

Of the 16 respondents to have moved from a previous Liverpool location, four

did not know who is now in the offices and over half of these premises (nine) had no tenant at the time of interview. The three tenants of previous offices are Ernst Young Accountants, a second hand car dealer and the tax office. This result therefore does not suggest a major influx of new business to replace that moving to newly redeveloped areas, but does suggest vigourous concentration on Brunswick Business Park, the Albert Dock and Mercury Court.

As a further analysis of the location issue, all respondents were asked to chose which of three statements best fitted the reason for a Liverpool location; 16 of those who felt that they could answer the question said that they had selected Liverpool and then looked for a suitable location within the city. Of the remaining, seven were already located in Liverpool and were looking for new accommodation and just two were looking for a suitable location and Liverpool fulfilled their requirements.

All respondents were asked to comment on why the particular building was chosen. Of the 27 to answer the question, just one interviewee mentioned the direct impact of tourism. This company makes and sells designs for t-shirts and sweatshirts, many of which are sold via the Albert Dock shop, although others are sold mail order and through bulk purchase. A number of respondents did however recognise that they located because the address was known and gave the company prestige (six respondents); of these most (five) are located at the Albert Dock. One manager here stated "we were a new company and needed the credibility and image which the location provided", and another company which advertises on radio thought that everyone in Merseyside knew the Albert Dock. Having a known address was similarly important for a computer training firm at Cavern Walks, where clients find it necessary to visit the offices.

For the remaining respondents other locational features were more important

attractors. At Cavern Walks business was attracted by the open floor space, city centre location and, in one case, the landlord was that of the tenant's previous office. At Mercury Court, managers were attracted by the size of space available, location (near to the city centre and also near to the tunnels, yet away from traffic), the building's capability to handle modern technology and the availability of car parking. Car parking was also an important consideration at Brunswick Business Park and the Albert Dock and a major source of complaints amongst tenants at Cavern Walks and Bluecoat Chambers.

Tourism as such did not figure among difficulties reported in the areas surveyed. At Mercury Court, the Albert Dock and Brunswick Business Park, distance from shops caused considerable problems, and at Mercury Court and Cavern Walks the lack of air conditioning was problematic. The main disadvantages at the Albert Dock were however the high cost, lack of space for expansion, the limited amount of passing trade and the lack of functional facilities for permanent members of staff, for example chemists, cash machines and the equivalent of a small village shop selling milk and coffee. Managers here were particularly concerned as the dock complex was marketed and intended as a mixed development of shopping, tourist attractions, business and accommodation. The survey results thus suggest that many office suite tenants consider their needs to be treated as secondary to those of the tourists. Similarly, the locational cost included a service charge which is considered high and often of more benefit to the tourist-related industries.

However, a number of respondents did consider the tourism initiatives to have had some positive outcomes. At Cavern Walks one interviewee noted that the staff like the association with the Beatles and another recognised how the close proximity of the Moat House Hotel and railway station was advantageous for business visitors to Liverpool. Nevertheless, at the Albert Dock the prestige of the complex originates in it being a tourist destination and its marketing in

both tourist literature and via the This Morning television programme.

When questioned on a wider scale about the reason for locating in Liverpool, the results reflect the ownership patterns already discussed. Generally, Liverpool was chosen because the directors (in the case of independent companies) were from the area, or because of the status of Liverpool as a major city. One may thus suggest that tourism initiatives are not an influence in city location patterns. Only one of the answers considered the redevelopment of the city centre as a factor in location; that of the architect directly involved in the redevelopment of the Albert Dock. Interestingly, another respondent involved in the arts considered that

> "in the cultural sector we need to fight the idea that we need to be in London. The company is committed to the city, its culture and identity. Liverpool is a regional city, as important as London. London shouldn't be the be all and end all".

Unfortunately for the hypothesis, this respondent and her partner are both from Liverpool.

The majority of respondents saw no disadvantages to being located in Liverpool as opposed to any other major city, an unsurprising result considering the high number of respondents who are Liverpool people. The remainder often complained of the wider image of Liverpool and the branch offices commonly complained of problems experienced in persuading staff to move to the Liverpool office. One respondent noted that "there is a hierarchy in business - where you are is what you are. Twenty or thirty years ago Liverpool and Manchester were equal". The key finding however was that none of these answers included references to tourism.

In comparison, only six of 28 respondents saw no specific advantage to a Liverpool location. Yet the quality of life in the region was considered by many

to be very important, one respondent reinforcing this by stressing the quality of the environment, the range of cultural facilities and the personality of the people. Another respondent was conscious of the high standard of cheap housing the infrastructure and the comparatively compact city centre. As mentioned earlier, quality of life is considered an important factor in attracting inward investment. It may be that the existing tourist industry and redevelopments focused around them have improved the quality of life or that the quality of life was high anyway.

For three of the companies interviewed a Liverpool location was advantageous due to the availability and access to Government grants. All of these work within the building industry and are thus directly involved with redevelopments. One respondent recognised "the city gets a lot of grant aid which gives us a diet of work, for example we do a lot of work for City Challenge and MDC" and another considered how the Objective One status for the city should be beneficial to business.

Table 6.11: Factors influencing business location (three chosen ranked 1-3, one being most important)

Locational factors	Number of firms to select	Average score
Attractive surroundings *	11	2.1
Provision of car parking	9	1.9
Access to potential markets	6	1.8
Financial incentives	5	1.6
As a status symbol *	4	1.8
Access to existing markets	4	1.5
Faith in the success of Liverpool as a business centre	3	3.0
Access to a good transport network	2	1.5
An available labour force	1	3.0
Access to eating and drinking facilities *	1	3.0
Access to leisure facilities *	-	-
Access to raw materials	-	-

Source: Author survey (Brunswick Business Park, Albert Dock, Cavern Walks, Bluecoat Chambers, Mercury Court - Liverpool)
* = related to direct or indirect results of tourism initiatives

None of these locational factors suggest that the tourist industry has had any direct influence on business location. To ensure that interviewees considered a range of influences, all respondents were asked to choose three out of twelve statements (in order of importance) which suggest motives for location. The results presented in Table 6.11 found that access to good transport networks, existing markets and financial incentives, when considered, were most important. The most frequent answers however concerned attractive surroundings and the provision of car parking. The list of twelve included four statements which are linked to perceived direct or indirect influences of tourism (those marked * in Table 6.11). With the exception of access to attractive surroundings, these motives were generally not commonly recognised, indeed no respondent considered access to leisure facilities as important, and only one ranked access to eating and drinking facilities (as least important). Location as a status symbol was considered important (average score 1.8) by four respondents, all of which are located at the Albert Dock.

Finally, respondents were asked if they had considered relocating from these premises, and if so why and where they would relocate. It was hoped that, by asking these questions, one could ascertain whether the impact of a tourism industry had caused or encouraged relocation away from these areas, or whether companies wanted to move to other locations also influenced by tourism and/or redevelopment. Managers were also asked when they had considered moving, in case this corresponded to any major tourism events or developments.

Overall, there was no evidence to support any of these assertions. The dates of consideration varied, with no two alike. Areas for relocation were similarly indifferent, none listing areas which are specifically redeveloped or in tourist areas; indeed, a third wanted a Liverpool city centre site. The reasons for wanting to move were consistently unrelated to tourism development, and often

reflected the major grievances which have been reported about office location.

Inward investment is not necessarily only a process of business location (or relocation) in the economy. This section examines the geography of business trade and the nature of any current or future investments into the Liverpool economy. Many of these results are not directly related to the tourism industry, but have been included in Appendix 17 to compare how general redevelopment, irrespective of motive, may encourage inward investment.

Business investment in Liverpool therefore appears to have succeeded, although it was often established during periods of recession. The trends in annual turnover of those interviewed are mostly positive and the majority are not in decline. There also appears to be intentions for further expansion often within external national and international markets, although a number of those companies to have struggled over recent years (particularly in the construction industry) are excited by the prospects of work created via Objective One funding. Liverpool based businesses, at least those in the areas included in this survey, are able to operate successfully in the national and international market, bringing a new wealth to the local economy.

The impact of tourism

In administering the questionnaire, respondents were not told the full purpose of the study, i.e. the role of tourism in business location and investment; however, the final section prompted the respondent to consider the issue of tourism. Almost half of respondents considered that the success of the Albert Dock scheme had directly or indirectly influenced the success of the business. Of the eleven businesses to consider the Albert Dock scheme as an important determinant of business success, five recognised the direct impact of the development. Of these, two had business interests in the scheme, another recognised that tourism there aids the recognition of the business location, one

business had recently held a party at the Maritime Museum and, most interestingly, a manager at Mercury court remarked "it helps with visitors from abroad, we can take them for a meal or a drink, also hotels have improved". The main indirect benefit was that the scheme was considered to have altered the profile of Liverpool both as a city and as a business address. Indeed, of the 13 respondents who saw no benefit from the tourism, three saw a benefit in terms of the changed profile of Liverpool.

Respondents were then asked to consider the effects which the more general growth of the tourist industry may have induced. Of the 27 responses ten businesses were aware of some impact; of these two respondents had been involved in work directly associated with the tourist industry. As with previous answers the tourism industry was recognised as a means of attracting people to the city; these people are likely to leave the area with a more positive image, hence they are more likely to do business with it. However, other responses to the question canvass it as a means for the city acquiring "a decent hotel", and another business located at Cavern Walks recognised that "we can't be unaware of tourists, it keeps the Cavern Quarter alive and business below flourishing".

For those who considered that tourism had not influenced the business, any prospects for it doing so in the future were examined. The majority of these answers saw no future impact. However, one respondent at Albert Dock noted that tourism had caused difficulties;

> "facts have proved that tourism is not what it was thought to be. It is incapable of sustaining development here, the city centre is not clean, there are wino's on the bridge to the Pier Head, pride is non-existent".

Respondents were finally asked whether the Tall Ships Race event had any impact on the business. The detailed results suggest that such special events

generally do not have any direct impact, the major conclusions recognising that they increase traffic and are enjoyed by people who work in the city; yet a couple of respondents were involved in corporate hospitality linked with the event and felt that it had succeeded in uniting the business community.

Summary

This section was entitled "tourism a mechanism for change" and as such attempted to analyze the indirect regenerative ability of an urban tourism policy, and more specifically the economic benefits which might accrue. The results for the Liverpool example question a number of well-cited assertions about the scale of the wider impacts of a tourism initiative. The indirect impacts can be categorised as either the economic benefits produced by tourist related industries reinvesting in the local economy, or by the presence of a tourist industry attracting business to locate or relocate in Liverpool.

Local recycling of tourism receipts is neither encouraged nor commonplace. The majority of tourism-related industries rarely use local suppliers. In the case of multi-nationals this is often due to suppliers being designated by the headquarters or as a result of perceived customer requirements for branded products. Although VAT registration data for three years suggests that there is a general growth in the wholesale business in the area, tourism-related industries rarely rely on locally based wholesalers. Even in the case of souvenir shops at the major tourist developments, local suppliers are rarely used; again this is because the type of goods sold are those which may be purchased anywhere. This situation is worse because Liverpool is not famous for any souvenirs which are produced locally. Although it was impossible to gain a precise value of the respending of revenue received through tourism, it can be concluded that the majority is reinvested in national or international companies based outside of Liverpool.

VAT information provided through the Central Statistical Office (via NOMIS) suggests that a general expansion in the number of establishments registering for VAT has not occurred since tourism has been a policy concern in Liverpool. The most successful and secure industrial sectors are those classified as finance and related. In the catering industry in general, although the number registering for VAT is high, so is the number of deregistrations, suggesting little security for employees and suppliers.

Results of the business survey similarly suggest that redeveloped areas of the city do not attract business relocated from outside of Liverpool, the majority of business having either relocated from a previous Liverpool address or being new starts. Of those firms relocating from a Liverpool location, the majority of their former offices were left empty. Overall, two fifths of those firms interviewed were branches of outside firms, usually established in the city as a northern office or because there is an office in every major city. A further third were independent firms with Liverpool as the only branch; these firms established usually because of the owner's local connections and ties.

The motives of the industry locating in the surveyed areas were rarely thought to have been directly or indirectly influenced by tourism. The tourists were reportedly not a major issue in choosing either the building or the city. Generally, the tourists were not a hindrance either. However, the mixed land use of business, accommodation and tourism at the Albert Dock was not always considered to be successful, a number of respondents complaining of high costs, poor services provided by the management and lack of functional facilities for office workers.

Nevertheless there are some advantages associated with tourism in the city and recognised by the interviewees, most importantly the availability of decent hotels and the Beatles connection for those located at Cavern Walks. However,

both of these particular features pre-dated the expansion in tourism. Other factors influencing location are the prestige associated with the location and its "known" address. Here there is evidence of the influence of tourism; the prestige for those located at tourist destinations results solely from the marketing of the areas for tourism. Tourism therefore has had little or no success as a motive for business location as there is no evidence of new economic activity in the study area as a direct result of growth in tourism. Firms attracted to the regenerated areas that were surveyed have not relocated from other provincial cities but from other Liverpool addresses.

Of the firms to be interviewed, a quarter of all business is done with companies located outside Merseyside and nearly two-thirds is outside Liverpool. There is however limited evidence to suggest that this pattern is altering. Over the past five years the firms interviewed have suggested a trend towards expanding business outside of Liverpool, but the majority are still cautious, dealing with just the North West. The tendency to encourage investment in Liverpool via this mechanism appears to have been affected by the Objective One status for ERDF, as, particularly in the construction industry, respondents see prospects of further work in Liverpool. This could however be preferential as the European money will be retained within the Merseyside economy, paying fees to Liverpool contractors who employ Merseyside staff.

The direct investment in the Merseyside economy, made by the firms interviewed is small but apparent; the number of jobs created as a direct result varying from 1-4 to 150. It was never considered that the investment was influenced by a growth in tourism, the main explanation being general expansion. In those cases of decline in job numbers and total annual turnover, this was thought to be due to recession.

Generally, staff in the companies interviewed are from the local population. As

there was little evidence of relocation, it is difficult to conclude whether staff employed by relocating ventures are likely to be Liverpool people or relocated with the business. One main example of relocation, not included in the survey is the £40 million headquarters of the VAT division of Customs and Excise in a newly built 250,000 sq. ft. building (1993) with the capacity for 1,850 jobs (some of which were relocated, others new jobs). Who ever takes new jobs in the city, they represent investment as any one who lives and works in the region will contribute towards local taxes and spend on food, petrol, entertainments and other services available.

The influence of tourism was however indirect, as a result of environmental change and its limited ability to change the image of the city. Generally, respondents began by being dubious about the impacts, but after some thought saw benefits associated with environmental and image change in making it a credible business location, as well as the additional benefits of facilities such as hotels and restaurants for entertaining business visitors and clients. The impact of special events was however limited. It is thus apparent that although there are limited indirect benefits, these all could have occurred as the result of general regenerative policies such as environmental improvements and an effective marketing campaign.

6.5: Environmental improvements

Results presented thus suggest that a factor in business location is environmental improvements. This section will address some of the main changes which have occurred and the possible subsequent impact on tourism. Liverpool is a difficult city in which to analyze environmental change. As we saw in Chapter 2 the city is influenced by a number of agencies, such as Merseyside Development Corporation (MDC), City Challenge, City Centre Partnership and the City Council. In some instances the responsibilities overlap, in others, there is just one controlling factor. Nevertheless, with the

exception of MDC land, the City Council Planning Department remains the only body authorised to grant planning permission. The strategies for the case study area are thus those of MDC, City Council and Liverpool City Challenge. However, Liverpool City Centre Partnership have also helped initiate environmental improvements. Merseyside's Objective One status has further encouraged proposals for environmental improvements. MDC expenditure (March 1991-93) totalled £318 million, roughly half of which has been spent on reclamation and refurbishment (46.9 percent).

Thus MDC can be described as the most important impetus for dockland redevelopment in Liverpool. The Albert Dock Complex is MDC's flagship scheme, the redevelopment being a sensitive re-use of Grade I listed warehouses. There has been no new building, but extensive improvements to water quality, public access and building fabric. A waterside footpath has been created with attractive railings and seating areas. Street lighting has been provided and there has been a limited amount of tree planting. The most recent waterfront environmental scheme is a major refurbishment of the Pier Head. After three years of regeneration the Pier Head opened in May 1995; the scheme cleared the area of an unsightly bus depot and created an open space with lawns, bandstands and walkways. This complements a 1993 refurbishment of the Merseyferries terminal.

Liverpool City Council urban environmental improvement schemes are primarily associated with improvements to pedestrianised areas. The planning office recognise the strongest need for environmental improvements to be focused on the routes between tourist sites. The major policy concern is thus to extend and improve the pedestrian network around the city, linking key sites. It was recognised that environmental improvements are not directly linked to the regeneration of the waterfront and would probably have occurred despite it.

City Challenge is more focused on economic regeneration than environmental improvement; however the latter is also important, particularly in the refurbishment of important public spaces, "gateways to the city" (interview May 4, 1994). The City Challenge initiative allows for quality private sector architects to design schemes, rather than the traditional City Council approach. Hence there is more opportunity for originality in design. However, as the Action Plan (1992) realises, City Challenge "provides the focus and resources to turn vision into reality" (p.4). It is a co-ordinator and initiator rather than a mechanism.

It is anticipated that Objective One ERDF monies can improve the built environment by improving and developing the quality of the region's architectural heritage, upgrading the environmental quality of key transport corridors to encourage further investment, and to encouraging new and existing environment and built heritage assets, including those on the urban fringe, to encourage tourism growth and recreational use (Merseyside 2000, p.28). This is linked to encouraging sustainable development, improved water quality, more recycling and reductions in levels of pollution. The scale of environmental improvements in Liverpool has thus been enormous and ranges from land reclamation, pollution alleviation, the elimination of low value land use and dereliction and the redevelopment of existing buildings and areas. This is accompanied by a general clean-up scheme to remove litter from the streets of the city centre.

A major player in environmental improvement is the City Centre Partnership. Formed in late 1992, this public-private sector partnership has all party support for a number of objectives agreed by all members, the funding for which comes from Urban Programme (until April 1995) (annual budget of £100,000), Liverpool City Council (£50,000), Liverpool Stores Committee (£25,000) and the major partners e.g. MDC, Boots, NMGM (100 in total

c.£325,000 per annum). The agreed objectives are i) to improve the security and perception of security; ii) maintenance of the environment; iii) organised street cleaning; iv) to develop a positive image; and v) to promote street festivals and bring life into the city. "The aim is to make Liverpool a better place to shop and work. It is to the benefit of visitors, locals and business" (interview, City Centre Partnership, 17 May, 1994).

Street condition may have improved as a result of two schemes. The first is the regular clearing of litter from streets via "green machines", giant vacuum cleaners for litter, and the regular emptying of waste bins. The role of the City Centre Partnership as co-ordinator and enabler has further helped to improve street conditions through a scheme known as area ownership. In this individuals monitor the area around their premises and report any difficulties to the City Centre Partnership. The Partnership then reports incidents directly to the City Council. The impetus behind the scheme was the presumption that often people do not know who damage, litter, vandalism etc. should be reported to so they do not do it. The scheme reportedly works well and members have seen positive results.

Two further schemes instigated by the City Centre Partnership are the introduction of closed circuit television (CCTV) and a hanging basket scheme. Hanging baskets are thought to add colour and interest to the street environment. Similarly, in 1994, the partnership funded a Christmas promotion for Christmas decorations in the city, to the value of £180,000. It is anticipated that the CCTV scheme (launched July, 1994) is both a crime prevention scheme and a "feel good initiative", which will encourage people to use the streets at night.

This work is much needed, as Table 6.4 illustrates about a third of summer visitors to Liverpool and Merseyside (1990) thought that there was too much

litter on the streets of the area. This is a perception which remained with visitors after a visit to the region. This result compares with a survey of student images (1994/95), in which the most surprising feature about Liverpool was reportedly its cleanliness (Table 6.6). It can be suggested that this change of opinion is a result of the campaign to clean the streets of Liverpool.

A further general criticism of Liverpool is the high number of derelict buildings which, as one business survey respondent noted, could be demolished and replaced with open grassland. Indeed the author's land use survey found there still to be vast areas of the city which remain undeveloped, despite general area schemes designed to alleviate this situation. One particular example is Jamaica Street, in the MDC defined Parliament Street area. As the MDC profile of the areas describes,

> "substantial parts of the area suffer from many if the problems associated with inner city decay: obsolete buildings, many multistorey, often underused or derelict; poor layout with lack of off-street parking; on street congestion; a degraded environment with dispersed ownership of property and varying tenures" (MDC Liverpool Waterfront Strategy, 1990, p.24).

To date the area remains unchanged, the exception being the redevelopment of the Skillion Business Centre (no.RD3, Map 6.1). The major roads in the area (Upper Parliament Street and Wapping) have been widened and thus there is less congestion.

A second area of inner city decay, linked to this, is the Bold Street, Wood Street, Seel Street and Fleet Street area, where many inner city developers see the most opportunity for development in the future. Rejuvenation of this area has been delayed. Charter House bought the area, since doing so they have gone out of business and a group of individuals, including the Dean of the Anglican Cathedral are in the process of a take over.

As Liverpool has a large number of buildings of architectural significance, there is a tendency within the city centre to redevelop rather than demolish, with a number of examples of demolition and redevelopment behind the original facade. One such example is the demolition of former city council tenement blocks and flats on Leeds Street, which have been demolished by Wimpey construction and replaced with flats for sale; apparently sales have been very successful. Also, along Leeds Street disused warehouses have been demolished to allow a BMW car salesroom to be built.

Elsewhere in the Liverpool District there are examples of demolition to create public open spaces. Everton Park is an ongoing project to replace terraced housing with a public park centred around the Everton Road area. Similarly, in Vauxhall, dock warehouses have been demolished and redeveloped as a canal side park. It can be speculated that this is designed to link with the Bootle City Challenge proposals to redevelop the southern end of the Leeds-Liverpool canal. Additionally, there is proposed demolition of local authority tower blocks. During 1992, most of Liverpool City Council's tower blocks (over 50) were handed to a Housing Action Trust (HAT), funded by central government. The proposed redevelopment of these areas is a mixture of demolition followed by the construction of new homes and the refurbishment of remaining tower blocks.

Redevelopment of the City Centre

Actual redevelopment and proposed redevelopment of the case study area are illustrated on Map 6.1. The geographical distribution of these redevelopments suggest that, although there are numerous examples, they are clustered around MDC and Liverpool City Challenge areas, or around city shopping areas. There are limited examples of redevelopment in the business sector of the city (Seymour Terrace (Map Ref. RD10) and Mercury Court (Map Ref. RD6)). The exception is the Granby Triangle and Toxteth areas of the city (Map Ref.

RD13). There are three examples of new and improved public spaces, the Pier Head (Map Ref PS1), Chervasse Park (Map Ref. PS2) and St Johns Garden (Map Ref. PS3) (all of which can be linked to tourism). In addition there is extensive pedestrianisation in the retail centre of the city. Earlier pedestrianised areas are being, or have been, refurbished and extended. Street regeneration and environmental improvements began in the late 1980's with Church Street and Whitechapel, followed by the redevelopment of Lime Street , Church Street and Lord Street, followed more recently by Bold Street. The area, initially pedestrianised in the 1970's had declined, attracting low quality shopping, empty premises and vandalism but the Bold Street redevelopment is generally viewed as an exciting development. The area has already improved, premises are occupied by Waterstones Booksellers, Hornes Menswear, The Early Learning Centre and Warehouse ladies fashion. The Lyceum (Map Ref. RD11), at the bottom of Bold street, has been refurbished as a Post Office, and high quality restaurant/cafe bar. This area is now viewed as an extension to the main Church Street shopping area.

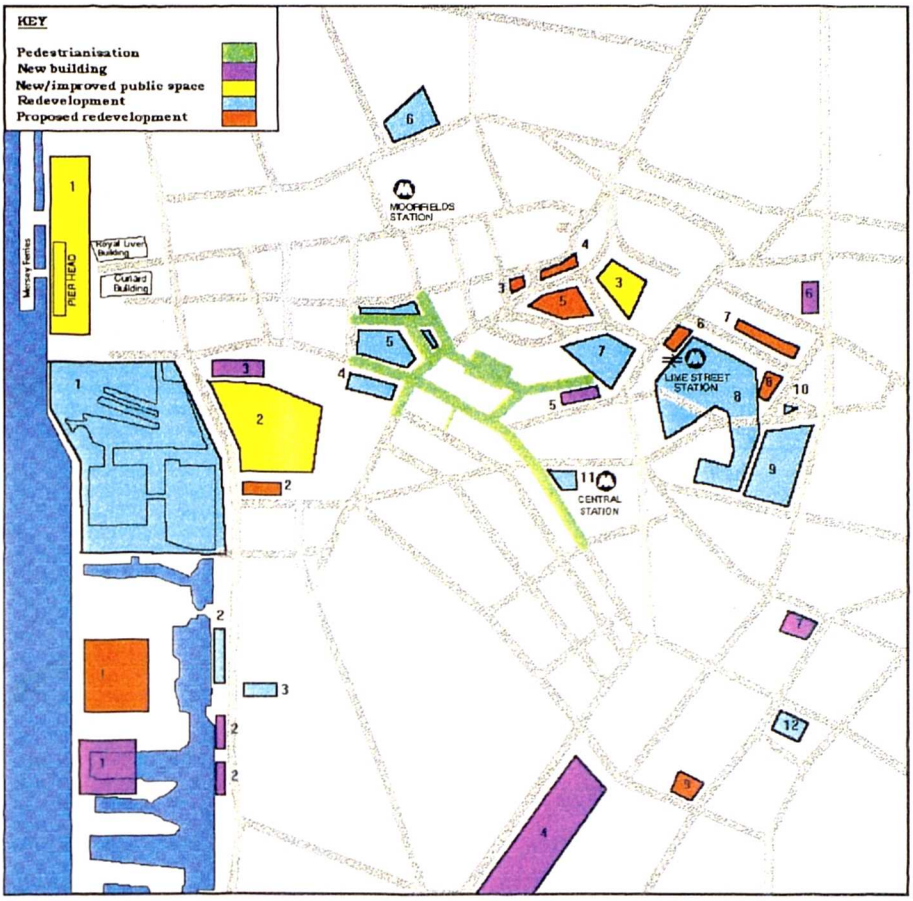
Additionally, Church Street, Lord Street and Whitechapel have been refurbished to provide a brighter land use. Bland flagstones and concrete seating have been replaced with patterned brick footpaths, black iron seating and new telephone boxes . This has been accompanied by some refurbishment of major stores fronting the street, for example, a Marks and Spencer expansion to provide a store which is almost double its original size. The environment appears cleaner, brighter and more lively. To add life to the street, vendors have been allowed to set stalls in the middle of Church Street. Although this provides atmosphere, most stalls sell cheap goods and are not aesthetically pleasing. Hence there is a tendency to cheapen the area and clutter the streets.

A further expansion and improvement to the retail areas occurred when

Clayton Square Shopping Centre (Map Ref. NB5) opened in 1989; this was accompanied by a major refurbishment of St Johns Precinct (Map Ref. RD7). To link this area to the Cavern Quarter and Church Street redevelopments, in addition to linking to a proposed redevelopment of Queen Square (Map Ref. PR5), a competition to find a preferred developer for Williamson Square was launched. It is anticipated that this will be a general meeting place for both shoppers and tourists and an avenue for street carnivals and festivals. Included within the proposal is an extension to the Playhouse Theatre to include an on street cafe atmosphere. This scheme is presently in its preliminary stages, hence all information is speculative.

A major redevelopment opportunity exists at Queen Square (Map Ref. PR5), with links with the refurbishment of the Daily Post and Echo Building (into office accommodation) and the Midland Railway Goods Depot as a conservation centre for NMGM (Map Refs. PR4 and PR 3). The Queen Square site is presently occupied by a car park and a bus station along Roe Street. The redevelopment will consist of a new hotel for the city and mixed leisure and retail facilities. Throughout the planning stages, ten-pin bowling, cinemas and a new department store have all been discussed. The redevelopment of this area will expand the retail provision and help to link St Georges Hall and the older core of attractions to the city centre.

Map 6.1: Liverpool City Centre Environmental Improvements



New building (NB)

1 VAT Customs & Excise
2 New hotels (Dolby & Campanile
3 Law Courts
4 Project Rosemary
5 Clayton Square Shopping Centre
6 Glaxo neurological centre & National Express Coaches
7 John Moores University Resources Centre

Proposed redevelopment (RD)

1 Kings Dock
2 Canning Place
3 Midland Railway Goods Depot
4 Daily Post & Echo Building
5 Queen Square
6 Lime Street Chambers
7 Lord Nelson Street
8 Seymour Street
9 Liverpool Institute of Performing arts

New/improved public spaces (PS)

1 Pier Head
2 Chervasse Park
3 St Johns Gardens

Redevlopment (RD)

1 Albert Dock
2 Wapping Dock
3 Skillion
4 Merseytravel Bus Station
5 Cavern Quarter
6 Mercury Court
7 St Johns Precinct refurbishment
8 Lime St., Russel St., Empire Theatre
9 St Andrews Gardens
10 Seymour Terrace
11 Lyceum
12 Liverpool Philharmonic Hall

Two other themes for redevelopment and new building have been inner city housing, particularly for students and by housing associations, and an improvement to public transport facilities. Major housing initiatives have occurred in Toxteth, particularly in the Granby Triangle area (Map Ref. RD13). In this Liverpool 8 post code sector, money from numerous sources, particularly housing associations, Liverpool City Council and English Heritage Grants, is being ploughed into building improvements to Georgian terraced housing. Some of the residents see this as gentrification, as their ghetto is being replaced by home owners, but the general consensus amongst developers is that the situation is improving. The Dean of the Anglican Cathedral is very involved with development in this area. Project Rosemary (Map Ref. NB4) provides construction, on a previously derelict area in front of the Anglican Cathedral, of housing for rent and sale, student accommodation and a new hospital.

More central housing initiatives include the redevelopment of Lime Street Chambers (Map Ref. PR6) to student accommodation by John Moores University, and an enormous scheme by Merseyside Improved Homes (MIH) at St Andrews Gardens (Map Ref. RD9). This is a joint venture between the Government, the City Council, the Housing Corporation and MIH, to create a mixed tenure residential area including improved homes for local residents, student accommodation in the Bullring and new Wimpey homes for sale. Additionally, a consortium of Amey Construction and Liver Housing Association have a proposal to convert unsightly offices in Canning Place (Map Ref. PR2) into flats.

Merseytravel have recently invested in a major refurbishment of Paradise Street bus station and the attached NCP car park. This scheme involved limited new building and extensive recladding of concrete to produce a light airy environment with new toilet provision, ticket machines and seating areas. This

has improved the car parking provision also, as pay stations are available in the secure bus station area. Additionally, an intercity coach station is being developed by National Express in Norton Street (Map Ref. NB6); this is the first time National Express have acted as developers and built for themselves.

As Map 6.1 illustrates, new building in the city is limited. In addition to the law courts (Map Ref NB3), two hotels (Map Ref. NB2), VAT Customs and Excise (Map Ref. NB1) and Project Rosemary (Map Ref. NB4), new building has occurred in building a Glaxo Neurological Centre (supported by Glaxo and Mersey Regional Health Authority) (Map Ref. NB6) and the architecture award winning John Moores University resources centre (Map Ref. NB 7).

This section does not include all major environmental improvements, but is intended to indicate the scale and nature of changes occurring in the city. Many changes have occurred as a result of grant availability (particularly via MDC, City Challenge and English Heritage). Although waterfront development is most apparent, proposed schemes are creating corridors of improvement which help to link existing products. It is however too early to analyze the success of environmental change and redevelopment as much is ongoing or little more than a proposal. There is an air of confidence in the city that these projects, and new ones, will be speeded up via Liverpool's Objective One status.

During direct interviews at tourist related establishments, interviewees were asked if they were presently involved in any redevelopment which might affect environmental quality. It should be noted that the eating and drinking and shopping facilities which were examined were all located within areas of redevelopment. Although all managers were asked about redevelopment the only change mentioned at Cavern Walks was redecoration at Cavern Walks and at Albert Dock tenants were not permitted to take part in any redevelopments.

Hoteliers were asked about any recent redevelopment which had occurred and about any planned future redevelopments. Only three of the hotels said that there were no plans for redevelopment in the near future. The majority of redevelopments are or have taken place within the premises, only two managers noting major building works. Three hotels mentioned a need for all rooms to be made en suite, and two hotels mentioned adding a conference centre. Only one hotel mentioned a possible application for European finance, this was to provide new windows.

Only two of the attractions have recently undergone redevelopment; these are however major changes which make the establishment more of an attraction to tourists. MerseyFerries has been converted to a "heritage attraction" which offers longer cruises for tourists, including video screens, information boards and a recorded tour guide. Establishment E has also made itself more amenable to tourists, by opening up the front of the building by adding small shops and benches.

Planned redevelopments were mentioned more frequently, many of which have arisen due to Liverpool's designation as Objective One by the European Commission; this proposal makes finances available for tourism-related facilities. The Objective One draft plan (1993, p.22) recognizes that the development of tourism will require three main programmes;

> "i) the development of promoting and marketing tourism on Merseyside, including a strong co ordination mechanism, involving all the private and public partners.
>
> ii) the enhancement of existing visitor facilities, both attractions and accommodation.
>
> iii) the development of new attractions and facilities including the expansion of the programme of festivals and events."

A number of establishments have ambitious plans for ERDF. For example

establishment A are anticipating five million pounds for reorganization, C expects expansion of the tourism element of the business into a planetarium and exhibition space and Gallery 2 have plans to extend the gallery space, create new staff offices and alter the foyer.

NMGM have, however, already received finances from Europe in order to convert the Midland Railway Goods Depot into a conservation centre (European money for this project amounted to £7 million). Two attractions, 1 and E mention redevelopment which is not dependent on finances. NMGM are hoping to acquire two additional floors from John Moores University for the City Museum; this would create more temporary exhibition space. At establishment E, plans involve extending the business to encourage the cafe and bar to stay open later and to enhance sales to the conference market.

Similarly in the case of theatres and cinemas, most of the establishments (8) were asked about any recent or proposed redevelopment of the building. Four of these reported recent redevelopment, the most recent being in 1989. The Empire Theatre is presently undergoing phase one of a three phase redevelopment programme. The work is funded by City Challenge and represents the first time that Apollo have ever received financial support from the public sector. The RLPO is also undergoing refurbishment. The concert hall was closed for one year from May 1994 whilst the work was done. The work will cost six million pounds, half of which has been raised by public donation. However, concerts continued to be held in the Anglican Cathedral. A third theatre, which is also in the City Challenge area, and perhaps in most desperate need of refurbishment, is the Royal Court. The theatre made an unsuccessful bid for finance from City Challenge, but is still determined to raise enough money to convert this rock venue into a "proper theatre" (C). The theatre is now hoping for funding from ERDF, but to do this they need to raise four million pounds themselves. A campaign started in February 1994 to raise

the money through public donation.

At the Playhouse redevelopment is due for the square outside. At present Williamson Square is a dull area, where drunks congregate and a taxi rank. The future use of the square has been put to competition. Aims for the new look include performance space, an extension to the Playhouse with catering facilities in the square, electronic signboards and a new five star hotel. If the scheme goes ahead, it will be a gathering place for tourists as it is very close to Lime Street Station and will be the location of the best hotel in the city. This could have some knock-on as it may increase the number of tourists visiting the nearby theatres (A,B,C).

Yet, who are these improvements for? Liverpool is a city which is presently undergoing a number of major schemes to improve the built fabric and hopefully stimulate further investment. The main initiatives are '*themed*' around housing, retail and tourism and leisure, with a small number of initiatives to improve office availability. However, a number of schemes link all these land uses, for example the Albert Dock complex and Cavern Walks area.

6.6: Conclusion

The thesis examines the role of tourism in stimulating urban regeneration. As evidence presented throughout this chapter illustrates, there is little doubt that the International Garden Festival of 1984 saw the start of major redevelopments including the Albert Dock (and other waterfront sites), Cavern Walks and Mercury Court. The question remains as to whether these were a direct result of tourism to the city. It is unlikely that this is the case. Agencies such as MDC were established with a remit to redevelop areas; the land use could equally have been education (as in the case of Teesside Development Corporation) or business parks (as in some Tyne and Wear Development Corporation riverside sites).

Representatives from City Challenge, Liverpool City Council and MDC all consider that non-leisure schemes would have occurred despite the Albert Dock redevelopment. Indeed, it was generally thought that tourism-related schemes would also have occurred. Environmental improvements, whether they be through demolition of low value land use, new building or general area improvement, are however important in changing the area's image and attracting tourists. Taking measures such as those presented here is thus crucial to re-imaging.

Visitors, whether they be for pleasure or business, are often looking for the stereotypical image. Any evidence to support this image needs to be removed before it can be changed. Attractive surroundings were often important motives for business location. Even though business located in these environments has rarely relocated from elsewhere, there is an apparent advantage to being located in pleasant surroundings. Similarly, attractive environments help to attract tourists as they often give a feeling of security and encourage one to linger for longer. People are attracted down colourful and lively streets. Indeed, the pedestrian networks, which are being created through the city are designed to link the Albert Dock complex to the city centre and older core of attractions, thus pulling tourists towards shopping facilities, encouraging them to see more of the city and hopefully recognise the need to spend more than one day in Liverpool, thus staying overnight in a hotel.

Whilst staying overnight in the city, tourists require night-time entertainments, not just theatres and cinemas, but also pubs, clubs and restaurants and safe places to walk and explore. It can be suggested that a recognition of tourist requirements to do this has lead to the creation of areas which attract people at night. Bluecoat Chambers have attempted a night-time business by extending opening hours, encouraging more evening concerts and events and providing outside benches. Similarly, Cavern Walks has encouraged an

extensive redevelopment of the Cavern Quarter, including numerous bars and restaurants, hence this is also a popular nightspot.

Consumption patterns of locals and tourists have thus been influenced. Tourists are encouraged to taste more of what the city has to offer and local people are encouraged to once again visit the city centre for shopping and night life, hopefully to the exclusion of nearby centres such as Wigan, Manchester and Chester. In so doing, there is greater investment within the local economy.

The countrywide and worldwide strategy to encourage more tourism particularly to places which were previously avoided leads to the conclusion that tourism would have ultimately been included within the regeneration of the city centre, despite the Albert Dock redevelopment. However, the success of leisure based strategies has undoubtedly been influenced by the success of the Albert Dock. Wider environmental change is likely to have occurred without a tourism industry. Although no one has the ability to foresee what would have happened despite it, it is apparent that national interest in the plight of Liverpool would have resulted in the same financial incentives. MDC was already created with a remit to redevelop, which is likely to have included renewal, new transport infrastructure, demolition and rebuilding with a different purpose. Similarly, the City Challenge team, who have little interest in tourism initiatives, would have continued similar work in their designated area.

The only speculation is that, without the success of the maritime museum at the Albert Dock, NMGM would not be involved in the redevelopment of the Midland Railway Good Depot as a conservation centre, or that Liverpool Philharmonic and the Empire Theatre would not have been involved in extensive redevelopment schemes. These projects are minor when compared to wider redevelopments occurring in Liverpool, and one can only speculate about

what would have been. It is however certain that the city wide improvements are designed to accommodate and often encourage the tourist.

CHAPTER 7
A CRITIQUE OF THE RESEARCH FINDINGS

7.1: The scope of the research:

As the thesis title suggests, the concept of urban tourism has been examined through the view of '*providers*'. Throughout, the emphasis has been to study the impact of tourism as explained both by those directly involved in the industry, and those who are experiencing the changes and impacts as part of their everyday business. These findings are intended as complementary to existing research into the '*tourist's view*' (e.g. Visitors to Merseyside Survey, MIS, 1990).

At its outset the thesis recognised, from a varied literature, how the tourism process might be a viable mechanism for urban regeneration. As such, previous chapters have considered tourism provision, the profile of tourists, the nature of tourism-related employment, the image-changing potential of the industry, and the nature of business investment both in the city and at specific tourist areas: the chosen case study for this being Liverpool. Each chapter outlined its own specific objectives and methodology and these will not be repeated here. The aim of this chapter is to consider the cumulative impact of tourism in an ex-metropolitan city.

The following section (7.2) provides a critique of the research findings; it reasserts many of the question raised in the initial chapters of the thesis and broadens the scope of discussion beyond that of tourism. Indeed, it should be reiterated that this is a study of tourism as a mechanism for urban change. Regeneration is the process of concern, tourism the chosen mechanism. Hence, other mechanisms which affect the process must fall within our comparative view.

In section 7.3, the reader is invited to question the legitimacy of the research findings. The author conducts an analysis of the highlights of the research and in reflection questions the hypothesis posed by Law (1993) and others and the effectiveness of tourism as a strategy for regeneration. It is again an opportunity to return to Chapter 1 and examine how the current debate has been widened and how much this thesis has added to our existing knowledge.

Finally this chapter concludes by analysing the limitations of this research project and reviewing the possibilities for further research into the issues highlighted in this thesis. In so doing the achievements of this piece will also be discussed.

7.2: A critique of the research findings:

Tourism - a policy concern?

In raising the issue of tourism as a policy concern, one is recognising that for any urban policy to be viable it must also be appropriate. Whichever mechanisms cities deem appropriate for renewal, it is necessary that they complement central and local government policies. If this is so, tourism-related initiatives will be in a position to benefit from grants, expertise, assistance and support. Hence, the issue of tourism in policy needs to be considered at two-levels - the national and the local.

Authors such as Haywood (1992), Boniface and Fowler (1993) and Morrison and Anderson (1994) have questioned the authority with which implementors are talking about the outcomes of tourism policy. Perhaps too often the perceptions of tourism are a result of excessively marketed, one-off American schemes, rather than evidence. As an outsider to the process, one can see that marketing (as explained in Chapter 6) of either a success or failure is an essential element of the process - it raises awareness, hence promotes the city. Now, with many declining industrial cities desperate to rejuvenate their

economies, the duplication of well publicised success stories is an obvious solution. This thesis as a whole set out to consider whether these are well marketed success stories or actual successes. Before discussing this, relevance to wider central government objectives should be questioned.

Previous UK national policy has been considered in the context of its connections to American urban policy in an attempt to explain the extent of American influence, particularly in the form of Urban Development Grant and Development Corporations. Yet, this trans-Atlantic transfer of policy does not always equate to a trans-Atlantic transfer of success; many other factors act as influences. Also, there are many differences in the systems of governance (as discussed in Chapter 1).

Nevertheless, tourism is an industry which accepts and acknowledges a number of policy issues of national concern; as such it can slot within an existing system of governance. The thesis' review of policies for urban regeneration has illustrated that as tourism has such a broad range of objectives it can be accommodated within many of these policies. Indeed it is an industry which, after 1979, has evidently been directly supported by central government (Department of Environment Circular, 13/79, 1979). A specific aim of Conservative inner city policy since the late 1980's has been to deal with economic, social, financial and political factors of decline. The Law hypothesis (1993) suggests that these are all potential impacts of urban tourism.

Polytechnic of Central London *et al* (1990) provide the most substantial research on the use of government funding for tourism projects, noticeably UDG and UP; in addition other sources, City Challenge, garden festivals and urban development corporations have all accommodated tourism initiatives. However, over recent years the mechanisms and finance for urban regeneration have become both more restrictive and limited. There remains an emphasis on

leverage, yet the distribution mechanisms are different. Little research is yet published on these mechanisms, although their rationalisation in the Single Regeneration Budget was included in Chapter 1.

The single funding initiative aimed directly at tourism development was short lived in England. Tourism Development Action Programmes (TDAP's) were limited in their duration (two to three years); yet in areas where they have been adopted, there is evidence of an apparently successful tourist industry. Places which have adopted the Programmes, such as Bradford, Tyne and Wear and Bristol, have been accepted as being in the forefront of tourism development.

Thus on an English national scale it appears that there is no longer a policy specifically aimed at tourism-related initiatives, leaving a patchwork quilt which may include leisure or tourism elements. Given the varied nature of the industry, enhanced by difficulties of definition, it would be very difficult, if not limiting, to restrict an initiative solely to tourism based policies. The Single Regeneration Budget is thus evidence of a general recognition of the need to allow entrepreneurial activity in regeneration, which may well include tourism.

The manifestation of these policies at a local scale is more complex. Tourism both influences and relies upon the infrastructure of a place. It leans on existing provision for both visitors and local residents. In addition, the tourist industry has a symbiotic relationship with local government mechanisms. In the early days of tourism in Liverpool, mechanisms for its development were accommodated into the existing system of governance. Moving into the 1990's tourism in this city had become primarily the concern of MTCB and MDC. Both of these institutions were initiators of the garden festival of 1984, and have since supported further developments for tourism. Only recently has the City Council designated direct funding for a tourism officer and his department. The cause of this segregation may however be a result of NMGM taking direct

control of the local arts collection away from the City Council.

City Challenge status for two areas of the city, the establishment in 1994 of the Government Office for Merseyside and most recently the designation of Merseyside as Objective One for European Regional Development Funds (ERDF) further complicate the situation. Each body, City Challenge, Government Office Merseyside, MDC, MTCB and the City Council works independently and, although representatives from each of these offices sit on various boards and committees, there is no single policy for tourism in the city.

From interviews conducted with these institutions, there is evidence of some competition and variance in aims and objectives between each department. It can be suggested that this is evidence enough that tourism can fit within the existing infrastructure of governance, but that this position is not enough. If tourism is to be adopted as a mechanism, then it is important that it is given the status it deserves. However, many other functions and objectives are all caught in a similar position of limbo between agencies. Here is evidence of a need for co-operation. The City of Liverpool, like many others, has been divided into departmental segments each with their own aims and objectives. Despite the existence of area plans, there are conflicting agendas which need to be brought together in harmony towards a common vision for the city.

Thus there is some argument that urban regeneration is in need of fewer site specific policies but of a better application of wider policy themes such as tourism, education, service industry, or manufacturing. Should policy proceed in this manner, it is feasible that geographical areas will become specialist in one particular theme. Should the chosen industry fail, it could be disastrous for the whole economy. This is a major issue in urban research for both governments and academics, yet it is not the prime concern of this thesis. Nevertheless, the issues should be raised.

The key finding of this section is that tourism can be and is being accommodated into existing initiatives for urban regeneration. It represents a low cost option for regeneration, yet there is some argument that policies such as tourism should be incorporated into one institution with powers to control the various agencies involved. Additionally, one may suggest that, although tourism no longer has its own mechanisms for government support, it is acknowledged in other mechanisms for urban regeneration. The ability of the industry to support itself independently is perhaps one of its possible benefits.

Provision

Figure 3.1 (p.89) outlined the major elements of tourism; *primary, secondary* and *additional.* Hence primary elements are museums and art galleries, themed heritage attractions, speciality shopping and eating, garden festivals, major sporting facilities and international conference facilities. Secondary elements include hotel accommodation, restaurants, coffee shops, public houses, night clubs and discos. Additional elements are maps, sign posting, accessibility and parking. Under the heading '*provision*', one should also consider the issue of special events, particularly their nature, frequency and audience.

This section will therefore present a comment regarding the suitability of provision. As this research takes the view of providers, there may be some bias in the assertions, yet the comments originate from people who are familiar with the industry and, in most instances, were willing to comment on both its positive and negative features. Finally, the geographical distribution of these facilities will be discussed, drawing out Falk (1987) and Karski's (1990) arguments that there needs to be a spatially critical mass of tourism facilities.

Liverpool has examples of most primary and secondary tourist resources. It has its fair complement of bars, restaurants and clubs, as well as a comprehensive central shopping area. Museums and attractions are however spatially

concentrated into key tourist areas - the Albert Dock and William Brown Street. The main areas visited by tourists to the city are the Albert Dock, Cavern Walks (because of its Beatles connection) and Bluecoat Chambers. The museums provided in the case study area are mainly controlled by National Museums and Galleries on Merseyside (NMGM) from a central city centre office - other attractions are privately controlled. There is however a considerable amount for a tourist to do which, if all attractions are visited, could keep the individual in the city for three days. There are not sufficient resources to hold the visitor for longer.

Eating and drinking facilities are similarly concentrated, but are found at other specific sites in the city as well as at both the key tourist areas. New facilities, including clubs, are located in the Bold Street area. The tourist facilities are however focused on a specific market. Since the closure of Animations World at the Albert Dock, there are few facilities suitable for children or families. The majority of attractions are aimed at *high culture* - often middle class couples interested in the arts. There are some facilities for older people, particularly those interested in the wartime history of the city. Tourist spaces such as the Albert Dock are not suitable for families, there are no children's play areas, no picnic spaces and the close proximity to water requires extremely close supervision of children. Nevertheless, the middle class tourists do have the facility to spend money in the local economy. These are people who are able to buy souvenirs, guidebooks, eat and drink in the nearby bars and restaurants and reside in hotels in the city. Other competing cities have done far more to attract this elite market. Birmingham for example has resident ballet and orchestra companies. Liverpool's equivalent is the RLPO - but the city is close to Manchester which has the Halle Orchestra and numerous quality theatres.

At present the City of Liverpool therefore does not appear to have selected a target market. There are plenty of attractions which appeal to a wide spectrum

of people with different interests and incomes. However, there is no single group which would be satisfied by provision for a stay over a period of more than two days. It is difficult to know who the city is trying to attract. If it does want more than one type of visitor, we might judge this was too optimistic for a place with a recognised image problem, just launching a career in tourism?

Liverpool may also lose some of its potential visitors to competition from nearby centres because of their superior hotel accommodation and the fear of crime in this city. There is currently a dichotomy of thought in Liverpool about the need for a five star hotel. Some supporters feel it is necessary to attract business clients and conferences to the city, as well as raising its profile, yet others feel that this is too extravagant for the Liverpool economy. The comparative budget price of Liverpool's accommodation is however evidently a bonus for some sectors, especially for poaching business from the more expensive Lake District and Chester destinations. Hotels such as the Britannia Adelphi attract a large number of touring coach parties which use Liverpool for this reason. The redevelopment of the Albert Dock area has encouraged these visits; tour groups now often stay a night in the city, but visit only the dock area.

Liverpool has a number of youth tourists, young people who visit night clubs and then reside in the city rather than travelling home. There have been substantial changes in night time entertainment; there is increased competition between night clubs and people are willing to travel greater distances to attend well known clubs. Hence, this is a growing market, which at present appears to influence mainly budget hotels; it is a potential resource for future growth in the hotel market.

Two further major tourism resources remain - Liverpool football is still a major attraction, as is the daily national morning television programme filmed at the

Albert Dock. *This Morning*, a Granada television production is filmed live at the dock, visitors are able to walk past the studio during filming and watch Fred (the weatherman) give his forecast from a floating map of the UK. At eleven each morning crowds can be seen waiting for the forecast. This is both an attraction for visitors and a daily marketing tool for the city. Unfortunately, as from September 1996, this programme has been filmed from London, and the impact on Liverpool will be interesting. The issue remains. Such resources need to be maintained and enhanced because they are both images with which the public recognise the city, and important marketing tools which act as important arrows to Liverpool's bow. There is thus an obvious need to create and embrace these positive images.

In conclusion, one can suggest, in agreement with Falk (1987) and Karski (1990) that those tourist sites which are most popular are those enjoying a critical mass of attractions and, as suggested during interview with Colin York (February 7, 1994), those which enjoy easy accessibility. In Liverpool, this appears to be the case, illustrated by the number of specific tourist areas in the city. This example is interesting in that, with the exception of William Brown Street, all tourist areas have mixed land uses, including attractions, eating and drinking facilities, residential and office provision. These land uses do not always work easily together, yet they may be a reflection of the mechanisms for government assistance for tourism-related schemes. Grant applications usually need to secure prescribed employment levels and leverage, hence mixed landuse schemes are in fashion. This idea may again hark to an American influence and the idea of a festival market place.

For the purpose of a study of tourism in Liverpool, the examination of special events cannot be excluded. The city began its tourism career by hosting an international garden festival. Nevertheless, these events tend to be major and occasional. Liverpool has hosted events such as the Tall Ships Race, but only

recently encouraged more frequent events such as the Festival of Comedy, the Beatles Festival and the Liverpool 'Pops' season. Critics of the special event may argue that this kind of attraction is not of greatest benefit to a city such as Liverpool. Though occurring only occasionally, there is pressure for the host to be highly successful; any errors or mismanagement will reflect badly on a community which is using the event as a tool to raise awareness and enhance its profile. Additionally an event may be too large for the host community to accommodate. In a similar manner, the smaller regular event, such as festivals or carnivals, tend to be more manageable, crowds are easily controlled and of greater benefit to the host community.

The Albert Dock is an example of a location where major one-off events have failed. The Tall Ships Race (1992) was considered by many shopkeepers to be unsuccessful as the dock was too busy for on-lookers to shop. A further criticism of this special event was its geographical specificity to one location; the dock area.

The recommendations from this study thus suggest more frequent and smaller events which are located at the Albert Dock and other locations. Indeed these events should occur in addition to larger festivals, and they should include all areas of the city, not just the dock. This would raise awareness of the wider attributes of the city, reduce congestion problems and hopefully help the wider economy of Liverpool as visitors might shop, eat and drink in all areas of the city.

Visitor type:

Although there has been a tourist industry in Liverpool for a number of years, there is evidence that it still needs to be actively promoted to potential tourists. This is being attempted through active and tactical marketing. One particularly successful campaign is that of Regional Railways "Live it up in Liverpool".

Additionally the Historic Waterfront VIP pass helps to attract day visitors.

The issue still remains that the city is failing to attract substantial numbers of overnight visitors and certainly many who stay more than one or two nights. For the leisure visitor, results correspond with literature in suggesting that city tourism attracts mainly short-break visitors, often during autumn months (Economic Intelligence Unit, 1992; Lohmann, 1991). Hence, again there is evidence that city tourism does not attract the typical week or two week holiday market; it is often an additional weekend break. The main motives for overnight stays in Liverpool are sporting events, particularly football and the Grand National. During these events room rates can be increased. There is however some evidence to support Lohmann's (1991) hypothesis that, in a city location, leisure breaks can be dovetailed with business visitors. The majority of major hotels in the city reported both mid-week business use and weekend tourism use.

The definition of tourism taken for this study involves more than overnight visitors. Day visitors are equally important, but do not spend as much in the local economy, as their requirement for accommodation and food and drink is less. The tactical marketing already mentioned has encouraged day visitors, as has the Albert Dock redevelopment. The Visitors to Merseyside Survey (1990) suggests that many of these visitors are in social classes AB and working on a full-time basis, hence they are the middle classes referred to earlier. Nevertheless, there is also evidence of unemployed people and housewives visiting the city during the autumn months. It was not possible to ascertain whether these people are merely extending weekly shopping visits or visiting specifically to see the tourist attractions.

One may be critical of visitors who have not travelled far, or those who are not spending money on entrance, eating and drinking, or even accommodation. But

tourism is considered to be an industry which has a number of secondary and varied impacts including those of day visitors. One perceived benefit of the industry is its ability to improve the quality of life for local residents. The redevelopment of places such as the Albert Dock and Bluecoat Chambers gives pleasure to all sectors of the local community visiting these sites.

One may thus conclude that the attractions within Liverpool postcode sectors L1-L3 attract a range of visitors, although they are not particularly suitable for family groups with children. There is still a tendency for visitors to be day trippers, with the majority of hotel occupancy being weekend short breaks, which co-exist with business related hotel occupancy. Yet, although day trippers tend to spend less in the economy, some have travelled substantial distances, the Albert Dock now being included on the itinerary of many organised tours of north west England, usually en route between the Lake District and Chester. The attractions are also used by local people. School parties are always evident during mid-week visits to the Albert Dock (the Maritime Museum and Museum of Liverpool Life are important for school history). Additionally, the regeneration of the Albert Dock is a popular subject for school GCSE and 'A' level geography projects. These findings reinforce the need for Liverpool to find its target visitor market.

Tourism employment:

The aim of researching the nature of tourism-related employment was to examine whether it is female dominated, seasonal and part-time (Egan, 1984; Hennessy, 1994) and whether, as local authorities assert, it is a substitute for those previously employed in the declining industry of the city (Hudson and Townsend, 1992). Additionally, the thesis went on to question the suitability of this type of employment for the younger population of the region. A comparison with Census of Employment data was also conducted, to allow comment regarding the reliability of this source to be made.

Information collected via surveys with managers at tourism-related facilities in Liverpool found that the nature of tourism-related employment varied between establishments, with female employment being particularly dominant around tourist shops, whilst at attractions, hotels and theatres and cinemas managers perceived an even distribution amongst the sexes. With the exception of eating and drinking, cinemas and shops, full-time employment is predominant.

Crucially, there is little evidence of seasonality in employment. As previous sectors of this conclusion have stressed, in this instance urban tourism enjoys an all year market for visitors; leisure at weekend and business visitors midweek. During school vacations the number of business visitors is less, whilst leisure visitors increase. Seasonality is also moderated by visits from amongst the local population.

Any discussion of the suitability of tourism-related employment is difficult. One argument which perhaps deserves support is that any employment is better than none. Yet these jobs must be set in relation to the norm - if one can presuppose an ideal. Permanent, well paid, full-time employment is seen by many to be the 'ideal' to which society must aspire. Tourism jobs are not this: evidence from this research suggests that although better than for tourism in other places such as resorts and historic sites, urban tourism does not provide jobs 'appropriate for everyone'. There is only a small amount of evidence of middle-aged ex-dockers being employed in tourism. There is considerable evidence of young females being employed in the industry. One may thus suggest that, as an employer, tourism can be suitable for an unskilled population or for those with no prior experience in the industry, yet employers are illustrating a preference for school leavers rather than older people. The exception to this is NMGM, where middle-aged men are preferred as room guides due to the authority which is associated with age.

In most sectors of the tourism industry in Liverpool, the results illustrate a predominantly full-time workforce, the exception being in secondary attractions such as eating and drinking and shops. Here employment is more transitory; the staff tends to comprise many employees who are, for example, mothers and students. Hence, the question of a need for full-time, permanent employment is difficult. There are sectors of the population which for various reasons do not desire this type of employment (Employment Gazette, p.45, 1995). Examples of such are mothers of young children who want some work whilst the children are in school, middle-class 'ladies' who want to fill time once children have left home, and students who require ways of subsidising their education. There is evidence that tourism is able to provide for each of these cases. There is however evidence of tourism-related employees *moonlighting* and working to earn cash in hand whilst claiming social security.

Employment in urban tourism thus does not replace male dominated manufacturing jobs nor does it directly respond to patterns of unemployment. Nevertheless it is a much needed source of employment which particularly suits a female worker. This stereotype does act as a restricting factors. Policy for regeneration at both a national and a local scale may help to break this image by introducing quotas for male and female employees based upon the unemployment characteristics of the area.

These apparent trends for tourism-related employment however fit with wider national trends for part-time work, temporary contracts and the rise in female labour across all sectors of the economy. Thus policy for employment which directly addresses unemployment needs to be applied at the widest level. In saying this one needs to fully address the issue of ideal employment characteristics. Part-time and temporary work are recognised features of service sector economies and as such may be features of modern society which, despite causing criticism during the transition period, need to be

accommodated and worked with instead of against.

A comparison with Census of Employment data has not been as successful as originally anticipated, due to delays in the publication of 1993 data. Nevertheless, comparisons with 1991 have been successfully conducted for those sectors interviewed and are discussed in Chapter Five. For specific tourism-related sectors, results from the two sectors are surprisingly similar for sectors such as eating and drinking and seriously inaccurate for hotels and attractions. Although differences are easily recognised, it is difficult to ascertain reasons for these discrepancies. One may however speculate. The field results for all tourism-related sectors are not taken from a sample; they have, where possible, included all establishments of all sizes. Managers of these establishments tended to quote figures without checking exactly from records. Thus, because of the criticisms of tourism as female dominated and part-time, there may be a tendency to exaggerate the discrepancy between assertions and reality in favour of male or full-time employees. In support of the research findings one may recognise that, as outlined in Chapter Five, there are problems in relying on a Census which creates discrepancies in the results.

Investment:

One indirect impact of urban tourism is suggested to be its ability to encourage non-tourist related industries to invest in the local economy, or indeed to retain business which might otherwise relocate in another area (Karski, 1990; Loftmann and Nevin, 1994; Lancaster City Council, 1987; Church, 1995). This thesis attempted an investigation of this. The survey was of both those offices relocated in main tourist areas and those in non-tourist areas of the central city.

As anticipated, these areas did not attract major investment from well-established companies. In most instances, recent relocation of companies from

outside of the Merseyside region occurred due to new starts by people with ties and connections in the Liverpool region. For larger national and international firms an office was often established many years ago, before the present managers' arrival. Hence for the areas surveyed, this often constituted a relocation within the city representing transferred rather than new investment. The survey results also showed little evidence of tourism as an influence on business location, either directly or indirectly, although there is evidence to suggest tourism does not act as a hindrance. However, there were some apparent locational advantages; noticeably the availability of decent hotels, the ability for visiting guests to visit attractions and, for those located at prestigious tourist sites such as the Albert Dock, the prestige which accompanies the location.

The anticipated local distribution of tourist expenditure is equally poor as this is neither encouraged nor common place. The survey of suppliers and VAT registration data suggests that local suppliers are rarely used and that any reliance on wholesale business in the area is rare. The assertion here, however, is that this picture may be somewhat less grim for cities which are famous for producing a product. Nottingham for example, was able to promote its lace industry. An ability to do this makes use of local resources and keeps a craft industry flourishing.

Image and marketing:

Linked with the issue of business location and attracting visitors is the issue of image change. For many of the policy-makers who were interviewed the key aim of tourism was that it can change the profile of the city. It is perceived that this could be the impetus to regeneration. All cities now see the need to promote their facilities in the newly created arena of competition, particularly by bids for titles, such as Liverpool's failed City of Architecture and Design 1999 bid. Rennie Short (1996), further highlights the role of sport in attracting

investment. In this aspect Liverpool is fortunate and benefits from two highly successful football teams and the prestige associated with the Grand National at Aintree.

The image of Liverpool is changing, but it is a slow process. A major marketing campaign introduced during the summer of 1995 appeared by early 1996 to have died; the city appears to lack impetus or mechanisms for change. Glasgow was seen as a prime example of successful marketing, but there are fears expressed from within the Liverpool camp that money will never be available for such a campaign on Merseyside. The biggest difficulty faced by Merseysiders is the lack of an agency which could be responsible for such a campaign. Even if such an institution existed, there is no guarantee of success.

Special events such as the Tall Ships Race, or even the 1984 Garden Festival may represent a more satisfactory marketing campaign. It was widely recognised by policy makers and managers that the only guaranteed way of making people see what Liverpool was really like was to get them to visit the city. Major special events do appear to do this, yet concern remains about their ability to show the city in its most positive light.

A discussion of image change is difficult. Suggesting that a place can change its image is a bizarre concept when in some instances the image is correct. Image is also based on personal judgement, and each individual will perceive different qualities from different characteristics. It is thus difficult for marketeers to know which market to address; is one market better than another, is there a tool which may attract all markets?

A personal view of the Liverpool image is perhaps biased due to my own allegiances and knowledge of the city, yet it will be stated. The concept of Liverpool as dull and depressing is perhaps true when viewed on a dull winters

evening, yet in the summer sun many consider Liverpool to be a beautiful city with an outstanding architecture. Liverpool is indeed renowned for its 'scousers', but these people are not all crooks and violent; many are very kind, warm and intelligent people and of course no different from those elsewhere. This debate could continue but the point stressed is that image is based around stereo-types. The aim of a marketing campaign is often to take the viewers' attention away from the negative to stress other, more positive, stereotypes, for example the architecture, the 'kind people' etc. As Urry (1990) discusses in his concept of the tourist gaze, a visitor will expect something of a destination, hence he or she will visit with the intention of finding it; returning home without it leads to dissatisfaction. It is thus important that the marketed stereotypical images are those which are guaranteed to be found by visitors.

To date there has been only limited success in the re-imaging of the city, but it was a factor widely recognised by non-tourist business as a positive effect of tourism and associated special events. It remains that a report from a contented visitor to friends is a stronger, and cheaper marketing tool than any nationwide poster campaign. Surely, if this attracts just one more visitor then it is a positive thing. But there remains a hierarchy of the kind of visitors which are of most benefit. Those in social classes AB who are in a position to relocate or expand business into the local economy are the most prized visitors. These are people who will possibly stay overnight in high quality hotels and eat in *'classy'* restaurants. Middle managers and professionals are also highly prized as these people, if they do enjoy a visit enough to contemplate relocation, may buy expensive property, will send their children to schools and pay taxes. This may be a simplistic view of the impact, but it is that which policy makers are frequently quoting. There was no direct evidence to support these assertions, yet they do appear credible. The issue in the Liverpool example remains that any visitor, whatever their purpose or social status, is good, both economically

and in terms of image change. The city is not yet fortunate enough to be selective, it needs to welcome all visitors with equal enthusiasm.

Nevertheless a marketing campaign is necessary. With the increased need for cities to compete in a global market, promotional videos and brochures are produced by most major cities, all flouting the benefits of location there. To retain, let alone enhance its position, Liverpool needs to produce this literature. The current campaign is designed to market the city to all sectors, but from the recorded response to the "Merseyside a 'pool of talent" campaign there may be a need for individual campaigns each designed to address a different business sector, but all with the same slogan or image. This form of targeting allows a more focused approach andproduces the image of a city which knows what, it wants not one which wants anything it can get.

The Environment

The thesis finds plenty of accumulated evidence to suggest that, through the redevelopment of areas for tourism and associated uses, there have been extensive environmental improvements made to the central core of the city. The nature of these improvements has been highlighted in both Chapters Two and Six, and range from new road schemes, redevelopments of existing building, new building, pedestrianisation, tree planting, environmental quality improvements and minor streetscape features such as litter bins, seating areas and the occasional strategic placing of sculpture.

However, these environmental improvements are neither placed solely at tourist sites nor solely for the purpose of the tourists. The benefits are for everyone who uses the city. There is an argument that these schemes are piecemeal, confined to specific locations. These are usually designated to agencies for regeneration such as the Urban Development Corporations and City Challenge. It can be concluded that, had these agencies not used tourism as a mechanism

for renewal, the environmental improvement would possibly have occurred anyway.

Whatever the impetus behind environmental change, one must also consider the anticipated and actual results of these changes. The anticipated results are that they may improve the image of the place, and in so doing attract investment and visitors. There is some linkage in that environmental improvements may occur in order to attract visitors. On the ground there is evidence of improvements both for and as a result of tourism, but there is similar evidence of change to attract business investment. Despite motivation for location in the areas studied in the business survey commonly including the 'attractive surroundings', noting the quality of environment is not sufficient evidence to quote it as the main reason for business location, but it is enough to suggest that attractive surroundings may favour one area against another. In perspective it is more likely that this represents advantage towards one area within the city, not favour to one city over another.

Many of the small scale improvements associated with tourist-related redevelopments appear to have occurred to encourage people to linger for longer in these areas. By staying longer, there is some possibility of greater spending in the economy; however, this thesis has no evidence to confirm this assertion. Nevertheless, results from the student visitor questionnaire illustrated how planting, pedestrianisation and clean, tidy spaces do change people's perceptions of an area.

Factors beyond the immediate and specific:

The geographical focus of the research presented here was central Liverpool (postcode sectors L1-L3). Nevertheless, the results provide some information which allows comment on the impact beyond the immediate tourist-related scheme or facility.

Although substantial research was not conducted beyond the designated case study boundary, the impact of tourism appears to be minimal. Environmental improvements are not apparent on major routeways in to the city, indeed a number of business respondents commented on the poor environment surrounding the link road from the city to Aintree race course; a crucial link when one considers the large number of visitors who come specifically to see the Grand National.

Economically, the redevelopment of premises for office suites has not stimulated considerable further investment in the rest of the Merseyside economy. Among those companies interviewed in L1-L3, a quarter of all business is done with companies outside Merseyside and almost two-thirds with companies outside Liverpool. As the companies located in the redeveloped office suites tend not to have relocated the wider impact of the specific developments appear to be minimal. Those companies newly established in the redeveloped suites are small, hence, the amount of investment is minimal in comparison to that for the whole city. Objective One funding may, however, in the case of construction based industry, keep work within the Liverpool economy, or encourage additional business to locate in these areas.

Another issue associated with the wider impact of tourism is employment. Managers of both tourist and non-tourist related establishments were asked to comment, if possible, on the home address of staff. In most instances staff live outside the case study L1-L3 area, yet, with the exception of middle and top managers, in the Liverpool postcode districts. The more highly paid element tend to live in Wirral and Cheshire. Hence the multiplier effect of spending is proportionately quite high in this respect. Wages paid as a result of tourism are generally retained in the Liverpool economy, although higher paid staff provide leakage from the economy.

Within the specific L1-L3 case study area the issues are different. It is apparent from the results presented that many of the environmental improvements and tourist attractions are combined in a critical mass. The question asked here regards the extent to which the regeneration element extends beyond the specific. Yet, when these sites appear successful, they are strong enough to run without the assistance of agencies; there may be a spread of benefits to surrounding areas which are impelled to improve either by agencies or via the imagination of key individuals. This concept is suggesting a spread effect, still site specific in origin and piece-meal, but extending in area.

The role which tourism plays within this is again dubious. New tourism-related establishments have been far more loyal to existing tourist honey-pots than to any new sites. There are only a couple of outlying attractions which, in the main, are unpopular. This reinforces the arguments for the 'American festival market place' and a critical mass of attractions. There are however some areas of the city where night time entertainment facilities are more apparent, and area renewal is occurring. This type of regeneration is however property led and refers particularly to the Cavern Quarter and Bold Street areas.

Lessons to be learnt from the Liverpool example:

A number of striking conclusions may thus be drawn about the approach of using tourism as a tool for regneration. These may then be applied to other cities which are aspiring to this solution to their urban problem. Many of the assertions made in this chapter refer to a *vision* for the city. This needs to be a total approach which specifies the aims and objectives of a tourism policy; targeting specific markets with acheivable results. Currently there is no co-ordinated approach in Liverpool, leading to an uncohesive pattern of attractions. If places chose to use tourism as a motive for environmental and infrastructure improvements they must also see the need for linkages of improvement and infrastructure. Pockets of attractions alone do not draw

tourists around the city.

These findings thus suggest a need for a city wide approach to tourism as a mechanism for improvement. Too often, tourism-related initiatives have been secondary or supplementary to other schemes. I stand by the previous statement suggesting that policy solely for tourism is not the solution. However, I see a need for a tool with which the city will market itself and focus regeneration, to be stated as a common goal amongst all parties in regeneration. If tourism is the chosen tool, then the vision may inlcude image change, environmental improvements and attracting investment in relation to this industry. To date in Liverpool this vision is held to different extents by different groups.

7.3: Effectiveness of the strategy:

In the context of this thesis the effectiveness of tourism as a strategy for regeneration can be discussed at two levels, firstly whether the results support the assertions made in the Law (1993) hypothesis, and secondly whether the findings suggest tourism to be an effective strategy for regeneration.

In reference to the Law (1993) hypothesis (Figure 1.3) and associated literature (see Section 1.2), tourism is considered to have a number of main aspects to its regenerative ability - employment, social, environmental and image change. The economic impact was stated public sector pump priming into investments in attractions and environmental improvements that will encourage visitors to spend a significant sum in the local economy; the income which this provides will encourage other economic activities to expand, in addition to permitting further investment into tourism-related activities. Within the theme of economic regeneration, this thesis has attempted to consider these issues. Tourism in Liverpool is tied with the redevelopment of areas for purposes extraneous to tourism, thus there are few examples of public sector pump

priming solely for tourism. The schemes which are developed therefore will often provide accommodation, shopping and office provision in addition to the tourist element. Thus the impact is difficult to distinguish from the impact on the other economic sectors. This is perhaps the most confusing element when attempting to measure the impact of tourism in this context.

The results support the hypothesis that tourism creates an income (e.g. Morrison and Anderson, 1994; Vaughan, 1986). Tourists do spend in the local economy yet, in the Liverpool situation, spending is not at its full potential. There is scope for tourists to spend considerable amounts on entrance fees, food and drink, and accommodation. In Liverpool, a substantial number of visitors do not stay overnight in the city, indeed there are not enough, or enough variety, of attractions to retain an audience for more than two or three nights. Similarly, there are few examples of events which will encourage return visits, particularly those which encourage overnight stays. Examples of note are, the Grand National, the RLPO concert season and the Festival of Comedy. Other one-off events may attract overnight stays.

The income created from tourist spending is often then distributed widely. Some returns to the local economy through direct spending and taxes, and, particularly in the case of mixed landuse schemes, such as the Albert Dock, were there are service charges which are also of benefit to other tenants. The Law (1993) hypothesis suggests that other economic activities may expand as a direct or indirect result of income generated by tourism. The results presented here suggest that there is little evidence of a direct expansion of economic activity solely because of the growth of income from tourism. There is however an argument that economic activities will expand because of the image change and environmental improvements which occur (see Figure 7.1).

The main process for recycling tourist expenditure is through its job creating

potential. Seasonality of work is rare in this urban area due to the dual market of leisure and business visitors. The jobs created might provide more income from taxes (due to new jobs created), the use of resources such as schools and hospitals by employees new to the area and their purchase of housing. In the survey of employees of tourist and non-tourist industries, there are few examples of this direct process occurring. It is a process more frequent in other industries relocating to newly redeveloped areas than tourism. Hence, for a more successful regenerative policy, there is an argument for attracting these relocating industries rather than tourists. This has the ability of supplying a market for a wealthier population. However, there are similar difficulties with this solution as the wealthier, more highly paid workers tend to commute longer distances to work, thus this expenditure may be invested into adjoining regional economies. Thus, economically, tourism appears an industry which offers immediate earnings among the low-paid for minimal investment.

Social benefits of tourism have also been recognised (e.g. Karski, 1990; Kotler and Haider, 1993). In addition to providing employment which meets the needs of those sectors who do not want full-time permanent employment, it can improve the quality of life. The various surveys conducted for this research project highlighted how employers and employees value the opportunity to visit the tourist sites and associated resources. It is interesting that, in his diagram, Law (1993) does confine income generated to the provision of new or enhanced facilities. As Figure 7.1 illustrates, if first round improvements enhance facilities, second round ones should also. The nature of second level investment into resources is however different. In the Liverpool case study, first round investment was in major attractions such as the garden festival site and Albert Docks; more recent investment is in smaller scale projects such as a bus station or hotel development which will further enhance the attractiveness of a location. The geographical distribution of these facilities will be wider. One should, however, not overstress the benefit for local residents as tourism

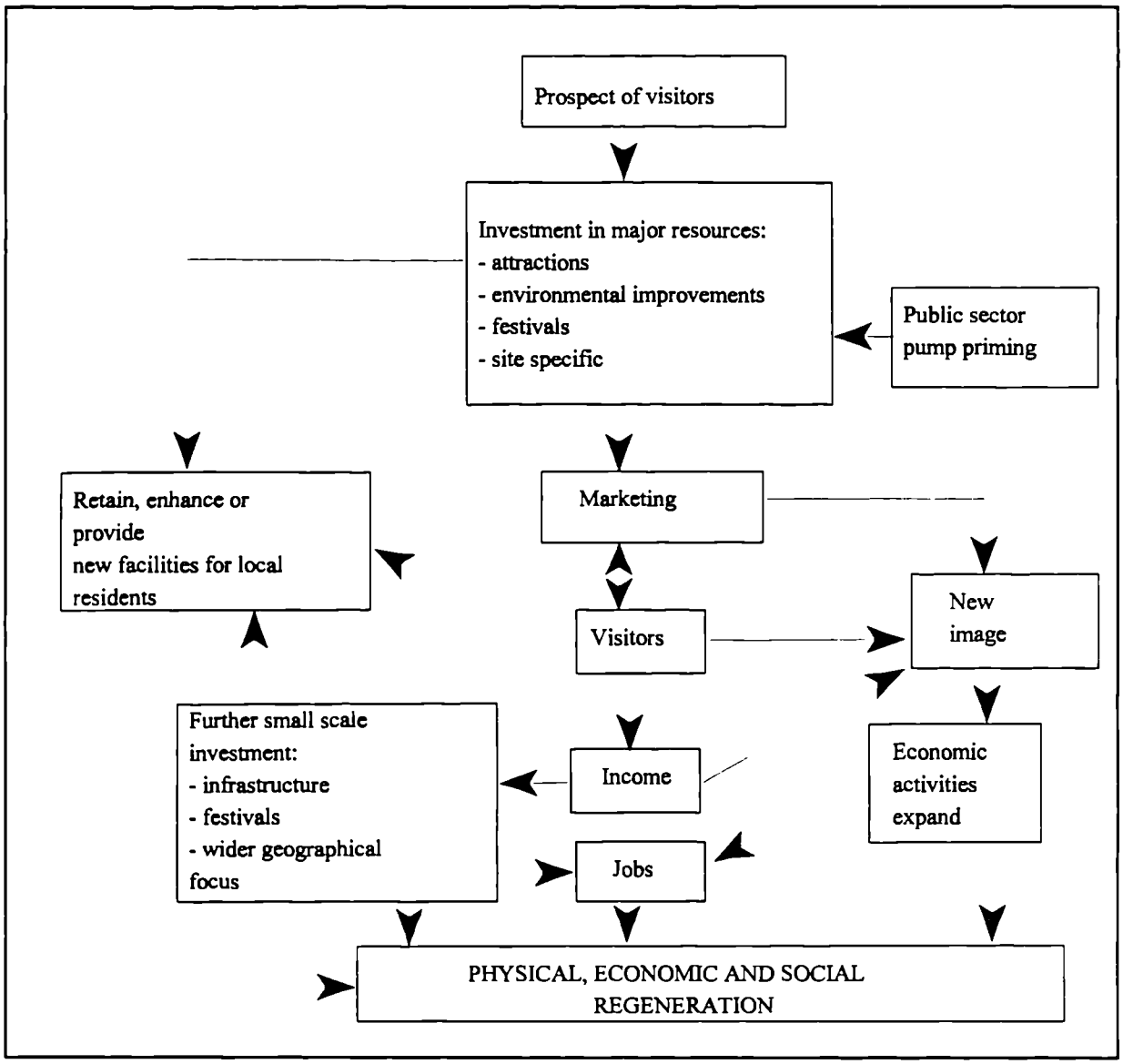
redevelopments rarely focus on locations near to outer housing estates; there is no compensation in lower entrance fees for local people and many may suggest that the initial outlay of finance would be better spent on upgrading housing provision.

It is suggested in Law's (1993) hypothesis that the marketing of and attraction of visitors to the city can enhance the image. The research presented here supports this assertion. Indeed, an improved image is one of the major functions of a tourist industry. The arrow between marketing and visitors should however be double-headed as the visitors themselves are evidently a marketing tool. Additionally, respondents were keen to highlight how tourism had improved the image, thus a growth in civic pride was evident.

The one category excluded on Figure 7.1, but evident in the Law (1993) hypothesis is that of population growth. The research findings here present no evidence of a growth in population as a direct or indirect result of tourism. The non-tourist businesses which have invested in redeveloped areas of the city tend not to be new to Liverpool, or else they are new business, hence there is no evidence of inter-regional relocation.

In conclusion therefore, the work of authors such as Law have been crucial in formulating a basis for this research project. Many of the linkages suggested do exist. Although the thesis aim has not been to critically evaluate Law's (1993) hypothesis, it has illustrated that, using a specific case study (Liverpool), tourism can be evaluated as an extensive process with numerous indirect impacts on the area, many of which acknowledge the assertions of this hypothesis (see Figure 7.1).

Figure 7.1: The strategy of urban tourism (After Law, 1993).



In analysing the regenerative role of tourism one should, most importantly recognise it as only one aspect of wider policies for regeneration. The mechanisms, institutions and interested parties acting in the interest of regeneration all pull together under a number of key heads which interact with tourism. The themes tend to concentrate around attracting inward investment and job creation; both themes of a tourism strategy. Funding for tourism is commonly incorporated into general funding for redevelopment; as such, many schemes cannot be solely designated as *tourism*, hence one cannot examine a

process in isolation.

Also in making an analysis of tourism's regenerative impact there is a tendency to lean towards the suggestion that the policy is a *"success"*. This is a difficult word as it requires a point of comparison; what should this be? This term also needs to be applied in relation to the aims and objectives of the policy. As has already been recognised the introduction of a tourism policy is thought to fulfill a number of regenerative aims. Hence this final analysis of tourism's regenerative impact will firstly analyse the impacts of tourism in Liverpool, followed by an attempt to finally question the effectiveness of this strategy.

In this context, a number of further impacts can thus be identified and will be discussed here in relation to the holistic impact. The economic impact of tourism is a value to the local economy; jobs are created, many of which, although not always full-time, are secure and suitable for many sectors of the population who require these working arrangements. The employment is low skilled and allows transfer between institutions and from other industry. It is also a growth industry, which in Liverpool stands with education as one of the two growth industries in the city. Tourism is also an export industry which attracts visitors and their subsequent spending.

Nevertheless, it is a small scale impact which, as already stated, in Liverpool does not reach its potential. Assertions are made that the investment in tourism-related industry will cause the change of image and marketing of the destination and attract new investment. Evidence from this project suggests this to be untrue; it acts more as a focus for the reorganisation of prime office locations within the city.

Yet, in being critical of the size of economic impact, one should acknowledge that, as an industry, it is a success which, in the Liverpool instance, is not on

the scale anticipated by planners or academics. It is an industry which could be further exploited. There are a range of strategies which can be and are not being used to encourage more residential stays. The Beatles connection is again not fully exploited, and internal bickering between key sites and the protection of one's own space by agencies has led to a general feeling that any regeneration will be site specific without a coordinated policy or strategy.

The social impact of the industry is perhaps greater than it is often credited. In addition to providing resources, tourism is an industry which people can be proud of; in this it is perhaps being successful. What it is successful in or indeed whether it is being successful are in some senses irrelevant, the *image* is one of success, highlighted via the Albert Dock redevelopment, which local people can talk about or take friends and relatives to visit. Thus it not only improves the impression which outsiders have of the region, but it boosts morale in the city. An alternative view, but not one brought out in this survey due to its focus, may be that these redevelopments are site specific and do not focus on the grassroot problems of deprivation and the urban fabric. Although many academics and planners would argue against this niaive impression, it is understandable from the view of an unemployed individual living in a decaying council block on the outskirts of Liverpool.

Indeed, the policy alone does not help change the immediate environment for these people, and more importantly offers little potential of doing so. The envisioned linkages which would encourage this are based on unrealistic expectations for Liverpool. The processes involved are slow and would take decades to occur if indeed they work at all - and the results presented here do not show evidence to suggest this. The tourism impacts evident in Liverpool are aimed at tourists only, not the local population. These people are seen as little more than a bonus if they spend money. The employment availability does benefit Liverpool people, beyond the area designated to tourism, but wages are

low and jobs only suitable for a minority. It is not the ideal solution, but one which can help some.

The physical renewal which has occurred via tourism-related schemes is indeed impressive. Yet the real issue here is whether this would have occurred for any other land use? There appears to be some consensus that this is true, especially considering the nature of financial assistance for such schemes. However, the knock-on effect may not have been so apparent. There are a couple of instances in Liverpool where private developers have initiated the redevelopment of areas for leisure purposes. This is not just for attractions, they include food, drink and club based entertainments or hotel developments. These often act as secondary tourist facilities for which the market may have been limited without the major public sector led schemes.

Some have argued that the increased number of people visiting Liverpool has been stimulated by the clearing of waste land. Derelict land is, where possible, no longer left to decay, but cleared and re-built on or planted. This improves the image of the city. Image change was indeed the most apparent 'success' of tourism to Liverpool. The marketing campaigns which have been discussed in this thesis have evidently not always had the success expected, but for the insider, the provider and facilitator, image has improved, as has the pride in the city.

This review of the impact of tourism thus leads to a suggestion of limited success. Indeed the impression of the view of providers and key policy makers is that, despite having been publicised as a major success of MDC's regenerative policy, the industry has had a limited impact and has indeed already gone stale, with no new developments and the closure of some major attractions (e.g. Animations World). But, is this limited success due to limited impact?

The industry has had some direct impact on the City of Liverpool. Some new restaurants, bars, cafés and museums have established in the city, all of which provide employment and encourage visitors to spend in the city. However, one could argue that, as the number employed in each establishment is small and the goods sold comparatively cheap, this impact could be achieved by attracting the location of two major multi-national corporations, which, it may be argued, could create a higher level of training and job security.

A further suggestion may be that this pessimistic view of the industry is due to its use as a lever on which to pull other regenerative initiatives into action. By this one can include the initiation of environmental improvements and an image changing campaign: mechanisms which may further regeneration in their own right. As it may be argued that Liverpool is in greater need of infrastructure improvements, housing and business investment than fancy restaurants and foreign tourists, this perceived limited success may signify that the city sees or hopes that the potential for regeneration lies elsewhere, possibly in the higher education sector and spin-off industries which may be encouraged. To use vacant and derelict land for an industry which may be short-term (tourism) may restrict the development of other potential regenerative tools.

Linked with this issue is the one of competition. In discussing a limited impact one needs to refer to outside forces. Despite this research project being conducted at a time of recession, the tourist industry is showing signs of growth on a national scale. In response to this and the well publicised success of regeneration schemes (needed to fulfill the aims of the initiatives), many other cities have adopted policy which includes tourism. It is thus a highly competitive market. Liverpool needs to compete with Manchester in particular, where the image, hotels and, museums are arguably better and location is more convenient.

Despite this speculation about the restricted impact of the industry there are some benefits to urban regions. As Section 7.2 highlighted, these benefits are however small and highly concentrated, spatially and socially. The economic benefits such as job creation and the multiplier effect are disappointing, and physical benefits such as urban renewal are promising only in selected tourism-related areas. Social impact is however greatest and relies predominantly on the image changing potential of the industry, as well as the ability of the industry to provide employment to a predominantly unskilled workforce, or jobs which do not require the re-skilling of ex-dock workers. Yet the nature of these jobs is of concern as they are low-paid and often temporary or part-time. The aim here is not to totally diminish tourism. In a temporal context, change can occur rapidly; presently it is little more than a decade since the first major tourism initiative in Liverpool and environmental impacts in this period have been outstanding. It is an industry which can promote a city in a way which is economically viable and profitable. It has a role which needs to be sustained through continued investment and special events. Despite are ideas of a tourist life-cycle model for urban areas, in terms of urban regeneration, if the tourism industry were to die is this a real concern as long as it is replaced? The benefits highlighted in this study are quick to materialise, and as such should not lose credibility. Yet, for tourism to be the answer to the urban problem is too much to ask.

Nevertheless the thesis has shown an important role for tourism which, it can be argued, needs to be recognised in formulating policy for urban areas. This role can be summarised as one through which environmental improvements and image change can be initiated whilst also instilling a *"feel good"* factor amongst the local population. Hence it is a good policy for desperate urban areas unable to find and alternative economic, social or physical boost.

Currently no national policy specifically aimed at tourism exists, and perhaps,

given the general trend of initiatives towards leverage and one-off grants, this is no bad thing. There is potential within existing provision for tourism schemes to be initiated at a small scale. Additionally, given current national competition, national funding for such schemes would only increase competition and lead to market saturation; thus all parties would lose in the long term.

However, at a local scale, Liverpool need to think carefully about the future of this policy. Stagnation at present does not bode well for tourism as the key to Liverpool's re-emergence as one of our great cities. A strategy to *'kick-start'* the industry is required if it is to be of any further benefit. One such strategy currently on the drawing board is a tram link between the tourist clusters and a national museum of sport. But is this enough to compete with Manchester's tram link and Bradford's National Museum of Photography, Film and Television?

If this industry is to prosper in the future it needs to play more upon the assets of the city, possibly including an emphasis on the Beatles or Cilla Black as key figures. It also need to try to link the growth of the industry with the decline of others. This has been successful elsewhere, for example Wigan Pier Museum is based on the mill industry and uses oral histories and community interest and involvement to tell the story. In Liverpool this form of heritage tourism may have some potential, possibly through a dock museum with ex-dockers acting as guides. One example of this is Merseyferries where the commuter service has been transformed into an attraction whilst also retaining its function as a commuter service. The architectural heritage of the city is another feature which requires publicity and formalisation within the tourist itinerary. One possibility may be to use a vacant building as an architecture museum and have guided walking tours emanating from it. This may link with the university architecture department and / or NMGM.

Finally, Liverpool needs to find a niche in the market. It needs to be identified. Glasgow and Bradford have found positive marketing campaigns have helped; Bradford has also created an annual festival which draws visitors back to the city. Liverpool needs to win a major title, for example the bid for City of Architecture and Design, 1999 in which it failed, or needs to name itself. The signals coming form the city currently are the Albert Dock and the home of the Beatles. More is needed; a major long-term festival such as the garden festival may do this.

To suggest answers may be easy, but all of these need financial support, something lacking as much in Liverpool as any other city. ERDF Objective One status has recently bestowed the city and it is hoped it will allow redevelopment to flourish. The fear is that internal politics and disjointed aspirations may waste the best opportunity Liverpool may ever have to recreate itself as one of Europe's greatest cities.

7.4: Research limitations and potentials

This project has had a number of limitations which need to be addressed when considering its conclusions. As this is a doctoral thesis, time and finances have been limited. The project has essentially been completed over a three year period, thus there is no evaluation over a period of time. It is a snapshot picture of the city, with some extensions backwards and predictions for the future. The timing of the project has also been unfortunate. The early 1990s are a time of national recession. Domestic tourists have been tightening their purse strings and cutting back on non-essential spending. This is linked with the ramifications of the Gulf War crisis which caused rising fuel prices and hence affected international tourism.

This is also a case study research project, examining just one city. Initially it was anticipated that this could be a comparative study with other ex-

metropolitan northern English cities. Unfortunately this was not possible in the time available, but would remain a necessity to check the assertions made in this chapter. The nature of the comparisons required is varied but should be both with similar cities and those with larger established tourist industries, but it might also involve a return to the home of this initiative and compare with Boston or Baltimore.

It may also be suggested that future research can draw upon the nature of urban marketing and image change, as these issues appeared to be the most important regenerative impacts of toruism in Liverpool. Perhaps one can question whether policy directed solely to these is more effective in attracting investment than linking them with tourism initiatives.

In stating this, one must not forget the achievements of the project. This project has taken a new angle (the view of providers) in questioning the viability of tourism as a mechanism for regeneration. It has also allowed discussions of the often quoted tourists' and policy makers' view; doing so questions the legitimacy of sources such as tourist surveys and census data. Achievements of note are the results of the business survey to assess whether businesses are attracted to locate by the tourist industry, concluding that it is more a process involving attractive surroundings, accessibility and the suitability of accommodation rather than tourism. The employment survey also concluded that urban tourism is less seasonal so part-time than that of the more traditional tourist resorts.

To leave this piece on a recommendation for further study it is apparent that future research is needed into those areas of the economy which can survive best, grow in synthesis with or continue should tourism decline. Tourism can survive, but alone is not sufficient to ground a future. One interesting concept here is the use of higher education as a source of regeneration. Substantial

work has been conducted by the John Moores University in Liverpool on its own economic potential. This industry is allied with tourism as students use the leisure facilities, or may be attracted by them; they are also heavily employed in some sectors. On graduating, these individuals may be encouraged to stay in Liverpool, buy property in the city and establish companies. For answers here, more research is necessary.

APPENDIX 1

1991 Population - Boroughs and counties of Northern England
(With a population of between 100,000 and 1 million).

GREATER MANCHESTER	
Bolton	253 300
Bury	172 200
Manchester	406 900
Oldham	211 400
Rochdale	196 900
Salford	217 900
Stockport	276 800
Tameside	211 700
Trafford	205 700
Wigan	301 900

MERSEYSIDE	
Knowsley	149 100
Liverpool	448 300
St Helens	175 300
Sefton	282 000
Wirral	322 100

SOUTH YORKSHIRE	
Barnsley	217 300
Doncaster	284 300
Rotherham	247 100
Sheffield	499 700

WEST YORKSHIRE	
Bradford	449 100
Calderdale	187 300
Kirklees	367 600
Leeds	674 400
Wakefield	306 300

CHESHIRE	
Chester	115 000
Crewe & Nantwich	101 800
Halton	121 400
Macclesfield	147 000
Vale Royal	111 100
Warrington	179 500

CLEVELAND	
Langbaurgh-on-Tees	141 700
Middlesborough	141 100
Stockton-on-Tees	170,200

CUMBRIA	
South Lakeland	101 900

LANCASHIRE	
Blackburn	132 800
Blackpool	144 500
Lancaster	125 600
West Lancashire	106 600

NORTH YORKSHIRE	
Harrogate	141 000
Scarborough	107 800
York	100 600

TYNE & WEAR	
Gateshead	196 500
Newcastle-upon-Tyne	263 000
North Tyneside	188 800
South Tyneside	151 900
Sunderland	286 800

SOURCE: OPCS, 1991.

APPENDIX 2

Employment change in the metropolitan boroughs of northern England (percentage change 1981-1991)

	% CHANGE 1981-91						
	Tour-ism	Hotel	Catering	Museum	Services	Manuf-acture	TOTAL
SOUTH YORKSHIRE							
Barnsley	7.4	*3.6	14.2	*11.7	13.3	-14.2	-19.2
Doncaster	26.7	*11.0	29.3	31.7	16.9	-25.5	-11.5
Rotherham	43.0	*104.3	50.0	6.5	24.9	-15.7	0.4
Sheffield	38.9	91.0	29.1	-36.9	8.1	-42.6	-12.4
WEST YORKSHIRE							
Bradford	39.6	81.9	79.3	10.3	15.9	-17.6	2.2
Calderdale	46.4	*118.0	64.3	-1.2	36.4	-26.1	1.2
Kirklees	50.3	*147.2	50.8	29.7	24.9	-9.9	5.8
Leeds	17.5	1.9	3.6	30.6	21.5	-24.8	4.0
Wakefield	36.7	*50.9	6.4	23.5	12.3	-22.1	-9.5
GREATER MANCHESTER							
Bolton	36.4	*23.7	54.9	0.0	17.8	-24.7	-0.9
Bury	72.7	*240.2	100.7	100.7	37.5	-25.5	9.5
Manchester	6.6	51.9	20.3	20.3	-0.2	-42.6	-10.5
Oldham	32.9	*122.3	40.5	40.5	6.1	-29.6	-12.0
Rochdale	7.0	*69.8	18.1	18.1	11.4	-19.0	-3.3
Salford	11.8	*125.9	9.7	9.7	13.3	-33.2	-5.4
Stockport	-1.4	*111.9	40.1	40.1	15.1	-23.6	0.9
Tameside	10.7	*119.0	71.1	71.1	28.3	-19.3	3.5
Trafford	8.4	*-6.6	11.5	*20.5	24.5	-40.3	-2.9
Wigan	41.9	*336.0	68.3	*35.3	14.3	-20.8	-2.8

% CHANGE 1981-91							
	Tour-ism	Hotel	Catering	Museum	Services	Manuf-acture	TOTAL
MERSEYSIDE							
Knowsley	7.4	*189.0	-32.5	-15.6	2.0	-35.9	-21.5
Liverpool	9.9	25.7	11.5	5.9	-13.3	-54.9	-23.3
St Helens	8.3	*-32.4	24.9	*-35.5	3.8	-37.8	-19.3
Sefton	4.9	103.3	27.4	*-15.6	27.7	-33.5	10.5
Wirral	5.4	*-24.9	18.3	1621.7	15.4	-20.2	0.6
TYNE & WEAR							
Gateshead	21.7	*67.7	34.0	24.7	27.4	-33.4	-0.9
Newcastle	13.7	-19.2	14.0	20.5	18.1	-43.4	1.0
North Tyne	1.7	*-23.0	12.5	*14.3	9.9	-34.7	-5.9
South Tyne	-10.7	*-31.2	-14.1	*33.8	-0.1	-38.1	-18.2
Sunderland	5.5	*82.4	5.8	-8.6	3.0	-3.5	-1.7

SOURCE: NOMIS, 1993.

Notes:

* Based on absolute numbers, not normally released by Department of Employment.

TOURISM = Tourism Related; including cafes, pubs, clubs, hotels, other short stay, museums and sports.

HOTEL = Hotel Trade (included above)

CATERING = Catering (included above)

MUSEUMS = Museums (included above)

SERVICES = Service industries

MANUFACTURE = Manufacturing

APPENDIX 3

Percentage of all attractions and visitor numbers (thousands) for Metropolitan boroughs of the north of England (1991)

	Total	Historic	Museums & Galleries	Other	Miscell-aneous
SOUTH YORKSHIRE Total	100% 127 263	21% 31 943	47% 101 522	21% 325 882	11% 36 500
Barnsley	21/100 87 973	25% 28 891	- -	25% 250 000	50% 36 500
Doncaster	21/100 103 457	25% 22 027	50% 120 901	25% 150 000	- -
Rotherham	21/100 244 143	- -	50% 36 524	50% - 451 764	- -
Sheffield	**37/100 96 529**	**29% 38 428**	**71% 119 769**	**- -**	**- -**

WEST YORKSHIRE Total	100% 124 863	21% 59 349	54% 95 592	10% 515 030	15% 48 485
Bradford	**29/100 126 451**	**14% 98 972**	**65% 143 330**	**7% 200 000**	**14% 41 198**
Calderdale	13/100 62 350	17% 21 601	17% 50 500	17% 125 000	50% 59 000
Kirklees	17/100 33 549	25% 25 021	63% 35 670	- -	13% 40 000
Leeds	**25/100 215 788**	**25% 85 086**	**50% 65 658**	**13% 190 154**	**13% 40 000**
Wakefield	29/100 123 898	25% 31 274	63% 114 528	13% 350 000	- -

	Total	Historic	Museums & Galleries	Other	Miscell-aneous
TYNE & WEAR Total	100% 67 683	33% 33 088	61% 72 343	- -	6% 200 000
Gateshead	11/100 118 497	- -	50% 36 994	- -	50% 200 000
Newcastle	**44/100** **51 519**	**25%** **23 606**	**75%** **60 824**	-	- -
N. Tyneside	11/100 50 898	100% 50898	- -	- -	- -
S. Tyneside	22/100 74 835	50% 36 759	50% 112 912	- -	- -
Sunderland	11/100 84 010	33% 37 088	61% 72 343	- -	6% 200 000

MERSEYSIDE Total	100% 523 918	10% 65 668	57% 156 647	19% 736 925	14% 2 014 614
Knowsley	14/100 152 755	33% 117 625	33% 20 639	33% 320 000	- -
Liverpool	**43/100** **931 926**	- -	**67%** **28 436**	**11%** **750 000**	**22%** **2 965 575**
St Helens	5/100 33 000	- -	100% 33 000	- -	- -
Sefton	19/100 -	- -	50% 33 474	25% 750 000	25% 112 334
Wirral	14/100 64 804	33% 13 711	33% 53 0000	33% 127 700	- -

	Total	Historic	Museums & Galleries	Other	Miscell-aneous
GREATER MANCHESTER Total	100% 200 486	5% 46 287	53% 201 932	26% 101 925	16% 411 333
Bolton	5/100 253 000	- -	100% 253 100	- -	- -
Bury	5/100 107 000	- -	- -	100% 107 000	- -
Manchester	**58/100** **272 618**	**-** **-**	**64%** **177 652**	**-** **-**	**18%** **579 500**
Oldham	11/100 48 832	- -	50% 22 663	- -	50% 75 000
Rochdale	- -	- -	- -	- -	- -
Salford	- -	- -	- -	- -	- -
Stockport	5/100 300 000	- -	- -	100% 300 000	- -
Tameside	11/100 48 956	50% 46 287	- -	50% 51 625	- -
Trafford	- -	- -	- -	- -	- -
Wigan	5/100 500 000	- -	100% 500 000	- -	- -

SOURCE: Visits to Tourist Attractions 1991 (BTA/ETB, 1992)

APPENDIX 4

Employment in post code districts L1, L2 and L3 - 1984 & 1991

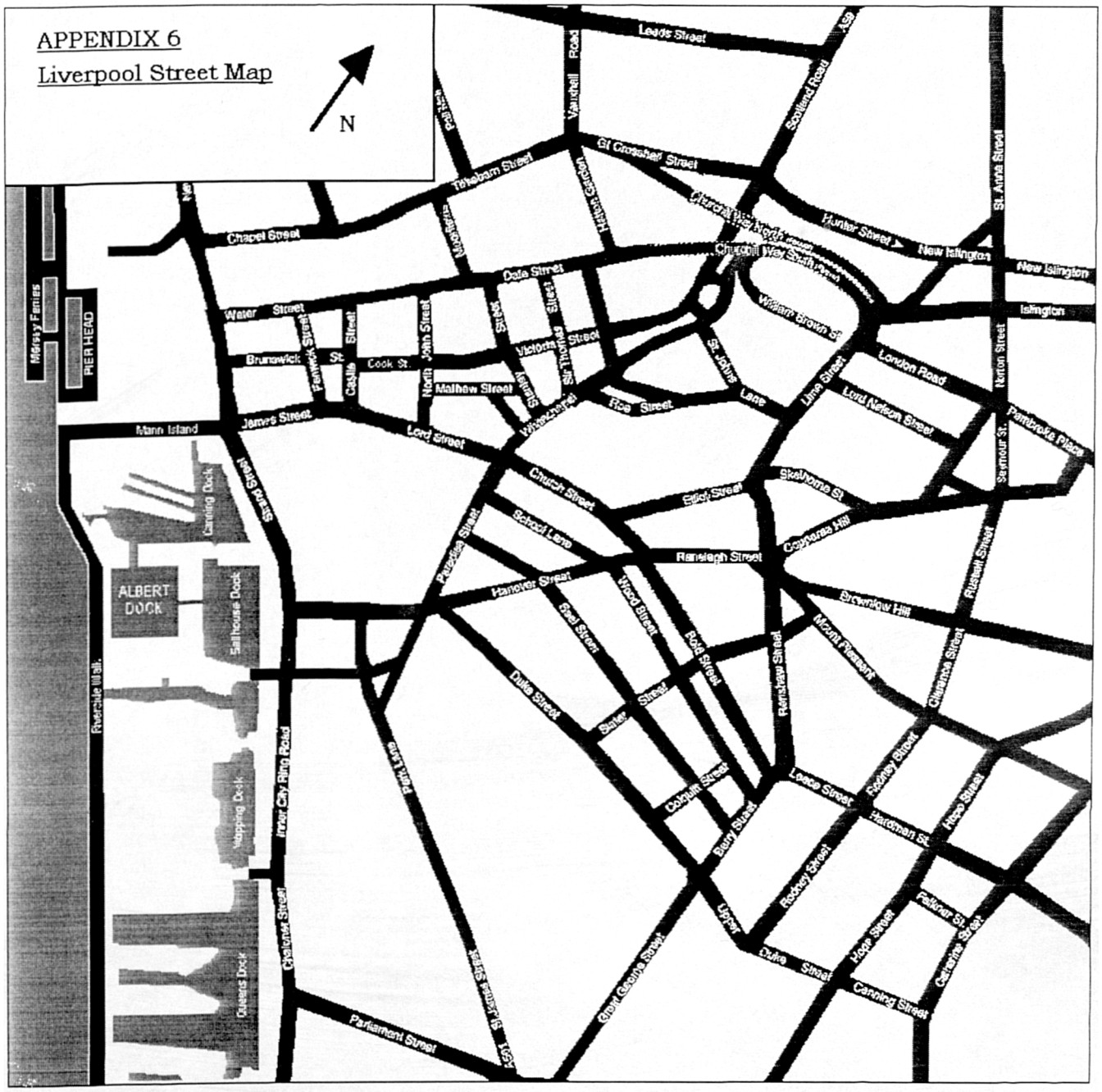
	LIVERPOOL 1 - 3			
SIC	1984		1991	
	No.	%	No.	%
1	200	0.2	100	0.1
2	500	0.7	200	0.3
3	1 800	2.4	1 700	2.5
4	4 700	6.4	2 800	4.1
5	2 200	3.0	1 200	1.7
6	18 600	25.1	17 100	25.0
7	14 100	19.0	10 500	15.3
8	13 500	18.3	16 400	23.9
9	18 500	25.0	18 500	27.1
TOTAL	74 100	100.0	68 400	100.0

Source: NOMIS

APPENDIX 5

The composition of MTCB Steering Group

Organisation	No. Places
North West Tourist Board (NWTB)	1
MTCB	1
Merseyside Development Corporation	1
Liverpool City Council	2
Knowsley MBC	1
Sefton MBC	1
St Helens MBC	1
Wirral MBC	1
Corporate member contributing in excess of £3,000 per annum (currently Albert Dock Co,. Littlewoods Organisation, Merseytravel, National Museums and Galleries on Merseyside).	1 seat each
City centre hotels	1
Outside city centre hotels	1
Other accommodation	1
City centre attractions	1
Outside city centre attractions	1
Tour operators	1
Conference venues	1


APPENDIX 6
Liverpool Street Map
N
Leeds Street
Vauxhall Road
Scotland Road
St Anne Street
Tithebarn Street
Great Charlotte Street
Hunter Street
New Islington
Chapel Street
Dale Street
Water Street
Brunswick
Cook St
Mann Island
James Street
Lord Street
Church Street
Silcot Street
Ranelagh Street
Hanover Street
Parliament Street
Upper Duke Street
Leece Street
Roscoe Street
Rodney Street
Hope Street
Catherine Street
Canning Street
Seel Street
Duke Street
Colquitt Street
Berry Street
Ross Street
Renshaw Street
Wood Street
Bold Street
Mason Street
Russell Street
Chatham Street
Hatton Garden
Falkner St
Pembroke Place
Seymour St
Norton Street
Islington
London Road
Lord Nelson Street
Rice Street
Mathew Street
North John Street
Victoria Street
St Thomas Street
Castle Street
Fenwick Street
Stanley Street
Parr Street
Redcross Street
Whitechapel
Skelhorne St
Copperas Hill
Strawberry Hill
William Brown St
Dale Street
Tithebarn Street
Chapel Street
Water Street
Brunswick

APPENDIX 7

LIVERPOOL'S RETAIL PROVISION

Liverpool has a number of main retail areas in the city centre:

LORD STREET / NORTH JOHN STREET
A tertiary retial pitch separated from the prime and secondary retail areas by heavy traffic flows along North John Street and Lord Street. The retail frontage includes a high proportion of non retail uses and links with the city's established office area.

LORD STREET / WHITECHAPEL
- Cavern Quarter - includes the recent development of Cavern Walks by royal Life Assurance, a purpose built enclosed speciality shopping centre, and a mixture of retail, office and service uses in period buildings
- Whitechapel - provides an important pedestrian link to the bus stands at Roe Street and the taxi ranks at Williamson Square
- Paradise Street - includes a public car park and bus station, extending through Chevasse park

CHURCH STREET / PARKER STREET / WILLIAMSON SQUARE
- Church Street - includes the prime retail pitch which extends through to Parker Street and Waterloo Place. The area is pedestrianized. The major retailers grouped here include George Henry Lee, Marks and Spencer, and other leading national multiple and variety stores, to the exclusion of local and independent stores

ST JOHN'S PRECINCT
This is a purpose built, covered shopping centre developed by Land Securities in the early 1970's, with refurbishment completed in 1989 at a cost of £10 million. The centre occupies an important pedestrian route from Lime Street to the city centre. The precinct included major multiples, such as Peter Lord, Currys and Beaverbrooks, as well as the city's general markets.

CLAYTON SQUARE / CHARLOTTE STREET / RANELAGH STREET
- Clayton Square shopping centre - A covered centre on two levels opened in 1989, includes Boots the Chemist
- Ranelagh Street - The eastern area is dominated by Lewis's department store and the refurbished Central Station concourse

BOLD STREET
There remains on this street a range of quality and specialist retail multiples such as Jeagar, Warehouse and Dormie, as well as independent traders such as artists materials and health foods.

LIME STREET / LONDON ROAD

- Lime Street - Occupied by tertiary retailing and non-retail users principally restaurants and public houses
- London Road - Discount retail operations have occupied some of the properties with a few independent retailers remaining. TJ Hughes, a successful discount department store, remains at the north of London Road

The retail core of the City has been subject to a progressive extension of the pedestrianised area. This now covers the following principle streets and connecting thoroughfares:

Lord Street	Whitechapel
Church Street	Williamson Square
Matthew Street	Parker Street
Stanley Street	Bold Street

There are also a number of indoor shopping centres:

SHOPPING CENTRE NAME	SIZE Ft^2
St Johns Centre	264,000
Cavern Walks	24,000
Central Station Arcade	82,000
Clayton Square	250,000
TOTAL	620,000

APPENDIX 8

TOURISM-RELATED QUESTIONNAIRE
RESTAURANTS, SHOPS, CAFES, GAMBLING, PUBS, CLUBS

NAME OF PERSON INTERVIEWED _____
NAME OF ESTABLISHMENT _____
ADDRESS _____
TYPE OF BUSINESS _____

==========

HISTORY
How long have you been at this address? _____
Did you relocate to these premises? _____
When was the company first established? _____
How often has the company / establishment changed hands ?
_____
_____
Who owns the establishment (where are they based)?_____
_____
Are there any important factors which influenced your location here?
_____
_____
_____
Did you consider locating anywhere else? _____
If so, where and why? _____
Are there any disadvantages to being located:
a) in this part of Liverpool? _____
b) in Liverpool itself? _____

REDEVELOPMENT
Has the building undergone any redevelopment over recent years?
If so, what and when?_____

TOURISM
Approximately what percentage of your business is tourism ?
_____
What other kinds of clients do you get ? _____
_____
Where do tourists usually come from ? _____
_____
What is the purpose of their visit to Liverpool ? _____
_____

Do you notice any difference in the kinds of visitors during special events such as the Tall Ships, Grand National ?

_____

_____

EMPLOYMENT

How many people do you employ at these premises? _____

Is it possible to categorize them by department ?

_____

_____

_____

_____

Are the staff mainly local people ? _____

_____

What sort of contracts do they works to ? _____

_____

How many are Part time / full time ? _____

How many are male / female ? _____

Do you provide any formal training for your staff (if so, what)

_____

Do you require staff to have any particular qualifications or previous experience?

_____ _____

_____

OTHER

Who are your main competition ? _____

Has the recession had any impact on your business? _____

_____

Who are your main suppliers ? _____

_____

APPENDIX 9

Attraction and Visitor Numbers (thousands) - Metropolitan Boroughs in the North of England, 1991

	Total	Historic	Museums & Galleries	Other	Miscell-aneous
SOUTH YORKSHIRE					
Total	19 2 418	4 128	9 914	4 1 304	2 73
Barnsley	4 352	1 29	0 -	1 250	2 73
Doncaster	4 414	1 22	2 242	1 150	0 -
Rotherham	4 979	0 -	2 73	2 904	0 -
Sheffield	7 676	2 77	5 599	0 -	0 -
WEST YORKSHIRE					
Total	48 5 993	10 593	26 2 485	5 2 575	7 339
Bradford	14 1 770	2 198	9 1 290	1 200	2 82
Calderdale	6 374	1 22	1 50	1 125	3 177
Kirklees	8 268	2 50	5 178	0 -	1 40
Leeds	12 2 589	3 255	6 394	1 1 900	1 40
Wakefield	8 991	2 69	5 573	1 350	0 -

TYNE & WEAR					
Total	18 1 218	6 223	11 796	0 -	1 200
Gateshead	2 237	0 -	1 37	0 -	1 200
Newcastle	8 412	2 47	6 365	0 -	0 -
N. Tyneside	2 102	2 102	0 -	0 -	0 -
S. Tyneside	4 299	2 74	2 226	0 -	0 -
Sunderland	2 168	0 -	2 168	0 -	0 -
MERSEYSIDE					
Total	21 11 002	2 131	12 1 878	4 2 948	3 6 044
Knowsley	3 458	1 118	1 21	1 320	0 -
Liverpool	9 8 387	0 -	6 1 706	1 750	2 5 931
St Helens	1 33	0 -	1 33	0 -	0 -
Sefton	4 1 929	0 -	2 67	1 1 750	1 112
Wirral	3 194	1 14	1 53	1 128	0 -

GREATER MANCHESTER					
Total	19 3 809	1 46	10 2 019	5 510	3 1 234
Bolton	1 253	0 -	1 253	0 -	0 -
Bury	1 107	0 -	0 -	1 107	0 -
Manchester	11 2454	0 -	7 1235	0 -	2 1 159
Oldham	2 98	0 -	1 23	0 -	1 75
Rochdale	0 -	0 -	0 -	0 -	0 -
Salford	0 -	0 -	0 -	0 -	0 -
Stockport	1 300	0 -	0 -	1 300	0 -
Tameside	2 98	1 46	0 -	1 58	0 -
Trafford	0 -	0 -	0 -	0 -	0 -
Wigan	1 500	0 -	1 500	0 -	0 -

Source: BTA/ETB Visits to Tourist attractions, 1991 (BTA/ETB, 1992)

APPENDIX 10

An Evaluation of the contribution made by tourism projects in meeting Government policy objectives

The tables presented here are taken directly from a Polytechnic of Central London *et al* (1990) survey commissioned by the Inner Cities Directorate of the Department of the Environment with the aim of evaluating the contribution which 20 tourism projects have made to meeting the urban policy objectives of the Government.

Table 1: Direct employment at the projects

PROJECT*	ALL YEAR		PART YEAR		TOTAL
	Full-time %	Part-time %	Full-time %	Part-time %	No.
1	97	3	0	0	63
2	64	3	0	33	454
3	97	3	0	0	73
4	0	0	0	0	0
5	67	33	0	0	3
6	100	0	0	0	18
7	57	21	0	21	14
8	85	4	11	0	80
9	41	8	22	30	208
10	33	67	0	0	251
11	100	0	0	0	46
12	28	72	0	0	58
13	29	0	0	71	70
14	31	69	0	0	26
15	11	52	0	37	27
16	66	34	0	0	32
17	67	33	0	0	3
18	63	37	0	0	30
19	45	36	0	19	84
20	44	22	0	33	9
TOTAL	56	22	3	19	1548

Source: Polytechnic of Central London *et al.* (1990) p.19.

Table 2: Distribution of jobs between males and females

PROJECT	PERMANENT JOBS				
	FULL-TIME		PART-TIME		
	% male	% female	% male	% female	number
1	*	*	*	*	*
2	51	45	0	4	304
3	59	38	1	1	73
4	0	0	0	0	0
5	*	*	*	*	*
6	67	33	0	0	18
7	55	8	27	0	11
8	42	54	1	3	71
9	58	26	1	15	101
10	26	7	12	55	251
11	61	39	0	0	46
12	*	*	*	*	*
13	*	*	*	*	*
14	15	15	0	71	26
15	11	6	6	78	18
16	47	19	6	28	32
17	33	33	0	33	3
18	*	*	*	*	*
19	29	26	13	31	68
20	*	*	*	*	*
TOTAL	44	30	5	21	996

* Not available

Source: Polytechnic of Central London *et al* (1990), p.20.

Table 3: The types of permanent jobs at the projects

PROJECT	NON MANUAL			MANUAL		TOTAL
	manager.	admin.	profess.	skilled	ancill.	
	%	%	%	%	%	number
1	24	37	0	34	5	62
2	25	7	0	18	50	304
3	18	8	26	41	7	73
4	0	0	0	0	0	0
5	33	0	0	0	67	3
6	6	17	17	56	6	18
7	18	18	0	36	27	11
8	23	6	11	31	30	71
9	23	20	0	29	29	101
10	*	*	*	*	*	*
11	*	*	*	*	*	*
12	14	24	0	1	62	58
13	20	10	0	25	45	20
14	*	*	*	*	*	*
15	6	6	6	0	82	17
16	28	9	0	44	19	32
17	33	0	33	0	33	3
18	*	*	*	*	*	*
19	7	6	7	14	65	84
20	33	0	0	67	0	6
TOTAL	21	12	4	24	39	863

* not available

Source: Polytechnic of Central London *et al* (1990), p.20.

APPENDIX 11

CONFIDENTIAL

TOURISM-RELATED EMPLOYMENT QUESTIONNAIRE

Many thanks for showing an interest in my research into tourism-related employment. The information which you provide will be used only as part of my PhD thesis and will be treated as strictly confidential. Nowhere do I ask you to identify yourself by name.

If you are willing to help by answering the following questions it will be most appreciated.

Many thanks,

Rachel Macdonald.

A: ABOUT YOUR JOB.

1. a) Job title _____
   b) Description of duties _____
   c) Why did you apply for this job ? _____
   _____

2. Male _____ Female _____

3. Apart from the job described in answer to question 1, do you ever do any other job in this establishment ? (eg. receptionist also working as a waitress) Yes No
   If YES please specify what _____

4. For how long have you held this position ? _____

5. What sort of contract do you work to ?
   a) Permanent _____
   b) Temporary _____ How long? _____
   c) Other _____ Please specify _____

6. Do you work full-time? _____ How many hours per week? _____
   Do you work part-time? _____ How many hours per week? _____

7. What was your take-home pay last week ? _____
   IF NOT APPLICABLE What is you salary? _____(per hour/week/month)

8. PART-TIME WORKERS ONLY :
   a) Is this your only job ? (if not please specify what the other is, and where it is)
   _____

   b) Would you, if the opportunity arose, like to work full-time?
   Why/why not ? _____

9. Do you get paid holidays? _____

10. Do you get paid sick leave ? _____

B: ABOUT YOU.

1. What is your age ? _____

2. What is your marital status ? _____

3. Ethnic group ? _____

4. Do you have any children living with you ? _____

5. In your household, who is the main wage earner ? _____
   If not you, please specify their job title and relationship to you.
   _____

6. What formal qualifications do you hold ? (either academic or work-related)
   _____
   _____

7. What other jobs or education have you been involved in. Please list the last **5 years**.

DATE	JOB TITLE	JOB DESCRIPTION
_____	_____	_____
_____	_____	_____
_____	_____	_____

8. Whilst in you present job have you received any onthe job training or been on any training courses ? (if so please specify what and where)
   _____

9. a) Do you live in Liverpool ? _____
   b) Have you always lived in Liverpool ? (if not where did you live before)
   _____
   c) What is your home postcode ? _____

10. a) How long have you lived at your present address ? _____ years.
    b) Is your house : bought _____ Parents house _____
    rented _____ Other (specify) _____
    council house or flat _____

11. a) How far do you travel to work ? _____ miles
    b) How do you travel ? (eg. bus, walk, train) _____
    c) Approximately how much does it cost **per day** ? £_____

APPENDIX 12

Number of people employed in tourism-related industries (Liverpool 1-3). A comparison of field research (1993-4) and Census of Employment data (via NOMIS) September, 1991.

HOTELS: SIC 665/667

a) Field Research (January, 1994): Full sample.

	MALE	FEMALE	TOTAL
PART-TIME	100	150	250
FULL-TIME	250	350	600
TOTAL	350	500	850

b) Census of Employment (September, 1991):

	MALE	FEMALE	TOTAL
PART-TIME	100	350	450
FULL-TIME	250	300	550
TOTAL	350	650	1000

ATTRACTIONS: SIC 977

a) Field Research (February, 1994): Full sample.

	MALE	FEMALE	TOTAL
PART-TIME	50	100	150
FULL-TIME	250	300	350
TOTAL	300	400	700

b) Census of Employment (September, 1991):

	MALE	FEMALE	TOTAL
PART-TIME	0	100	100
FULL-TIME	300	200	500
TOTAL	300	300	600

EATING AND DRINKING: SIC 661/662/663

a) Field Research (June/July, 1994): Sample of 20/200 grouped up.

	MALE	FEMALE	TOTAL
PART-TIME	350	2200	2550
FULL-TIME	1000	450	1450
TOTAL	1350	2650	4000

b) Census of Employment (September, 1991):

	MALE	FEMALE	TOTAL
PART-TIME	500	1600	2100
FULL-TIME	650	500	1150
TOTAL	1150	2100	3250

TOTAL TOURISM-RELATED

a) Field Research (1994): Sum of above estimates.

	MALE	FEMALE	TOTAL
PART-TIME	500	2450	2950
FULL-TIME	1500	1100	2400
TOTAL	2000	3550	5550

b) Census of Employment (September, 1991):

	MALE	FEMALE	TOTAL
PART-TIME	600	2050	2650
FULL-TIME	1200	1000	2200
TOTAL	1800	3050	4850

THEATRES AND CINEMAS

a) Field Research (February, 1994): Full sample.

	MALE	FEMALE	TOTAL
PART-TIME	300	400	700
FULL-TIME	50	50	100
TOTAL	350	450	800

TOURISM-RELATED SHOPS

a) Field Research (June/July, 1994): Full sample, part-area only.

	MALE	FEMALE	TOTAL
PART-TIME	50	100	150
FULL-TIME	0	100	100
TOTAL	50	200	250

APPENDIX 13

University College Stockton, Student Impressions of Liverpool Questionnaire

LIVERPOOL QUESTIONNAIRE
(Before visit)

1. What is the first thing that you think of when someone mentions Liverpool to you ?

_____

2. What is your image of Liverpool ?

_____

_____

3. What have you heard of to do in Liverpool ?
(List everything)

_____

_____

4. Which of the following phrases fit your impression of Liverpool ?

	AGREE	DIS-AGREE	N/A
The service you get in shops, restaurants etc. in Merseyside is helpful, friendly and makes you feel welcome.			
Liverpool is a rough, violent and depressing place			
The main attraction of Merseyside is not Liverpool but the areas around it			
There is a wide variety of places of interest such as museums and art galleries			
Merseyside is not a suitable place for women to visit alone			
The only attraction of Merseyside is its associations with the Beatles			
I would only visit Liverpool because I have friends and relatives there			
Merseyside is excellent for a family holiday with children			
Liverpool is unsafe at night			

5. Have you ever been to Liverpool before, if so when?

_____

6. Where do you live ? (where are you from - if you live in Stockton during term times only)

_____

LIVERPOOL QUESTIONNAIRE
(After visit)

1. What is the first thing that you think of when someone mentions Liverpool to you ?

_____

2. What is your image of Liverpool ?

_____

_____

3. What have you heard of to do in Liverpool ?
(List everything)

_____

_____

4. Which of the following phrases fit your impression of Liverpool ?

	AGREE	DIS-AGREE	N/A
The service you get in shops, restaurants etc. in Merseyside is helpful, friendly and makes you feel welcome.			
Liverpool is a rough, violent and depressing place			
The main attraction of Merseyside is not Liverpool but the areas around it			
There is a wide variety of places of interest such as museums and art galleries			
Merseyside is not a suitable place for women to visit alone			
The only attraction of Merseyside is its associations with the Beatles			
I would only visit Liverpool because I have friends and relatives there			
Merseyside is excellent for a family holiday with children			
Liverpool is unsafe at night			

5. Have you ever been to Liverpool before, if so when?

_____

6. Was there anything about your visit to Liverpool which surprised you ?

_____

_____

7. Would you come to Liverpool again, for a holiday ? _____
Would you come to Liverpool again, as a day trip, whilst on holiday in the area ? _____

8. What did you do during your visit to Liverpool ? (be honest!)

_____

9. Where do you live ? _____

APPENDIX 14

Initial thoughts of Liverpool. UCS students, (1994/95)

As the table below recognises the thoughts are varied, yet the number of different responses increased after a visit; the "other" row recording nine respondents before a visit compared to 21 after a visit. The surprisingly large number of respondents to think of the Albert Dock after a visit (18) compared to just four respondents before is justified as all respondents visited the docks. After the visit, the initial thoughts recorded but not categorized in this table tended to more positive images of the city. The media images of the region (Beatles, Brookside, This Morning TV) were less obvious associations when the respondents had not visited the city, yet the association with football remained strong after the visit to Liverpool. A surprising feature of the before visit image of Liverpool is that of "curly hair" as well as "shell suits" - this is the image of scousers portrayed by the comedian Harry Enfield and being used in a current advertising campaign for the city.

The initial thoughts of Liverpool. University College Stockton students, April 1994/95

	Before visit (n=90)	After visit (n=84)
Beatles	23	12
Football	18	17
Brookside	16	7
This Morning TV	11	7
Shipping	8	3
River Mersey	8	9
Ferry across the Mersey	7	9
Liverpudlians	7	2
Famous Liverpool personalities	5	2
Albert Docks	4	18
Other music	4	-
Cathedrals	3	1
Liver Buildings	-	2
Negative aspects	8	5
Others (<3 before visit)	9	21

APPENDIX 15

VAT data by sector - Merseyside 1989 -91

Source: Census of Employment via NOMIS

Table 1: Registrations for VAT 1989-91 - Merseyside

	1989	1990	1991
Agriculture	0	0	0
Production	350	400	300
Construction	700	650	500
Transport	200	200	200
Wholesale	300	350	400
Retail	850	750	650
Finance & related	350	400	250
Catering	400	400	350
Motor trade	200	200	100
Other services	700	850	650
All industries/services	4050	4200	3450
Column Totals	8100	8350	6900

Table 2: Deregistrations for VAT 1989-91 - Merseyside

	1989	1990	1991
Agriculture	50	0	0
Production	250	300	350
Construction	450	500	550
Transport	150	200	200
Wholesale	250	250	300
Retail	800	700	700
Finance & related	150	200	250
Catering	400	350	400
Motor trade	150	150	150
Other services	400	450	600
All industries/services	3100	3150	3500
Column Totals	6200	6300	7000

Table 3: VAT Stock 1989- 91 - Merseyside

	1989	1990	1991
Agriculture	400	350	400
Production	2400	2500	2450
Construction	3800	4000	3900
Transport	1350	1350	1350
Wholesale	1950	2050	2150
Retail	5850	5850	5800
Finance & related	1950	2150	2200
Catering	2300	2350	2300
Motor trade	1250	1300	2250
Other services	3150	3500	3600
All industries/services	24400	25400	25350
Column Totals	48750	50800	50700

Table 4: VAT Registrations - Net change 1989-91 - Merseyside

	1989	1990	1991
Agriculture	0	0	0
Production	100	100	-50
Construction	250	200	-50
Transport	50	0	0
Wholesale	50	100	100
Retail	0	0	-50
Finance & related	200	200	50
Catering	0	50	-50
Motor trade	0	50	-50
Other services	300	350	50
All industries/services	950	1050	-50
Column Totals	1900	2050	-100

VAT data by sector - Liverpool 1989-91

Source: Census of Employment via NOMIS

Table 1: Registrations for VAT 1989-91 - Liverpool

	1989	1990	1991
Agriculture	0	0	0
Production	120	130	100
Construction	220	210	150
Transport	70	70	70
Wholesale	90	100	80
Retail	280	250	230
Finance & related	110	140	90
Catering	160	180	160
Motor trade	50	40	30
Other services	250	250	100
All industries/services	1350	1350	1120
Column Totals	2700	2750	2240

Table 2: Deregistrations for VAT 1989-91 - Liverpool

	1989	1990	1991
Agriculture	0	0	0
Production	110	120	120
Construction	170	170	180
Transport	60	80	80
Wholesale	90	100	100
Retail	270	240	260
Finance & related	50	60	70
Catering	180	150	180
Motor trade	60	40	50
Other services	170	180	200
All industries/services	1170	1160	1220
Column Totals	2330	2300	1440

Table 3: VAT Stock 1989- 91 - Liverpool

	1989	1990	1991
Agriculture	20	20	20
Production	850	860	840
Construction	1050	1080	1060
Transport	440	430	420
Wholesale	760	760	730
Retail	2080	2090	2060
Finance & related	860	940	960
Catering	1000	1030	1010
Motor trade	340	340	330
Other services	1100	1170	1190
All industries/services	8510	8710	8610
Column Totals	17010	17430	17230

Table 4: VAT Registrations - Net change 1989-91 - Liverpool

	1989	1990	1991
Agriculture	0	0	0
Production	10	10	-20
Construction	50	40	-30
Transport	10	-10	-10
Wholesale	0	0	-20
Retail	10	10	-30
Finance & related	60	80	20
Catering	-20	30	-20
Motor trade	-10	0	0
Other services	80	70	10
All industries/services	170	200	-100
Column Totals	360	430	-200

APPENDIX 16

CONFIDENTIAL
LIVERPOOL BUSINESS SURVEY

Name of Company: _____
Address: _____
Name of Interviewee: _____
Position in Company: _____
Date: _____ Time start: _____ Time Finish: _____

****

COMPANY ACTIVITY

1) Please describe the activities of your company: _____
_____
_____

2) Is the firm;
(a) independent (only site)? _____
(b) HQ of independent company? _____
(c) one site of several of an independent company? _____
(d) a branch of an outside firm? _____ If so, specify HQ location _____
(e) a subsidiary? _____ If so, give parent name, and HQ location _____

If (b) or (c) please list other sites and function: _____
_____

If (d) why did the organisation set up this establishment in Liverpool? _____
_____

If not (d) how was the firm established (please give details)?
(i) A spin-off from existing business _____ _____
(ii) Completely new start-up _____ _____
(iii) Management Buyout _____ _____
(iv) Merger of existing firms _____ _____
(v) Other (specify) _____ _____

LOCATION

1) When did you move to these premises? _____
2) Where were you previously located (full address) _____
_____
When did you move there? _____
Do you know who is now in those premises? _____
_____

3) Why was this particular building chosen? _____
_____
_____

4) a. What are its disadvantages? _____
_____
b. What are its advantages? _____
_____

5) Have you recently considered moving away from this building? _____
If yes: When did you consider it? _____
Where would you move to? _____
Are you still looking to move? _____
Why did/do you want to move? _____

6) What attracted you to Liverpool for business location? _____
_____
_____
7) Do you see any disadvantages to being located in Liverpool? _____
_____
8) Do you see any advantages to being located in Liverpool? _____
_____
9) In choosing to move to these premises, which of the following were the most important factors?
(Please choose 3 in order of preference)
a) financial incentives _____
b) access to eating/drinking facilities _____
c) attractive surroundings _____
d) faith in the success of Liverpool as a business centre _____
e) access to a good transport network _____
f) as a status symbol _____
g) access to leisure facilities _____
h) access to potential markets _____
i) access to existing markets _____
j) access to raw materials _____
k) an available labour force _____
l) provision of car parking space _____
10) Are there any other important factors which have influenced your location here? ____
_____
11) In choosing where to locate did you:
a) select Liverpool and then look for a suitable location within the city? _____
OR b) look for a suitable location and Liverpool fulfilled your requirements? _____
OR c) were already located in Liverpool and were looking for new accommodation? ____

BUSINESS INVESTMENT
1) Please estimate the approximate proportion of business in the following areas:
Liverpool _____
Rest of Merseyside _____
Rest of North West _____
Rest of North _____
Rest of the UK _____
Europe _____
Rest of the world _____
2) Has this pattern altered since formation? Yes _____ No _____
If yes give details _____
_____

3) In which of the above regions do you expect the greatest sales increase over the next 5 years, and why?

_____

_____

4) What was your total annual turnover for the year ending April 1994? _____

5) How has this changed over the last 5 years? _____

6) Have you made a financial commitment to investment on Merseyside in the last 6 months?

_____

If yes What was it? _____

Will this investment have any effect on the number of jobs in your establishment?

_____

_____

What is the approximate size of the investment? _____

If no Are you likely to make an investment on Merseyside during the next six months?

What will it be?

_____

What is the approximate size of this investment? _____

EMPLOYMENT

1) What is the total employment of this establishment? _____ Company Total? _____

2) How has the total number of employees changed over the last few years (at this establishment)?

September 1987 _____

September 1989 _____

September 1991 _____

September 1993 _____

3) What were the reasons for these changes? _____

_____

_____

4) Please supply the number of employees and occupations at this particular establishment.

	NUMBER		AV. MONTHLY SALARY
	MALE	FEMALE	OR RANGE
Partners	_____	_____	_____
Managerial & Professional	_____	_____	_____
Technical	_____	_____	_____
Clerical / secretarial	_____	_____	_____
Labourers	_____	_____	_____
Others (specify)	_____	_____	_____
TOTAL	_____	_____	

APPENDIX 17

The geography of business trade and investment in the Merseyside economy

The 29 survey respondents were asked to estimate the proportion of business in each of seven geographical areas (see Table below). Almost three quarters of all business is located in northern England, exactly half of which is located in Liverpool. Less than a tenth of all business is overseas. Unsurprisingly branches of outside firms are most likely to be involved with business predominantly in Liverpool and Merseyside, whilst some independent firms are highly associated with wider UK and overseas markets (these companies are prevalent at Brunswick Business Park). Indeed, one respondent at the Albert Dock (international distributors of financial services) is involved only with international clients.

Geographical location of business for firms located at Brunswick Business Park, Cavern Walks, Albert Dock, Bluecoat Chambers and Mercury Court, Liverpool n=28 (1994) (not weighted by size)

	% Business
Liverpool	37.3
Rest of Merseyside	24.8
Rest of North West	10.4
Rest of North	2.1
Rest of UK	16.8
Europe	0.9
Rest of the world	7.7
Total	100.0

The majority of respondents considered that this pattern had altered since formation. Of these almost half mentioned that work had increasingly become more widespread geographically. One respondent noting "upto twelve months ago seventy percent of work was based in Merseyside, now this is just 25 percent". This result suggests that Liverpool based companies are able to trade

favourably against those located elsewhere in the national and international arena. Similarly, these companies are anticipating further expansion outside of Liverpool over the next five years; all of these areas are in north west England. Alternatively three respondents recognised potential for growth within Liverpool and Merseyside. The other two, both in the building industry, talked of the availability of Liverpool based work due to the Objective One status of the city. Annual turnover for the companies surveyed ranged from a minimum of nothing (for a property developer in the first year of business) or £500,000 to £120 million. Over half had an annual turnover in excess of £1 million. Across all sectors turnover appeared to be increasing, yet within this there are contradictory cases for example, one member of the construction industry noting that "turnover has dropped, fees are down, there is less work and more competition".

All respondents were asked to consider whether they had made a financial commitment to investment on Merseyside over the last six months. Of the 22 to answer the question 14 believed that they had done so. Of the remaining only one considered that they may make a financial commitment to investment in Merseyside in the next six months; a shipping company suggesting that, if they start to handle trade to Australia, they may develop Liverpool in preference to the busier ports of Felixstowe and Southampton. Although investment was widely recognised is was generally quite small. Nevertheless the majority of these schemes created new jobs; although one new office development resulted in 150 new jobs other initiatives created just two or three posts. One respondent did, however, note that although the investment may not have created jobs, it did guarantee others.

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