

CASE Regional Insights

The CASE (Culture and Sport Evidence) programme is a joint strategic research programme, led by DCMS in association with Arts Council England, English Heritage, Museums, Libraries and Archives Council and Sport England. The programme aims to influence the policy agenda in culture and sport in England by generating high quality, relevant research with easy access to a range of analysis and data for partners to build sound arguments.

As part of the CASE programme, Regional Insights has been developed to provide partners with data and evidence on the position and role of culture and sport within key local and regional agendas.

The purpose of this work

The aim of the project is to provide culture and sport agencies, local authorities and other public bodies with a set of statistical data about CASE sectors. The data is organised within a number of themes such as the economy, education and engagement. Within each theme, the data is broken down by region and, where possible, local authority area. The consistent format allows for comparison across and within sectors and geographies. The importance of particular themes and sectors will vary by place, but the overall approach to accessing, comparing and using the data will be similar.

Regional Insights has been designed to deliver a quantitative picture, to help local partners to identify key trends in culture and sport in their area and where there is potential for growth. Combined with other research and local knowledge, this data can point to areas where further investment is justified.

The purpose is to provide consistent quality data, which enables users to quickly and easily identify quantitative evidence to support the development of clear arguments for investment in culture and sport.

How should it be used?

Regional Insights is a dataset – a compendium of quantitative data and facts. The dataset is accompanied by a summary report for each region. These reports are not intended to provide a comprehensive interpretation of the

data. Rather, they provide an overview of the type of data available so that you can choose what to interrogate in more detail.

This report is the 2010 North West Regional Insights report. The dataset used to support this report contains the most current data available from the various different sources. The data should be used alongside the qualitative insight you have about the working context of your locality or region. It is not designed to provide the whole story, but to support you in writing it. You decide what data is most important and how to link it to your priorities.

Where you can find the data

The dataset is available to download from the [CASE website](#).¹

There are 8 sections in the dataset:

Section	Data contained
CASE Economy	Gross value added, businesses, turnover, employment, volunteering, and business start-up.
Non-capital Investment	Local authority, central government, lottery and private investment in the sector.
Capital Investment	Sector specific capital investment, local authority land acquisition and construction.
Tourism	Domestic overnight tourism, inbound tourism, visits to visitor attractions
Education	Participation in Higher Education, Further Education GCSE level education and in non mainstream CASE related education programmes
Physical Assets	Number and density of physical assets.
Engagement	Participation in activities across CASE sectors and levels of satisfaction
Community & Wellbeing	Feelings on community cohesion, belonging, community safety

For further information on the CASE programme please visit www.culture.gov.uk/case/ or email case@culture.gsi.gov.uk.

¹ http://www.culture.gov.uk/what_we_do/research_and_statistics/7276.aspx

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2010: Key Statistics

The CASE economy in the North West:

- Employs 196,000 people
- Includes 15,300 businesses
- Contributes £5 billion in Gross Value Added (GVA)
- Generates £2.4 billion/year in spend from domestic tourists

Across the CASE sectors in the North West:

- 427,000 people work on a voluntary basis
- The average business turns over £730,000
- There were 4,200 new business start-ups between 2006 and 2009.
- There are 17,300 physical assets

Investment in the sector totals:

- £500 million in non-capital investment from local government
- £94 million² in capital focused investment from local government
- £60 million³ in lottery investment
- £18.5 million in private investment in the arts

Engagement in the sector is extensive:

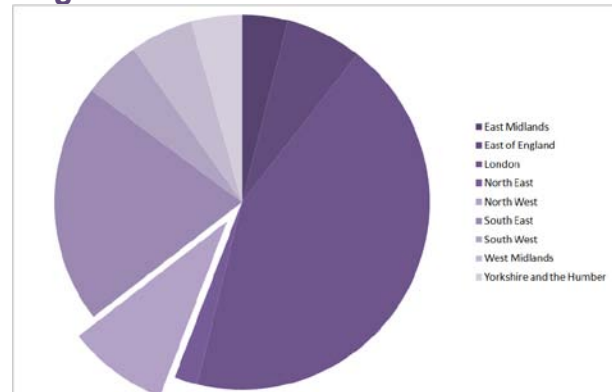
- 2.7 million people participating in cultural activity⁴
- 1.0 million participating in 3 sessions of sport per week
- 123,000 people studying at GCSE level
- 27,000 higher education students
- 149,000 people studying at FE institutes

² Not including Heritage spending, this is captured under non-capital investment.

³ Investment in the arts, sports and heritage.

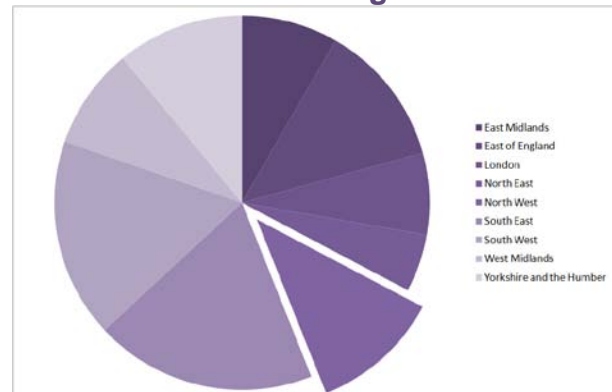
⁴ Includes participation in: craft, dance, literature, music, theatre and the visual arts.

North West GVA as a proportion of total GVA for the CASE sectors across England.



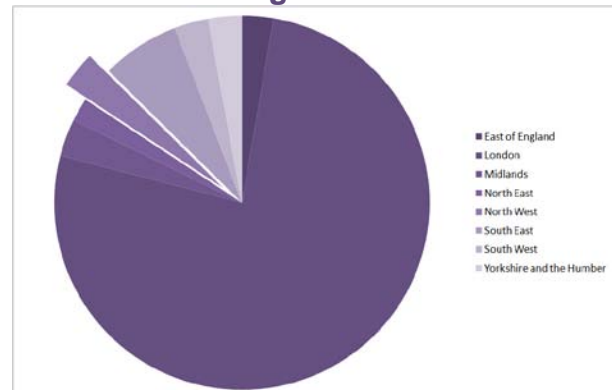
Source: ONS, ABI (2009)

North West physical assets as a proportion of the total assets in the CASE sector across England.



Source: IM, POI (2009)

North West private investment in the arts as a proportion of total private investment in England.



Source: A&B (2009)

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CASE Economy

Data in this section is drawn from the CASE Economy data tables available from the Regional Insights website. Key sources include:

- Annual Population Survey (APS)
- Annual Business Inquiry (ABI)
- Inter-Departmental Business Register (IDBR)
- Trends Central Resource (TCR)

Across the North West 196,000 people are employed in the CASE sectors. This decreased by 2% between 2006 and 2008.

Outside London and the South East, the North West has the highest regional employment in the creative sector. Heritage employment in the region was also the greatest outside of London and the South East. However, North West heritage employment fell by 17% between 2006 and 2008, reducing from 5,300 to 4,600.

CASE sectors attract high levels of volunteer engagement. Approximately 430,000 people undertook voluntary work in the North West in 2007/08 in CASE sectors.

There are 15,300 CASE organisations in the North West, contributing £5 billion GVA in 2007/08. Of these, 4,400 are new start-ups since 2006. The large majority (4,100) of new start-ups are creative businesses.

GVA produced by CASE sectors increased in the North West by 28% between 2005/06 and 2007/08, from £4 billion to £5.1 billion. More than three quarters (85%) of CASE GVA produced in 2007/08 was contributed by creative firms.

Top 5 Local Authorities in the North West by number of CASE businesses

Local Authority	Businesses
Greater Manchester Metropolitan County	5,825
Cheshire County	2,516
Lancashire County	2,466
Merseyside Metropolitan County	2,088
Manchester	1,178

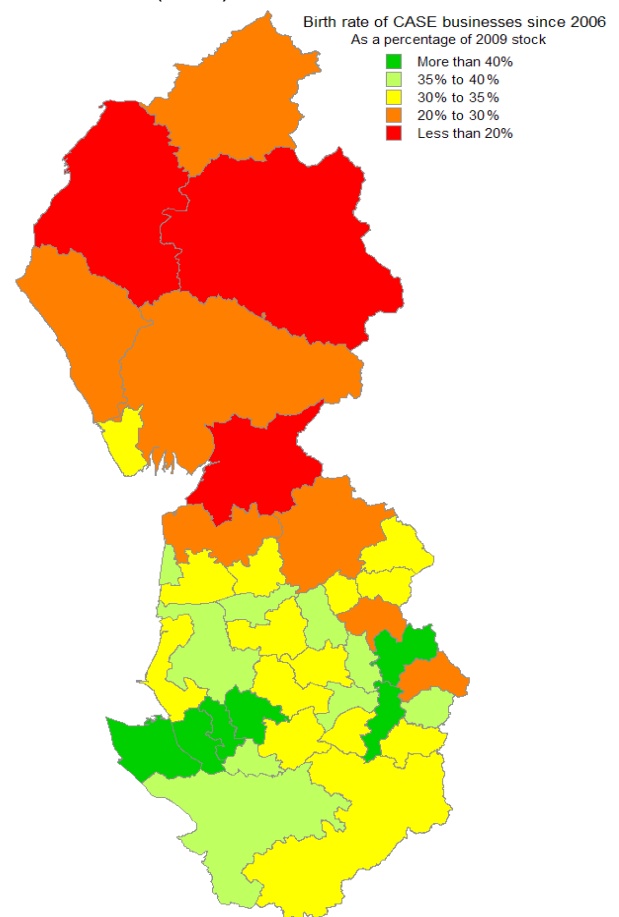
Source: IDBR (2009)

Top 5 Local Authorities in the North West by level of CASE employment

Local Authority	Employment
Manchester	25,058
Liverpool	9,232
Trafford	4,580
Macclesfield	4,084
Salford	3,604

Start-up rates across the region by local authority

Source: TCR (2009)



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Non-Capital Investment

Data in this section is drawn from the non-capital investment data tables available from the Regional Insights website. Key sources include:

- Department for Communities and Local Government (DCLG), Local Government Finance Statistics (LGFS)
- Department for Culture Media and Sport (DCMS), National Lottery database (NLD)
- Arts Council England, (ACE) Regularly Funded Organisations (RFO) Annual Submission Dataset
- Arts & Business (A & B) Investment in Culture Survey
- Heritage Lottery Fund (HLF) Initial Grant Decisions Data

This report focuses on non-capital investment in sector development by Local Authorities. For example, service or community development.

Between 2004/05 and 2008/09 local authority investment in CASE sectors increased in real terms in all regions bar one⁵. The second greatest percentage increase in CASE sector investment was in the North West, where local authority expenditure increased by 15% over the period; reaching approximately £500 million in 2008/09.

In most regions, sports and MLA expenditure represent the majority of local authority spending on CASE sectors. In the North West, in 2008/09, sports funding was worth £195.2 million and MLA funding was worth £175.2 million of all local authority spend in the region.

Local authority investment in the arts increased by 58% (from £75 million to £119 million) between 2004/05 and 08/09. This was a greater proportional increase than occurred in any other region.

Local authority investment in sports services was £195 million in 2008/09, second only to the South East where £200 million was invested. The North West also has the third greatest density⁶ of local authority investment in sport, with £237,000 per 10,000 people invested in 2008/09; compared to £302,000 in the North East and £270,000 in Yorkshire and the Humber.

Although in real terms, investment in the region's library services fell by 1% between 2004/05 and 2008/09, local authorities in the North West made the third largest expenditure in these services in both years – in 2008/09 this was £134 million.

Local authority investment in heritage increased from £10.3 million to £10.8 million across 2004/05 – 2008/09. The density of heritage spending in the region was above average in 2008/09, at £26,000 per 10,000 people compared to an average of £22,000 across England.

Top 10 LAs for non-capital investment in CASE sectors in 2008/09

Local Authority	Investment £000s
Liverpool	73,832
Manchester	62,555
Lancashire	35,941
Wirral	20,923
Bolton	17,327
Blackburn with Darwen	17,138
Knowsley	16,973
Sefton	16,512
Cheshire	15,977
Salford	14,678

Source: DCLG, LGFS (2009)

⁵ Investment in CASE sectors in the East of England reduced by less than 0.02% between 2004/05 and 2008/09.

⁶ Investment in thousands of pounds per 10,000 of the working age (WA) population of that administrative area – local authority or region.

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Capital Investment

Data in this section is drawn from the Capital Investment data tables available from the Regional Insights website. Key sources include:

- Department for Communities and Local Government (DCLG), Local Government Finance Statistics (LGFS)
- Department for Culture, Media and Sport (DCMS), National Lottery database (NLD)
- Sport England (SE) Exchequer Funding Data

Local authority capital expenditure is divided between acquisition of land and existing buildings (hereafter acquisition investment) and new construction, conversion and renovation (new construction investment). References to 'CASE sectors' in this section exclude heritage, as data was not available.

Between 2004/05 and 2008/09 local authority capital investment in CASE sectors increased in real terms in all regions bar one⁷. The fifth greatest percentage increase in CASE sector investment was in the North West, where local authority capital expenditure increased by 50% over the period; reaching approximately £90 million in 2008/09. In most regions Sports expenditure represents the majority of local authority capital spend⁸.

A significant proportion of capital investment in the arts in the region in both 2004/05 and 2008/09 was made on new construction as part of the arts facilities and activities funding stream. In 2004/05 this accounted for 62% of North West capital investment in the arts, and increased to 82% in 2008/09. The remainder of North West arts capital expenditure was on new construction as part of museums and galleries funding.

This pattern is typical of most regions, where new construction makes up the vast majority of investment, far exceeding that made in acquisitions. Despite the overall increase of 37% in capital investment in the arts between 2004/05 and 2008/09 within the North West, the region remained 5th highest when the nine English regions are ranked by actual expenditure in 2008/09.

Local authorities in the North West made the third greatest investment in sports capital assets, spending almost £60 million in 2008/09. This was a 51% increase on 2004/05 expenditure. However, most regions increased their expenditure over this period by at least 30%. The majority of North West expenditure in both years was on new construction of sports facilities (86% in 2008/09).

The North West approximately doubled expenditure on capital assets within its library services between 2004/05 and 2008/09, increasing expenditure from £3.4 million to £6.9 million. Almost 90% of this investment in 2008/09 was on new construction. The remainder was spent on acquisition of capital assets within the libraries service.

Top LAs for capital investment in new construction conversion & renovation by investment area in 2008/09

Investment Area	Local Authority	Investment £000s
Museums and galleries	Ribble Valley	1,944
Arts activities and facilities	Wirral	8,185
Sports facilities	Sefton	11,684
Library services	Manchester	1,006

Source: DCLG, LGFS (2009)⁹

⁷ Capital investment in CASE sectors in the North East reduced by 2% between 2004/05 and 2008/09.

⁸ LA expenditure on capital investment only covers the arts (which includes museums and galleries), sports and libraries.

⁹ Please note that there is no data available for heritage.

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Tourism and Physical Assets

Data in this section is drawn from the *Tourism and Physical Assets* data tables available from the *Regional Insights* website. Key sources include:

- Visit Britain (VB), ONS International Passenger Survey (ONS-IPS)
- Enjoy England (EE), UK Tourism Survey (UKTS)
- Enjoy England (EE), Annual Visitor Attractions Survey via (AVAS)
- InterestMap (IM) Points of Interest (POI)

In both 2006 and 2009, the North West was the destination for 13% of domestic tourist trips, the third most popular region in both years. Trips to the region increased by 1% across the period, demonstrating the region's consistent appeal. Domestic tourists to the region spent a total of £2.4 billion in 2009, a 6% increase compared to 2006.

Visits to the North West by international visitors increased by 36% between 2004 and 2008, the highest regional increase. Despite this increase, similar changes in other regions meant that the North West retained its 9% share of non-domestic visitors in both years.

Overseas visitors spent a total £850 million in the North West in 2008, representing 6% of national expenditure that year. This was up from 5% of total overseas expenditure in 2004 and was largely due to an increase of 53% in the amount spent within the region between 2004 and 2008.

Overall, visits to attractions in the North West increased by 32% between 2004 and 2008, the largest proportional increase across all the regions.

The North West has a higher than average number of arts, sports and MLA physical assets per 10,000 people. The largest proportion of these assets are

sports related (53%). This follows the national trend. The number of heritage assets per 10,000 people in the North West (19.86) however, is lower than the England average of 21.36.

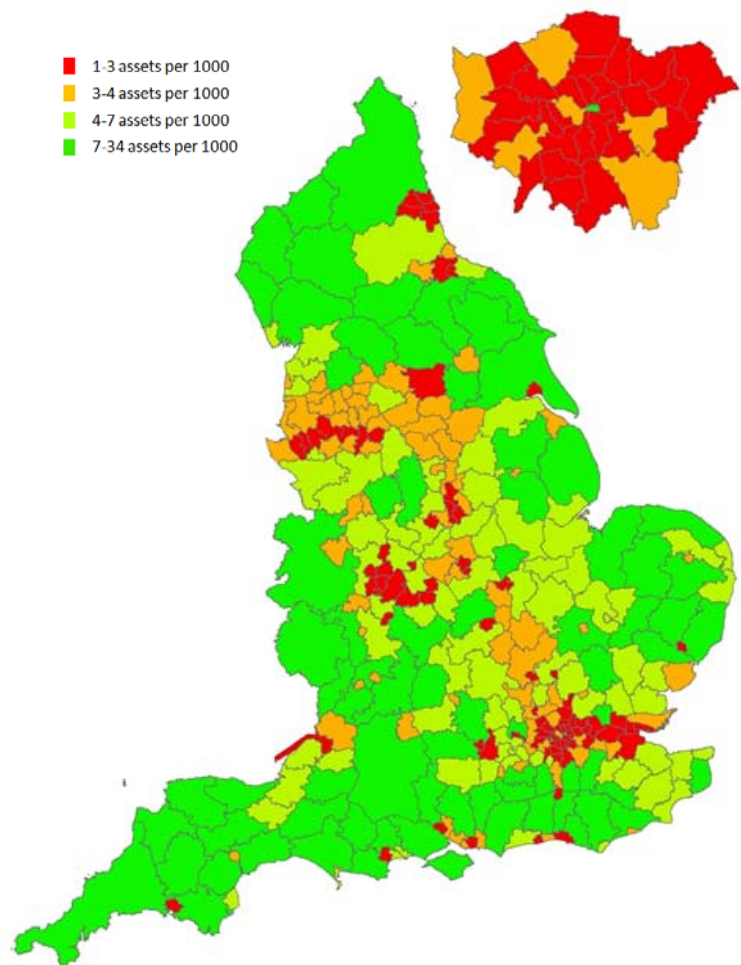
Top 5 visitor attractions by number of visits 2008

Attraction	Visitors (000s)
Chester Zoo	1,259
Windermere Lake Cruises, Bowness	1,199
Tate Liverpool	1,089
Merseyside Maritime Museum	1,021
Liverpool Museum	788

Source: AVAS, EE (2008)

Density of all arts, museums, libraries, sports and heritage assets per head of population as at 2008/9

Source: IM, POI (2009)



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North West

Education

Data in this section is drawn from the Education data tables available from the Regional Insights website. Key sources include:

- The Department for Children, Schools and Families (DCSF, Research and Statistics Gateway (RSG), GCSE results in maintained schools by Local Authority
- Higher Education Statistics Agency (HESA), Students in Higher Education (SHE)
- The Data Service (DS) Individualised Learner Record (ILR)
- Arts Council England (ACE, Regularly Funded Organisations (RFO) Annual Submission Dataset
- English Heritage (EH), Heritage Counts (HC)
- Sport England (SE), Active People Survey (APS)

The total number of students studying a CASE related subject at GCSE level in the North West fell by 8% between 2007/08 and 2008/09. The same percentage fall was experienced across England in the same time period.

In 2008/09, the largest proportion of CASE GCSE students (29%) in the North West studied a design and technology course, a similar proportion to the England average (28%).

The number studying a physical education GCSE fell by 11% between 2007/08 and 2008/09. History subjects experienced the smallest fall in the number of students, dropping by 4% in the North West compared with a 3% fall across England between 2007/08 and 2008/09.

Whilst the number of people studying a CASE related GCSE has fallen, these subjects have grown in popularity at a higher education level in recent years. In the North West, the number of students studying CASE related subjects in higher education increased by 9% between

2004/05 and 2008/09 from 24,355 to 26,635. This compared to an increase of 13% across England.

In the North West in 2008/09, 71% of CASE students in higher education were studying arts, 14% heritage, 13% sports and 2% a museums, libraries or archive-related subject. In all these subject areas, more students were studying in 2008/09 than in 2004/05.

Top 5 HEIs for number of students studying a CASE subject

University	Students (000s)
The Manchester Metropolitan University	4.5
Liverpool John Moores University	3.4
The University of Salford	3.3
The University of Central Lancashire	3.1
Edge Hill University	1.8

Source: HESA, SHE (2008/09)

Change in participation in CASE HE courses and average across all courses between 2004/05 and 2008/09

Course	Percentage change
Arts	9%
Sports	13%
MLA	13%
Heritage	7%
CASE total	9%
All Higher Education	8%

Source: HESA, SHE (2008/09)

Top 5 LAs for number of students achieving A-G in a CASE subject in 2008/09

Local Authority	Students (000s)
Lancashire	22.7
Wirral	8.0
Cheshire West and Chester	7.2
Liverpool	7.2
Cheshire East	7.2

Source: DCSF, RSG (2009)

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Engagement

Data in this section is drawn from the Engagement data tables available from the Regional Insights website. Key sources include:

- Department for Culture Media and Sport (DCMS), Taking Part Survey (TPS)
- Sport England (SE), Active People Survey (APS)

The proportion of people that had participated in a cultural event in the last year in the North West was 49% in 2007/08. This compared to the England average of 53%.

As with the whole of England, the proportion of people that had taken part in each type of cultural activity in the North West varied considerably. For example, whilst 65% of people had participated in literature activity in 2007/08, only 17% had participated in a craft activity.

In 2008/09, 17% of people in the North West took part in at least three sessions of moderate intensity sport per week. If recreational walking and cycling are included in the calculations this figure increases to 22%. The area with the highest percentage of sporting participants (including recreational walking and cycling) is Lancaster (28%), whilst the lowest is Blackpool (16%).

The percentage of people that had attended a sporting event (as a spectator) in the previous year rose from 16% in 2005/06 to 17% in 2007/08.

This compared to 15% in England in both years.

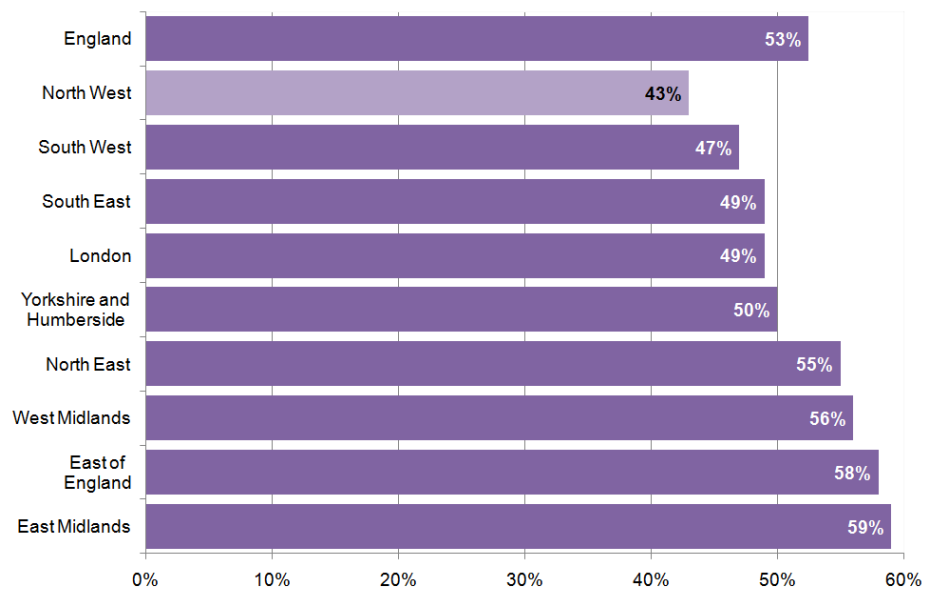
In 2007/08 attendances at archives (5%), libraries (47%) and museums or galleries (44%) were comparable to the percentage across England as a whole.

In the North West, 24% of people had attended a place connected with industrial history, compared with only 20% across England.

The percentage of people in the North West that had attended an arts event in the previous year in 2007/08 was 66%. This compares to 67% across England for the same period.

Attitudes towards arts activities rated on a scale of 1-10 scored an average of 8.0 in the North West, the same figure as for England in both 2006/07 and 2007/08.

The percentage of people that participated in a cultural activity in 2007/08, by region and compared to the average for England



Source: TPS (2007/08)

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North West

Community and wellbeing

Data in this section is drawn from the Community and Wellbeing data tables available from the Regional Insights website. Key sources include:

- Department for Communities and Local Government (DCLG), Citizenship Survey (CS)

Within the North West, 81% of those surveyed think that people from different backgrounds get on well together and 19% think that people from different backgrounds do not get on well together. The region had slightly lower than average agreement rates, with the average for England being 83% agreement and 17% disagreement.

The North West has the lowest rate of agreement with the statement that 'I have friends with different incomes to me', at 56%. All other regions had a percentage of agreement of 61% or higher and the average rate of agreement was 64%. The region also has the third lowest rate of agreement with the statement 'I have friends from different ethnic groups to me': 45% agreed with the statement, compared with 52% for England.

People in the North West have a slightly greater fear of crime than the national average; 44% of individuals stated that they were worried about crime compared with the national average of 42%. The North West has the joint highest percentage of regional respondents who are very worried about crime (13%).

The majority of individuals in the North West (69%) feel very safe or fairly safe walking alone in their neighbourhood after dark. This is slightly lower than the

national average of 73%. A greater than average proportion of people feel either very unsafe or never walk alone in their neighbourhood after dark (13%). Nationally, only 10% feel this way.

When considering life in their neighbourhood, 79% of respondents in the North West felt strongly that they belonged to their neighbourhood. Approximately 18% thought that their local area had improved in the past 2 years, a little higher than the national figure (15%).

Only 7% of people in the North West stated that they did not feel part of British society. Of those surveyed in the North West, 52% thought that the number of immigrants entering Britain should be reduced a lot, 27% thought it should be reduced a little and the remainder thought it should either remain the same or be allowed to increase. These findings are similar to the national average.

The percentage of people that feel that they strongly belong to their neighbourhood in 2008/09, by region and compared to the average for England

Region	Percentage population
West Midlands	80%
North East	80%
North West	79%
East of England	78%
Yorkshire and the Humber	78%
South West	77%
East Midlands	76%
South East	76%
London	74%
England	77%

Source: CS (2008/09)

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