

Final

National Museums Liverpool

Its Impact on Liverpool and the North West

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1. Introduction

The arts, culture and visitor attractions have become big business. In the past it was possible to view such activities as pleasing distractions from day-to-day economic activity. But in recent years, cities throughout the developed world have come to see museums, galleries, theatres, music, cinemas and nightlife as longer leading indicators of a new economy. Places as diverse as Barcelona, Venice, Lille and Los Angeles have chosen to use the arts and culture to signal economic and/or cultural change.

Within Britain, the need to renew industrially-based cities has led local governments and regional agencies to think creatively about the way institutions such as museums and galleries can create a bridge from the past to the future. Within the North West of England – the cradle of the Industrial Revolution – the need to re-cast urban economies has meant a move towards new industries such as civil aviation, modern ports, research & development, business services, retail and the creative sector.

As a result, airports at Manchester and Liverpool have been expanded, the Port of Liverpool has been transformed, while Daresbury at Warrington has become one of the country's leading scientific research centres. Cultural facilities have been expanded in Liverpool, Manchester and other key centres. A regional development agency has been created to assist the process of change.

National Museums Liverpool is a visible manifestation of the new economy. Although many of its institutions have a long history within the region, in their current form they represent a collection of bodies that alongside others such as Tate Liverpool, are a visible contributor to the regional and local economy. Shops, cafes, transport operators and hotels benefit from their proximity to the museums and galleries. Money is spent in Liverpool and surrounding areas that would otherwise be spent elsewhere.

The educational and curatorial elements of National Museums Liverpool's work can be seen to contribute to Liverpool's resurgence as a post-modern economy, with strengths in sectors that relate directly to those in other global cities. Professionals in the so-called 'knowledge economy' – both within the public and private sectors – are widely seen as an essential element in ensuring an area remains competitive and productive.

The purpose of a study of this kind – and comparisons with other institutions – is to make it possible to understand more clearly, National Museums Liverpool's role within the cultural and economic life of Liverpool and the North West region more generally. Our research has also involved unattributed interviews with a number of key individuals who have provided an informed and concerned context for the wider study. It is important to know the extent to which National Museums Liverpool institutions are meeting the expectations of local and regional partners.

National Museums Liverpool bodies are a regionally-centred example of heritage and learning, as well as an element in Liverpool's renaissance. While this report cannot provide a full analysis of the impacts of such a diverse and unusual set of institutions, it can generate a fresh way of understanding National Museums Liverpool and perhaps facilitate additional interest and support from both its traditional friends, regional partners, commentators and policy experts. Above all a project of this kind should help the public see their local museums in a new light.

2. National Museums Liverpool – their purposes and activities

National Museums Liverpool is one of the key elements in the cultural offer of the City of Liverpool, Merseyside and the North West. It would be misleading to see the institutions that make up the organisation simply as a number of museums and galleries, at a time of relentless economic and social change in the region National Museums Liverpool provides both a reminder of local history and a focus for renewal.

National Museums Liverpool brings together a number of leading museums into an entity that provides Liverpool and its region with a focus for its past and future. There are currently eight institutions within the National Museums Liverpool family: Liverpool Museum, the Walker, Merseyside Maritime Museum, the Museum of Liverpool Life, the Conservation Centre, the Lady Lever Art Gallery, Sudley House and the Customs & Excise National Museum. A National Slavery Museum is soon to be added to the existing eight sites.

National Museums Liverpool's family is, to a significant extent, a reflection of the city and region's history. Liverpool developed to be one of the world's largest ports and it continues to operate as a successful and profitable maritime centre. Links were established across the Atlantic with cities such as New York, Boston and Halifax. The wealth generated in the commercial heart of the Victorian city spread out into what is today Merseyside and beyond into Lancashire, Cheshire and North Wales. The Liverpool 'diaspora' today is a powerful and visible presence well beyond the city's boundaries.

Because it was a port, people moved in and out of the city, to and from all parts of the world. The bulk of passengers and freight moving through Liverpool Docks were a creative element in the Industrial Revolution. Trade with North America included the movement of cotton, tobacco, sugar and (particularly at Birkenhead) grain. During World War Two, the Docks were vital as the arrival point for Atlantic convoys bringing food, arms and troops from the USA and Canada. Not all of the people passing through Liverpool were willing travellers: the new slavery museum is a way of recognising issues from Britain's (and America's) past.

Liverpool and Merseyside is a classic, complex, urban area that has generated a deep and evolving culture. Local businesspeople, as was common in newly-industrialised cities, funded civic art collections. The Walker is a prime example of this phenomenon. Andrew Barclay Walker (1824-93), a Liverpool brewer and alderman, offered to present a gallery to Liverpool to commemorate his term as mayor. Walker donated £20,000 towards the new gallery. Lord Leverhulme, similarly, originated the Lady Lever Art Gallery at Port Sunlight.

Architecture flourished. Liverpool Architectural Society was founded in 1848, making it one of the oldest architectural societies in the world. The growth of trade was accompanied by new structures such as the world-famous Liver Building, the Cunard Building and the Port of Liverpool Authority Building. The city's two cathedrals have latterly added to this extraordinary heritage.

Liverpool is also world famous as the home of The Beatles, four young men from Liverpool who irreversibly changed rock music forever. Subsequently, the city has continued to enjoy a reputation as a place for lively, contemporary, cultural activity. Indeed, the renewal of Liverpool and the wider region have to a significant extent, taken the creative aspects of its culture as a starting point. The city's success in becoming City of Culture 2008 is international recognition of this wider, modern capacity to use the arts and culture to drive the city forward.

National Museums Liverpool is the city's largest collection of institutions devoted to the protection and promotion of art, natural history, maritime history and the region's own inheritance. Indeed, it is arguable that no other city in Britain has an institution quite like it. Local people and visitors from the rest of Britain and overseas can come to National Museums Liverpool's collections and better understand the city, the region and even Britain as a whole.

In common with other leading museums and galleries, National Museums Liverpool combines a number of functions. In part, its institutions are a classic repository of paintings, decorative art and scientific artefacts. But they also fulfil a number of rapidly-developing modern functions such as places of education and a mass tourism destination. National Museums Liverpool provides educational programmes and activities for school children, young people and adults. It offers courses for 150,000 students a year through formal learning initiatives. Experts working in National Museums Liverpool venues are consulted by local, national and international cultural institutions.

But it is as a tourism destination that National Museums Liverpool museums have become most visible, encountering over one and a half million people a year, in the process making it one of the biggest concentrations of its kind in the United Kingdom. Indeed, few cities in Europe have a set of collections brought together in this way and for such a large number of visitors. At a time when many older urban centres are regenerating their economies, the importance of a concentration of activities of this kind is hard to exaggerate.

The scale of museums and galleries concentrated in Liverpool is significant. However, other cities enjoy parallel agglomerations in other fields, for example Manchester as a burgeoning media centre (soon to be enhanced by the transfer of BBC functions from London), Leeds's financial and business services industry or Edinburgh's government institutions. Liverpool's concentration encourages benefits to be gained from having a number of similar institutions in one city in much the same way as London's West End theatre district or Birmingham's conference facilities.

National Museums Liverpool institutions also provide what might be called 'civic' space. That is, the buildings which house the Liverpool collections can be accessed by people from the city and region as locations that offer the possibility for them to enrich their lives and visit places that are neither domestic nor commercial. There are relatively few buildings – apart from local authorities, government offices or hospitals – that fulfil such a function. Crucially, people can access museums and galleries to develop themselves culturally or spiritually.

The economic impact of National Museums Liverpool on the city and region is considered elsewhere in this report. However, it is important to recognise that visits made to museums and galleries also produce a financial benefit for local businesses and residents. Britain's economy increasingly depends on its capacity to trade services, including tourism. All regions of the country are now recognised as attractive to overseas visitors – as well as those from the rest of the UK.

Liverpool, because of its rich cultural heritage and position as a port of arrival or departure, has greater potential than most of the country to exploit international links. Increasingly, people from the United States, Canada, Ireland, Australia and New Zealand are taking an interest in their origins. Strong links exist between Liverpool and New York because of the liner traffic between their two historic waterfronts. National Museums Liverpool institutions, working with their sister institutions such as Tate Liverpool, can assist the city and the region to take advantage of the growing tourism market.

National Museums Liverpool is more than a simple collection of museums and galleries operating in the North West of England. Rather, it is a family of institutions that allow the city and region to link the past to the future. They offer a way of retaining the city's heritage – good and bad – using it to offer future generations and people from outside the region an opportunity to enjoy and enrich themselves.

3. Economic Impact of National Museums Liverpool

National Museums Liverpool is a city institution with local, regional and national impacts. A major civic institution such as National Museums Liverpool must be able to explain how it uses and invests public and private funding. Britain has seen an extraordinary recovery in its regional economies

during the past 15 years. Museums and galleries are often a central element in this renewal. Nevertheless, the way such institutions use their resources remains a key public policy question. The economic impact of cultural institutions is a prime element in their regional and local contribution. This section of the report will examine the economic impacts of National Museums Liverpool within the city, region and beyond

The total annual incoming resources (turnover) of National Museums Liverpool in 2004/05 is currently £32.2 million a year and this figure is likely to be sustained over the next five years as a major capital expenditure programme is undertaken. The incoming resources of National Museums Liverpool are applied to its wide operating programme and to its extensive programme of capital works; this spending activity converts into payments to employees and suppliers of goods and services. This sum is significant in itself, suggesting that resources flow from National Museums Liverpool institutions into the local, regional and national economies. The geographical incidence of this expenditure is considered in later sections.

To put National Museums Liverpool in context, Table 1 below compares the turnover of the organisation in 2004-05 with broadly equivalent figures for other kinds of national or regional bodies. At £30.2 million, the turnover is comparable with a number of other regional or local institutions. It would be easy to dismiss the economic impact of a museum or gallery on the grounds that it was relatively small within the wider economy, however, as the figures in Table 1 suggest, the jobs, spending power and wider effects on the North West economy are similar to or greater than those of many important transport, sport and cultural institutions.

National Museums Liverpool's turnover is also similar to that of a smaller university or hospital.

Table 1
National Museums Liverpool's turnover compared with other institutions

Major regional companies	
	£m
<i>Liverpool Post & Echo</i>	62.3
Burtonwood Brewery	50.4
Pochin plc	45.2
Everton FC	44.3
Regional charitable bodies	
	£m
National Museums Liverpool	30.2
Liverpool School of Tropical Medicine	15.0
Mersey Partnership	5.9
Everyman Theatre	2.7

National institutions	£m
South Bank Centre	26.9
Royal Academy of Arts	21.7
Business in the Community	19.9
Welsh National Opera	15.1
Opera North	12.0

Note: figures generally refer to 2004 (in some cases 2003-04 and in some 2004-05)

Sources: (a) Annual reports, various companies; (b) CharitiesDirect.com; (c) Mersey Partnership Annual Report; (d) Higher Education Statistical Agency; (e) National Museums Liverpool own figures

Rather more important than such comparative turnover figures, are the wider impacts on the local and regional economy. Direct expenditure by the National Museums Liverpool is not the only kind of economic impact generated by its existence. People who visit National Museums Liverpool institutions will spend money in surrounding businesses and transport facilities that would not have otherwise been spent. In the case of expenditure by overseas visitors (who are increasingly visiting Liverpool because of its cultural offer), such expenditures are a gain for the local, regional and national economies. Methods for calculating the impacts of overseas visitors are not always simple, though acceptable and rigorous estimates can be generated

National Museums Liverpool's direct expenditure was £19.45 million in 2004-05, total capital expenditure amounting to £9.9 million. Added to this amount must be the totals spent by British and overseas visitors to the organisation, estimated (using cautious assumptions) at £23.2 million for UK visitors and £1.9 million by overseas visitors. These numbers imply that total expenditure by all visitors to be broadly £25 million.

It is legitimate to calculate the wider effects of the spending outlined above, arriving at a so-called 'multiplier effect'. To do this, we would include National Museums Liverpool's budget spent by its staff and on suppliers, and the money spent by visitors on the North West economy.

Economic impact calculations have generally used multipliers of anything from 1.5 to 1.7 to generate a plausible range of indirect and induced effects. On the basis of multipliers of this size, National Museums Liverpool's total impact, including the expenditure it generates from British and overseas visitors, is estimated to be in the range £65.9 million and £74.6 million.

A large extent of National Museums Liverpool's direct expenditure is financed by publicly-funded grants, including funding from the Department of Culture, Media & Sport, Customs & Excise and from local or regional partners. It might be argued that the grant-funded proportion of the Museums' income (£17.2 million) could have been used for other purposes within the public sector, or to pay for reductions in taxation. However, if the "grant" element of funding were to be removed, there is still a substantial element of economic

activity generated by the impact of visitors and from wider social or economic benefits. Public sector support generates between £49 million and £57 million in these broader benefits.

4. Major National Museums Liverpool developments and their economic impact

National Museums Liverpool has embarked on a number of major new projects to extend its reach and impact. World Museum Liverpool (formerly Liverpool Museum) opened in April 2005, including several new galleries and attractions, together with much improved access into and circulation within the building. Additional attractions include a new entrance and six-storey atrium, café, shop, World Cultures gallery, Bug House, Clore Natural History Centre, Weston Discovery Centre, Treasure House Theatre and a refurbished Aquarium. Curatorial and office facilities were also improved.

These facilities were each part of a Heritage Lottery Funded *Into the Future* project, having received a £35 million grant. The impact of these works has not been subject to a full economic impact analysis, though it is inevitable that there will have been significant short-term employment generation associated with the project. Much of the direct employment and supply-chain impacts will, plausibly, have been within Merseyside. The additional visitors attracted to National Museums Liverpool will, of course, score in future years' turnover, staff and economic impact figures.

The next big project is the Museum of Liverpool, which is due to be completed in 2010. This is a £65 million project, with funding from a number of sources. Housed on Liverpool's historic waterfront, the new institution is intended to be the world's leading city history museum. The start-up impact of this project will undoubtedly be significantly greater than the World Museum, simply because it is a bigger project. A boost to local employment in construction and supplies would be enjoyed for the period from 2006 to 2010, with subsequent benefits for visitor numbers.

The National Slavery Museum is a third project, with a total value of £9 million. Additional works or extensions are also in progress or planned for the Conservation Centre, Sudley House, Lady Lever Art Gallery, the Walker Art Gallery and the Customs & Excise Museum. These smaller projects (including the Slavery museum) will total almost £13 million. Thus, if all these projects are completed, National Museums Liverpool will have invested broadly £120 million into capital projects within a decade. By any standards, this is a major infusion of construction and, in the longer term, visitor spend into the economy. The cultural impact of these projects is also significant for the region as a whole.

5. The impact of spending on employees, goods and services

The total National Museums Liverpool resource applied to operating activity almost £20 million a year. 61 per cent of which is devoted to staff salaries. There are 488 full time staff, plus 135 part timers. In addition to the £20 million spent directly by National Museums Liverpool venues, there will be indirect impacts as a result of the fact that the venue's spending buys goods and services from suppliers who can then use resources to buy more goods. These so-called multiplier effects are discussed elsewhere in the report.

The direct effect of National Museums Liverpool's activities will occur as a result of the resources that flow through its employees into the neighbourhoods within which they live, shop and spend their leisure time. Given the nature of commuting into the city centre, these effects will spread outwards beyond Liverpool into Sefton, Knowsley, Wirral, St Helens and beyond.

An analysis of where National Museums Liverpool employees live suggests that currently 3 per cent are resident within the city centre (L1 – L3), 32 per cent in North Liverpool, 25 per cent in South Liverpool, 9 per cent in Sefton, 21 per cent in Wirral and the remaining 10 per cent in the rest of Merseyside or beyond. It is clear that the direct spending-power benefits of salaries paid to National Museums Liverpool staff will find their way beyond the city centre. Indeed, purchases of goods and services by National Museums Liverpool institutions will spread this effect still further into the North West.

National Museums Liverpool employment is contributing millions of pounds each year into the local economies of shopping centres, service-providers and other activities throughout Merseyside. It would be easy to imagine the impact of National Museums Liverpool was only felt in the city centre or in the areas immediately surrounding individual museums. However, in reality, a much wider area benefits, including some of the less advantaged parts of the region.

In addition to the geographical location and impact of National Museums Liverpool's direct employment, there will be a significant economic effects generated more widely in the regional economy (as estimated in Section 3 above) by the expenditure of National Museums Liverpool visitors and their wider indirect and induced impacts of this spending. On the basis of average gross earnings¹ (£15,532 per annum in 2004 - though allowing for overheads and other on-costs equivalent to a further 50% of pay), workers in the leisure and catering industry would be the most important group to be employed as a result of National Museums Liverpool-related expenditure within Merseyside. The number of jobs indirectly supported is likely to be in the range 2000 to 2390 – implying an overall employment total related to National Museums Liverpool (including its own staff) of between 2600 and 3000.

¹ Office of National Statistics (2004) *Annual Survey of Hours and Earnings (ASHE) Analysis by Work Region by Industry*, Table 5.7a

If all multiplier effects were removed, the benefits of tourism-related expenditure would still be equivalent to approximately 1000 jobs outside the National Museums Liverpool institutions, suggesting that at a very minimum, 1600 Merseyside jobs depend on National Museums Liverpool and its economic impacts.

6. National Museums Liverpool institutions as visitor attractions

Many of the National Museums Liverpool museums were created as classic British museums – as places of scholarship and curatorial expertise. Some were the gift of philanthropists who wanted to improve or beautify Liverpool or its regions. Originally, most museums saw themselves as having what would today be called a ‘mission to explain’. But by the early part of the twentieth century, the original, educational, purpose had often become heavily academic. A number of museums and galleries evolved into universities of ‘high art’.

Britain has many of the world’s leading academic museums which fulfil purposes similar to those of many university departments. These institutions, however, have in recent years been expected to extend their reach into colleges, schools and, once again, to the general public. Government grants have been attached to strings that have required a far greater willingness of institutions to achieve a wider ‘cultural transfer’. In Liverpool, as in many cities within Europe that do not have the scale of collections to be found in for example, the British Museum, the Louvre or the New York’s Metropolitan Museum of Art, there is now a need to re-build a wide audience for arts and culture.

Liverpool, by chance, has an agglomeration of institutions that, between them, can offer the possibility of drawing large numbers of visitors. National Museums Liverpool is responsible for the majority of these bodies. Visitor numbers have grown in recent years to 1.5 million per year – more than double the figure in the late 1990s. Of these numbers, roughly one quarter are children and one quarter are aged over 60. It is expected that total visitor numbers will now quickly grow towards two million per year.

National Museums Liverpool is a major producer of education and cultural transfer. Indeed, so large are the numbers of visitors to National Museums Liverpool institutions, it would also be perfectly legitimate to view them as a major visitor attraction. Table 2 below shows the number of visitors to the top 10 unpaid visitor attractions in the North West in 2003. National Museums Liverpool institutions, taken together, come third in the list. Three National Museums Liverpool institutions feature in their own right in the North West Top 10.

Table 2
Attendances at major free attractions, 2003

	millions
Blackpool Pleasure Beach	6.2
Pleasureland Theme Park	2.1
National Museums Liverpool	1.5
Oswaldtwistle Mills Shopping Village	1.2
Chester Cathedral	0.8
Blakemore Craft Centre	0.6
Tate Liverpool	0.6
Museum of Science & Industry in Manchester	0.4
Merseyside Maritime Museum	0.4
Liverpool Museum	0.4
Museum of Liverpool Life	0.4

(Source: (i) *Statistics on Tourism and Research*, (ii) National Museums Liverpool)

These visitor numbers are large by international standards. The newly refurbished Museum of Modern Art in New York expects to receive about 1.75 million (albeit paying) visitors per year. It seems likely National Museums Liverpool will overhaul this total in the next few years.

Another way of looking at National Museums Liverpool is visitor numbers, is to compare the number of people who visit it from overseas as a proportion of the total visiting Liverpool and the North West. Table 3 shows this comparison.

Table 3
Overseas visitors, National Museums Liverpool, Liverpool and North West, 2003

North West	1,370,000
- of which: Liverpool	225,000 (range 190,000 to 275,000)
- of which: National Museums Liverpool	107,000

(Sources: (i) North West Regional Development Agency; (ii) Office of National Statistics; (iii) National Museums Liverpool)

According to the North West Regional Development Agency, 1.37 million overseas visitors stayed in the region in 2003. The figures for Liverpool were roughly 225,000 (there is a significant variation between official sources for this number). Overseas visitors to National Museums Liverpool institutions are equivalent to about half the total number of overseas visitors to Liverpool. This strongly suggests that National Museums Liverpool institutions are a key 'pull factor' in bringing overseas visitors to the city. If the figures for Tate and other museums were added to National Museums Liverpool's 107,000 total, the proportion of overseas visitors attracted by all Liverpool museums and galleries would approach 75 per cent.

A rather different way of considering National Museums Liverpool's capacity to draw overseas visitors is to compare the numbers attending its constituent

bodies and then to compare these numbers with those for different parts of the country. Put simply, how attractive is National Museums Liverpool compared to for example, an English or Scottish county? Although this is not really a like-for-like comparison, it does give some idea of the scale of visits to National Museums Liverpool venues as compared with relatively large geographical areas.

Table 4
Overseas visitors, National Museums Liverpool, selected counties of the UK, 2003

	'000s
National Museums Liverpool	107
Merseyside	325
Derbyshire	177
Shropshire	105
Strathclyde	105
Durham	74
Isle of Wight	61

(Source: *Travel Trends 2003* Table 4.11 London :ONS)

The number of overseas tourists who chose to visit National Museums Liverpool museums in 2003 was broadly one third of all the visitor numbers for the whole of Merseyside, though very similar to the numbers for the whole of Shropshire or Strathclyde. Perhaps surprisingly, National Museums Liverpool's international visitor numbers were almost double those of the Isle of Wight. Other data produced in *Travel Trends* (Figure 4.17) suggests the number of foreign visitors to National Museums Liverpool was similar to those visiting Bath, Newcastle-upon-Tyne, Leeds or Chester.

The number of overseas visitors coming to Merseyside has risen in recent years. In 2003, the most recent year for which data exists, the total was 325,000. This number is well up on the average of 250,000 in previous years. International tourism to Merseyside and to the wider North West region, has significant potential to grow. The world's largest cities often attract over ten million annual visitors from overseas. The possibility of attracting large numbers of additional visitors – and their spending power – is, according to a host of surveys, heavily influenced by cultural facilities.

7. Culture and tourism, Liverpool and the North West

The North West has long been a major centre for tourism and holiday-making. Blackpool, Southport, Morecambe and the Lake District have, for many years, been associated with holidays and travel. However more recently, as the economies of Liverpool, Manchester and their surrounding areas have changed, it has become necessary to make better use of the cultural and other attractions that exist within major urban centres. This process is not unique to the North West or to Britain, though the scale of economic change

seen in some cities within the Midlands and the North suggests that the need for change has been greater than in other countries.

This report is not concerned with tourism as such, but it is about the development and impacts of a set of cultural institutions that feed into the 'brand' or 'offer' of Liverpool and the wider region. National Museums Liverpool's visitors often travel to the city from outside. Those who come from overseas and spend money are creating an 'export' for the UK economy.

Table 5 shows official estimates of spending by overseas visitors within the North West region during 2003. In Merseyside, the total was £105 million. As visits to Liverpool represent broadly half of all those made to Merseyside, it is likely that some £50 million is spent by overseas visitors within the local economy each year.

Table 5
Expenditure by overseas visitors, counties within the North West, 2003

	£m
Greater Manchester	307
Merseyside	105
Lancashire	78
Cheshire	71
Cumbria	50
North West	611

(Source: *Travel Trends 2003*, Table 4.11 ONS)

While it is impossible to measure National Museums Liverpool's contribution to the 'pull factor' that brings people from outside the region into Liverpool, elsewhere in this report we have made estimates about the proportion of the overall overseas visitor spend that could reasonably be attributed to overseas visitors. What can be argued is that National Museums Liverpool institutions, Tate Liverpool, the Everyman and Playhouse Theatres, cinemas, university activities and festivals will, between them contribute to the supply-side that is now tempting larger numbers of foreign visitors to come to Merseyside.

Manchester has also been successful in building up tourism based on a new 'offer' that includes the arts and culture. Part of the benefits of joint working within the North West is that overseas visitors are more likely to come if there is a number of different cultural facilities on offer within a relatively small geographical area. The possibility of visiting a range of museums and galleries, theatres, restaurants and other modern leisure facilities, increases the more of them are co-located. National Museums Liverpool, partly by accident, provides the North West with a group of museums, which alongside other cultural facilities in Liverpool, Manchester and Chester, makes it possible for even new tourists to visit many different places on a single stay.

8. National Museums Liverpool in the media

Museums and galleries have become key elements in the media's representation of cities, regions and countries. There are a number of reasons for this, not the least of which is the importance personally attached to cultural institutions by elite commentators. The rapt press attention focused on the re-opening of the Museum of Modern Art in New York during 2004, or annually to the Edinburgh Festival, shows how powerfully the television, radio and newspapers are attracted by particular kinds of cultural institutions.

National Museums Liverpool has recently had the advantage of benefiting not only from a national upsurge of interest in the arts and culture but also of two particular, local attributes. First, the institutions under the National Museums Liverpool banner have been re-branded into their current format. Second, there has been a major programme of investment in the organisation's infrastructure including the opening of the Museum of Liverpool Life and the World Museum Liverpool project.

National Museums Liverpool and its constituent institutions enjoy a significant level of media attention, locally, regionally, nationally and in the specialist press. The *Liverpool Echo*, the *Daily Post* and BBC Radio Merseyside provide almost daily coverage of activities. Such news items and features are immensely important in generating local interest and audiences. Relationships between National Museums Liverpool and the local media appear to be highly productive and of mutual benefit. Museums and galleries, television and radio, advertising and the performing arts are each part of the increasingly important 'creative industries' cluster that has evolved on Merseyside.

(The link between art and the local economy was well understood by Victorian philanthropist William Hesketh Lever, who founded the Lady Lever Art Gallery. He bought paintings and then used them as adverts for his soap, a point brought out in a 2004 programme on Five, where Tim Marlow presented a programme about the Gallery. Little really changes).

In a broadly representative two-month period from 23 March to 23 May 2005, National Museums Liverpool venues were mentioned in the media 431 times – on average seven times a day. Around one quarter of these references were in national publications, including the *Times*, *Telegraph*, *Independent*, *Guardian*, *Daily Mail*, *Daily Mirror* and *Sunday Times*. Several national BBC television and radio programmes also featured National Museums Liverpool.

The national media can assist in giving Liverpool a more positive and informed image. For example, an article in the *Times*, published on 19 February 2004, about visitors to major UK attractions in 2003, observed that Liverpool museums had bucked a national trend of declining attendances: "...the promotion of Liverpool had paid dividends, with numbers at Tate Liverpool up 20 per cent and at the Museum of Liverpool Life up 40 per cent".

The content and tone of national press reporting of National Museums Liverpool stands in sharp contrast to other coverage of the city and its people.

Despite years of economic revival and cultural change, there is still a propensity for the press to cover Liverpool in a particular, and not always flattering, way. However, media stories about developments and ventures at National Museums Liverpool institutions are almost always positive. Some carry the strong impression of a changed city with a confident international future. There can be little doubt that National Museums Liverpool has helped to enhance Liverpool's 'brand'.

Thus, for example, in a major *Guardian* feature about Liverpool, occasioned by the reaction to a highly-critical piece in the *Spectator* about the city and its culture, contrasted a number of views about the way the city had changed with the measurable impact of culture and attendance at museums. 'While public attendance at "high" cultural institutions has fallen nationally by 20% in 10 years, in Liverpool it has – remarkably – defied the trend to increase by the same amount: eight museums attract a million visitors a year. And if there is one art gallery that really does belong to its city – where visiting figures have soared way above even the 20% increase – it is the Walker Art Gallery'.

The quotation from the *Guardian* contradicts other coverage of the city, including some of the dissenting local voices who criticise some aspects of the changes now taking place there. Interestingly, museums and galleries are rarely challenged, even if regeneration programmes more generally are. Moreover, they are capable of reaching beyond the 'broadsheet' papers into the rest of the press. A feature in the *Daily Mail* in May 2005 explained 'National Museums Liverpool is one of the country's largest and most popular attractions'. The national press often link museums to hotels, short-breaks and other facilities. A short feature in the *Sunday Times*, also published in May 2005, in describing the 'stunning makeover' to the Liverpool Museum went on to state 'There's only one place to stay – the Hope Street Hotel', thus directly linking National Museums Liverpool institutions to the wider economy.

Inevitably, the specialist arts press can devote more space to the changes taking place in Liverpool. In a longer feature published in *artsindustry*, summer of 2005, National Museums Liverpool Director David Fleming, was able to use the opening of the new World Museum to discuss Liverpool's historic and contemporary roles in Britain. He was able to explain that 'Between 1900 and 1910, 40% of Britain's shipping came and went from Liverpool, stating that what came into Britain, came to Liverpool first... Even post war, the first electric guitar and first vinyl records came from the United States to Merseyside before anywhere else, with historic results... The merchants of Liverpool were also the greatest collectors who bought their prizes back here and often gave them to the museum'. Finally, Fleming explained 'this museum and the collections recollect how important Liverpool has been in terms of introducing Britain to the world and the world to Britain and how important it still is now with its world class museums and cultural scene'.

Lastly, it is interesting to see how the media reacted to efforts by cultural institutions to modify the age-old rivalry between Liverpool and Manchester. From the North West of England's point of view, the competition between the

two cities has not assisted the development of a global cluster of economic activity. A consensual and complementary relationship between these competing centres would potentially allow the region to build up deeper concentrations within each than might occur if they battled each other for everything. Regional institutions such as the North West Regional Development Agency have certainly sought to improve this relationship.

Commenting on the Liv/Man exhibition that ran in both cities during 2004, the Independent's Ian Herbert wrote: 'The exhibition grew out of an examination by the artist Laurence Lane of similarities and differences between accents.... amid the suspicions there is plenty of affection. But among men in particular, support of the cities' football clubs often breeds bitter terrace vitriol'. Perhaps museums can bring together what sport has rent asunder – to the economic benefit of all?

The media can project the work of National Museums Liverpool institutions, these can in turn, project a particular version of Liverpool and North West region to a national audience. Press coverage of the kind quoted here would never appear in the national and local media if there were no new and developing museums and galleries in the city. Other major world cities have successfully created a new image for themselves in recent years, notably Barcelona, Berlin and Glasgow. For the museums and galleries of Liverpool, the media is a helpful, critical, friend.

9. Views of National Museums Liverpool – interviews and analysis

This part of the study attempts to provide an account of how National Museums Liverpool is perceived. A dozen prominent figures in Liverpool and the wider region were interviewed, they were asked how they thought National Museums Liverpool was doing. What follows is an attempt to synthesise a collection of disparate views into a coherent account of how National Museums Liverpool is regarded.

The interviews were conducted off-the-record. The quotations cited below are therefore unattributed. But in the appendix there is a list of those who gave us their time and opinions.

First reactions

Without exception the reaction of those interviewed to the question of how well or not National Museums Liverpool is doing its job, were positive and complimentary. National Museums Liverpool was described as a 'huge asset'; it was the 'jewel in the crown'; 'I've no complaints about what they are doing'; 'thank goodness we have them'; National Museums Liverpool is 'an immense strategic asset'; it is 'incredibly important'; Liverpool should be 'very grateful they are there'.

This favourable view derived from two distinct perceptions. The first was concerned quite simply with the quality of the museums as museums. There was, as is to be expected, a range of views about the personal experience of visiting the museums. Most found them impressive: 'the exhibitions are outstanding'; 'they are as good as or in excess of what I find elsewhere'; visitors are often 'bowled over' by what they find. Such praise was matched by the odd derogatory remark such as: 'personally, I find the Maritime Museum as boring as it gets'. But even the most critical observer acknowledged: 'It has to be said they are good at what they do'. The quality of curators (and their skill) is not an issue and elsewhere, the new World Museum in particular elicited a lot of praise.

The other ground for approval was the recognition that National Museums Liverpool is changing in the right direction. That is to say, it is shaking off the insularity which was widely thought to have characterised it even in the fairly recent past, and which constrained it from having the impact on the city and the wider region which it was felt it ought to have had. In particular, there was unqualified approval for the opening up of the board of trustees to represent a wider part of the community.

There was a difference of opinion about how fast this change was happening. To one, National Museums Liverpool was only 'slowly coming out of that [insularity]' and there was still 'a long way to go'; but to another the last couple of years had seen 'big strides'. Yet there was no dispute about National Museums Liverpool's progress, the organisation was 'very much moving in the right direction'; it had 'a new-found confidence'; it was now 'not short of ambition'; and there was 'no question it's on the way up'. 'There has been an unremitting increase in the status of the museums in recent years.'

In line with this, the management and leadership of National Museums Liverpool were regarded as highly competent. David Fleming was described as 'a modernising director'; Loyd Grossman was called 'a breath of fresh air'. 'The people I meet at National Museums Liverpool are very impressive from David Fleming downwards.' 'There are extraordinarily talented people there who give very good service.'

In short then, the underlying attitude of our interviewees was very favourable and conveyed the sense that they thought National Museums Liverpool was very much up to the job.

But what exactly is the job?

The wider context

There was no fundamental disagreement about this. All those we talked to shared a similar view of National Museums Liverpool's function, which is derived from a largely consensual view of how Liverpool and the wider region need to develop.

It can most simply be expressed by contrasting the cities of Liverpool and Manchester. Historically they have been rivals. Both grew up at the beginning of the industrial revolution, which they helped export to much of the rest of the world. Both fell victim to its global success. Now, the argument goes, they no longer need to regard themselves as rivals (except in football and music). Rather, they are complementary within the North West region. Manchester has the commercial and financial upper hand, Liverpool the cultural pre-eminence.

The relationship between the two was even compared to that of the City of London and the West End. By those keen to make people in the region think of themselves as part of a single north west region rather than as citizens of competing cities, it was pointed out that the fifty minutes it takes to travel from Liverpool to Manchester is little more than it takes to move across London during rush hour.

The implication for Liverpool's future is clear. It has to exploit the cultural hegemony that constitutes its competitive advantage. That hegemony derives from many things: from the Beatles, the international brand recognition of the Mersey ferry, football, from probably the largest number of listed buildings in any city outside London, its orchestra, the Tate Gallery, the most important national collection of art outside London and most of all, from its place in world history. Liverpool is at the centre of the history of not only world trade, but also of slavery, the Irish diaspora and of the floods of immigration from the east and of emigration to the west. It is not for nothing that part of the Liverpool's waterfront became a UNESCO World Heritage Site in 2004.

Liverpool's opportunity to exploit this hegemony is essentially two-fold. First, this cultural richness enables the city to make the case that it and the region around it are attractive as a location to live and work in and therefore as a place for investment in business.

Secondly it gives Liverpool the means to make a strong 'offer' to tourists. This offer can be targeted in different ways: to make Liverpool seem attractive as a day trip to people in the region; as a weekend city break to people in the UK; and as one of the cities of the world that international tourists will feel they have missed out on if they have failed to visit.

National Museums Liverpool's role in this context

As the custodian of a substantial part of the physical assets of this cultural heritage and (just as much) as the agent best placed to realise the potential in much of the as yet unexploited aspects of that heritage, National Museums Liverpool has, as it was often put to us, a 'vital' role to play.

That role should not be misunderstood. No museum (or group of museums) alone can act as the magnet that draws people and their resources into a city or region. The experience of Bilbao is evidence enough of that. Nor was it suggested to us that National Museums Liverpool should be seen as the

primary agent in bringing about the two opportunities for exploiting Liverpool's cultural hegemony.

In relation to making Liverpool and the North West seem attractive as a place to live and work and therefore to invest in, National Museums Liverpool's potential role is more subtle. It was put to us that the prime pitch in this regard refers to such matters as good schools, green spaces, and affordable house prices. Beyond that, the city needs to be able to boast good cultural amenities such as bars and restaurants. Only after that stage is it valuable to be able to claim that Liverpool is a city of art galleries, museums, theatres and concert halls.

However, there is a further point. To make this case successfully, Liverpool has first to erase a past reputation: one of industrial decline, worker militancy and extremist city government. A high profile cultural institution can replace that negative reputation with a more dynamic and attractive one. Newcastle-Gateshead was cited as an example where a new footbridge, the conversion of a flour mill into an art gallery and the building of a state-of-the-art concert hall combined to transform the city's image from cold to cool.

A similar point can be made about tourism. No one suggests that if the Walker Art Gallery were to proclaim to a still largely unknowing world that it held Titians, Veroneses, Rembrandts and the rest, Liverpool's future as a tourist centre would be assured. The stark fact is that for many tourists, shopping is the main interest. Following on is the opportunity to eat and drink and only after that (but ahead of theatres), do museums and galleries matter.

The point is that without the cultural offer, none of the rest of it will work (or certainly not for weekend city breaks or attracting the international tourist). It may be the case that people go to New York to shop, but if there was not also the chance to visit MoMA, the Frick, the Guggenheim and the rest, they would almost certainly not do so in such numbers. The 'vital' role that we were told National Museums Liverpool had to play in promoting tourism lies in contributing to the 'critical mass'. This makes the difference between a city succeeding or failing to become a tourist attraction.

That vital role would exist anyway. But it is acutely focussed because of what lies in store for Liverpool: 2007, its 800th anniversary; and even more so 2008 when it will be the European City of Culture. At least in the headlines, shopping will for once take a more subsidiary role.

How well is National Museums Liverpool fulfilling its role?

It was suggested that National Museums Liverpool faces not so much a dilemma, but certainly a problem in pitching its effort. 'It could say, "the national and international markets are what are important, so we'll not bother with the people of Liverpool", or National Museums Liverpool could try and flood the doors with locals. The thing is: these are different market places.'

The analysis of those we talked to was that while these may be different market places, it was essential for National Museums Liverpool to try to integrate or at least reconcile them. 'It's important not to drive a wedge between the city's people and the institution.'

This is important for several reasons, not the least of which is that unless the locals are 'on board', the wider ambition of using the city's cultural heritage to make Liverpool a more attractive place for outsiders to come to won't be achieved. One interviewee said: 'Imagine going up to St Andrews and staying in a boarding house and the woman who runs it hasn't a clue what a golf handicap is. You'd wonder where you'd come to.'

Therefore, one task for National Museums Liverpool is to generate an upbeat attitude within the city, not only to the individual institutions within National Museums Liverpool but also to the emerging identity of Liverpool as a city of culture. This is no easy task among people who, it was put to us, 'have a tendency to accentuate the negative' and therefore go on seeing their identity in terms of what they used to be but no longer are.

One of National Museums Liverpool's advantages that its great buildings on William Brown Street (together with St George's Hall and the Pier Head) represent Liverpool at its peak and embody a civic pride that it is still felt. What is less clear is that people yet recognise that this heritage is as much a part of what Liverpool is now and what it could become, rather than simply a relic of a past that is gone. The impression is that the city has not yet convinced itself that its cultural past and the arts today give it a future. 'There has been a shift of gear in the city's attitude to culture, but it is skin-deep.'

In Liverpool, this is because - as elsewhere - culture (or at least institutional culture) has tended to divide people on class lines. 'High art is for the toffs: the Walker Art Gallery is not for us'. (There is a story that the first time John Lennon and Paul McCartney set foot in the Walker as young men was when they were forced into it to shelter from a downpour: they wouldn't have thought of going in otherwise.)

Breaking down the them-and-us mentality has been and still is one of National Museums Liverpool's main tasks. It has been helped by Liverpool's largely unexpected success in being chosen as 2008 European City of Culture. 'After the success of the City of Culture bid, the them-and-us attitude dissolved. Liverpool was seen as a success by everyone - but it won't last.'

So, how well is National Museums Liverpool doing in achieving a more permanent shift in attitude among Liverpudlians?

National Museums Liverpool's record within Liverpool

We were told that National Museums Liverpool has 'a very good profile in Liverpool'. In particular it has good relations with the city's media and achieves a fair amount of positive coverage - critical response in the local press to the opening of the World Museum was 'very favourable'.

Those we talked to acknowledged National Museums Liverpool's efforts at reaching out to the people of Liverpool, at attempting to get them through the doors of the museums and at trying to change their attitudes about the role of art and culture in the life of the city. Those efforts have taken several forms.

One involves attracting the interest of children. One interviewee said that in pursuing this National Museums Liverpool was 'doing well'. Another went much further saying: 'I think they are doing spectacularly well. Their outreach into schools is positive, good and well-regarded.' One reported that the children he knew were always enthusiastic when a visit to one of National Museums Liverpool's museums was suggested and remarked that for them the word 'museum' had entirely lost the association with stuffiness, silence and being bored, which it had had for him in his own childhood. It was thought National Museums Liverpool should take much of the credit for that.

Others commented on the transformation of the Liverpool Museum into the World Museum and how much more appealing it had become for children. Though one added that while the World Museum Liverpool was very good 'there was still some way to go'. The Science Museum in London should be the model for all modern museums, maximising the opportunities for interaction with exhibits by those visiting, especially children. The Walker, it was argued, should not be exempt from this ambition.

In short, National Museums Liverpool was largely thought to be doing what was necessary to shift attitudes to culture and art in the next generation, but by the nature of things this was going to take time.

Meanwhile there was the business of trying to get more of today's adult Liverpudlians to identify with the museums and come through its doors. We were told that National Museums Liverpool was 'very good at marketing' and had 'a very professional set-up'. During the time that we were in Liverpool, at the beginning of May 2005 and immediately after the opening of the World Museum Liverpool, it was almost impossible to move within the city centre without seeing a colourful and lively poster or banner advertising the museum and doing so in an attractive and inviting way, making the museum seem popular without talking down to potential visitors.

Given the background of the 'them-and-us' attitude to culture, one of National Museums Liverpool's chief jobs is to attract groups who might not naturally think of visiting the museums, especially in the C2DE socio-economic groups who form a disproportionately large part of Liverpool's population. National Museums Liverpool was seen to be 'keen' to do this and was generally thought to be doing well.

The Museum of Liverpool Life was singled out as especially popular with locals (as it also is with outside visitors). National Museums Liverpool's attempts at populist programming were thought to be effective: a soccer exhibition at the old Liverpool Museum and exhibitions on the Blitz and on Cunard were mentioned approvingly.

It was pointed out that people are often attracted into museums and galleries by what could be said to be peripheral about them: the appeal of the physical space and the opportunity to grab a coffee. (It was remarked that what has really made London's Tate Modern such a success is not so much the art exhibited, but the pleasure of standing in the Turbine Hall's huge space and the comfort of the extensive coffee shop overlooking St Paul's and the river. A similar point is made about the Baltic in Newcastle-Gateshead, many of whose actual exhibitions some people think are best left unmentioned.)

National Museums Liverpool is thought to be doing well in this regard. The new entrance to the World Museum is 'much more friendly' and less intimidating than the old one. The new atrium is 'striking' and 'worth visiting for its own sake' and the space in the Walker Art Gallery is 'impressive'. There is a sense of informality now, the museums are places where at least initially you can drop in, take a break, have a drink and read the paper. This is especially true of the Walker, but is true too of the museum, which an ordinary person might otherwise be least likely to visit, and the Conservation Centre. Once the paper is read and the coffee drunk there, is then the possibility that the casual visitor will feel tempted to explore what is really on offer.

In terms of the museums themselves, it is generally thought that National Museums Liverpool is doing well in trying to reach out to the people of Liverpool and to encourage them to visit, but more could still be done in this regard. It was said that National Museums Liverpool 'needs to do more marketing locally' and that 'a programme of [local] education needs to take place'.

A more critical view was taken about National Museums Liverpool's opening itself up to the people of Liverpool at a corporate level, notwithstanding the progress, it was recognised it had already been made, 'National Museums Liverpool has come some way to recognise that it was not representative enough, but has it taken sufficient action?'

The point being made here was that the opening up of the board of trustees was fine as far as it went, but it did not go far enough. In particular it was suggested that citizens' groups and community groups were still excluded. 'What they need to do more is give local people a sense of ownership of National Museums Liverpool. They need to work at engaging stakeholders more.' The question (which we take to be literal as well as rhetorical) was asked: 'Has the board ever gone on the road to get people to come and talk to them?'

Another said: the old them-and-us attitudes would return unless National Museums Liverpool did more public relations in the community 'and PR by walkabout'.

National Museums Liverpool's record beyond Liverpool

The general impression was that National Museums Liverpool was thought to be less successful at promoting itself outside Liverpool. This though, was seen as symptomatic of a wider Liverpool malaise.

It was put to us that Liverpool generally has something of a 'bunker mentality', an insularity borne of seeing itself as stuck out at the end of a peninsular attached to the wider North West region. This manifests itself in a defensiveness which one of our interviewees had found genuinely surprising when first coming to the area from outside. It is a defensiveness which assumes that the world beyond Liverpool will not find credible the notion that the city might have anything of real value to offer (while, at the same time, thinking of itself as the centre of the universe).

This was illustrated by an anecdote. One person we spoke to told us that when he read an article which Loyd Grossman had written in *Country Life*, celebrating all that is on offer on Merseyside, he was so excited by it he showed it to a friend, urging that they must spread it around everywhere so that the great message about Liverpool could become widely known. But the response he got to his missionary zeal was cold water. What was the point, the friend wanted to know, in such an article appearing in *Country Life*? No one outside Liverpool would believe a word of it. That is not how people 'down south' saw Liverpool and there was no point in trying to persuade them otherwise.

That such a perception still prevails is illustrated by the expectations aroused by the 2008 City of Culture competition. It is probably fair to say that in Britain, more people expected Newcastle-Gateshead to win than Liverpool. Newcastle-Gateshead was thought the more likely winner because it had succeeded in changing the image of Tyneside. It had a modern bridge and an iconic building conversion complemented by fantastic nightlife. Its university had become strongly in demand as much for social as academic reasons.

That such an expectation should have been created out of such meagre assets is a measure of Liverpool's past failure to proclaim itself. For, in terms of cultural assets, Liverpool undoubtedly beats Newcastle-Gateshead. Indeed, it was put to us that had the 2008 title been awarded on assets alone (which it was never going to be) there would have been no competition at all, for no British city outside London could have matched Liverpool.

A substantial part of those assets are in the hands of National Museums Liverpool, so it must share in the responsibility for failing to get the wider world to know about them. 'This is the ultimate example of hiding lights under a bushel,' said one person, referring particularly but not solely to the Walker Art Gallery. And again: 'It is extraordinary how often those who know their way about the art world come here and say "This is astonishing!" but then we fail to communicate that with the wider world.'

It was expressed that even experts in their fields are sometimes astonished to come across things on Merseyside which they did not know existed, even though they thought they knew pretty much everything about their speciality.

(The Pre-Raphaelite collection in the Lady Lever Art Gallery was cited as an example.)

We were told also that the tourist office in Liverpool receives more enquiries about Tate Liverpool than it does about National Museums Liverpool's museums and galleries, notwithstanding the fact that National Museums Liverpool is a national institution in the same way that the Tate is. Unlike Tate, it is not (yet) a national, still less an international brand.

It was pointed out to us several times that this failure refers not only to the profile in the far-flung world, but even to the North West region, much nearer to home. 'Many people in the region have no idea of the quality of National Museums Liverpool, of the reach and extent of what it does.' Even 'supposedly informed people' don't know about National Museums Liverpool. 'Does National Museums Liverpool think about the wider Merseyside? How does it regard West Cheshire and North Wales, for example?'

It is widely accepted that this is largely the inheritance of an earlier regime at National Museums Liverpool and that those currently running it are keen to change things. We were told that if we went back a few years, National Museums Liverpool was 'anonymous' in the region. 'National Museums Liverpool didn't [then] see its role to let people know.' Former trustees had essentially 'taken day trips to Liverpool' and there had been 'not much effort to engage with the region'. But as of now, 'National Museums Liverpool can have a much bigger role in the region' and 'seems willing to do so.' National Museums Liverpool is now 'more outward-looking' but there is still 'a real need to appeal to opinion-formers.'

What could remedy that is an educational and promotional campaign. 'National Museums Liverpool is doing it to some extent, and they have very good people, but it needs to be improved immeasurably. It needs to be brilliantly done.'

In part, this can be achieved through the regional media. The general view seemed to be that National Museums Liverpool's relations with it were less close and effective than with the local city media. Its presence on regional television, for example, was said to be 'spasmodic', also National Museums Liverpool does not sufficiently seek to exploit opportunities for getting on to regional television and that it needs to take a more proactive approach, providing more events that would attract regional media interest, it was said. No one, however, pretended this was easy.

The point was also made that the mere fact of Liverpool being 2008 European City of Culture would not in itself do the job of putting National Museums Liverpool on the map in the region or beyond even though that would obviously be enormously helpful.

National Museums Liverpool as a local partner

National Museums Liverpool's success in persuading the people of Liverpool of its value to the city and to the city's future as the cultural heart of the north west of England depends in part on its ability to be thought a willing partner in the city's renaissance. How well is it perceived to be doing as a civic partner?

National Museums Liverpool starts with some baggage. When it was created in 1986 ('Mrs Thatcher's only nationalisation', said one), it was seen as something of a cuckoo in the nest. The 'national' in the name made it a bit suspect. In particular, there was an initial 'institutional rivalry' and a 'tense relationship' between National Museums Liverpool and the city council which went on for some time. It seems that this tension has largely thought to have been dissipated, although one interviewee implied that it was still an ongoing task: National Museums Liverpool had still 'got to build relations back with the city'. But one view was universally held: National Museums Liverpool's national status was now 'a benefit not a problem'.

The benefit is (and always was) obvious in two ways. The 'national' designation gives the museums enhanced status in the eyes of outsiders. Also its position within the national system of museums gives it direct access to the Department of Culture, Media and Sport, an advantage in several obvious respects.

The national status could still also be a problem. It is not, we were told, because National Museums Liverpool has largely succeeded in conveying the sense that it sees itself at the same time very much as a local institution to Liverpool. In this it was contrasted with Tate Liverpool which, it was said (and without criticism), always regards itself primarily as part of a national institution. ('National Museums Liverpool never says, "we're national" in the way the Tate always does.')

One of the 'smart moves' that had helped to change this perception, was altering the name of the institution from 'National Museums and Galleries, Merseyside' to 'National Museums Liverpool'. So much is National Museums Liverpool now integrated into the life of Liverpool that one of our interviewees regarded it as 'our local museum service', while acknowledging that many people would think that too extreme a way of putting it.

There is no dispute about National Museums Liverpool's local credentials, but how well is it behaving as a partner? There was nothing but praise for National Museums Liverpool's willingness to cooperate in such matters, for example, as the business of 'destination marketing'. 'National Museums Liverpool always shoulders its responsibilities as the biggest attraction operator. It's always willing to show leadership to everyone else.' 'Everyone would recognise their lead.' 'National Museums Liverpool is always the first to the table, always first to offer help.' 'They sign up without hesitation, they will

always be cooperative.’ ‘National Museums Liverpool is always in there. They are pro-active, always at the forefront.’

It was also suggested to us that National Museums Liverpool performed far better in this regard precisely because they are a sovereign body rather than part of local government. Similarly National Museums Liverpool was praised for its contribution to Liverpool’s winning 2008. It had been a ‘key player’ and ‘very supportive’. It was also said that National Museums Liverpool works well with business in the area. ‘We have had nothing but warmth from them and a good working partnership.’

In general terms it was contrasted favourably with another (unidentified) Liverpool arts institution: ‘National Museums Liverpool understands: there’s a partnership approach’. The contrast was made too with its own past when it had been ‘managed from afar’. Now there is talk of ‘inclusiveness’ and of National Museums Liverpool ‘rooting its museums in the community’.

Yet despite this praise, words such as ‘aloof’ and even ‘arrogant’ quite frequently cropped up in interviews. It should be said that this was usually expressed rather tentatively in phrases such as ‘there is a slight aloofness at National Museums Liverpool’, or in questions that were volunteered by interviewees and then left unanswered, such as: ‘are they slightly arrogant?’. But even those who did not wish to make such a criticism, understood it: ‘I myself find them co-operative, but I understand those who say they experience the opposite’.

A subtle point made about any alleged aloofness was that National Museums Liverpool can sometimes seem distant, not in the sense of being stand-offish but in the sense of not fully having confidence in itself. The result (it was suggested) of its not yet being the national or international brand it ought to be. ‘This can be frustrating’.

More specifically arrogance was thought to be provoked when outsiders tried to step on National Museums Liverpool’s turf. ‘There is a bit of arrogance there. The message seems to be: “Leave us to get on with it!”.’ Since it was widely recognised that National Museums Liverpool does its own job pretty well, this was broadly thought to be fair enough even if the manner in which the message is delivered ruffles feathers occasionally. It was conceded that other people ‘shouldn’t be trying to do their job for them’.

This point was acknowledged in particular because of what was widely seen to be National Museums Liverpool’s success with the new World Museum. As one interviewee put it: ‘They made a significant investment; they have demonstrated high quality; they have shown good commercial thinking; and the curation is outstanding’.

A particular point was made to us about the Conservation Centre. While one interviewee spoke of it as being ‘at the forefront of its trade’ and a ‘purveyor of best practice internationally’, another, in the context of discussing possible aloofness in National Museums Liverpool, thought it had not been as good as

it should have been at disseminating the results of its research in the wider world or at benchmarking its research productivity. This was seen as academic aloofness, the insularity of the 'ivory tower'. 'Is the number of people working in the backroom of the Conservation Centre disproportionately large?'

A digression on the Fourth Grace

Any discussion of National Museums Liverpool's record as a local partner in Liverpool cannot avoid mentioning the Fourth Grace, an iconic multi-use building to be built on Mann Island. Although there were a variety of opinions on National Museums Liverpool's role in this project there was no feeling that that relations had been permanently soured by the experience of the Fourth Grace.

And we were also told that National Museums Liverpool has 'learned from the experience' and has been able to 'continue to work in partnership'. In this regard we encountered a largely upbeat attitude to the prospects of a continuing partnership between National Museums Liverpool and other agents in Liverpool creating the Museum of Liverpool.

The Museum of Liverpool

Generally there was optimism about the new Museum of Liverpool and the rest of the Mann Island development, the replacement scheme for the Fourth Grace site. Although there were some dissenting voices, most people we spoke to were supportive of the project. One argued that in the light of Liverpool's key role not only in British but also in world history, the city 'deserves better' than it has got in terms of a museum proclaiming the fact.

Most people we interviewed seemed confident that National Museums Liverpool would produce a fine building. Despite an ongoing national debate about whether or not iconic buildings are quite as valuable as they are cracked up to be, we encountered no such scepticism in Liverpool and there was a broad assumption that National Museums Liverpool would build a structure that was 'dazzling', 'stunning', an 'eye-catcher' that 'will draw people in'.

The point was made that a building on its own may not be able to do this and that it needs to be associated with a brand that is well known. National Museums Liverpool is not yet such a brand. It may be more of a recognised brand than the Tate within Liverpool, but it is less so outside, where indeed it is not a recognised brand at all.

National Museums Liverpool, we were told, had doubled the size of the old Liverpool Museum when converting it into the World Museum but still had plenty of material left in store. National Museums Liverpool was complimented on having already shown initiative in exploiting Liverpool's place in world history, a place that 'was not yet sufficiently recognised'. Its approach to the issue of slavery was cited as evidence of this. Not only were there plans to

expand its existing treatment of the issue but it had taken the lead in the city in commemorating Slavery Remembrance Day. It had understood that 'Liverpool can become a centre in the world for the study of slavery and atoning for it.'

Two additional points were made to us. One is that it would be important for National Museums Liverpool to be ready to go beyond its own existing collections to fill the new museum, particularly since there is a mass of material gathering dust in the vaults of many private institutions in Liverpool and beyond.

The other more far-reaching point was that National Museums Liverpool should be ready to make substantial space available for travelling exhibitions, so-called 'blockbusters' such as the dinosaur exhibition at the Natural History Museum in London. The opportunity was there to make Liverpool the acknowledged venue in the north west for such exhibitions.

2008

2008 is seen as the great test of National Museums Liverpool. 'It is the opportunity to change perceptions [of Liverpool] once and for all.' The underlying attitude is confident. Repeatedly we were told that National Museums Liverpool is seen as the 'crown jewels' in relation to 2008. 'If you ask the locals about the City of Culture they think it *means* the national museums here.'

Some are worried that people may believe that the mere fact of being labelled European City of Culture in 2008 will in itself put Liverpool in the place it needs to be to exploit its cultural hegemony. But no one we spoke to suggested National Museums Liverpool was itself complacent about this. 'National Museums Liverpool is very much doing their bit. But the hard bit is to come.' The nature of the task reflects the double challenge remarked upon earlier: 'They need to contribute a programme of international-level events to attract high net-worth people while also running a programme of events that reaches out into the community, so as not to drive a wedge between them and it.'

The overall impression, then, is that everything that National Museums Liverpool is doing is in the right direction. One interviewee who had been sympathetic but not uncritical said of the points he had raised: 'All these things they are working towards and there is clearly a new-found confidence there'. But as many people told us: 'there is a great deal further to go'. 'There is huge scope. It has only just begun.'

10. Conclusion

This report has analysed National Museums Liverpool in a number of different ways. It has considered National Museums Liverpool institutions as major cultural assets, transmitting the city and region's history to future generations. It has examined National Museums Liverpool as a key contributor in Liverpool's efforts to modernise its image from being an impoverished ex-industrial city to a renewed and competitive one. It has analysed National Museums Liverpool's impact as a generator of economic activity, jobs and tourism. The impact of the media's treatment of National Museums Liverpool on both Liverpool's image and, indirectly, its economy has been considered. All of this output has been placed against the background of a qualitative examination of the views of key regional and local figures about National Museums Liverpool and its work. The result is intended to be a rounded picture – including some criticisms – of a particular set of cultural institutions within their political and economic context.

Each of National Museums Liverpool's different roles is important. Acting as curator to one of the world's great cities is challenging and important. Few places have such a powerful and occasionally misunderstood story as Liverpool and Merseyside. The story can be interpreted very differently, even within the city. Nevertheless, people of all backgrounds, constituting a global diaspora, care sufficiently about the place to want to see its culture represented and interpreted in museums and galleries. Such representations, coupled with national collections of art, natural history and science are now used by National Museums Liverpool to promote a new and confident version of Liverpool. In doing so, the city and its region are increasingly able to attract British and international tourists. Other kinds of investment will surely follow.

Major new developments are adding to National Museums Liverpool's stock of institutions. The Museum of Liverpool and the World Museum should strengthen the city's future cultural offer. Indeed, given the fierce competition from other cities, it essential that progress is maintained. Standing still would risk falling behind. In recent years, National Museums Liverpool has been successful in strengthening the cultural and economic infrastructure of the North West, Merseyside and Liverpool itself. Creativity and continued development should now secure that success for the long-term.

Appendix a - List of Interviewees

Neil Ashbridge
Deputy Agent
North West Agency
Bank of England

Keith Blundell
Head of Tourism
Liverpool Culture Company

Professor Drummond Bone
Vice Chancellor
University of Liverpool

Neil Flenley
Research Executive
The Mersey Partnership

Jim Gill
Chief Executive
Liverpool Vision

Bryan Gray
Chairman
North West Regional Development Agency

Sir David Henshaw
Chief Executive
Liverpool City Council

Geoffrey Piper
Chief Executive
The North West Business Leadership Team

Pam Wilsher
Head of Tourism Sector Development
The Mersey Partnership

Sue Woodward
Managing Director
ITV Granada

Appendix b - Economic impact calculation

The economic and employment impacts calculated for this report are, as is the case for all such studies, both direct and indirect. First, there are the direct impacts of NML's expenditure (funded from all sources) on the local and regional economies. These direct numbers (and employment totals) are provided within the report.

There are also so-called 'indirect' impacts, which take account of the amount of economic activity generated by visitors during their visits to NML institutions. To estimate these indirect impacts, it is necessary to know the totals of local, national and overseas visitors and the amount of expenditure they are likely to generate during their visits. There have been a number of British, American and other studies of cultural institutions that have attempted to improve the precision with which ancillary visitor expenditure (ie not the museum or gallery's direct spending) is measured (see, for example, Americans for the Arts, 2002).

The Office for National Statistics (ONS) publishes spend-per-day estimates of tourists' expenditure for UK and overseas visitors. NML visitor numbers and their profile (and data on visit length available from surveys) makes it possible to estimate the proportion of the daily tourist spend that can reasonably be attributed to NML visits. NML visitor and staff numbers are available in this report. *Travel Trends* is published by ONS.

Economic impact studies of this kind seek to estimate the multiplier effect of the direct and indirect expenditure related to the institution concerned (in this case of NML institutions) on the wider economy. That is, what effect will the businesses, traders and others receiving income as a result of NML-related direct or indirect expenditures have on the wider economy? Given the resources reasonably available for this study, it is necessary to rely on earlier studies or on recommendations from official publications.

A report prepared for the British Arts Festival Association in 2002 suggested a multiplier of 1.99 be used. In 1995, the Treasury suggested a multiplier of 1.7 should be used for sectors with strong local supply linkages. The Wyndham Report (SOLT, 1998) produced for the Society of London Theatre in 1998 used a more cautious multiplier of 1.5. This study will again err on the side of caution and use multipliers of 1.5 to 1.7 to generate a range of plausible indirect and induced effects.

The results of calculations made in this way are included within the body of the report. As in all economic impact estimates, the results should be treated as broad indications of impact, not precise measures.

Appendix c - References

Americans for the Arts, 2002, *Arts & Economic Prosperity The Economic Impact of Nonprofit Arts Organisations and Their Audiences*, Washington DC:Americans for the Arts

Society of London Theatre (1998) *The Wyndham Report*, London:SOLT