NATIONAL MUSEUMS LIVERPOOL

Economic Impact Study

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England’s Northwest Research Service

This report is produced by the research team at The Mersey Partnership, who are also responsible for the annual Merseyside Economic Review and conducting many regional surveys including Destination Benchmarking, the Merseyside Visitor Survey and the Liverpool John Lennon Gateway study.

Under the banner of England’s Northwest Research Service, the team conducts research in a range of industry sectors across the Northwest, with a particular specialism in economic development and in the tourism industry.

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Background

National Museums Liverpool (NML) is the only national museums group outside of London. Comprising eight venues across the Liverpool City Region it forms one of the key components of the visitor offering as well as forming a core of the city's cultural institutions.

During 2008, NML recorded some 2.7m visits to its different venues; a 37% increase on 2007, and one of the largest increases seen across the country. This number is expected to have been raised by Capital of Culture, and in the case of the Walker three high-profile exhibitions took place this year:

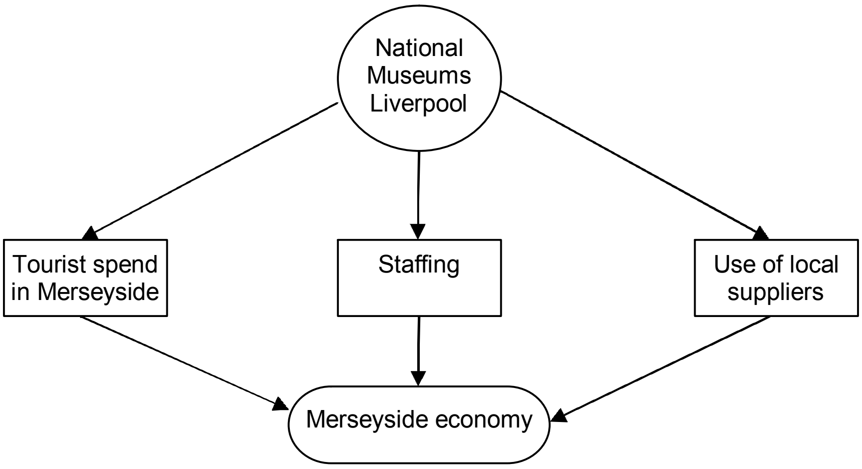
- Art in the Age of Steam
- Ben Johnson's Liverpool Cityscape and World Panorama Series
- John Moores Contemporary Painting Prize

Visits to National Museums Liverpool venues			
Merseyside Maritime Museum	1,020,712	HMRC Seized	210,483
World Museum	787,767	Lady Lever Art Gallery	157,460
International Slavery Museum	414,470	National Conservation Centre	128,170
Walker Art Gallery	396,356	Sudley House	64,407

About this study

NML asked England's Northwest Research Service (ENWRS) to investigate the economic impact the organisation has on the local area.

This study looks at three components:



National Museums Liverpool conducts extensive visitor profiling work which is heavily used to understand the nature of the visitors it draws in; ENWRS used segmentation to compare these results with visitor spend estimates produced by The Mersey Partnership, the tourist board for the Liverpool City Region.

Key to this work is understanding that the impact from tourists *only* comes from the spend of non-residents visiting a venue, who were drawn to visit the area by the presence of the NML venue.

Findings

In total, National Museums Liverpool is worth £115m to the economy of the Liverpool City region. Potentially, this spend supports 2,274 jobs (full-time equivalent).

This impact comes from the following:

Area of economic impact	Value to Liverpool City Region (£m)	Jobs supported (FTE)
Spend in the local economy by tourists drawn to Liverpool by NML	£79.3	1,354.9
Additional spend as the result of hosting major exhibitions	*£10.3*	*177.2*
Staff	£14.7	624.2
Local Suppliers	£10.7	117.5

The role of National Museums Liverpool in the visitor economy

The impact of National Museums Liverpool is important not just in terms of this direct and indirect impact on the economy, but on the role their varied venues plays in drawing new and repeat visits to the Liverpool City Region. Information from the tourist board suggests that visitors to Liverpool were considerably more satisfied with the range of attractions on offer than was the case for other large towns and cities.

The growth in visits is driven not just from the presence of NML's venues, but also the visitor experience; 96% of tourists who were visiting an NML venue expressed satisfaction, and 92% were likely to go home and recommend a visit to their friends and family.

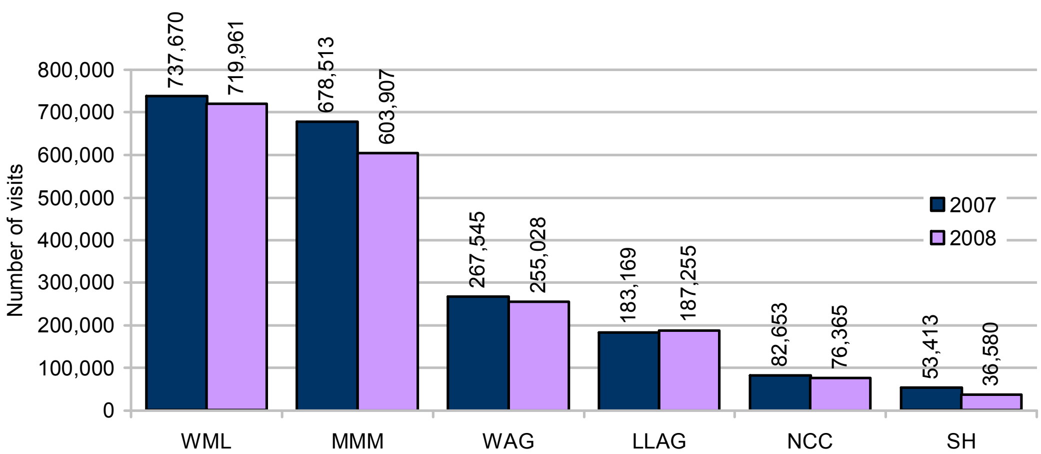
From 2008 to 2015 tourism was expected to show significant growth in the city region; the number of staying visitors to Liverpool by 23% and day visitors by 17%. Although these figures were calculated before the current economic situation, it would still be true to say Liverpool's cultural offering remains strong and long-term tourism likely to show continued growth.

1. Background

1.1 About National Museums Liverpool

National Museums Liverpool is the only national museums group outside of London. It forms one of the key components of the tourism and cultural product on Merseyside, with over 25 million visitors passing through its doors, including residents, tourists and school groups.

Currently the National Museums Liverpool group consists of eight venues across the city: the graph below presents an overview of total visitor numbers at key venues.



Walker Art Gallery

One of the finest art galleries in Europe, housing outstanding collections of British and European Art from 1300 to the present day. Three high profile exhibitions *Art in the Age of Steam*, Ben Johnson's *Liverpool Cityscape* and *World Panorama Series* and the *John Moores Contemporary Painting Prize* took place in 2008 and are covered separately later on in this document.

Merseyside Maritime Museum
Based in the historic Albert Dock, the museum tells the story of one of the world's greatest ports. The highly popular exhibition *Magical History Tour* was on display throughout 2008 and a new permanent gallery *Seized! Revenue and Customs Uncovered* opened in May 2008.

Lady Lever Art Gallery
Housing the collection of soap magnate William Hesketh Lever, the gallery is famous for its Pre-Raphaelite paintings, 18th century furniture and Wedgwood collection. Exhibitions in 2008 included *Masterpiece Watercolours and Drawings* and *Victorian Visions.*

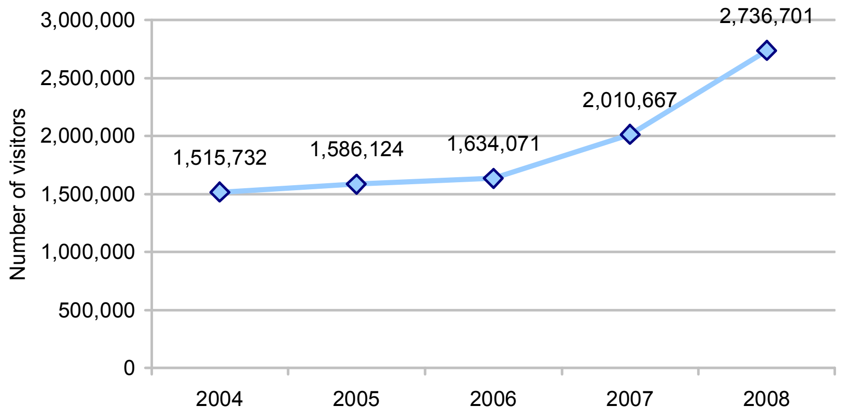
International Slavery Museum
Explores both the historical and contemporary aspects of slavery, addressing issues such as freedom, identity, human rights, reparations and discrimination.

National Conservation Centre
Science meets art at an award-winning venue that reveals the important behind-the-scenes work of museum conservators to the public. The popularity of photography exhibitions here endured during 2008 with *Now These Days Are Gone, Metropolis:Capturing Modern Liverpool* and *Recollections.*

Sudley House
A sandstone mansion in the leafy suburbs of south Liverpool, Sudley House is the only place where you can view the art collection of a Victorian merchant in its original domestic setting.

World Museum
A family favourite, World Museum combines historic treasures from across the globe and live specimens with the latest interactive technology. 2008's special exhibitions included *The Beat Goes On* and *Only a Game?*

All National Museums Liverpool offer free admission and are open from 10am to 5pm, seven days a week; most offer a wide range of visitor facilities including gift shop and cafe.



The above chart shows the number of visitors within each financial year to all National Museums Liverpool venues, and indicates the ongoing growth. Clearly, the figure achieved in 2008 is elevated by the Capital of Culture year, but even before this background growth was evident.

Indeed, according to data compiled by the Association of Large Visitor Attractions (ALVA), the venues operated by National Museums Liverpool saw amongst the highest increases of any of the members in 2008.

• Merseyside Maritime Museum	1,020,712	+69%
• National Conservation Centre	128,170	+68%
• Walker Art Gallery	396,356	+55%
• Pier Master's House	181,829	+38%

Undoubtedly, besides the draw of the venues themselves this growth has been spurred on further by the effect of Capital of Culture. To provide some context for this those, large attractions (100,000 plus visitors) listed by ALVA as having the highest rates of increase were as follows;

• Tate Liverpool	1,080,327	+67%
• Westminster Abbey	1,481,150	+40%
• National Maritime Museum	2,051,270	+21%
• Attingham Park	216,483	+21%

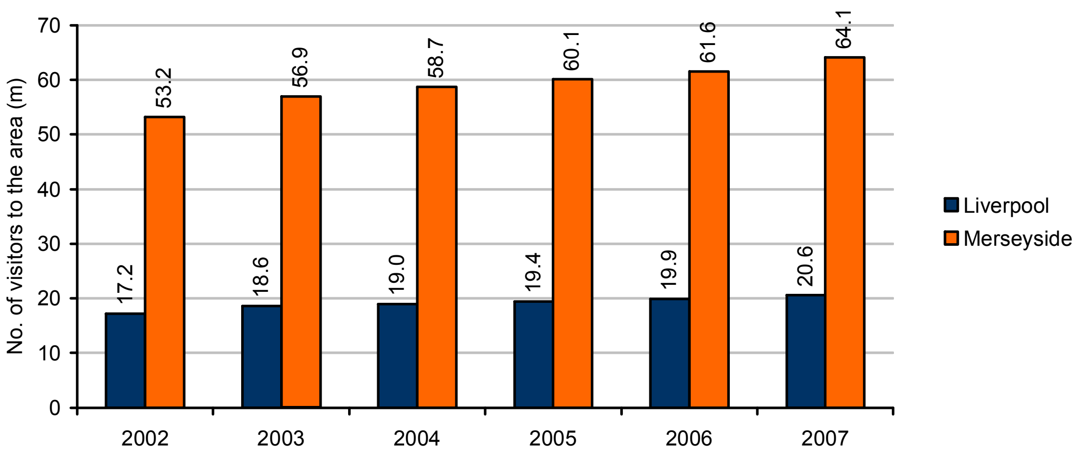
It is noteworthy that the only other attraction seeing such an increase was Tate Liverpool.

1.2 The growth of Liverpool as a tourism destination

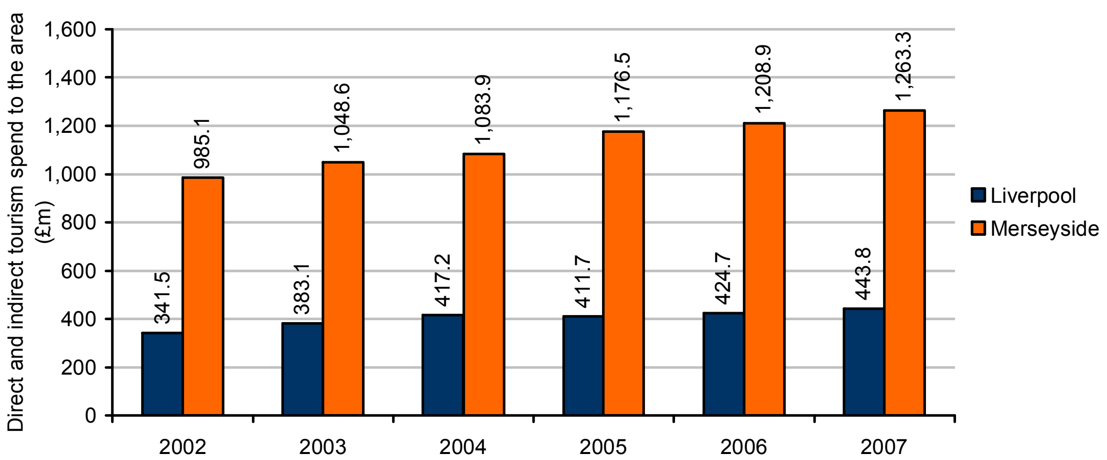
Liverpool is one of the UK's most visited destinations. According to the International Passenger Survey the city is ranked 6th for overseas visitors, receiving an estimated 544,000 staying visits by foreign tourists in 2007. Since the regeneration of the Albert Dock complex in the 1980's, Liverpool and Merseyside have been attracting increasing numbers of leisure visits, spurring growth in hotels, restaurants and other areas of the local economy where visitor spend has either a direct or indirect impact.

The measurement of the total number of visitors and their impact on the economy (rather than just the overseas visitors referred to above) is calculated through the use of STEAM (Scarborough Tourism Economic Activity Monitor). This model, widely adopted throughout the UK, estimates that for Merseyside in 2006 there were 61.6m visitors, spending £1.2bn directly or indirectly into the local economy. Liverpool itself acted as a key driver of this, with 19.9m visitors, spending £425m.

Volume of tourism in Liverpool and the City-Region



Value of tourism to Liverpool and the City-Region



Note: figures shown for 2007 are projections.

The numbers above were expected to grow further for Capital of Culture year. Early indications expect a growth of 8% in staying visitors in Liverpool and 32% in day visitors.

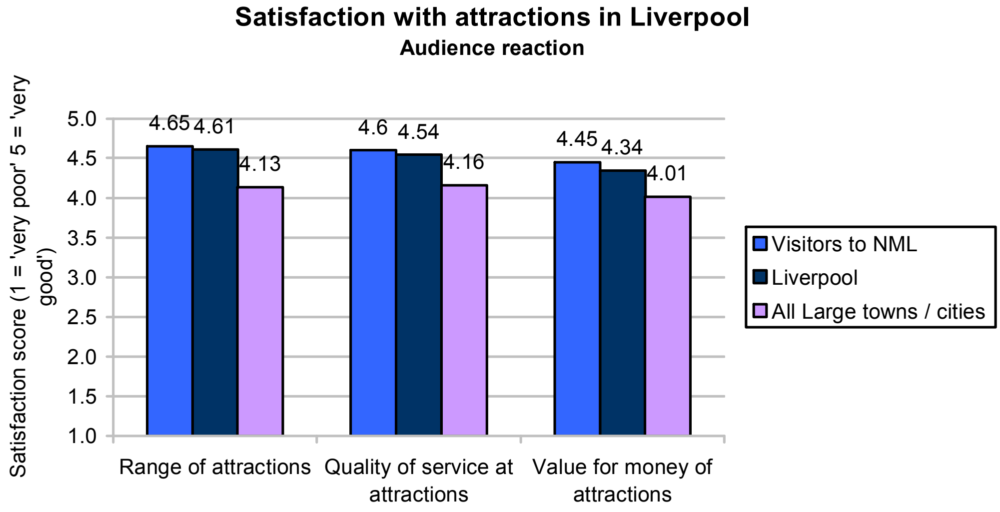
Crucial in the growth of a tourism destination is the offering to visitors; a key measurement used by The Mersey Partnership, the tourist board for Liverpool and Merseyside, is Destination Benchmarking, a survey which allows a tourist destination to compare itself against other similar locations. This was most recently conducted in 2008 and showed Liverpool to have a range of attractions which were perceived as being stronger than for any other location.

Part of Destination Benchmarking particular to Liverpool is that visitors are asked to list the attractions they visited or intended to; in 2008 this reports that:

- 25% of all visitors to Liverpool visited the Walker Art Gallery
- 24% of all visitors to Liverpool visited the Merseyside Maritime Museum (this includes the HMRC Seized! and new International Slavery Museum.
- 15% of all visitors to Liverpool visited the World Museum
- 2% of all visitors to Liverpool visited the National Conservation Centre

In addition to this, some 5% of visitors *only* visited an NML venue and no other attraction during their visit. This would equal about 28,000 individuals during the July to September period.

Destination benchmarking is only conducted amongst visitors and thus excludes the leisure visits of residents. The fact that such a high proportion of all tourists in Liverpool visited at least one of the venues is a reflection on the importance of NML in the city's product offering.



Although “satisfaction” covers the whole range of attractions in the city, National Museums Liverpool obviously plays a part in this, and the score is marginally higher when one looks at the satisfaction expressed by those who had visited at least one NML venue as part of their visit.

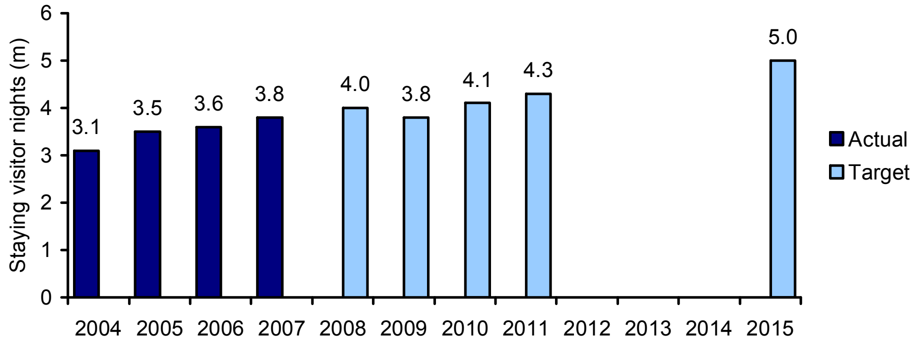
In particular it is worth commenting on the high satisfaction with “*value for money*” of attractions; with so many 'free' attractions provided in the city this especially shows the contribution of NML.

The high levels of satisfaction are already recognised in terms of visiting individual NML venues; data from the profiling survey showed that 96% of all visitors to the group’s venues believed their visit to have been good or very good, with 92% being likely to recommend to their friends and family, and it is evident that this level of experience applies equally to residents and tourists.

%	Resident	Visitor from elsewhere on Merseyside / NW England	Visitor from further afield
Satisfied with overall visit	95%	96%	96%
Likely to recommend	94%	93%	91%

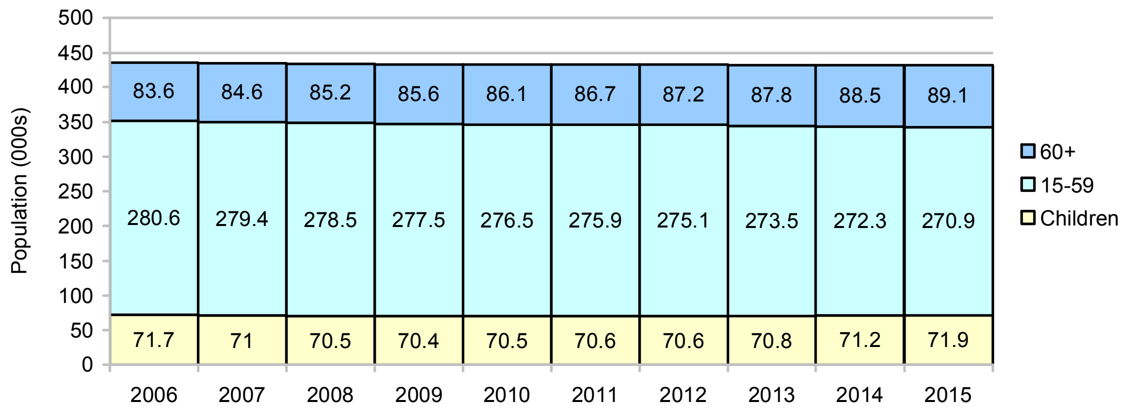
1.3 Future growth

Looking ahead, tourism is expected to continue to grow further. The Mersey Partnership, in the 2008 Destination Management Plan[1] looks to the future with projections of staying visitor nights in Liverpool itself (below).



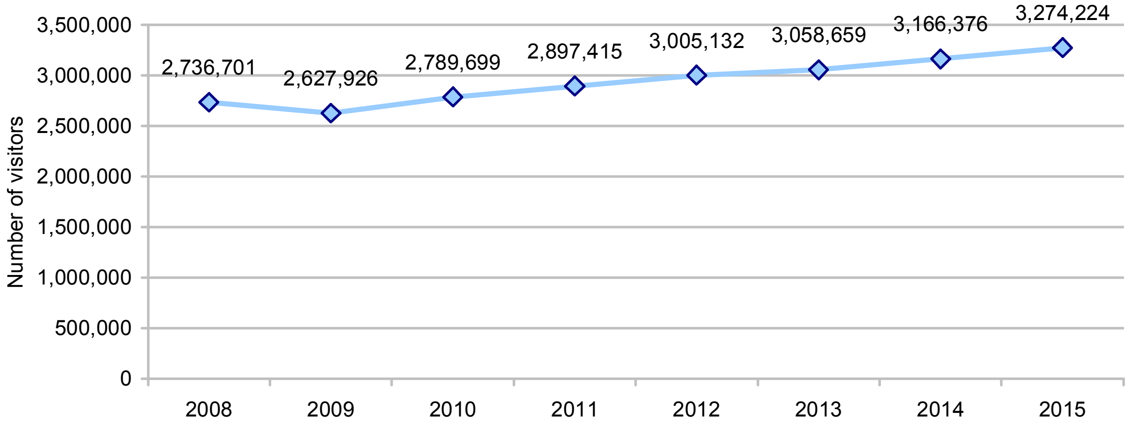
Understandably, this expects a dip in 2009 in the number of tourists coming to Liverpool, following the higher numbers drawn in by events, exhibitions (including those at The Walker) and advertising during Capital of Culture year.

Likewise, forecasts of Liverpool's population, driving the 'resident' proportion if National Museum's Liverpool's visits are also available, from National Statistics[2]. This shows a small drop in total population over this period (1% - including a 3% drop in those aged 15-59 and a 7% increase in those aged 60 or above).



1 http://www.merseyside.org.uk/dbimgs/DMP%20final%204-7-082.pdf
2 http://www.statistics.gov.uk/statbase/Product.asp?vlnk=997

If these projections are mapped onto the current visitor numbers, then this suggests the following may be the pattern of growth to be expected.



It should be noted that this might be considered to be the 'background growth' – the opening of the new museum on the waterfront in 2010 would be expected to give an uplift to these numbers.

In terms of the current economic situation, which is less positive than at the time these projections were published, there is the possibility that the visitor numbers will fall to a lower level during 2009 / 2010 than indicated above. However, research amongst a panel of businesses by VisitBritain[3] suggests that there is the potential that the current Sterling exchange rate may encourage more domestic tourism and make Britain more attractive for overseas visitors.

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3 http://www.tourismtrade.org.uk/MarketIntelligenceResearch/DomesticTourismStatistics/domesticindustrypanel/domesticindustrypanel.asp

2. Economic Impact of National Museums Liverpool

2.1 Economic Impact 1: Visitors to National Museums Liverpool

So far we have not produced an estimate of the *worth* of tourists drawn by National Museums Liverpool to the area. We will do this in this chapter, but before we do it is worth noting that in order to achieve this we will *segment* the data, using natural breaks suggested by the visitor profile of this year's Destination Benchmarking.

In general, when measuring the economic impact of visitors at a venue, event or destination, the impact is considered to be valid if:

a) They meet the definition of a tourist (as defined by the World Tourism Organisation); this is, *any person making an irregular visit outside of their usual environment*. This encapsulates then not just visitors to attractions – such as National Museums Liverpool – but also 'business tourists' and 'retail tourists' who may happen to visit attractions but who are primarily in the area for other reasons.

b) The spend should be *additional* to the area – it should be spend which would not have occurred in the location had the venue not been present / the event not taken place.

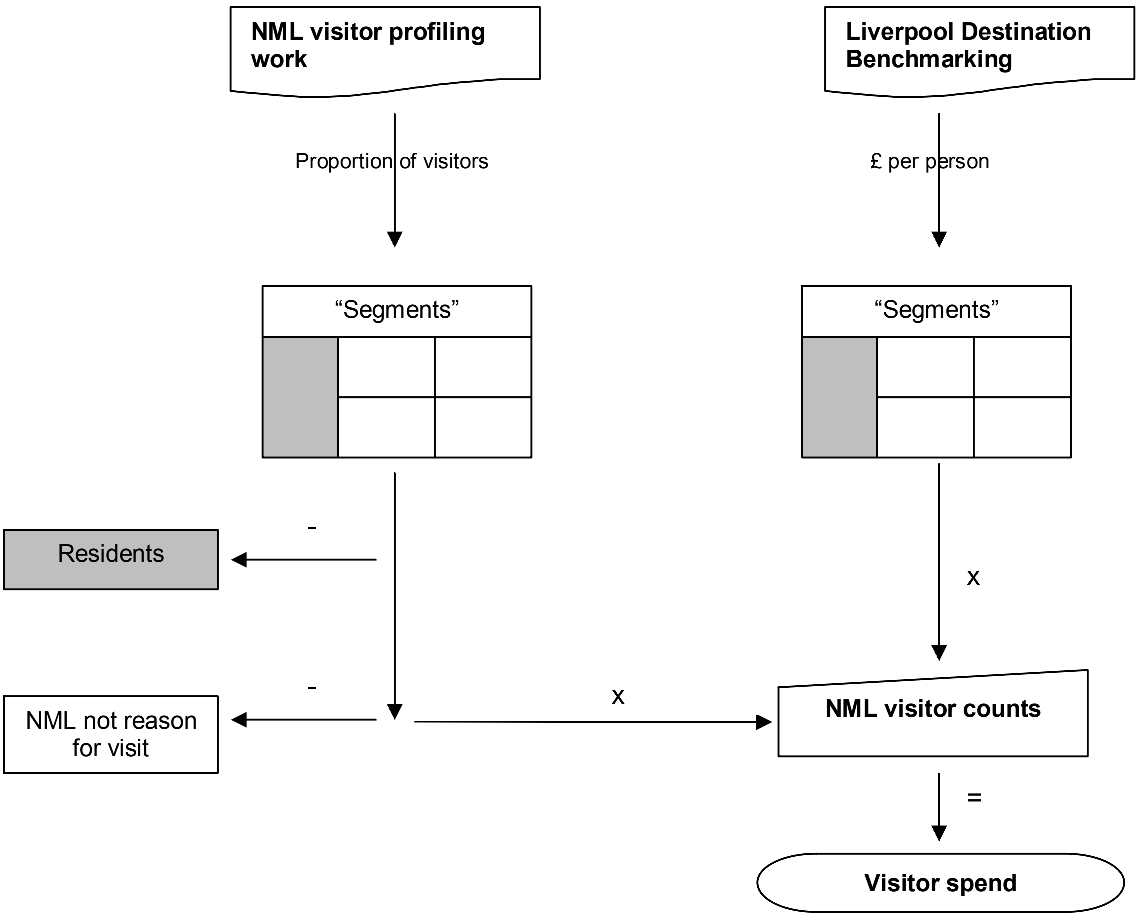
This does mean that (for example) a leisure visitor to the Walker Art Gallery from Birkenhead (Wirral district) or Formby (Sefton district) would be considered to have an economic impact; someone from Childwall (Liverpool district) would not. This is important as these are the definitions we use to measure the impact of visitors at the gallery in this study.

One reason we make reference to the Destination Benchmarking data is that it provides a robust basis for analysis (700 records); A second is that although extensive visitor profiling work is conducted by National Museums Liverpool, it does not include any spend data and, hence, the Destination Benchmarking provides some measure in this regards. Fuller details are included within the technical appendix, but the table below shows the key segments we are looking at within this study, including the proportions they represent of NML’s total audience.

<table>
<tr><td rowspan="2">Residents
21.0%</td><td>Higher spending local visitors
23.2%</td><td>Lower spending local visitors
12.0%</td></tr>
<tr><td>Higher spending travellers
34.9%</td><td>Lower spending travellers
8.8%</td></tr>
</table>

The segments above were applied together with the estimates of visitor spend to the data from the National Museums Liverpool profiling work. However, in order to ensure a robust measure, the estimates were only applied to the number of visitors it was estimated whose primary reason for visiting was the museum or gallery concerned.

There are a number of different measures of visitor spend which can be used and these together with fuller details of those chosen are in the technical appendix.



- In total it is estimated that National Museums Liverpool generated **£57.5m** in direct visitor spend in the local economy. This is after subtracting those who were drawn to the city for other reasons than visiting NML's venues.

- This is calculated to support **990.2 Full-time equivalent jobs** in the local economy.

- There is also *indirect* spend by visitors into the economy, and this is calculated as being **£21.8m**, this amount supporting an additional **364.6 FTE** jobs.

Total impact to the local economy:	**£79.3m** **1,354.9 full-time equivalent jobs**

2.2 Economic Impact 2: Staffing

National Museums Liverpool employs over 500 staff; some **475 full time and 120 part time**, with a total payroll of **£13.0m.**

Within an economy, jobs have a direct value in terms of wages, but there is also an indirect cost in terms of the effect on the local economy of this spending power.

The staffing levels at NML are thus expected to support an **additional 89.2 full-time equivalent jobs (FTE) in the economy, with a value of £1.7m**.

Total impact to the local economy:	**£14.7.m** **624.2 full-time equivalent jobs**

2.3 Economic Impact 3: The use of local suppliers

A key measure of economic impact of any event, organisation or destination is that of the value it presents to local businesses through purchasing goods and services. This absolute value has a worth to the local economy, supporting businesses and local jobs, but it also has a multiplier effect; spend with local businesses as opposed to businesses outside the area means these companies will have varying levels of spend with other companies, further supporting local jobs.

- During the 2007/8 financial year, National Museums Liverpool spent an estimated **£31.2m** with third parties.

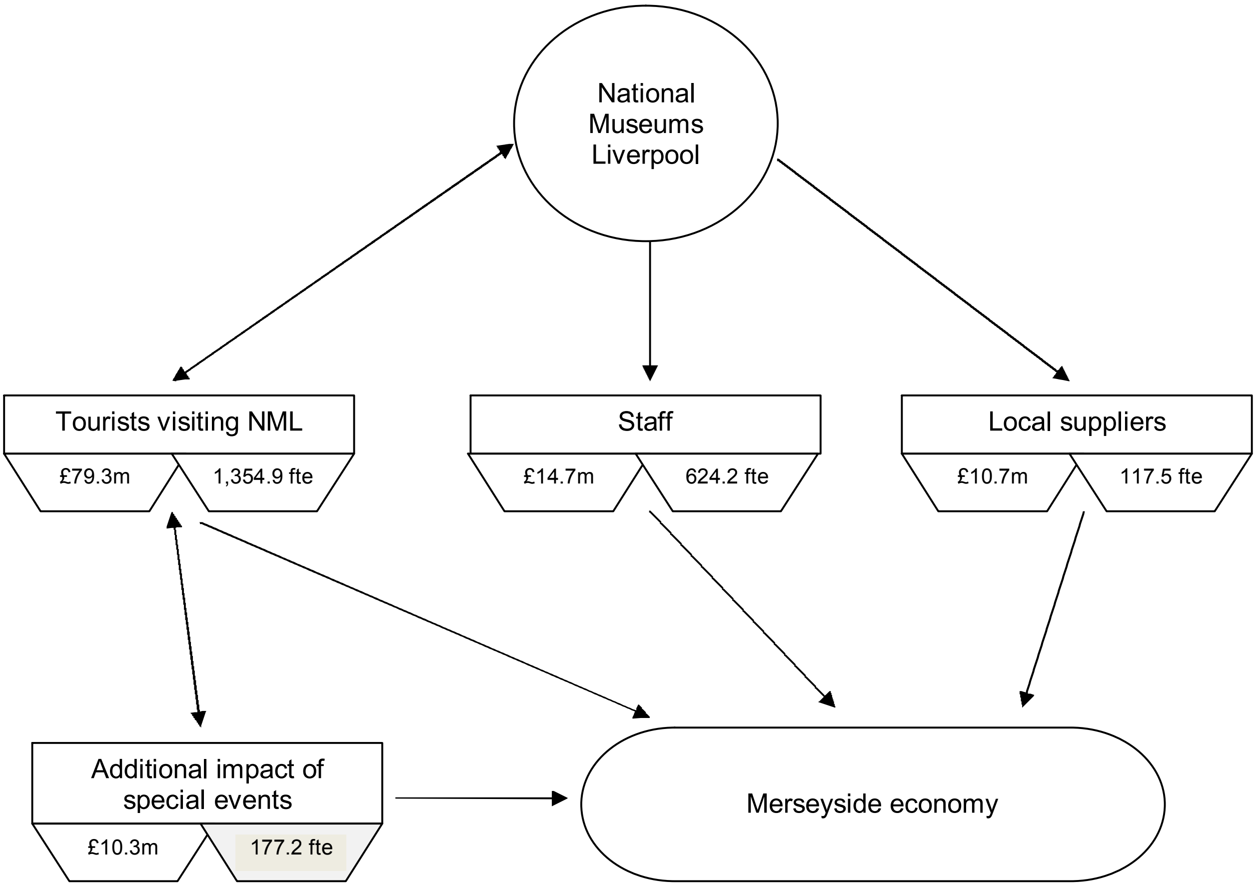
- What is crucial here is the *location* of the spend. Using a sample of data provided by National Museums Liverpool, it appears that a quarter of this spend is with Merseyside businesses – and 12% with businesses elsewhere in the Northwest.

- Accordingly, we estimate that National Museums Liverpool spent **£7.9m** and from this there is an *indirect* value to the local economy of **£2.8m**.

- In total this spend with local suppliers is estimated to support **117.5 full-time equivalent jobs** with a further 57.3 FTE jobs supported elsewhere in the Northwest.

Total impact to the local economy:	**£10.7.m** **117.5 full-time equivalent jobs**

2.4 Total Economic Impact



Note: diagram summarises both direct and indirect impacts

In total, we would estimate that National Museums Liverpool generates **£115m** for the local economy, supporting **2,273.7 full-time equivalent jobs**.

3 Major Events held at National Museums Liverpool

Within the overall impact, a key driver behind attracting visitors has also been the hosting of major events at The Walker Art Gallery. This year there have been three such events:

1) Art in the Age of Steam
2) Ben Johnson's Liverpool Cityscape and World Panorama Series
3) John Moores Contemporary Painting Prize

Major events can play a key part in drawing visitors to a destination, above that of the normal tourist offering; and in particular, can attract a high proportion of staying visitors.

Within this section we show both the total impact of each event, and what this equates to in terms of *additional* economic impact not included in the above "total impact" of tourists visiting NML.

3.1 Art in the Age of Steam

Art in The Age of Steam was a major free exhibition held at the Walker Art Gallery, running from the 18 April to 10 August 2008. The exhibition drew together around 100 paintings, photographs, drawings and prints, including works by artists such as Manet, Van Gogh and Hopper, exploring how artists responded to the impact of the steam train on landscape and society.

It is estimated that some 33,100 visitors were drawn to Liverpool by this event.

Total impact of the event:	**£3.3.m**
<u>Additional</u> impact to the local economy:	**£1.9m**
	33.0 full-time equivalent jobs

3.2 Ben Johnson's Liverpool Cityscape and World Panorama Series

Ben Johnson's Liverpool Cityscape 2008 and the World Panorama Series' was a major free exhibition held at the Walker Art Gallery during 2008. Although the exhibition itself ran from 24 May to 2 November, this was preceded by a period (28 January to 7 March) when the artist completed the work in residence at The Walker. The Liverpool Cityscape is a panorama of the city which was commissioned by National Museums Liverpool and took three years to complete, showing the architecture of Liverpool in detail. In addition to this major work there were a number of other components to the exhibition, including:

- Panoramas created by the artist of other cities
- Historical views of Liverpool by many artists
- A community exhibition

It is estimated that some 119,000 visitors were drawn to Liverpool by the exhibition itself.

Total impact of the event:	**£10.7m**
<u>Additional</u> impact to the local economy:	**£6.9m**
	119.6 full-time equivalent jobs

In addition, from the end of January to the 7 of March, the impact of the residency period is calculated as being:

Total impact of the residency:	**£1.2m**
<u>Additional</u> impact to the local economy:	**£830k**
	14.3 full-time equivalent jobs

3.3 John Moores Contemporary Painting Prize

The John Moores Contemporary Painting Prize was a major free exhibition held at the Walker Art Gallery. The exhibition ran from 20 September 2008 to 4 January 2009, and marked 50 years since the first John Moores exhibition. With this in mind, a section of the gallery also featured previous prize-winners work, and a number of additional components attempted to engage the exhibition audience, including:

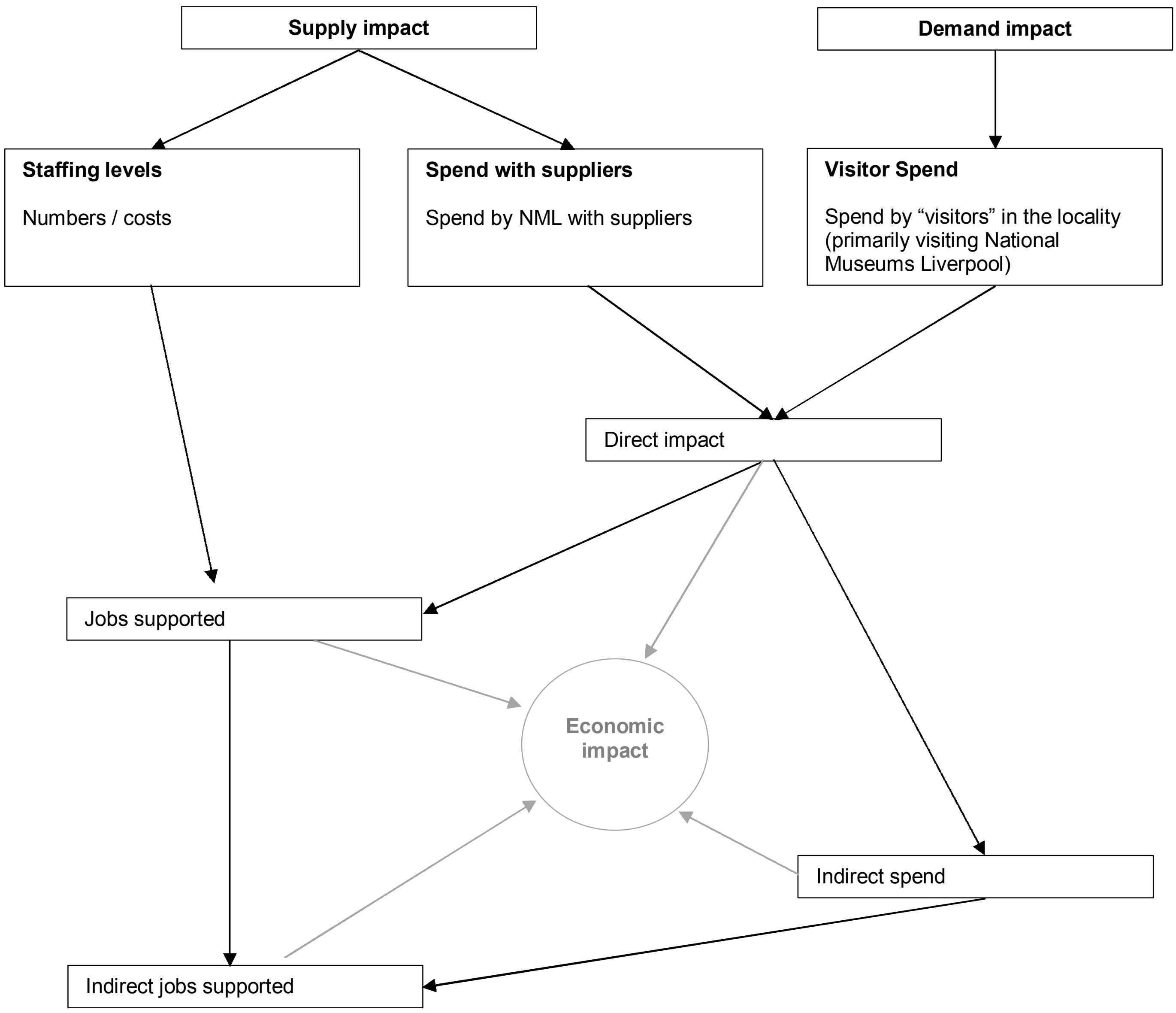
- A 'web point' for finding out further information
- Audio description points
- Cards so that visitors could vote on their own choice

This year's first prize-winner was 'Fontana' by Peter McDonald.

It is estimated that some 17,800 visitors were drawn to Liverpool by this event.

Total impact of the event:	**£1.4.m**
<u>Additional</u> impact to the local economy:	**£0.6m**
	10.3 full-time equivalent jobs

Technical appendix 1: Schematic of analysing economic impact



Technical appendix 2: Calculating visitor spend

Segments as derived from the 2008 Destination Benchmarking

The following segments were drawn from the 2008 Liverpool Destination Benchmarking, a survey conducted with 700+ visitors to Liverpool.

Residents (excluded from economic impact at this stage)	Higher spending local visitors *Merseyside and Northwest England residents; upper NRS social grades.* *Tend to be visitors combining attraction with higher value activities including dining out and shopping.* 15% of all visitors to Liverpool	Lower spending local visitors *Merseyside and Northwest England residents; lower NRS social grades.* *Tend to be 'day trippers' looking for a value-for-money day out.* 33% of all visitors to Liverpool
	Higher spending travellers *Visitors from elsewhere in the UK and overseas; upper NRS social grades.* *Tend to be staying visitors in serviced accommodation* 30% of all visitors to Liverpool	Lower spending travellers *Visitors from elsewhere in the UK and overseas; lower NRS social grades.* *Includes visitors staying with friends and family as well as the more budget conscious.* 22% of all visitors to Liverpool

This suggests that – overall – the following are the spend per person per day which would be applicable (Note: it is felt that in part at least the lower spending local visitors have seen an inflated spend due to the opening of Liverpool One during this period).

Residents n/a	Higher spending local visitors £46.96	Lower spending local visitors £45.02
	Higher spending travellers £98.99	Lower spending travellers £91.91

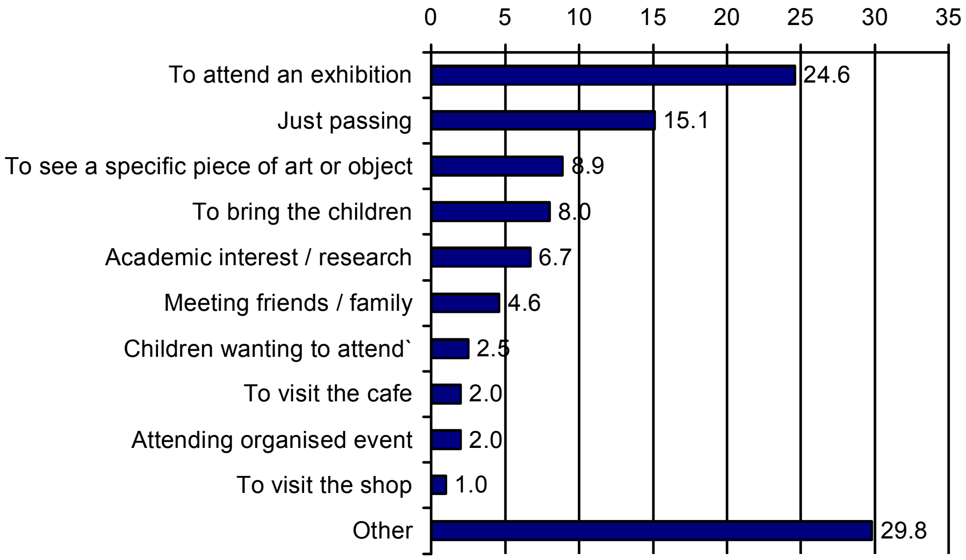
Using analysis from the latest profiling survey suggests that the following visitor segments apply to visitors to NML venues, although this would be expected to vary by each individual attraction.

Residents 21.0% 574,000	Higher spending local visitors 23.2% 636,000	Lower spending local visitors 12.0% 330,000
	Higher spending travellers 34.9% 956,000	Lower spending travellers 8.8% 241,000

Selecting valid impact

This establishes the general proportion of the segments to be applied; there are two issues to be resolved before this can be done.
a) The level of visits where the venue was the driver for the visit to Liverpool.
b) Accounting for multi-site visits: Ensuring where a visitor made more than one trip to a venue that this is not double-counted in the economic impact.

To calculate those visits where the venue was the main driver we use the proportions indicated by the NML profiling survey. This suggests that the following were (overall) the key reasons for visiting venues:



For the purposes of this study, we would exclude those ‘just passing’, ‘meeting friends / family’ or ‘other’, and thus, we would consider that 56% of visits to the city itself were generated by the venue – although as should be expected this will vary from one venue to another; and would also vary by respondents' origin.

Destination benchmarking suggests that local visitors visit one NML venue per visit; those from further afield visit two NML venues per visit. This thus gives the following impact of those who NML influenced to visit the city.

Residents	Higher spending local visitors	Lower spending local visitors
n/a	£16.6m	£8.3m
	Higher spending travellers	Lower spending travellers
	£26.4m	£6.2m

Total impact of visitor spend

In total it is estimated that NML generated **£57.5 m** in direct visitor spend in the local economy.

This is calculated to support **990.2 Full-time equivalent jobs** in the local economy.

However, there is also the issue of the *indirect* spend by visitors in the economy, and this is calculated using the STEAM multipliers as being **£21.8m**, supporting an additional **364.6 FTE** jobs.

To give some idea as to how much the figures can vary by venue, the tables below detail this.

World Museum		
Residents 27.5%	Higher spending local visitors 25.7%	Lower spending local visitors 18.8%
	Higher spending travellers 19.7%	Lower spending travellers 8.3%

Walker Art Gallery		
Residents 17.4%	Higher spending local visitors 25.5%	Lower spending local visitors 8.1%
	Higher spending travellers 41.3%	Lower spending travellers 7.7%

Sudley House		
Residents 49.6%	Higher spending local visitors 29.2%	Lower spending local visitors 4.4%
	Higher spending travellers 14.2%	Lower spending travellers 2.7%

National Conservation Centre		
Residents 38.4%	Higher spending local visitors 26.0%	Lower spending local visitors 8.9%
	Higher spending travellers 21.9%	Lower spending travellers 4.8%

Merseyside Maritime Museum		
Residents 12.4%	Higher spending local visitors 14.4%	Lower spending local visitors 11.2%
	Higher spending travellers 47.6%	Lower spending travellers 14.4%

Lady Lever Art Gallery		
Residents 17.9%	Higher spending local visitors 33.8%	Lower spending local visitors 12.8%
	Higher spending travellers 28.2%	Lower spending travellers 7.3%

International Slavery Museum		
Residents 10.5%	Higher spending local visitors 17.9%	Lower spending local visitors 7.4%
	Higher spending travellers 55.4%	Lower spending travellers 8.8%

HMRC Seized!		
Residents 20.7%	Higher spending local visitors 25.0%	Lower spending local visitors 16.8%
	Higher spending travellers 30.4%	Lower spending travellers 7.1%

Technical appendix 3:Impact of major events

Major events are a key draw in attracting visitors to the Liverpool City Region. This section shows how this is calculated.

Firstly, how the profile varies from that of the “average” for a visitor to the Walker Art Gallery:

Walker Art Gallery - average		
Residents 17.4%	Higher spending local visitors 25.5%	Lower spending local visitors 8.1%
	Higher spending travellers 41.3%	Lower spending travellers 7.7%

Walker Art Gallery – Art in the Age of Steam		
Residents 9.5% -3.8%	Higher spending local visitors 32.5% +7.0	Lower spending local visitors 10.4% +2.3%
	Higher spending travellers 45.6% +4.3	Lower spending travellers 2.1% -5.6%

Walker Art Gallery – Ben Johnson’s Liverpool Cityscape		
Residents 13.6% -3.8%	Higher spending local visitors 32.3% +6.8%	Lower spending local visitors 9.9% +1.8%
	Higher spending travellers 40.5% -0.8%	Lower spending travellers 3.8% -3.9%

Walker Art Gallery – John Moores Contemporary Painting Prize		
Residents 13.0% -4.4%	Higher spending local visitors 33.4% +7.9	Lower spending local visitors 5.8 -2.3%
	Higher spending travellers 45.0% +3.7%	Lower spending travellers 5.8% -1.9%

Secondly, the table below details the key economic impact variables of these special events:

	No. of visitors drawn by the exhibition	% of visitors staying in Liverpool drawn by the exhibition	Average length of stay (nights)
Art in the age of Steam	33,081	26%	3.6
Ben Johnson's Liverpool Cityscape	118,977	21%	3.9
John Moores Contemporary Painting Prize	17,806	9%	3.2

The following tables display the estimated spend by all visitors in each of these areas (Note: this is *prior* to removing the spend that is estimated as already having been included within the general profile of visitors to the Wirral, but as the events generate a higher proportion of spending visits, clearly there is an amount of additionality.

Walker Art Gallery – Art in the Age of Steam		
Residents n/a	Higher spending local visitors £505,000	Lower spending local visitors £155,000
	Higher spending travellers £2,504,000	Lower spending travellers £107,000

Walker Art Gallery – Ben Johnson's Liverpool Cityscape		
Residents n/a	Higher spending local visitors £1,805,000 *+£208,000 in the residency period*	Lower spending local visitors £530,000 *+£64,000 in the residency period*
	Higher spending travellers £7,675,000 *+£886,000 in the residency period*	Lower spending travellers £720,000 *+£77,000 in the residency period*

Walker Art Gallery – John Moores Contemporary Painting Prize		
Residents n/a	Higher spending local visitors £279,000	Lower spending local visitors £46,000
	Higher spending travellers £952,000	Lower spending travellers £114,000

Note: the table below displays the end result of this calculation.

	Total spend	Spend which is *additional*	FTE jobs generated by additional spend
Art in the age of Steam	£3,271,000	£1,916,000	33.0
Ben Johnson's Liverpool Cityscape (*Exhibition*)	£10,730,000	£6,944,000	119.6
Ben Johnson's Liverpool Cityscape (*Residency*)	£1,235,000	£830,000	14.3
John Moores Contemporary Painting Prize	£1,391,000	£598,000	10.3

Technical appendix 4: Staff details

National Museums Liverpool employs over 500 staff; some **475 full time and 120 part time**, with a total payroll of **£12,983,283.**

	Full Time	Part Time	Total
Hourly rate: £5.95	1	70	71
£11,731 - £13,263	116	19	135
£14,577 - £16,275	77	12	89
£18,287 - £20,225	88	10	98
£22,777 - £26,350	105	8	113
£29,540 - £33,347	48	1	49
£37,965 - £43,933	22	0	22
£48,876 - £54,319	11	0	11
£61,265 - £67,109	6	0	6
+++	1	0	1
Total	**475**	**120**	**595**

The Cambridge Model, employed by the Tourist Board until 2002, enables a calculation of the *multiplier* effect of these jobs; that is, these jobs have a direct value in terms of wages, but there is also an indirect cost in terms of the effect on the local economy of this spending power.

The staffing levels at NML are thus expected to support an **additional 89.2 full-time equivalent jobs (FTE) in the economy, with a value of £1.7m**.

Technical appendix 5: Supplier details

A key measure of economic impact of any event, organisation or destination is that of the value it presents to local businesses through purchasing goods and services. This absolute value has a worth to the local economy, supporting businesses and local jobs, but it also has a multiplier effect; spend with local businesses as opposed to businesses outside the area means these companies will have varying levels of spend with other companies, further supporting local jobs.

	Share by Value	Share by no. of transactions	Purchases by area	Spend through local linkages	Wages supported	ASHE wages per capita estimate	No of jobs supported
Merseyside	25%	34%	£7,908,612	£2,800,439	£2,878,593	£24,509	117.5
NW	12%	13%	£3,733,793	£1,322,136	£1,359,034	£23,729	57.3
Elsewhere	63%	53%	£19,557,596	£6,925,345	£7,118,614	£25,123	283.4
Total			*£31,200,000*	*£11,047,920*	*£11,356,241*		*458.1*