

CONFIDENTIAL

MONITORING
GLASGOW 1990

Prepared for Glasgow City Council,
Strathclyde Regional Council and
Scottish Enterprise

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Economic impact assessment

SUMMARY OF THE REPORT

BACKGROUND

- o This independent study was commissioned by Glasgow City Council, Strathclyde Regional Council and Scottish Enterprise. The task of this study was to monitor Glasgow's Year as European City of Culture. Its aim was to provide:
 - . a statistical picture of attendance at arts events and attractions;
 - . an analysis of the 1990 market for Glasgow's cultural programme;
 - . an assessment of the economic and social impact of Glasgow 1990, including an account of development in Glasgow's cultural sector; and
 - . an indication of any post-1990 opportunities arising from the lessons of the Year.
- o The work of the study included:
 - . three special market research surveys carried out by System Three Scotland;
 - . comprehensive surveys of arts organisations and institutions; and
 - . an overall assessment of the economic impact of 1990 by Ecotec Research & Consulting Ltd.
- o Once the accolade of European City of Culture 1990 had been awarded by the Ministers of Culture, the drive and finance for the initiative came primarily from the local authorities. The City's motive to profit from the event arose from its desire to demonstrate a new face as a European post-industrial city geared to growth and a commitment to using the arts as a means of communicating its renaissance.
- o Glasgow City Council and Strathclyde Regional Council decided to adopt an all-encompassing approach to the City of Culture over an entire 12-month period. This contrasts with previous European Cities of Culture which had devised concentrated programmes of arts festival events.
- o In addition to the regular activity undertaken by Glasgow's established arts institutions and organisations, a substantial programme was provided by centrally-initiated promotions, independent projects and support to the work of the main institutions. A range of initiatives were funded in the fields of education, social work, community events and celebrations. Many agencies and organisations were galvanised into delivering projects for the Year.
- o Revenue support for the City of Culture totalled £32.7 million, mainly provided by the two responsible local authorities. Programming accounted for £26.8 million including community events/celebrations (£5.1 million) and social work/education (£3.7 million). Other areas of spend were marketing (£4.9 million) and administration (£0.9 million).

OUTCOMES

(a) System boost

- o The Year delivered a major boost to Glasgow's cultural system. The much expanded tide of activity (e.g. theatre/concert performances 32 per cent more than in 1989) neither engulfed the system nor harmed existing institutions.
- o The public responded with a 40 per cent jump in attendance at theatres, halls, museums and galleries, rising from 4.7 million in 1989 to 6.6 million in 1990. Adding outdoor and community events (1.7 million) takes Glasgow 1990 participation to 8.3 million. The public for Glasgow's commercial entertainment (cinema and pop and rock concerts) was estimated at 3.7 million in 1990.

(b) More access and interest

- o The momentum generated in the Year achieved significant developments in local attendance. Proportions of residents currently attending ("reach") increased in all art forms, taking Glasgow above British averages. Increases in "reach" ranged from 10 percentage points for plays to 2 points for opera.
- o The Year of Culture programme touched the lives of four out of five adult residents in the region. Some 54 per cent went to the theatre or a concert at least once in the Year; 61 per cent visited a museum/gallery.
- o The main extensions of "reach" during 1990 were achieved by renewed attendance on the part of residents whose active interest had previously lapsed. First-time attenders accounted for between 2 per cent (museums) and 19 per cent (dance) of the public.
- o There were successful examples of specific initiatives to develop interest among targetted social groups. "Neighbourhood events" reached 10 per cent of adults who attended nothing else.

(c) Market development

- o All sectors of the market expanded in 1990, but there was a swing in composition from residents to visitors. Tourist visits to arts events and attractions were 81 per cent above the level for the last previously measured year (1986). Day visitor admissions to arts events/attractions were 89 per cent higher than in 1986.
- o Resident attendance rose by 31 per cent. The Glasgow City increase of 52 per cent contrasted with the weaker response of Outer Glasgow (the nine contiguous district council areas) with a 6 per cent rise.
- o The spending on centrally-initiated projects and cultural spectacles made an impact mostly on the resident market within the region. The visitor market responded more to the work of the existing institutions (many with enhanced programmes) and the promotional campaign.

- o The Glasgow Royal Concert Hall had a major impact on local audiences, which responded generously to the opening; the renovation of the McLellan Galleries was a major achievement; they drew a significant public, despite the inevitably rushed programming.

(d) Tourism development

- o Glasgow 1990 expanded the region's tourism base. Whilst museums and galleries remained the main tourist attraction, theatres/concerts established a visitor base in the tourist market. A negligible factor in 1986, tourists averaged 10 per cent of theatre/concert attendance in 1990.
- o Market strengths of Glasgow as a tourist destination were developed during 1990. An estimated 555,000 trips involved attendance at an arts event/attraction. Overseas markets accounted for 38 per cent of Glasgow 1990 trips. Some 71 per cent of non-English speaking 1990 tourists were first-timers in Glasgow.
- o The domestic market was 57 per cent repeat business, and over half were on short breaks; 1990 tourists were concentrated in prime market areas, socially (ABC1s) and geographically (London & the South East).
- o Consumer responses to the destination improved during 1990. Significant tourism prospects were confirmed by the Year of Culture with 74 per cent of domestic tourists indicating an intention to return to Glasgow.
- o Glasgow 1990 demonstrated that the City was a cultural destination with tourism potential, especially in the short-breaks market.

(e) Economic impact

- o The initiative generated a positive net economic return to the regional economy of £10.3-14.1 million. Extra employment arising from Glasgow 1990 was estimated at 5,350 - 5,580 person years. Gross public sector cost per job was calculated at £7,286 which compares favourably with estimates in other initiatives.
- o Glasgow 1990 levered private sector support for the arts. Contributions were made by 340-350 businesses. The private sector commitment to arts events/attractions and 1990 projects was valued at £6.1 million.
- o The cultural industries (the art trade, music industry, designer trades, film and video, etc.) were a growth area, up 3.9 per cent since 1986. Though they were not a prime focus of the Year of Culture, some sectors (e.g. film) did benefit from the initiative.

(f) Other impacts

- o Public agencies had reasons other than purely employment related ones for spending on the Year of Culture. Longer term impacts of a less tangible kind were delivered by Glasgow 1990.

- o Glasgow 1990 substantially improved perceptions of the City at home and abroad. There was a 15 percentage point increase in belief (in London & the South East) that Glasgow was "rapidly changing for the better". But there remains scope for further improvement.
- o Glasgow 1990 was valued as a backdrop for business. Improved awareness of the City at home and abroad is a positive business influence.
- o The social work programme of Glasgow 1990 broke new ground in integrating the arts into a pattern of social care. The education programme, which included a range of innovative projects, should yield long term benefits.
- o Residents responded positively to the Year of Culture. Almost all residents agreed that the 1990 programme "improved the public image of Glasgow". Some 61 per cent thought the programme "made the City a more pleasant place to live".
- o There was little support (16 per cent) for the view that the 1990 programme was "only for visitors to the city". Whilst it was a strong belief of 22 per cent of residents that "too much public money was spent on the 1990 programme", the majority thought otherwise.

(g) Cultural impact

- o The capacity of the cultural sector was expanded by the initiative. The legacy of capital projects (the McLellan Galleries and the Glasgow Royal Concert Hall, etc.) reinforced the investments of the 1980s and expanded Glasgow's ability to address various opportunities which the Year highlighted.
- o The increasing numbers of individual artists (in the visual arts, etc.) based in Glasgow indicated Glasgow's growing role as a "creative centre". Extra creative opportunities were provided by the Year of Culture. New commissions were arranged, including a small legacy of public art projects.
- o International contacts were expanded and the range of visiting performances/exhibitions seems likely to have made an impression on a generation of Scottish artists.
- o Some smaller performing arts organisations were galvanised by the Year and most of the art galleries and museums in Glasgow City had a very active 1990. There were important developments in the scale and significance of temporary exhibitions presented during the Year.
- o In the major institutions, whilst artistic opportunities were created which would not have been possible in a normal year, the momentum of their work went on much as usual.
- o Tramway proved its worth as an international venue for the visual and performed arts. Glasgow gained experience in promoting special arts events and attractions, including cultural spectacles.
- o The Year was "good for pop music and young people", especially the Big Day promotion, which was the most cited highlight for residents (mentioned by 12 per cent of adults).

OPPORTUNITIES

- o Development successes of Glasgow 1990 included market growth, increased access to the arts and improved perceptions of the City. The nature of future opportunities highlighted by the Year means that action will be needed to maintain the momentum and capitalise on the gains made during 1990.
- o The study defines a number of areas of opportunity which will require sustained effort:
 - a programme of market development: to build on the opportunity created by 1990 and to tap the areas of latent demand;
 - cultural tourism strategy: to develop the promotion of Glasgow as a "European cultural tourism destination" (especially in the short-breaks market) and capitalise on the hard work already done in achieving high market awareness for the City;
 - cultural industries: to address this sector of opportunity by building on existing training strengths and business resources to secure Glasgow's position as the UK's principal cultural industry centre outside London.
- o Glasgow 1990 drew attention to existing achievements in the European context. The report suggests it is now necessary to return to building the creative base and establish a phase of asset development. It proposes "targetted investments" to extend artistic opportunities for Glasgow's main institutions. None of the opportunities defined in the study will be effectively addressed without firm resolve to nurture the creative resources of the City.
- o Glasgow's Year of Culture was conceived as both a celebration of achievement and an exercise in development. More than most British cities, Glasgow has used the arts to strengthen and communicate its regeneration. The positive outcome of Glasgow 1990 has created further opportunities for the City to address in pursuing its chosen future as one of the Great Cities of Europe.

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APPENDICES

1. INTRODUCTION

(i) Terms of reference

1.1 In May 1990, the City of Glasgow, in partnership with Strathclyde Regional Council and the then Scottish Development Agency, commissioned John Myerscough to carry out a monitoring study on Glasgow 1990.

1.2 The study was asked to provide:

- a statistical picture of attendance at events and attractions, including indications of emerging trends;

- an analysis of the 1990 market for Glasgow's cultural events and attractions (residents, day visitors and tourists), including awareness and perceptions of what was available;

- an assessment of the economic and social impact of 1990, its economic contribution to the region (e.g. extra jobs) and other perceived benefits;

- an account of Glasgow's cultural sector (including the cultural industries and commercial entertainment), its size, structure, market and trajectory; and

- an indication of post-1990 opportunities, and of the appropriate issues and measures to be addressed, including those relating to cultural industries, arts-led tourism and the promotion of the Glasgow region.

1.3 The aim of the study was to provide an independent appraisal of the effects of Glasgow 1990. The promoters of the event wished to have available basic data on attendance at cultural events and attractions as a measure of the success of the Year. They also wished to assess the event in terms of its direct and indirect economic contribution to the region, including any boost to the cultural industries and benefits provided for the Glasgow public.

1.4 It was recognised that any lessons to be learnt from Glasgow 1990 could have a bearing on future policies towards the arts, tourism and the continuing promotion of the Glasgow region and that the event could signal a range of relevant opportunities for the 1990s.

(ii) Background

1.5 Glasgow's nomination as European City of Culture was announced by the Minister for the Arts in October 1986. At that time, previous holders of the title had been Athens (1985) and Florence (1986), and others which would bear the title, Amsterdam (1987), Berlin (1988) and Paris (1989), had already been nominated.

1.6 Glasgow won the UK nomination in competition with eight short-listed rivals. The City had been able to show that it:

possessed an exceptional array of cultural institutions with a strong international outlook;

was experienced in arranging collaboration among institutions;

could fund the project through its established public and private partnership arrangements; and

was capable of marketing the concept of the City of Culture, as it had done with the Miles Better Campaign (1982) and the Glasgow Garden Festival (1988).

1.7 Glasgow's motive to profit from the event arose from the City's desire to demonstrate its new face as a European post-industrial city, geared to growth in the service sector. This new direction had been proposed in the McKinsey report on the "Potential of the Glasgow City Centre" prepared for Glasgow Action. It was adopted by the District Council and a city centre strategy was launched in 1985. The City was already committed to using the arts (e.g. the newly opened Burrell Collection in 1983) as a means of communicating its "renaissance".

1.8 The study region had been the focus of a range of urban regeneration initiatives designed to address its employment, housing and social problems. Between 1971 and 1981 the area had lost some 11 per cent of its population and since 1981 an estimated further 9 per cent. Despite the emphasis on - and success of - a range of major regeneration initiatives, unemployment in the travel-to-work area was 11.3 per cent in August 1991 (DE Employment Gazette).

1.9 The Policy Studies Institute's 1988 study had shown the relative significance of the cultural sector as a component of the Glasgow economy. In terms of employment, the cultural sector was estimated to support over 14,700 direct and indirect jobs, equivalent to 2.3 per cent of total local employment, after allowance for indirect and induced effects and including the impact of ancillary expenditure by visitors. The comparable percentages of local employment dependent on the cultural sector in Merseyside and in Suffolk were both around 1.2 per cent.

1.10 Whilst other European Cities of Culture had received substantial central government funding, Glasgow's was essentially a local and regional initiative, apart from a small grant given by the Office of Arts and Libraries. The Scottish Arts Council had supported the Glasgow bid, but it had neither a formal position nor special funding with regard to the nomination. By the same token, the Scottish Office confined its position on what it regarded as a 'one-off initiative' largely to that of observer status.

(iii) Preparation

1.11 Professional support in the preparation of this study was provided by two associates:

System Three Scotland: who carried out the market research surveys;

Ecotec Research and Consulting Ltd.: who prepared the overall assessment of the economic impact of 1990; this included:

- an assessment of the additional direct spending within the local economy generated by Glasgow 1990, and its net impact on local employment;
- the scale and nature of any more enduring impacts;
- diseconomies created by Glasgow 1990; and
- a summary assessment of "value for money" in terms of its economic impact.

(iv) Methods of study

(a) Market research

1.12 Three special market surveys were carried out by System Three Scotland, as follows:

- . residents of Glasgow region;
- . holiday visitors to Glasgow; and
- . attenders at events and attractions.

1.13 The residents survey was used to establish firm data on the social reach of, participation in and response to Glasgow 1990. The fieldwork was carried out between 11 and 28 January 1991. A total of 796 interviews were completed in homes. To ensure that the sample was as representative of the region's adult population as possible, a sample framework was provided by CACI Limited using census information in conjunction with Postcode Address File (PAF). Over 50 sampling points within the region were selected to reflect the distribution of population and neighbourhood type. Within each sample, quotas were set for sex, age and working status to replicate the region's population. A copy of the questionnaire used in the survey forms Appendix 1.

1.14 In order to establish to what extent holiday visitors to the City had been attracted by the Glasgow 1990 initiative, System Three Scotland were commissioned to undertake a limited number of interviews (275) with a sample of visitors to the City. Eligible respondents were visitors from outwith the City and the surrounding area and who were on holiday visiting the City. Interviews were conducted at various locations in the City centre, including George Square and Buchanan Street. Respondents were selected on the basis of the next eligible person to pass the interviewer on completion of the previous interview. The interviews were conducted in the period 29 August to 12 September 1990. A copy of the questionnaire used in the survey forms Appendix 2.

1.15 The market profile for Glasgow 1990 events and attractions was ascertained by surveys carried out at a representative sample of venues and attractions. Examples of the questionnaires used (which concentrated on socio-demographic details, origins, travel, motivation, responses and spending) can be found in Appendix 3. The field work was undertaken in two phases, 30 July to 29 September 1990 and 5 November to 14 December 1990, in order to take account of the different seasons of the year. The breakdown of the total 5,925 interviews between the two phases was as follows:

	Phase 1	Phase 2	Total
Museums & galleries	955	1,017	1,972
Theatres & concerts	<u>1,940</u>	<u>2,013</u>	<u>3,953</u>
Total	2,895	3,030	5,925

- 1.16 The sample frame was drawn to be representative of the overall market for museums and galleries and theatres and concerts throughout the Year. Minimum samples were set to enable separate market sectors, or "product lines", to be examined on an individual basis. Within the "product lines" involving more than one venue, interview days were allocated to venues proportional to 1989 attendance. Venues with attendance below 30,000 were excluded. Allocations of field work days and interviews achieved were as follows:

	Days	Interviews
Burrell Collection	16	411 ^a
Kelvingrove	14	342
Other local authority and independent museums	14	322
McLellan Galleries	16	363
Other galleries	12	186
1990 projects	<u>16</u>	<u>348</u> ^b
Total museums and galleries	88	1,972
	Nights	Responses
Producing theatres	7	639 ^c
Receiving theatres		
King's Theatre	7	718 ^d
Theatre Royal (Scottish Opera)	3	364
Small scale venues/arts centres	7	506 ^e
Concerts	4	432 ^f
1990 projects		
SECC Bolshoi	3	343
The Ship (Harland & Wolff Shed)	<u>3</u>	<u>291</u>
Total theatres and concerts	41	3,953

- ^a 126 carried out during the van Gogh exhibition.
- ^b 208 for Glasgow's Glasgow.
- ^c Includes 261 at Strathclyde Summer Season (Citizens Theatre).
- ^d Includes 283 at Five Theatres of the World Season (Theatre Royal).
- ^e 323 Mitchell; 39 Third Eye; 144 Tramway.
- ^f Of which 250 were at the Glasgow Royal Concert Hall.

- 1.17 Institutions included in the survey under "other local authority and independent museums" were Peoples' Palace, Provand's Lordship, Pollok House, Hunterian Art Gallery and the Paisley Museum. Field work under 'other galleries' was carried out at Third Eye, Collins Gallery (Phase 1) and Tramway. The 1990 exhibition projects were Glasgow's Glasgow and the Dome of Discovery. Field work on producing theatres was carried out at the Citizens Theatre. The small scale venues and arts centres were the Mitchell Theatre, the Third Eye Centre and Tramway. Concert field

work was undertaken at the Glasgow Royal Concert Hall and the Royal Scottish Academy of Music and Drama. These interviews, together with those for theatre programmes at the Third Eye Centre and Tramway, were confined to Phase 2.

- 1.18 At museums and galleries the field work took the form of exit interviews. For weighting purposes, five minute counts were undertaken every hour. At theatres and concerts, questionnaires were distributed for self completion to selected attenders on arrival in specified parts of the house. This process was professionally supervised as was the collection of completed questionnaires. In order to obtain a robust estimate of the basic components of theatre/concert audiences (residents of region, day visitors, tourists), calibration counts were carried out on audiences as they arrived. During the two phases, these amounted to 21 counts at nine different venues, at which some 8,935 contact interviews were achieved.

- 1.19. In the subsequent analysis, all "product lines" were weighted by actual attendance during 1990. Phase 1 and Phase 2 results of the theatre/concert surveys were weighted by attendance and the calibration counts were used to re-weight the data for attender components (City of Glasgow, Outer Glasgow, day visitor, tourist). The five minute counts at the museums/galleries were used to weight results by time of day, weekday and weekend, and summer and winter. This was in addition to the overall weighting of each museum/gallery "product line" by actual attendance.

(b) Survey of institutions

- 1.20 The survey of Glasgow's arts organisations and institutions was carried out in two phases. The first phase (initiated 27 July 1990) established base line attendance/activity data for 1989, together with preliminary figures on the first six months of 1990. The second phase (initiated 19 February 1991), completed the picture on attendance and activities for 1990, as well as assembling information on employment and finance for 1990 as a whole. Reactions to Glasgow were recorded in both Phases.

- 1.21 Examples of the questionnaires used can be found in Appendix 4. The institutions/organisations covered in the surveys are listed in Appendix 5. Some supplementary information (including data from a few non-respondents) was obtained by telephone, correspondence and from other sources (e.g. published accounts, annual reports).

(c) Other information

- 1.22 Additional information came from a wide range of other sources. Public expenditure figures were supplied by Glasgow District Council, Strathclyde Regional Council and the Scottish Office. Information on direct promotion, community events and celebrations, press and public relations and sponsorship was supplied by the District Council. The Region made available material on its own programmes. The sponsorship figures supplied by the District were cross checked with data supplied directly in the Survey of Institutions and with information made available by ABSA Scotland. The Festivals Office and Greater Glasgow Tourist Board were helpful in innumerable ways. Tourist information and the results of the Edinburgh Festival study were supplied by the Scottish Tourist Board. Information on different aspects of the cultural industries was generously provided from sector sources by individuals and organisations.

(d) Definition of Glasgow region

- 1.23 For the purpose of this study, the Glasgow region was defined as the City of Glasgow, plus the nine contiguous District Council areas. This corresponds closely to Glasgow built up area. The same definition was used as part of the Policy Studies Institute 1988 study. The nine contiguous district council areas form "outer Glasgow" referred to at various points in the study.

(e) Consultations

- 1.24 During the course of the work, we have held discussions with:

o various public agencies:

Glasgow District Council (Festivals Office, Finance Department)
Strathclyde Regional Council
Scottish Office (Scottish Education Department)
Greater Glasgow Tourist Board
Scottish Tourist Board
Scottish Arts Council
Scottish Museums Council
Scottish Film Council

o a range of organisations in the business community:

Glasgow Chamber of Commerce & Industry
Touche Ross
Whyte and McKay Distillers
Outrams plc
Bellhouse & Joseph
Webster & Company
ABSA Scotland
Glasgow Development Agency
Cyril Gerber Fine Art
The Fine Art Society
Christies Scotland
Regular Music

o several cultural institutions:

Tramway
Glasgow Museums & Art Galleries
Citizens Theatre
Scottish Opera
Scottish Ballet
Royal Scottish Orchestra

(iv) Structure of report

1.25 The format of the report is as follows:

Section 2 describes the shape of the City of Culture event. Section 3 details the funding of Glasgow 1990, including the role of the private sector. Section 4 examines the level of programme activity compared with 1989, including attendance at events and attractions. Section 5 contains a detailed profile of Glasgow 1990 attenders. Section 6 examines the involvement of Glasgow residents in the City of Culture celebrations and their responses to the event. Section 7 analyses the visitor markets (day visitors and tourists) for Glasgow 1990 and sets this in the context of Scottish tourism. Section 8 describes the structure of the cultural sector in Glasgow. Section 9 contains Ecotec's detailed assessment of the economic impact of Glasgow 1990 and considers the Year's added impacts on other areas, such as external perceptions of Glasgow, education, social work, artistic activity and the cultural industries. Section 10 summarises the various outcomes and opportunities arising from the Year.

2. SHAPE OF THE EVENT

A. OBJECTIVES OF 1990

(i) Glasgow District Council

2.1 Previous European Cities of Culture had devised concentrated programmes of arts festival events. Both the District Council and the Strathclyde Regional Council decided to take a broader approach to the definition of culture and to the scale of the event, seeking to draw in assistance and involvement from a wide range of public and private agencies for a year-long celebration.

2.2 The District Council defined two objectives for the Year as:

- to celebrate Glasgow as the Culture Capital of Europe in 1990 by developing a visible-high profile programme of cultural activities; and

- to develop and strengthen structures which will have longer term positive impacts on Glasgow's cultural, social and economic environment beyond 1990.

2.3 These were translated into specific aims under three headings:

o cultural objectives:

- to develop the work of existing cultural organisations in Glasgow in relation to quality, innovation and distinctiveness;
- to provide incentives and encouragement for artists which help improve and enhance their work;
- to increase exposure to outside cultural influences and work of excellence;
- to develop a more cooperative and collaborative approach to cultural provision on a city-wide basis;
- to extend cultural initiatives on an international basis which may be of advantage to Glasgow; and
- to identify and then fill important gaps which currently exist in cultural provision in Glasgow in relation to specific interests, geography or demography.

o economic objectives:

- to create employment opportunities;
- to increase number of visitors to the City;
- to expand the number of spectators and participants for cultural activities; and

- to improve the image and perception of Glasgow; this will influence the attractiveness of Glasgow as a place to live and work, helping to attract new business to the City and to maintain a quality work force which wants to remain in Glasgow.
- o social objectives:
 - to widen the social base of audiences for cultural activities and improve access;
 - to provide increased opportunities for participation in and understanding of cultural activities, with an emphasis on groups which are often ignored by the mainstream cultural institutions;
 - to increase civic pride in Glasgow and in Glasgow's individual and broadly based culture by Glaswegians;
 - to provide entertainment and fun for the people of Glasgow; and
 - to ensure adequate consideration is given to particular problems, interests or needs of special groups, such as the elderly, disabled, children and youth, or cultural or social minorities.

(iii) Strathclyde Regional Council

2.4

At the same time and separately, Strathclyde Regional Council made public its objectives for participating in the City of Culture and beyond. These objectives, which addressed the Region's specific areas of responsibility (social work, education, regional economic development) reflected a degree of congruity with a number of important elements in the City's formulations. Many were designed to focus on "longer term" goals beyond 1990;

- o general themes:
 - encourage activities all round Strathclyde;
 - discriminate in favour of disadvantaged groups;
 - promote participation as well as spectating;
 - recognise that cultural activity is part of the process of urban renewal;
 - assist in the process of generating change through partnerships; and
 - strengthen the base, build upon 1990 investment.
- o Education and Social Work Department themes:
 - enhance the learning experience;
 - provide new learning opportunities;

- develop new skills;
- develop the talents and abilities of special client groups;
- demonstrate the talents of disabled; and
- boost self esteem and self confidence by active involvement in public events.

o infrastructure and business development:

- improve the physical fabric of the cultural facilities;
- improve access for disabled persons;
- encourage local arts and arts-related companies to develop;
- encourage the formation of new arts and arts-related companies;
- bring cultural events/people/activities of national/international significance for the enjoyment of the people of Strathclyde; and
- draw to the attention of those outside Strathclyde the qualities and capabilities of local people and organisations in the field of cultural endeavour.

(iii) Culture

- 2.5 The breadth of these aims was matched by an all encompassing view of "culture". Some twenty specific areas of potential interest were listed at an early stage by the City, covering topics as diverse as video arts and archaeology. An early press release from the Festivals Office defined "culture" as follows: it is "individual, collective and diverse and reflects the particular experiences of all of us, including children, youth, the elderly, ethnic minorities and other groups which may have special needs".

B. NATURE OF THE EVENT

(i) General approach

- 2.6 Glasgow 1990 was in no sense a conventional arts festival. It was neither limited to a short festival period (but it lasted for the entire year), nor was it focused exclusively on a specially promoted programme of events. The City took an all embracing approach to its year as European City of Culture and sought to celebrate the widest cultural achievements, promoting its cultural assets to its own residents, as well as to a wider constituency, during an entire 12-month period.
- 2.7 Whilst a range of supplementary events and attractions were programmed to occur throughout the year, the bed rock of Glasgow 1990 was formed by the regular activities undertaken by Glasgow's established arts institutions and organisations. They numbered 39 museum sites and galleries, and 49 organisations in the

performed arts. These 88 organisations, almost entirely non-profit operations, can be said to constitute the core of Glasgow's professional arts infrastructure.

C. INSTITUTIONAL FRAMEWORK

(ii) Museums and galleries

2.8 In terms of museums and galleries, the principal elements are:

Glasgow City Museums and Art Galleries (9 sites): the major fine and decorative art collections are at the Burrell Collection and Kelvingrove Art Gallery and Museum (also containing natural history); the Museum of Transport and Peoples' Palace (local history) are big specialist museums; the other attractions are Pollok House (with fine Spanish paintings, close to the Burrell), Hagg's Castle, Provand's Lordship and Rutherglen; to these were added in 1990 the refurbished McLellan Galleries;

other local authority museums (8 sites): apart from Glasgow City Council, 6 local authorities operate museums in the Glasgow region; they range from modest community museums (Clydebank, Lochwinnoch, Hamilton) to significant collections in Paisley (18th century Scottish painting, 19th century French painting, modern British studio pottery) and the Lillie Gallery (19th-20th Scottish); Paisley also operates the Coats Observatory; the Region operated Heatherbank Museum of Social Work and opened Scotland Street School as a museum of education during 1990;

independent museums (10 sites): included within this category are the Hunterian Art Gallery and Museum operated by the University of Glasgow; the Charles Rennie Mackintosh Society displays Mackintosh materials and the Glasgow School of Art opens its great Mackintosh building to the public; there are 2 regimental museums (Cameronians and Royal Highland Fusiliers); the National Trust runs the Tenement House (a display of domestic life); the independent museums of social and economic history include Springburn, Summerlee and the David Livingstone Centre;

specialist galleries/studios (12 spaces, including arts centres presenting exhibitions): the latter are principally the Third Eye Centre, the Glasgow Art Centre and (for 1990) Tramway; specialist independent galleries are the Collins (part of the University of Strathclyde), Compass and Transmission; within the Glasgow School of Art, the Newberry Gallery operates as a public space; Street Level photographic gallery has a specialist role; Glasgow has 3 major group studios, Glasgow Sculpture Studios, Glasgow Print Studio and WASPS; the Print Studio operates a gallery and a retail outlet; commercial galleries are enumerated in para. 8.8 below.

(ii) Theatres, halls, ensembles

2.9 Glasgow is home to all but one of Scotland's national performed arts companies. The main elements in the City's performed arts framework are:

Scottish Opera; Scottish Ballet; these two national companies have production bases in Glasgow; both tour extensively in Scotland and elsewhere; they each operate reduced scale second companies (Scottish Opera-go-Round and Steps Out) and undertake substantial specialist educational programmes; Scottish Opera owns and operates the Theatre Royal, which acts as "home" to both companies where productions are premiered;

music ensembles: two long established salaried orchestras, the Royal Scottish Orchestra (celebrating its centenary in 1991) and the BBC Scottish Symphony Orchestra are based in Glasgow; the RSO is a national organisation undertaking, in addition to its Glasgow series, national and international touring commitments; the Scottish Ensemble recently moved from Edinburgh to Glasgow; the BBC SSO is a radio orchestra with a growing portfolio of concert appearances; the Glasgow Philharmonic Orchestra is a recently established freelance orchestra presenting light music concerts; an important specialist group is the Scottish Early Music Consort; smaller groups/ensembles are Festival Strings, Ensemble 90 and Paragon; Capella Nova is a small choral group active in promoting concerts of new music;

concert halls: the Glasgow Royal Concert Hall (seating 2,401) was opened during 1990; it is owned and operated by Glasgow Cultural Enterprises Ltd.; the RSO presents its principal concert series in the GRCH and the other orchestras and ensembles make some use of it; in 1990 the City promoted a Visiting Orchestra Series; popular musical entertainment provides most of the rest of the programming in which the management of the Hall occasionally plays a promotional role; equivalent activities were previously housed in the City Hall (seating 1,216; owned and directly operated by the City Council); this remains open and the Scottish Chamber Orchestra, for example, consider it more suitable for some programming purposes; the RSO and the BBC SSO have rehearsal halls which double as small concert halls (Henry Wood Hall, the BBC Concert Hall); the Royal Scottish Academy of Music and Drama's new building contains two concert halls (seating 360, 130), a theatre (seating 350) and a studio theatre (seating 150); the RSAMD is now Glasgow's main recital centre;

producing theatres: the Citizens Theatre (657 seats) is a producing house of major standing presenting around 300 performances annually; at the Tron (seating 216) half the programmes consists of the Tron's own productions;

receiving theatres: the Theatre Royal (1,547) is a large receiving theatres and home to Scottish Opera and Scottish Ballet, but presents relatively few performances (200 a year) because of its heavy use for Scottish Opera rehearsals; the King's Theatre (1,785 seats), an ex-variety house, owned and operated by Glasgow City Council, is Glasgow's largest auditorium which presents a variety of commercial, theatrical entertainment, including the pantomime, and provides a positive service to Glasgow's active amateur companies; the Pavilion (seating 1,449) is a commercial theatre offering a mix of popular concerts, drama, variety and one-nighters;

arts centres/small venues: this sector includes Glasgow's major arts centres, the Third Eye (with two small performance spaces) and Tramway (developed in the framework of 1990 as a flexible space, seating approx. 800); Glasgow Arts Centre is operated through the Education Department of Strathclyde Region; the Paisley Arts Centre (seating 165) has a much expanded mixed-

programme, and the Pearce Institute similarly has recently developed its professional programming; the small venues are the Mitchell Theatre (like the King's, operated by Glasgow City Council; 418 seats), the Old Athenaeum (home of the Scottish Youth Theatre) and the Crawford (at Jordanhill College; 400 seats) which undertakes professional programming; the Royal Scottish Academy Theatre is intended primarily but not exclusively for student productions; mention should also be made of the Glasgow Film Theatre (the West of Scotland's only specialist film theatre) and of the Scottish Mask and Puppet Centre; the Scottish Ballet Studio Theatre (seating 182) in the Scottish Ballet Centre; the Arches Theatre was a 1990 project, part of the Glasgow's Glasgow exhibition; additionally, a large number of local halls are managed by the City (e.g. Woodside Halls, Govan Town Hall, Couper Institute);

independent drama/dance companies: independent companies based in Glasgow could not be fully enumerated; the best established include Wildcat (now based at the Clyde Theatre); 7.84 Scottish Peoples' Theatre, and Tag Theatre Company; Big Noise was established for 1990 to specialise in children's programmes; Glasgow Independent dance is an association (linked to Rotating Dancers) which initiated several 1990 dance events;

promoters, festivals: Mayfest is the established large general arts festival with a focus on unconventional and new works; the Glasgow International Jazz Festival and the Glasgow International Folk Festival are more recent in origin; Glasgow has a range of active music promoters; in addition to the small music clubs, concert series are presented by Glasgow University and Westbourne Music, the latter in a range of unusual venues; of the music festivals, Musica Nova (managed by the RSO) and Paisley Organ Festival are triennial and biennial events; Tryst (the festival of Scottish traditional arts) completes the list of established festivals.

D. SPECIAL PROGRAMMING

(i) Arts programme

2.10 The Year of Culture supplementation to Glasgow's regular cultural calendar focused on the following areas:

enhanced programming for the main institutions: this included extra activities (e.g. international exhibitions at the Burrell), larger scale work than usual (e.g. exceptional casting at Scottish Opera) and artistic exploration (e.g. two triple bills by Scottish Ballet); international seasons, together with appropriate support programmes, took place at the Theatre Royal (e.g. Five Theatres of the World; International Dance Season, Stuttgart Ballet);

promotions and centrally-initiated projects: some direct promotion was undertaken by Glasgow District Council (e.g. visits of the Bolshoi, Frank Sinatra and the Orchestras of the World Series); a range of visual arts projects and theatrical promotions (as well as community and children's events) were realised through the agency of Tramway, directly managed by the District Council; centrally-generated projects under independent management included

the Glasgow's Glasgow exhibition, the Dome of Discovery and the 56 performances of The Ship, a production specially commissioned by the Festivals Office;

1990 commissions: new works were commissioned, such as musical compositions (e.g. from Judith Weir, James MacMillan, Thea Musgrave and Thomas Wilson) and various visual arts projects (e.g. by Dieter Magnus, David Mach, Ian Hamilton Finlay);

independent projects: numerous special projects in drama, dance, music and the visual arts and architecture were realised during 1990 by independent organisations, some of them newly created; the District and the Regional Councils awarded some 517 external grants to such initiatives; they included projects which fed into the programming of Glasgow's established venues; others were extensions to the activities of existing organisations (e.g. the new festivals, Chorus International arranged by Capella Nova and the International Early Music Festival promoted by the Scottish Early Music Consort); independent festival promoters established for 1990 included Streetbiz (an international street festival), Women 2,000, Women in Profile and Festival of Jewish Culture;

capital projects: major additions to Glasgow's cultural infrastructure were completed during the year, including the Royal Concert Hall and McLellan Galleries.

- 2.11 The European dimension in programming was pursued at an early stage. Glasgow made contact with two predecessor Cities of Culture. It presented a miniature festival "Glasgow Style" in Amsterdam in 1987 and it contributed to Berlin's 1989 programme with a Ken Currie Exhibition, performances by the Scottish Early Music Consort, a Scottish trade promotion week, a commissioned spire by George Wylie and a writers and photographers exchange project. The Festivals Unit, established in July 1987, made early contact with foreign and international organisations. As a result, many 1990 programme elements which came from abroad were eventually supported with overseas government money. The Regional Council's links with the Spanish region of Asturias and the French region Nord pas de Calais led to a month long cultural festival in Glasgow in 1990.

(ii) Broader interpretation

- 2.12 Both Glasgow District Council and Strathclyde Regional Council gave a wide interpretation to the cultural opportunities afforded by 1990. This led to a range of programmes and initiatives of which the following should be noted:

education: Strathclyde Regional Council Education Department undertook approximately 660 cultural projects in schools, further education colleges and community education centres; additionally, the 102 main 1990 programme projects funded by the Regional Council either related directly to the Department of Education (32) or were supported by educational programmes involving the Department (70);

social work: Strathclyde Regional Council undertook 267 projects in the context of social work policies bringing cultural experiences to the disadvantaged and disabled;

community events: extensive programmes of community events and projects related to European City of Culture took place during the Year; Glasgow City Council funded 354 small projects and several large ones (e.g. Glasgow All Lit Up and The Second Coming by Test Department); sport was included in this wider programme and several major events were mounted during 1990 (e.g. European Special Olympics, European Indoor Athletics Championships, Youth Olympiad);

celebrations: major celebrations (Hogmanays) and free public entertainment (e.g. the Big Day, Big Noise children's events, Glasgow Mela involving ethnic minorities) gave a pattern to the Year; the Hogmanays were promoted by the Festivals Office; the Big Day was arranged by an independent consortium including the local authorities, Channel 4 and Regular Music.

(iii) Management

2.13 The programmes were mostly supported by the two local authorities. The Festivals Office was formed in July 1987 as a unit of the Glasgow District Council. It took responsibility for the District's City of Culture grants programmes and for the directly-promoted projects (e.g. the Bolshoi visit). The Festivals Office worked alongside the established District Council Departments with cultural responsibilities, such as the Museums and Art Galleries Department, the Libraries Department and the Halls and Theatres Department. Its small team of professionals relied heavily on voluntary help and the efforts of independent organisations across the City. Various specialist assignments were given in specific areas (e.g. visual arts, sport, religion, community projects, disability, architecture). Tramway was line managed by the Festivals Office.

2.14 Strathclyde Regional Council handled its own grants schemes through newly established procedures. The Region directly administered its education and social work programmes. Participation in development of the 1990 programme took place through direct liaison with the Festivals Office. The Festivals Office had the coordinating role for giving shape to the Year. The Greater Glasgow Tourist Board handled the generic advertising of 1990 which was monitored by a joint group of GDC and SRC. Quarterly brochures, fortnightly newspaper listings and some advertising were prepared by the Festivals Office. There was a press and public relations unit in the Festivals Office. Additionally, the City and the Region each made use of their own public relations staff on 1990 matters.

(iv) Involvement of other agencies

2.15 Glasgow 1990 galvanised many other agencies and organisations into delivering projects and programmes for 1990. Agencies which became involved included the Strathclyde Passenger Transport Executive and the then Scottish Development Agency. It should be said that some of their schemes might have occurred without Glasgow 1990, perhaps at a different time. This applied particularly to the heritage field, including such projects as the floodlighting of listed and commercial buildings. Many events which were largely unrelated in their timing, organisation or funding to the Glasgow celebrations (e.g. Pavarotti's visit, the Rolling Stones concert) were caught up in the momentum of the Year. Several of these events were among the most cherished 1990 occasions and for some people came to symbolise the achievements of the Year.

E. CAPITAL PROJECTS

(i) Schemes

2.16 The capital programmes completed in 1990 which should be mentioned are:

Royal Concert Hall: opened October 1990; this is a 2,401 seat concert hall replacing St Andrew's Hall destroyed by fire in 1962;

McLellan Galleries: opened February 1990; these refurbished and upgraded Edwardian galleries together with support areas are capable of presenting major art exhibitions at the international level; they represent the first major gallery devoted exclusively to this function in Scotland; the McLellan is operated as part of the Glasgow Museums and Art Galleries Department;

Glasgow Film Theatre: a second auditorium was opened in 1990;

Scotland Street School: this Mackintosh building was refurbished as a Museum of Education;

other projects: some smaller capital programmes were undertaken specifically in relation to 1990; of principal note were:

- facilities for the disabled: Strathclyde Regional Council funded a programme of improvements to cultural buildings in order to provide better facilities for the disabled; works (such as the installation of loop systems) were carried out in 18 venues (e.g. at City Hall, the Mitchell, Pavilion, Scottish Youth and Citizens Theatres);
- House of an Art Lover in Bellahouston Park: based on designs by Mackintosh, the project was not fully completed in 1990;
- minor works: Strathclyde Regional Council carried out minor works improvements in a range of venues with a view to providing a 1990 legacy.

(ii) Tramway

2.17 Mention should be made here of Tramway. Originally a tram depot, it had housed Glasgow's Museum of Transport until 1986 and was converted to theatrical use for performances of The Mahabharata presented by the City Council in 1988. After this theatrical baptism, it was decided by the City Council to operate Tramway as a flexible space (seating up to 800) for visiting productions in 1989. The intention was to develop interest in an unconventional theatre in preparation for 1990. Visual art exhibitions were added and a greatly expanded level of theatrical activity took place as well as community and children's events. Originated as a 1990 project, it could prove a lasting addition to the artistic infrastructure of the city.

F. LONGER TERM DEVELOPMENT

(i) Capital schemes

- 2.18 Whilst Glasgow seized the opportunity of 1990 to make some major additions to the City's cultural infrastructure, these were part of a longer term programme of development. Since the opening of the Burrell Collection in 1983, Glasgow has seen its Museum of Transport rehoused and acquired the Glasgow Sculpture Studio and Street Level Gallery. Glasgow Print Studio moved to new premises in 1988. In the performed arts, the King's Theatre was refurbished (1985) and the Royal Scottish Academy of Music and Drama acquired purpose-built premises, which included halls and a theatre. Clyde Theatre was another new development. The Scottish Youth Theatre moved from Edinburgh to the refurbished Old Athenaeum building. Major improvements were carried out to the Citizens' Theatre (new foyers and backstage improvements), the Third Eye (extra studio theatre) and the Tron (second auditorium). Improvements were also undertaken at the Clyde Theatre and the Pearce Institute.

(ii) Programming and companies

- 2.19 The Glasgow International Jazz Festival and the Glasgow International Folk Festival were established as part of a policy to provide programming in previously empty parts of the Year. A new concert promoter, Westbourne Music appeared in 1988. Developments are difficult to track among the independent companies and ensembles. In this period, among other initiatives, 7.84, the Scottish Ensemble and the Scottish Youth Theatre moved to Glasgow, the Glasgow Philharmonic Orchestra was founded and the Scottish Chamber Orchestra opened a Glasgow office.

G. SUMMARY

- 2.20 Whilst previous European Cities of Culture had devised concentrated programmes of arts festival events, both Glasgow District Council and Strathclyde Regional Council decided to adopt an all-encompassing approach over an entire 12-month period. Glasgow 1990 was conceived as a celebration of cultural achievement and as an exercise in development with an eye to longer term targets.
- 2.21 The bedrock of the 1990 programme was formed by the regular activities undertaken by Glasgow's established arts institutions and organisations. Supplementation of the regular cultural calendar was provided by:
- . enhanced programming for the main institutions;
 - . centrally-initiated projects and programmes;
 - . 1990 commissions; and
 - . independent grant-aided projects.

- 2.22 The broader interpretation of the cultural opportunities afforded by 1990 led to programmes and initiatives in the fields of education, social work, community events (including sport) and major celebrations (e.g. the Big Day). Education and special needs programmes increased by 25 per cent in the museums and galleries and by 43 per cent in the theatres, halls and ensembles. Community events of various kinds numbered over 2,000.
- 2.23 Among the capital projects completed in 1990 were the Glasgow Royal Concert Hall and the McLellan Galleries. These were part of the longer term programme of investing in the cultural infrastructure of the City, which had been sustained through the 1980s.

3. FUNDING GLASGOW 1990

- 3.1 This section details the funding of Glasgow 1990. It examines capital projects realised in the context of Glasgow 1990 and the "regular" annual spending of public agencies in support of arts organisations and activities before describing the extra City of Culture revenue support. Finally, private sector support for the arts in Glasgow is examined in relation to the 1990 programme.

A. CAPITAL PROJECTS

(i) General

- 3.2 As was pointed out in Section 2, Glasgow's year as European City of Culture was made the occasion for realising a number of major capital projects in the region. Spending by Glasgow District Council, Strathclyde Council and Scottish Office on capital schemes totalled some £43.03 million. This includes Glasgow District Council's regular capital programme for maintaining and enhancing the extensive array of cultural buildings in its ownership. The main projects were the Glasgow Royal Concert Hall (£29.4 million), the McLellan Galleries (£5.8 million) and the Scotland Street School (£1.3 million).

Figure 1 Expenditure on capital projects: by source

	£ thousand		
	1989/90	1990/91	Total
Glasgow District Council ^a	22,478	13,359	35,837
Strathclyde Regional Council	2,673 ^b	2,141	4,814
Scottish Office	-	-	2,378
	25,151	15,500	43,029

Source: Glasgow District Council; Strathclyde Regional Council, Scottish Office.

^a Includes maintenance of cultural buildings.

^b 1988/89 and 1989/90.

(ii) Royal Concert Hall and McLellan Galleries

- 3.3 The Glasgow Royal Concert Hall project involved the construction of a new 2,401 seat concert hall in Buchanan Street, Glasgow. It replaced St. Andrew's Hall destroyed by fire in 1962. The Hall occupies a strategic site in the heart of the City, part of Glasgow's "emerging arts and entertainment district". The scheme was partly made possible through cross funding from an adjacent commercial development which will provide 530,000 sq.ft. of retail space. There are also retail elements in the concert hall building at street level. The McLellan Galleries project consisted of the refurbishment of existing purpose built Edwardian galleries to the

correct environmental standard for presenting and initiating major temporary exhibitions. With 2,158 sq.m. of gallery space arranged in seven rooms, the McLellan Galleries represent probably the largest and best equipped facility specialising in temporary loan exhibitions outside London.

- 3.4 The Glasgow Royal Concert Hall and McLellan Galleries were Glasgow District Council projects done out of existing budgets. The schemes were realised with support from SRC and Scottish Office (via the then Scottish Development Agency). The schemes qualified for European Regional Development Fund support within the objectives of the Strathclyde Integrated Development Operation.

(iii) Strathclyde Regional Council projects

- 3.5 The Scotland Street School was an SRC project. It involved restoring the Mackintosh designed School as a Museum of Education. Other Strathclyde funds were devoted to a variety of schemes, including the provision of Mackintosh street lamps and an imaginative programme for upgrading disabled facilities in theatres, halls and museums (see Figure 94).

Figure 2 Strathclyde Regional Council: City of Culture expenditure on capital projects

	£ thousand
McLellan Galleries	1,000
Glasgow Royal Concert Hall	458
Cathedral Precinct	500
Scotland Street School	1,341
Glasgow's Glasgow	180
Citizen's Theatre	100
Glasgow Film Theatre	100
Art Lover's House	300
Scottish Youth Theatre	100
Glasgow Arts Centre	200
Borderline Theatre	25
Mackintosh lamps	98
Education Media Bus	94
Knightswood Dance School	110
Drumchapel Theatre	50
Clyde Theatre seating	50
Facilities for disabled in theatres, halls and museums	190

Source: Strathclyde Regional Council.

(iv) Scottish Office

- 3.6 Scottish Development Agency capital contributions were also made to floodlighting of listed and commercial buildings and the rehabilitation of the arches under Central Station. Scottish Office support included schemes funded through Historic Buildings and Monuments (now Historic Scotland) and the Urban Programme.

(v) How specific to 1990

- 3.7 It is difficult to isolate schemes and funding which were specific to Glasgow 1990. Some of the schemes might have been undertaken without the City of Culture celebrations, perhaps at a different time. In the economic impact analysis, no specific allowance is made for construction related employment. In a few cases, the timing of the programme was wholly or partly propelled by 1990 considerations. Some of the Strathclyde Regional Council capital programme (e.g. on disabled facilities) were conceived as City of Culture schemes.

B. REGULAR REVENUE SUPPORT

(i) Bedrock

- 3.8 The revenue funding of the City of Culture celebrations needs to be considered against the background of "regular" revenue support provided by local authorities and other public agencies for arts events and attractions in the Glasgow region. "Regular" spending relates to the longer term programmes of support which existed before 1990 and continued to support the bedrock of the arts programme during the Year of Culture.

- 3.9 Revenue support for arts events and attractions from the local authorities totalled some £19.7 million in 1990/91. The main provider was the Glasgow District Council spending £17.4 million in 1990/91, up from £14.4 million in 1989/90. Strathclyde Regional Council made a smaller contribution £0.62 million in 1989/90 rising to £0.65 million in 1990/91. A further £1.69 million revenue support was made available from two other local authority sources, the remaining district councils in the Glasgow region (in support of their own museums, etc.), and the COSLA-recommended contributions to the national companies based in Glasgow from local authorities throughout Scotland. It should be noted here that the Scottish Arts Council contributed an estimated £8.9 million to Glasgow-based organisations in 1990/91. Some £6.8 million was to Scottish Opera, Scottish Ballet and the Royal Scottish Orchestra, Scottish national companies based in Glasgow serving Scotland's main population centre with a remit for the whole country.

(iii) Glasgow District Council

- 3.10 The bulk of the City's expenditures related to its major responsibilities for direct labour organisations, the museums and galleries and halls and theatres in its ownership and operation. The halls and theatres expenditure was £3.822 million in 1990/91. This included £1.057 million spent on aspects of administration, together with the Candleriggs box office centre, and £1.562 million on public halls throughout the City. Substantial growth in the museums and galleries budget (from £8.108

million in 1989/90 to £10.296 million in 1990/91) partly reflected necessary increases in expenditure for the reopened McLellan Galleries.

- 3.11 Glasgow District Council gave 82 external annual revenue grants valued at £3.28 million to a wider variety of independent organisations in 1990/91. The principal grants are detailed in Figure 4. The rise of £640,000 in the 1990/91 external grants budget compared with the previous year included a major increase in support offered to the Glasgow Royal Concert Hall. It is relevant to note here that as a library authority the City spent £13.89 million revenue and £0.769 capital on this service in 1990/91.

Figure 3 Glasgow District Council: "regular" spending* on arts, events and attractions

	£ thousand	
	1989/90	1990/91
Galleries, museums	8,108	10,296
Halls, theatres	3,649	3,822
External grants	<u>2,645</u>	<u>3,285</u>
	14,402	17,403

Source: Glasgow District Council.

* Annual support, excluding capital programme and excluding library spending.

Figure 4 Glasgow District Council: "regular" cultural spending, external grants

£

	1989/90	1990/91
Citizens Theatre	315,900	300,000
Scottish Youth Theatre	33,500	70,150
Third Eye Centre	96,000	136,000
Glasgow Film Theatre	39,375	37,350
7.84 Theatre Company	25,000	28,000
Scottish Chamber Orchestra	11,000	17,400
Scottish Opera, Theatre Royal	219,000	197,150
Scottish National Orchestra	60,000	66,000
Scottish Ballet	50,000	64,000
Tron Theatre	114,000	137,500
Wildcat Stage Productions	40,000	40,000
Mayfest	449,000	439,000
Glasgow International Jazz Festival	217,500	118,250
Tag Theatre Company	18,150	19,000
Glasgow Sculpture Studios	11,500	17,857
Glasgow Royal Concert Hall	277,000	1,050,000
Glasgow Print Studio	20,000	21,300
Other*	647,000	526,000
	<u>2,644,825</u>	<u>3,284,957</u>

Source: Glasgow District Council.

* Other cultural grants numbered 68 in 1989/90 and 55 in 1990/91.

(iv) Other local authorities

- 3.12 The "regular" spending of other local authorities in the study region was on a much smaller scale. Several of the district councils carried responsibilities for directly managed museums and operate external grant programmes. Strathclyde Regional Council concentrated on an external grant programme for independent organisations (£619,000 in 1989/90 and £654,000 in 1990/91), including COSLA formula support for national companies. SRC makes regular grants to the Citizens Theatre, Mayfest and the Theatre Royal, as well as a major payment to the Burrell Collection. Significant additional financial support for the arts came through the Education Department which, for example, operated the Glasgow Arts Centre.

Figure 5 Strathclyde Regional Council: "regular" cultural spending, external grants

	1989/90	1990/91
Citizens Theatre	77,400	81,270
Scottish Youth Theatre	4,286	4,586
Scottish Chamber Orchestra	85,242 ^a	15,492 ^b
Scottish Opera, Theatre Royal	83,640	58,500
Scottish National Orchestra	45,430	47,090
Scottish Ballet	6,450	
Glasgow International Jazz Festival	22,500	
Cumbernald Theatre Company	23,100	24,255
Borderline Theatre Company	28,380	29,799
Strathclyde Youth Jazz Orchestra	16,880	18,568
Burrell Collection	300,000	300,000
Other	5,692	53,410
	619,000	654,000

Source: Strathclyde Regional Council.

^a Includes Strathclyde concerto.

^b Includes Concessionary Ticket Scheme.

^c "Regular" funding included in enhanced Year of Culture grant (see Figure 12).

C. CITY OF CULTURE REVENUE SUPPORT

(i) Public sources

- 3.13 Extra revenue spending specifically related to the City of Culture programme totalled £32.72 million, and was overwhelmingly contributed by the two responsible local authorities, Glasgow District Council (£19.3 million) and Strathclyde Regional Council (£12.8 million). This includes GDC and SRC City of Culture spending in 1989/90 and 1990/91, and some SRC City of Culture spending in 1988/89. According to the Scottish Office, revenue support from the Scottish Office and from Scottish Office funded bodies which can be related fairly directly to the Glasgow 1990 programme amounted to some £558,000. Overall grants contributed by the Office of Arts and Libraries (£500,000) and the Commission of the European Communities (£80,000) were used to offset the Glasgow District Council expenditures. Neither the Scottish Arts Council, the Arts Council of Great Britain, nor the Scottish Museums Council made special financial provision for 1990. They chose to handle any increased requests for support arising from the City of Culture through their standard allocation procedures.

Figure 6 City of Culture revenue spending: by source and purpose

	£ million			
	Glasgow District	Strathclyde Region	Scottish Office	Total
Programme	14.72	11.75	0.40	26.87
Marketing 1990	4.04	0.74	0.15	4.93
Administration, etc.	<u>0.58</u>	<u>0.34</u>	<u>-</u>	<u>0.92</u>
	19.34	12.83	0.55	32.72

Source: Glasgow District Council; Strathclyde Regional Council; Scottish Office.

(ii) Scottish Office

- 3.14 The Scottish Office gave a major grant (£180,000) for the "Scotland Creates" exhibition (involving the National Museums and Galleries) presented at the McLellan Galleries; it also gave a grant to the European Film Awards Ceremony and a small contribution via the Prisons Group. According to the Scottish Office, the Scottish Tourist Board spent £153,000 on Glasgow 1990 media promotion. Otherwise, the Scottish Office estimates that its funded bodies made financial contributions towards Glasgow's year as European City of Culture 1990 valued at £169,000 (e.g. National Youth Orchestra Scotland, Royal Scottish Academy of Music and Drama, Glasgow School of Art).

(iii) General allocation

- 3.15 The bulk of City of Culture revenue spending was devoted to programming. This accounted for £26.87 million of the extra resources. Other sums were allocated to marketing (£4.93 million), and £0.92 million was spent on necessary additional staff (running the Festivals Office, and extra staff in various Regional Council departments), and on information and public relations services.
- 3.16 It was a central tenet of Glasgow's approach to the City of Culture that funded activities should be broader in range than arts programming. In fact, the latter took the largest share of local authority expenditure at £18.08 million. The other main areas were community events and celebrations (£5.1 million) and social work and education programmes (£3.7 million). These are examined each in turn.

Figure 7 City of Culture programme spending: by type

	£ million			
	Glasgow District	Strathclyde Region	Scottish Office	Total
Arts programme				
Pre 1990	1.03	1.06	-	2.09
1990	11.08	4.51	0.40	15.99
Community events/celebrations	2.61	2.44	-	5.05
Social work/education	-	3.74	-	3.74
	14.72	11.75	0.40	26.87

Source: Glasgow District Council; Strathclyde Regional Council; Scottish Office.

D. MAIN ARTS PROGRAMME

(i) Pre-1990 spending

- 3.17 The City of Culture arts programme support cost £18.08 million. It is calculated that some £2.09 million arts programme expenditure was on pre-1990 events. This partly concerned establishing Tramway as a venue for performances and exhibitions following its dedication as a theatrical space by the 1988 performances of The Mahabharata. Glasgow District Council reported Tramway expenditure of £1.03 million in FY 1989/90, which included some provision for minor capital works as well as staffing and net performance costs. Strathclyde Regional Council contributed £185,000 to Tramway visiting companies (e.g. Peter Brook's Carmen) in 1989/90. Further antecedent projects were initiated by SRC in 1988 and 1989 as part of its preparation for 1990. These included Strathclyde Summer Seasons at the Citizens, special dance seasons at the Theatre Royal and the Peter Pan ballet for Scottish Ballet, with linked access programmes.

(ii) General allocation in 1990

- 3.18 Expenditure on events and attractions during 1990 itself by the various public agencies totalled some £15.99 million. Centrally-generated projects accounted for £8.50 million, whilst some £7.49 million took the form of external grants to key Glasgow institutions, independent companies and some specially created independent organisations.

Figure 8 City of Culture 1990 arts programming expenditure: by type of organisation

£ million

	Glasgow District	Strathclyde Region	Scottish Office	Total
Festival office projects	7.61	0.88	0	8.50
Main institutions	0.91	1.14	0.22	2.26
Other organisations	<u>2.57</u>	<u>2.49</u>	<u>0.17</u>	<u>5.23</u>
	11.08	4.51	0.40	15.99

Source: Glasgow District Council; Strathclyde Regional Council; Scottish Office.

(iii) Festivals Office promotions, etc

3.19 Centrally-generated projects covered the following: direct promotions undertaken by the Festivals Office itself; Tramway, which was directly managed by the District Council to provide a venue for 1990 programming; and three independently managed major projects, Glasgow's Glasgow and the Dome of Discovery (long running exhibitions presented in reclaimed premises), and The Ship's Company (which gave 56 performances of a production in a Govan turbine engine hall). The latter three projects were long-running attractions which took place in their own temporary premises and drew a measurable public.

3.20 Whilst many projects were arranged by the Festivals Office, its involvement in direct promotion was kept to a minimum. The directly-promoted events were Sinatra at Ibrox, the Bolshoi Opera Season at the Scottish Exhibition and Conference Centre and the World Orchestra Series at the Royal Concert Hall. The results of these promotions, which had a net cost to the City of £1.93 million (including the grant of £150,000 from the Region), are set out in Figure 9. The Festivals Office also promoted the two Hogmanays (at a net cost of £349,000) and the Gala Opening (£89,000).

Figure 9 Festivals Office promotions: expenditure and income

£ thousand

	Expenditure		Income		Net cost ^a
	Fees	Other	Box off., sales	Grants, spon.	
Sinatra at Ibrox	575	375	285	-	665
Bolshoi at SECC	245	1,532	464	150 ^b	1,163
World Orchestras at RCH	344	127	206	165	100

Source: Glasgow District Council.

^a To Glasgow District Council.

^b Strathclyde Regional Council.

3.21 Public spending on the centrally-initiated projects totalled £8.50 million in 1990 and Festival Office promotions accounted for £2.08 million. Expenditure at the Tramway amounted to £1.025 million in FY 1990/91. In the previous year, GDC committed some £1.03 million, with SRC contributing £185,000 for Tramway presentations. Thus, total public expenditure on Tramway up to the close of FY 1990/91 was £2.24 million. The figure excludes any GDC external grants to companies/exhibitions appearing in the Tramway. Additionally, expenditures on the three major projects were £4.80 million on Glasgow's Glasgow (excluding repair works on the arches), £0.5 million on The Ship and £90,000 on the Dome.

(iv) Established institutions

3.22 It was possible to identify major grants to the established Glasgow-based institution totalling some £2.26 million in 1990. This relatively modest allocation (14 per cent of City of Culture arts programme expenditure in 1990) was additional to the "standard" annual grants and was intended for special works/projects. It made possible the Theatre Royal seasons of visiting companies (including the Five Theatres of the World Season, arranged by the Festivals Office), the Scottish Ballet triple bills and the Scottish Opera's heavy repertoire, including the newly commissioned Vanishing Bridegroom. Also included were the Citizens third Strathclyde Summer Season and extra grants for Mayfest and Glasgow International Jazz Festival projects. Apart from the challenge of a new venue (the Glasgow Royal Concert Hall) in which to present its concerts, the Royal Scottish Orchestra received extra funding for Musica Nova, the triennial festival of new music which coincided with 1990.

(v) Independent projects

3.23 Expenditure on project grants for other than the main institutions totalled £5.23 million in 1990. These included some independently generated exhibitions (e.g. Glasgow Girls) and drama productions (e.g. Peter Brook's Tempest, Jock Tamson's Bairns) which fed into the programming of Glasgow's venues, including Tramway.

Free street events (e.g. StreetBiz) and special events (e.g. European Film Awards) were supported in this way. Very many of the grants were on a relative modest scale responding to commissions and creative initiatives from individual artists and a host of small independent companies.

(vi) Artistic balance

- 3.24 Overall, some 517 external grants were awarded by the local authorities to arts programming initiatives (pre-1990 and 1990). Major grants to the established Glasgow-based institutions numbered some 32. Some of the bigger projects (e.g. Glasgow's Glasgow) were handled by specially formed independent organisations which were then given external grants by GDC and/or SRC. The small number of grants from the local authorities (as few as 24) to film/media projects should be noted. To a degree, they were financed by other sources. The visual arts exhibitions attracted 213 grants and the performed arts 280. Glasgow District Council gave rather more grants to the visual arts and Strathclyde emphasised projects in the performed arts. In round terms, the programme expenditure went 59 per cent to the performed arts, 39 per cent to visual arts and only 2 per cent to film and media.

Figure 10 City of Culture arts programming: external grants by art form and awarding body

	Number		
	Glasgow District	Strathclyde Region	Total
Performed arts	101	179	280
Visual arts, exhibitions	127	86	213
Film/media	<u>16</u>	<u>8</u>	<u>24</u>
	244	273	517

Source: Glasgow District Council; Strathclyde Regional Council.

Figure 11 City of Culture arts programming: Glasgow District Council "external grants"*

	£ thousand
Performed arts	
Theatre Royal	345
The Ship's Company	248
StreetBiz	125
Scottish Opera	120
Various commissions	119
Scottish Ballet	100
Special Mayfest projects	75
Festival of Early Music	75
Glasgow International Jazz Festival projects	50
Tron Theatre	50
Other projects (92)	<u>1,079</u>
	2,386
Visual arts, exhibitions	
Third Eye Centre	88
Various commissions	60
Four Cities project	50
Glasgow Girls	35
British Art Show	18
Other projects (122)	<u>842</u>
	1,093
Miscellaneous exhibitions	
Glasgow's Glasgow	4,601
Dome of Discovery	<u>50</u>
	4,651
Film	
European Film Awards	75
Glasgow Film Theatre	25
Other projects (14)	<u>144</u>
	244

Source: Glasgow District Council.

* FY 1989/90 and 1990/91.

Figure 12 City of Culture arts programming: Strathclyde Regional Council
"external grants"

	£ thousand
Performed arts	
Theatre Royal	250
Scottish Opera	211
Scottish Ballet	171
Citizen's Theatre	100
Mayfest	110
Glasgow International Jazz Festival	52
Tramway projects	244
The Ship's Company	254
Bolshoi visit	150
Other projects (170)	<u>1,782</u>
	3,324
Visual arts, exhibitions	
Third Eye Centre	140
Women 2,000	69
Glasgow Girls	45
Glasgow's Glasgow	200
Dome of Discovery	30
Other projects (81)	<u>462</u>
	946
Film	
European Film Award	75
Other projects (7)	<u>12</u>
	87

Source: Strathclyde Regional Council.

E. OTHER PROGRAMMES

(i) Community events/celebrations

- 3.25 Broader cultural activity and involvement were boosted by spending programmes on community events and celebrations and on educational and social work programmes. The former ranged from major all-day free musical entertainment as provided by the Big Day (at a cost to the two local authorities of £1.25 million), to children's events (e.g. Big Noise) and broad participatory initiatives (e.g. Call that Singing). Religious celebration (e.g. Spirit of the City), the sports programme and numerous locally organised events were also included. The Festivals Office directly managed the Hogmanay celebrations. For the most part, the events were independently arranged. Some 453 external grants were given by the two local authorities in support of community events. Expenditure on community events and celebrations amounted to £5.05 million. Channel 4 spent over £1 million on televising the Big Day.

Figure 13 Local authority grants to community events

	£ thousand	
	Glasgow City Council	Strathclyde Regional Council
The Big Day	802	450
Lantern Project	100	111
Big Noise (children's events)	100	147
Call That Singing!	75	65
Glasgow Mela	60	50
Other projects (443)	807	1,466

Source: Glasgow District Council; Strathclyde Regional Council.

(ii) Education programmes

- 3.26 Strathclyde Regional Council City of Culture spending on educational initiatives amounted to £1.95 million. The sum was additional to the normal allocation made by the Education Department for the arts. It related to upwards of 650 projects (see Figure 14) across the entire Strathclyde region. These included 262 school initiated projects and 85 adviser-led projects. There were many projects running in schools for which additional funding was not requested and so are not recorded here. In the Community Education sector 152 schemes and projects were mounted. The Department also took responsibility for leading a number of projects as well as supporting a variety of external schemes.
- 3.27 The special projects undertaken by the Department ranged across all the art forms. They involved residencies (e.g. textile artists in Argyll and Bute), workshops (e.g. lantern making with Welfare State International), creative projects (e.g. a video scheme in conjunction with Channel Four Television in Glasgow) and the establishment of new organisations (e.g. the Strathclyde Schools Chorus, Strathclyde Schools Symphonic Wind Band and other musical groups and ensembles).
- 3.28 In addition to Education Department projects, over 100 Main Programme events/attractions incorporated specific educational activities. For example, in connection with the Age of van Gogh exhibition at the Burrell, 650 pupils attended the play and 4,600 took part in workshops. Scottish Ballet involved 32 schools in a project linked to a new production of Peter Pan. Each school received two workshops and pupils attended a performance. Many schools evolved productions of their own versions of Peter Pan.
- 3.29 The Strathclyde Concertos combined many elements in an innovative approach to a composition project. The Council commissioned a series of ten concertos from Peter Maxwell Davies to be premiered in Glasgow by the Scottish Chamber Orchestra. In 1990 the third and fourth concertos were performed. Linked to each concerto was an associated composer in residence who worked with schools (around six) in the context of the concerto to develop the composing skills of pupils and teaching staff. This led to a series of concerts in which pupils performed their

own work in association with the first performance of each Maxwell Davies concerto. The Council also funded recordings of the concertos.

- 3.30 Several projects focused on the European dimension. An exchange between Glasgow and Berlin was built around the preparation of dance performances by students in the two cities. Senior pupils in Glasgow and Berlin used exchange visits to prepare portraits of the other city through drawing, painting and photography. Over a dozen projects had a multi-cultural focus e.g. Indian bronze casting, Afro-Brazilian dance workshop and multi-cultural cookery book.

Figure 14 Strathclyde Education Department City of Culture projects: by type

	Number of educational projects
School projects	262
Education Department projects*	
Drama	13
Music	11
Visual arts	20
Dance	26
Writing	9
Mixed media	6
Community education	152
Further education	18
Regional projects	23
External projects	35
Main programme linked schemes	<u>107</u>
Total	677

Source: Strathclyde Regional Council.

- * Initiated by education advisers.

(iii) Social work programme

- 3.31 Until the advent of the City of Culture, the region's Social Work Department had no cultural allocation in its budget. The resources allocated to the City of Culture festivities were additional to the service and were not diverted from other social work programmes. An expenditure of £1.81 million from 1988 to 1990 supported some 267 projects across the region.

(a) Over 200 projects

- 3.32 Many of the projects were out-reach schemes specially arranged by Glasgow's established companies (e.g. Scottish Opera, Scottish Ballet, Scottish Youth Theatre, the Scottish Mask & Puppet Centre and the Royal Scottish Academy of Music & Drama) to meet the specific needs of individuals and groups. Additionally, substantial funds were made available to two organisations specialising in arts for

the disabled (Project Ability and Fablevision) to develop schemes for the physical and mentally disabled.

3.33 Examples of projects funded included:

Heart Beat: a songwriting competition for young people on the theme of drugs misuse; a music group has grown out of this project;

Contact Art: painting, mosaic, batique, sewing and embroidery programmes for elderly people;

Paisley Shawl Road Show: a musical/visual show arranged with Paisley Museum involving displays of shawls, songs of loom work, and reminences, toured to homes for the elderly;

Drumchapel Puppet Project: a puppet show devised by teenagers under referral and performed in association with the Scottish Chamber Orchestra;

Ruchazie Ruchazie: Fablevision's project turned a whole street into a theatre, using its houses and inhabitants as backcloth and cast.

One Plus: drama and video workshops and performances undertaken by lone parents;

Linthaugh Theatre Group: a theatre group of mixed able bodied and disabled people whose productions were aimed at raising public awareness of social needs for physically handicapped people.

(b) Skills

3.34 Many of the social work projects were centred on gaining and using skills through cultural projects. Some skills were acquired as vital supports for performances or presentations (e.g. in graphics, costumes, lighting). Others were indirect spin-offs: creative writing leads to word processing and publishing techniques. Another strand of work related simply to ensuring that expeditions out from centres and home took place to museums, theatres or street events. Full use was made of special ticketing arrangements to enable a large number of individuals and groups to gain access for the first time to theatrical events.

(c) Training

3.35 Extensive efforts were made to train staff in a variety of art forms and applications in care. Courses included:

music as a form of communication and expression for the profoundly handicapped;

visual art as a means of helping individuals suffering from dementia;

movement therapy techniques for children with severe blocks in verbal communication;

theatre skills for social work staff.

Figure 15 Strathclyde Social Work Department City of Culture projects: by area

	Number of grants
Argyll/Bute/Clydebank/Dumbarton	20
Glasgow North East	16
Glasgow North West	36
Glasgow South East	11
Glasgow South West	24
Hamilton/East Kilbride	22
Inverclyde	22
Monklands/Cumbernauld	17
North Ayr	19
Renfrew	4
South Ayrshire	16
Headquarters	49
Total	267

Source: Strathclyde Regional Council.

F. PRIVATE SECTOR SUPPORT

(i) Types of contribution

- 3.36 The financial contribution of the private sector to Glasgow's arts events and attractions during 1990 was valued at £6.46 million. The figure covers a range of different kinds of private sector contributions. Included are income from business sponsorship, trusts, corporate and individual giving and some aspects of in-kind support.

Figure 16 Private contributions to City of Culture events and attractions: by type, 1990

	£ thousand
Business sponsorship	4,316 ^a
Charitable trusts	128
Corporate donations (Festivals Office)	144
Other private giving ^b	939
	5,527
BSIS awards	446
In kind giving (via Festivals Office)	488
	6,461

^a Includes £423,000 corporate memberships.

^b Friends, endowment income, donations.

3.37 Business sponsorship (business giving for commercial benefit) was the principal source, accounting for some £4.32 million. This figure includes business expenditure on various corporate memberships and club schemes amounting to £443,000. Apart from sponsorship in cash, 1990 attracted significant levels of sponsorship in kind. In kind support routed through the Festivals Office alone totalled an estimated £0.488 million (from 38 companies). It is clear that in kind support was widely given directly to arts organisations and institutions. For example, Scottish Ballet estimated its in kind support at £131,000, but figures on this are not generally available.

3.38 The Festivals Office set up a central fund for corporate donations which attracted £128,000 from 28 donors paying £3,000 each and 68 subscribing £500 each. Some nine charitable trusts gave a total of £114,000 towards specific projects of which the Hugh Fraser Foundation was perhaps the most generous. Finally, other forms of private support, including income from donations, friends organisations and endowments amounted to £0.939 million. The figure includes substantial contributions to the Glasgow Film Theatre's capital programme.

(iii) Company involvement

3.39 Overall perhaps some 340-350 companies made contributions to Glasgow 1990. Recorded sponsors numbered some 218, 180 in cash and 38 in kind. Corporate membership (Scottish Opera, Scottish Ballet and the Royal Scottish Orchestra) involved a further 35 companies. Some 96 firms supported the donors/benefactors scheme. Looked at in relation to the membership of Glasgow's Chamber of Commerce, the corporate contributors to Glasgow 1990 represented upwards of 10 per cent of Glasgow's business community. Larger Scottish companies were particularly well represented in the lists of supporters, especially companies headquartered in Glasgow.

3.40 Figure 109 analyses companies making "substantial" sponsorship commitments (upwards of £3,000 in cash or kind). The largest group (some 20 per cent) was

drawn from banking and financial services. The manufacturing sector at 17 per cent of the total was another significant contributor. Utilities, property, media, retail, each represented between 10 and 13 per cent of the total. A point of some significance is the relatively poor representation of the hotel/catering trade at 3 per cent of the total and, with one notable exception, their contributions were confined to in-kind support. It was a significant breakthrough in sponsorship terms to find some 7 per cent of the companies in the £3,000 plus group drawn from the professional services sector (solicitors, quantity surveyors, lawyers, etc.), including a number of relatively small firms.

Figure 17 Sponsors of arts events and attractions: by business sector, 1990

	Percentages		
	Cash*	Kind*	All
Finance	23	-	20
Utilities	10	11	10
Manufacturing	15	-	13
Beverages	15	32	17
Property	8	16	9
Media	9	5	9
Catering, hotel	1	21	3
Retail	11	16	11
Professional	8	-	7
All	100	100	100
Base (number of companies)	131	19	150

* Companies spending > £3,000 cash or kind.

- 3.41 Companies contributing sponsorship in excess of £100,000 (some 15 in number) accounted for over half the total value of 1990 sponsorship (56 per cent). The average value of individual projects at £28,671 was similar to that provided by companies in the £30-99,000 range. In fact, the top 30 sponsors (16 per cent of the total) accounted for 75 per cent of the total sponsorship value. The most common level of commitment was in the £3-9,000 range (36 per cent of sponsors) with sponsorships averaging £4,304.

Figure 1B Business sponsorship of arts events and attractions: by size of sponsorship, 1990

Percentages and £

	Companies number (%)	Sp'shps number (%)	Value sp'shp (%)	Average value of spon (£)
Total sponsorship				
> £100k	8	27	56	28,671
£30k-£99k	8	11	19	25,000
£10k-£29k	22	21	15	10,136
£3k-£9k	36	25	8	4,304
< £3k	25	16	2	1,500
All	100	100	100	13,993

3.42 Of the 15 top sponsors, 6 were in beverages and 3 were in the financial services sector. Most of these companies took a portfolio of sponsorships across a spectrum of activity. The banks tended to spread their money (25 sponsorships averaging £15,280), expressing wide ranging commitment in this way. The beverage companies went for larger individual sponsorships with targetted marketing objectives in mind. The Whyte & Mackay major sponsorship of the Age of van Gogh is a case in point. Other beverage company sponsors included Guinness, Tennents, Teachers and Black Bottle.

Figure 19 Business sponsorship of arts events and attractions: companies spending > £100,000, 1990

Number, £ thousand and £

	Companies (number)	Sp'shp (number)	Sp'shps (£'000)	Average value of spon (£)
Beverages	6	21	899	42,810
Utilities, power	4	26	696	26,770
Finance	3	25	382	15,280
Other*	2	4	202	50,050
Total	15	76	28,671	2,179

* Media, construction.

(iii) Allocation

3.43 The allocation of business sponsorship support is summarised in Figure 112. Whilst £2.95 million went to the established arts institutions and organisations, some £1.37 million (or 43 per cent of the total) was devoted to centrally-initiated 1990

projects and other aspects of the 1990 celebrations. In terms of art forms, the performed arts attracted over half (£2.77 million) museums, galleries and visual arts drew £0.95 million; and other aspects of the 1990 celebrations attracted £0.6 million. The latter included youth/amateur projects and support for community programmes, but the major part went to 1990 celebrations, such as Hogmanay, Kite Festival, Balloon Festival and Glasgow All Lit Up. 1990 official projects in the performed arts attracted some 17 sponsorships amounting to £508,000, including the Ship, the opening of the Glasgow Royal Concert Hall and the International Orchestra Series. In terms of exhibition projects, Glasgow's Glasgow and the Dome of Discovery together with various independent exhibitions (especially in the field of architecture) attracted sponsorship valued at £397,000.

Figure 20 Business sponsorship of arts events and attractions: by purpose, 1990

	£ thousand	Number of sponsorships
Theatres, halls, ensembles	2,258	155
Museums, galleries, visual arts	690	71
1990 special projects		
Performed arts	508	17
Exhibitions, visual arts	263	13
Community, youth, sport, etc.	236	29
Celebrations*	<u>361</u>	<u>9</u>
All	1,366	681
Total	4,316	294

* Hogmanay 1989, Gala Opening, etc.

- 3.44 The performed arts institutions and organisations received £2.26 million support. The majority of this went to the Glasgow-based national companies (Scottish Opera, Scottish Ballet, Royal Scottish Orchestra) and established festivals (Mayfest and Glasgow International Jazz Festival), which accounted for 70 per cent of the total. For the rest, concerts were very popular projects. Sponsorships for Scottish Chamber Orchestra projects in Glasgow included here. The Glasgow Philharmonic Orchestra, BBC Scottish Symphony Orchestra and Early Music Consort drew significant sponsorship and by the same token the concert halls (RSAMD and RCH) were successful in the sponsorship field. Little sponsorship went to producing theatres, receiving theatres and independent theatre companies, apart from the Scottish Youth Theatre which attracted sponsorship of some £59,000.

Figure 21 Business sponsorship of the performed arts: by type of recipient, 1990

	£ thousand	Number of sponsorships
Producing theatres	4 *	2
Scottish Opera/Ballet	1,171	17
Musical ensembles	386	52
Independent companies	31	2
Receiving theatres	-	-
Small venues/arts centres	155	12
Halls	150	15
Film theatre	28 *	3
Promoters/festivals	<u>333</u>	<u>65</u>
	2,258	155
1990 projects ^b	508	17
Total	2,766	172

* Excludes capital projects.

^b Includes The Ship, World Orchestras, opening of RCH and Dance Gala.

3.45 The Glasgow Art Gallery and Museums achieved significant sponsorship of temporary exhibitions at the Burrell and the newly opened McLellan Galleries. This formed the bulk of their £410,000 sponsorship. Independent museums and galleries accounted for most of the remaining visual arts sponsorship, with the Collins (£32,000), and Compass (£27,000) achieving significant support. The Charles Rennie Mackintosh Society won sponsorship of £38,000 for its particular celebrations.

Figure 22 Business sponsorship of museums, galleries, visual arts: by type of recipient 1990

	Value (£ thousand)	Sponsorships (number)
Glasgow Art Gallery & Museums	410	25
Other local authority museums	14	6
Independent	56	9
Galleries	<u>91</u>	<u>19</u>
	571	39
Exhibitions ^a	119	12
Official 1990 projects ^b	263	13
Total	<u>953</u>	<u>64</u>

^a Independently generated, including architecture, sculpture.

^b Glasgow's Glasgow, Dome of Discovery.

(iv) ABSA/BSIS

3.46 The ABSA/BSIS Scheme made 43 awards to Glasgow in 1990 worth £446,000. This related to sponsorship valued at £965,000. Some £25,000 went to Scottish Ballet in respect of £235,000 sponsorship for touring outwith Glasgow. Another award was to the Glasgow School of Art in relation to a sculpture commission for Falkirk. The BSIS awards related to the Glasgow 1990 programme can be numbered at 40 and were valued at £396,000.

3.47 Some 35 of the awards were for companies undertaking first time sponsorship, which totalled £424,000. The Scottish Ballet touring sponsorship referred to above (£235,000) also qualified for the first-time award. The new 1990 money resulted mainly from initiatives on the part of smaller organisations and was distributed widely across the cultural system. Only two of the national companies (the RSO and SCO) were involved. They were responsible for 7 per cent of the total. The museums and galleries share was 28 per cent, of which the McLellan attracted the single largest first-time sponsorship (£80,000) from the Lilley Group plc. The 1990 centrally-initiated projects were responsible for 25 per cent of the new money qualifying for BSIS awards. The Ship attracted £50,000 from a first-time sponsor, GEC Scotland.

(v) Effect of 1990

3.48 Since there are no comprehensive sponsorship figures available on 1989, the overall sponsorship effect of 1990 is not easy to assess. But it is fairly clear that the benefits of increased 1990 sponsorship were not felt mainly by the established performed arts institutions and organisations. Though there were instances of major

sponsorships agreed specifically because of 1990, the Scottish national companies based in Glasgow saw their Glasgow sponsorships fall from (£653,000 in 1989) to (£651,000 in 1990). (If the Scottish Ballet touring sponsorship is included, the 1990 figure rises to £908,000.) Mayfest was another established institution for whom sponsorship income fell from £163,000 in 1989 to £144,000 in 1990. Corporate membership schemes for the established companies appear to have fared better than pure sponsorship, with, for example, especially strong growth experienced by Scottish Opera (1990/91).

- 3.49 One source of trend data on sponsorship is the Scottish Arts Council (SAC), which collects an annual return from its clients on their receipts from the business sector. They show that SAC's Glasgow-based clients attracted £2.23 million of sponsorship in 1990/91, up 20 per cent on the previous year. As explained above, the growth in "sponsorship" of the Glasgow-based national companies was mainly an effect of Scottish Ballet's exceptional success with sponsorship for its Far Eastern tour and marked growth in income from corporate memberships.

Figure 23 Business sponsorship of the arts: Scottish Arts Council clients, in Glasgow and rest of Scotland

	£ thousand			
	1986/87	1988/89	1989/90	1990/91
Glasgow based				
National companies	359	1,169	1,352	1,635
Other clients	160	585	502	598
All Glasgow	519	1,754	1,854	2,233
Rest of Scotland	782	1,231	1,586	1,274
All	1,301	2,983	3,440	3,507

Source: Scottish Arts Council.

- 3.50 The PSI study put the private sector contribution to the arts at £1.16 million in 1985/86. This can be roughly compared with the £5.53 million for 1990 (excluding in kind giving and BSIS awards). According to the PSI, study business sponsorship accounted for 46 per cent of private support; the equivalent figure for 1990 was 78 per cent. Whilst patronage has virtually doubled in cash terms since the mid 1980s, sponsorship had grown eightfold.

F. SUMMARY

- 3.51 Glasgow's year as European City of Culture was the occasion for realising a number of capital projects in the region. It is difficult to isolate the schemes and funding initiatives which were specific to Glasgow 1990. Some of the schemes might have been undertaken without the City of Culture celebrations, perhaps at a different time. Spending on these schemes, including the Glasgow Royal Concert Hall (£29.4

million), the McLellan Galleries (£5.8 million) and the Scotland Street School (£1.3 million), amounted to some £43 million.

- 3.52 Extra revenue spending specifically related to the City of Culture programme totalled £32.7 million. This was overwhelmingly contributed by the two responsible local authorities, GDC (£19.3 million) and SRC (£12.8 million).
- 3.53 The bulk of the revenue spending went on programming at £26.9 million. Other sums were allocated to marketing (£4.9 million) and administration, information and public relations (£0.9 million). Specific areas of programme expenditure were community events and celebrations (£5.05 million), social work/education programmes (£3.7 million) and the main arts programme (£18.1 million).
- 3.54 Arts programme spending on events occurring during 1990 was £16 million. Other spending was devoted to pre-1990 programmes, much of which was related to developing Tramway as a venue. Strathclyde Regional Council's pre-190 programme included the Strathclyde Summer Seasons at the Citizens Theatre, the first of which took place in 1988.
- 3.55 Over half the main programme expenditure (£8.5 million) went on centrally-initiated projects. Major items (£0.5 million plus) included the Bolshoi at SECC, Tramway, The Ship, Sinatra at Ibrox and Glasgow's Glasgow. Direct grants to the established Glasgow-based institutions for enhanced programming during the Year amounted to £2.3 million.
- 3.56 Some 470 other grants were given to independent projects, many on a small scale, responding to commissions and creative initiatives from individual artists and a host of small independent companies. Some independently generated exhibitions and productions fed into the programming of Glasgow's venues, including Tramway. The sum allocated to the independent projects was £5.2 million in 1990.
- 3.57 The revenue funding of Glasgow 1990 needs to be considered against the background of "regular" revenue support provided by local authorities and other public agencies on an ongoing basis. This amounted to £19.7 million from all local authority sources in 1990/91 and the Scottish Arts Council contributed an estimated £8.9 million to Glasgow-based organisations in the same year.
- 3.58 The main local authority provider of "regular" funding was Glasgow District Council, whose contribution was £17.4 million in 1990/91, excluding spending on libraries. The figure represented a major increase from 1989/90. This related to extra spending on external grants (mainly the Glasgow Royal Concert Hall) and a 27 per cent cash rise in spending by the Museums and Art Galleries Department.
- 3.59 Private sector support of Glasgow 1990 was valued at £6.1 million. The figure covers business sponsorship in cash (£4.3 million) and in kind, income from trusts and corporate/individual charitable giving.
- 3.60 Some 43 per cent of the business sponsorship was devoted to the centrally-initiated 1990 projects, community programmes and celebrations. The established institutions and organisations received £2.9 million, of which £2.3 million went to theatres, halls and ensembles and £0.7 million to museums and galleries. The sponsorship benefits of 1990 were not felt mainly by the established performed arts institutions.

- 3.61 Perhaps 340-350 businesses made contributions to Glasgow 1990. A significant development was the 7 per cent of companies in the £3,000 plus group drawn from the professional services sector, including a number of relatively small firms/partnerships.
- 3.62 The level of business community involvement in Glasgow's arts organisations and institutions must be seen as rather exceptional in a British context. Glasgow 1990 acted as a catalyst for further involvement. New sponsors were encouraged with some 35 companies receiving ABSA awards for undertaking sponsorship of the arts for the first time during the Year.

4. EVENTS AND ATTENDANCE

A. NUMBER OF EVENTS

(i) Market stimulation

- 4.1 Glasgow 1990 represented a major opportunity for the region and its visitors to enjoy an expanded array of activities in the cultural field. It was also a test of the market's ability to respond to significant programming extensions and promotional stimulation. Because of Glasgow 1990's all-encompassing approach, the dimensions of the Year's activities are not easy to define. We have tried to do this by drawing comparisons with equivalent events and attractions in 1989 as a base year.

(ii) Exhibitions

(a) Museums and galleries

- 4.2 Museums and galleries in the Glasgow region presented some 360 temporary exhibitions during 1990. This can be compared with 231 shows in the equivalent institutions and organisations during the previous year and represents a 56 per cent increase in activity. Furthermore, there were important developments in the scale and significance of exhibitions presented during the Year. For the first time, the Burrell promoted major national and international loan exhibitions. As a new facility, the McLellan mounted five major exhibitions.

Figure 24 Temporary exhibitions in museums and galleries: by content, 1990

	Number			
	Fine art	Decorative art	Other	Total
Burrell	4	-	1	5
Kelvingrove	30	19	5	54
McLellan Galleries	4	1	-	5
Other Glasgow City sites	-	1	27	28
Other local authorities	33	6	23	62
Independent museums	21	7	14	42
Specialist galleries	132	7	10	149
Tramway	15	-	-	15
All	239	41	80	360

- 4.3 Some 239 of the shows were devoted to fine art subjects, 41 to the decorative arts and the remainder to other areas. The biggest increase in the number of temporary exhibitions was in Kelvingrove where 45 more shows were presented in 1990 than

in the previous year. Major increases in activity were indicated by the independent museums, up from 21 to 41 exhibitions, and the other local authority museums which undertook 55 per cent more exhibitions during 1990.

Figure 25 Temporary exhibitions in museums and galleries: growth of programme

	Number and percentage		
	Number of exhibitions 1989	1990	Percentage difference
Burrell	1	5	+400
Kelvingrove	29	54	+86
McLellan Galleries	n.a.	5	n.a.
Other Glasgow City sites	17	28	+65
Other local authorities	40	62	+55
Independent museums	21	42	+100
Specialist galleries	122	147	+20
Tramway	1	15	n.a.
All	231	360	+56

- 4.4 Temporary exhibitions in the specialist galleries showed a more modest increase of 20 per cent from 122 in 1989 to 149 in 1990. In these galleries, the volume of programming was already intensive in 1989. Transmission, Open Circle and the Third Eye chose to mount fewer shows during 1990, though in some cases they were on a more ambitious scale. The Tramway provided the main source of 1990 growth in contemporary exhibitions, up from one in 1989 to 15 in 1990.

(b) Other exhibitions

- 4.5 These figures do not take account of activities outside the specialist institutions. For example, exhibitions of some significance were held in the Stirling's Library and in the Mitchell Library. Exhibitions were also mounted in other kinds of venues (e.g. theatres, concert halls). The returns showed 69 exhibitions in this category, though the figures are unlikely to be comprehensive.

(iii) Other programmes at museums and galleries

(a) Opening hours

- 4.6 The public aspect of museums and galleries developed in other ways during 1990. For example, the District Council provided additional finance to extend the opening hours of their own sites (selected evenings and earlier Sunday opening) and at the Hunterian Museum and Hunterian Art Gallery (Saturday afternoons and Sundays).

(b) Events

- 4.7 Museums and galleries reported huge programmes of other events during the Year. There were some 326 workshops/lectures, 158 performances and 156 amateur and other events, a total of 640 compared with 318 in 1989. Specific attendance at these events rose from a recorded 67,259 to 167,045. The traditional Kelvingrove organ recitals were extended and drew a major public. The local authority institutions were the main centres of these activities. Six specialist galleries hosted lectures/workshops/ residencies. Three presented literary events and Transmission showed 8 films.

(c) Education and special needs

- 4.8 The majority of museums operated educational programmes before 1990. The 1990 figures show that the level of work was sustained with significant increases in the number of visits from schools and colleges. Some 28 museums and galleries (out of a total of 30) received special visits from schools and colleges during 1990. All the local authority museums (except Rutherglen) arranged programmes of this kind. Holiday programmes for young people were available in 13 museums. Sessions for special needs/minority groups were provided by fewer museums; 12 institutions reported involvement in this kind of activity.

Figure 26 Museums and galleries offering education programmes: by type of institution, 1990

	Number of sites		
	School visits	Holiday programmes	Special needs groups
Glasgow City Museums & Art Galleries	8	5	4
Other local authorities	6	3	2
Independent museums	10	3	3
Specialist galleries	4	2	2
All	28	13	12

- 4.9 School visits increased by over 1,000 during 1990. In contrast, sessions at holiday programmes declined (down 14 per cent), while social/minority group sessions saw a modest increase (up 3 per cent). The bulk of school visits were made to major institutions, especially the social and economic history museums. Haggs Castle was very active in providing holiday programmes (numbering 203 sessions in 1990).

Figure 27 Museums and galleries: educational programmes, by type of event

	Number of events/sessions		Percentage difference
	1989	1990	
School visits	3,500	4,537	+ 30
Holiday programmes	300	258	-14
Special needs group sessions	204	211	+ 3
All	4,004	5,006	+ 25

- 4.10 In addition to the established sites, the 1990 centrally initiated projects were very active in the broader areas of animation. Glasgow's Glasgow operated a studio theatre (the Arches) for the duration of the exhibition. The Dome of Discovery presented a handful of performances (1 dance and 8 light entertainment events). Holiday programmes (science shows) were an area of particular focus in the Dome; it presented 228 holiday programmes and received visits from 501 school parties. Some 12 sessions were arranged for special needs/minority groups. In addition to the school parties, which were particularly numerous (2,672), Glasgow's Glasgow provided 18 holiday programmes and 32 sessions for special groups.

Figure 28 Museums and galleries: school visits, by institution, 1990

	Number of parties/groups
Burrell Collection	400
Kelvingrove	750
McLellan Galleries	600
Other Glasgow City Council sites	2,020
Other local authorities	174
Independent museums	375
Specialist galleries	218
	4,537
1990 projects	3,173
All	7,710

(iv) Theatres and halls: performances

(a) Total

- 4.11 As for theatres and halls the returns show 3,961 performances taking place within the framework of Glasgow 1990. The figure covers the principal theatres (producing, receiving and small), arts centres, concert halls and 1990 central projects (e.g. The Ship). In comparison with equivalent activities in 1989, when some 2,999 performances were mounted, there was a 32 per cent increase in the number of events in 1990. This meant that theatre/concert performances averaged 10.9 per day for the entire 12-month period.

Figure 29 Theatres and halls: performances by type of organisation

Number and percentages			
	Number of performances 1989	1990	Percentage difference
Producing theatres	597	611	+ 2
Scottish Opera/Scottish Ballet*	81	83	+ 2
Receiving theatres	559	593	+ 6
Small venues/arts centres/ indep.co's ^b	1,221	1,351	+ 11
Concert halls/promoters	276	707	+156
Other festival activities	164 ^c	164	-
1990 projects ^d	101	452	+348
All ^e	2,999	3,961	+ 32

* Main-scale companies and Glasgow performances only.

^b Small venues/arts centres 577 in 1989 and 1,139 in 1990.

^c Estimate.

^d Tramway, Arches, Bolshoi, The Ship and Sinatra.

^e Excluding Scottish Mask and Puppet Centre which presented 164 performances in 1989 and 341 in 1990; additionally, the Glasgow Film Theatre was responsible for 924 showings in 1989 and 840 in 1990.

(b) Music

- 4.12 The 1990 increase in concerts was partly attributable to the opening of the Glasgow Royal Concert Hall where some 170 performances were given, of which a small number (mainly the RSO and some SCO concerts) could be regarded as transfers from the City Hall. In fact, the City Hall presented more concerts in 1990 than in 1989. 1990 also brought new festivals (International Early Music, Chorus International) and a more expanded role for a new promoter (Westbourne Music) making use of unusual venues. The Glasgow University concert series expanded and the small halls all saw increased activity, with Henry Wood up 23 per cent and the RSAMD presenting 252 concerts during the Year. Whilst the SCO, the RSO and the

BBC SSO each used the new concert hall, the latter two presented fewer concerts overall in Glasgow during 1990 than in 1989.

(c) Theatre

- 4.13 The major drama companies maintained activity at usual levels during 1990, whilst smaller venues in conjunction with independent companies eagerly exploited expanded opportunities. Arts centres and small venues were generally a growth area in the theatre. Third Eye and the Athenaeum were notably more active during 1990. On the other hand, the Citizens played rather few performances in 1990 than in 1989 (295 as opposed to 326); this included the third year of the Citizens Theatre Strathclyde Summer Season. Receiving theatres showed some 6 per cent growth in performances, which was attributable to increases at the King's up from 213 to 248 performances (including Scottish Ballet) in 1990. Scottish Opera and Scottish Ballet operated at their usual level during the Year, though with enhanced artistic content. The Theatre Royal enjoyed special programming during 1990 including the Five Theatres of the World Season (26 performances) and various guest dance and opera seasons (20 performances).

(d) Centrally-initiated projects

- 4.14 Of the centrally-generated projects, Tramway was a main space for special projects with an international flavour during 1990. The public for this venue was gradually developed with the Mahabharata performances in 1988 and 101 performances in 1989 (including Peter Brook's Carmen). There were 224 Tramway performances in 1990. These included Communicado Theatre Company's production of Jock Tamson's Bairns and Peter Brook's Tempest. The Scottish Chamber Orchestra, the Scottish Early Music Consort and Scottish Opera all found the space suitable for music theatre projects. As for other central projects, The Ship played 56 performances and the Bolshoi visit to the SECC involved 6 performances. The Arches, a performance space within Glasgow's Glasgow, presented 165 performances. The centrally-initiated projects totalled 452 performances in 1990.

(v) Theatres and halls: education programme

- 4.15 The level of educational activity undertaken by the-performed arts organisations increased substantially during 1990. This was built on the base of existing work. Scottish Opera and Scottish Ballet operate well-established specialist units devoted to this work. The Citizens robustly commits its entire corporate rationale to the centre ground of expanding access and artistic appreciation for all. Other companies have a specific educational brief such as TAG and the Scottish Youth Theatre. The Scottish Chamber Orchestra pioneered some of the most original and influential educational activity around the Strathclyde concertos commissioned from Peter Maxwell Davies.

Figure 30 Theatres and halls: educational programmes, by type of organisation, 1990

	Number of events				
	Workshops, visits	Special performances	Holiday progs	Special needs groups	All
Producing theatres	-	10	-	3	13
Scottish Opera/Scottish Ballet	233	189	3	220	645
Music ensembles	68	48	36	111	63
Other venues*	28	104	80	167	379
All	329	351	119	401	1,200

* Including 1990 centrally-initiated projects.

- 4.16 Educational events of all types increased by 43 per cent from 1989 to 1990. Holiday programmes expanded seven-fold. Special needs groups (up 43 per cent) and workshops/visits (up 24 per cent) were other growth areas. Some of the centrally-initiated projects incorporated educational work, as in *The Ship* and *Tramway*. Educational posts were funded at the Theatre Royal in relation to the special 1990 seasons presented there and an education post was created at the Glasgow Film Theatre.

Figure 31 Theatres and halls: educational programmes, by type of event

	Number of events/sessions		Percentage difference
	1989	1990	
Workshops/visits	265	329	+ 24
Special performances	331	351	+ 6
Holiday programmes	17	119	+ 600
Special needs groups	229	401	+ 43
All	842	1,200	+ 43

(vi) Community events

- 4.17 Glasgow District Council supplied statistics on community events in the Glasgow City area during 1990. Events may be widely defined and not all exhibitions, workshops, community galas, neighbourhood festivals and street pageants were counted in the figures. Many of Strathclyde Regional Council's social work and education projects were community events. According to the City, some 465

recorded events were organised by community groups. These included 99 theatre projects involving 783 performances, and 88 music projects leading to 240 performances. Overall, performances numbered 1,199 which together with exhibitions, workshops, local galas and other events gave a total for 1990 community activities of 1,399.

- 4.18 In addition, note should be taken of the professional events which targetted aspects of community involvement in their programmes. They included "Call That Singing" (an introduction to mass choral singing) and StreetBiz. The following projects were jointly funded by SRC and GDC:

	Number of events
Spirit of the City	35
Call That Singing	33
Street Biz	20
Big Noise	82
Glasgow International Folk Festival	24
Glasgow International Jazz Festival	30
Mayfest	194
All	618

- 4.19 The sports programme of Glasgow 1990 was planned on the principle that there should be "something for everyone". The aims were to provide:

- a range of world and European sports events in recognised popular sports;
- an opportunity for governing bodies of sport to bid for events at world and European levels with financial assistance and support from the City;
- a unique range of sporting events at British and Scottish national level to allow athletes at this competitive level additional events to gain experience on home soil; and
- a large range of participatory, learning, coached and fun sport and leisure events for all target groups in Glasgow, with particular emphasis on disabled, ethnic, children, women, senior citizens.

A number of themes were pursued during the Year including track and field, American games, sports clinics, racket sports, fitness, outdoors and disablement. In addition to the established annual Glasgow events (e.g. the Great Scottish Run), new events were attracted to the City (e.g. European Special Olympics). Among events originated by the Festivals Office were British Junior Basket Ball, Highland Games of Strength and Clyde Sail '90. The Festivals Office identified 195 events taking place during the Year, 33 "World and European events", 49 "GB and Scottish level events" and 113 "local level events", district and participatory in nature.

(vii) Events summary

4.20 Events and activities described in this section may be summarised as follows:

Number of events/activities	
Main programme	
Performances	3,961
Exhibitions	<u>429</u>
Total	4,390
Education/special needs	
Museum programmes	53
Theatre/ensemble performances, workshops	1,200
Education Department projects	660
Social Work Department projects	<u>267</u>
Total	2,180
Community events, etc.	
Community organised	1,399
Professional input	618
Sport	<u>195</u>
Total	2,212

• School visits totalled 7,710.

4.21 It would be tempting to sum these figures and arrive at an estimate for total activity during 1990. This would be a misleading procedure, mainly because it involves adding together activities of differing kinds and sizes.

B. ATTENDANCE 1990

(i) Glasgow 1990 arts attendance

4.22 Glasgow 1990's main arts programme attracted 6.59 million attendance. Some 4.86 million admissions (74 per cent of the total) were for museums, galleries and the visual arts. Attendance at theatres and concerts, a smaller market (26 per cent of the total), was 1.74 million. These figures do not include attendance at community events, celebrations, etc, which are considered below.

(ii) Pre-1990 comparison

4.23 The 1990 attendance represented a massive 39.6 per cent increase on the 1989 figure. Market growth in museums/galleries (39.2 per cent) was slightly less than in theatres and concerts (40.5 per cent). The surge in attendance to 6.59 million in 1990 compares favourably with what had been a modest upward movement from 4.39 million in 1986 to 4.72 million in 1989. Between 1985/86 and 1989 attendance at museums and galleries in Glasgow had risen 9 per cent and admissions to theatres and concerts increased by 4 per cent, an overall growth in the arts market of 8 per cent.

Figure 32 Attendance at arts events and attractions

	Thousand		
	1986 ^a	1989	1990
Museums, galleries	3,207	3,488	4,856
Theatres, halls	1,184	1,237	1,738
Total ^b	4,391	4,725	6,594

^a FY 1985/86.

^b Excludes pop, rock, folk, jazz, commercial cinema, street entertainment, free events, amateur presentations.

Figure 33 Attendance at arts events and attractions: market growth

	Percentage change	
	1986 - 1989	1989 - 1990
Museums, galleries	+9	+39
Theatres, halls	+4	+40
Total	+8	+40

(iii) Comparison with rest of Britain

4.24 The surge in the Glasgow 1990 market can be compared favourably with the uncertain trading environment for attractions in the rest of Britain. Some key comparisons of visitor numbers were:

	Percentage change 1989-1990
UK Tourist attractions ^a	+ 4
UK museums and galleries ^a	+ 6
London West End theatre ^b	+ 3
Provincial theatre ^c	-11
Scottish building based drama companies ^d	- 3
King's Theatre Edinburgh ^e	6
Edinburgh International Festival ^f	-13

- ^a Visits to Tourist Attractions 1990, BTA; figures relate to all attractions.
- ^b Box Office Data Report 1990, SWET.
- ^c Theatrical Management Association; April-May 1991 compared with 12 months previously.
- ^d Scottish Arts Council; FY; excludes Royal Lyceum Edinburgh (closed for refurbishment September 1990).
- ^e Edinburgh District Council.
- ^f Edinburgh International Festival.

C. MUSEUMS, GALLERIES, EXHIBITIONS

(i) 1990 projects

4.25 Figure 34 shows attendance at Glasgow's museums/galleries rising from 3.2 million in 1986 to 4.9 million in 1990. Extra attendance in museums/galleries during 1990 amounted to 1.37 million (see Figure 35) compared with 1989. Exhibitions in the refurbished McLellan Galleries drew a total attendance of 129,731. The main shows were:

	Attendance
British Art Show	17,894
Glasgow's Great British Art Exhibition	20,264
Art Machine	46,585
Scotland Creates	35,358

The centrally-initiated projects accounted for 647,000 admissions as follows:

	Attendance
Glasgow's Glasgow	507,000
Dome of Discovery	85,000
Tramway exhibitions	55,000

4.26 The 1990 features (the new McLellan, together with the central projects) accounted for 57 per cent of the attendance growth in museums/galleries during 1990. The rest of the expansion was achieved by the established institutions and organisations.

Figure 34 Museums and galleries attendance

	Thousand		
	1986	1989	1990
Burrell Collection	1,050	497	879
Kelvingrove	806	1,041	1,017
Other Glasgow City sites	790	1,314	1,363
Other local authorities sites	130	116	111
Independent museums	187	285	420
Specialist galleries	194	235	288
McLellan Galleries	50	-	130
1990 central projects*	n.a.	2	647
All	3,207	3,488	4,856

* Tramway, Glasgow's Glasgow, Dome of Discovery.

(ii) Progress of institutions

- 4.27 The specialist galleries (excluding the commercial galleries) saw an 18 per cent growth in attendance during 1990 which continued the expansion of the late 1980s. The Collins (51,000), Compass (39,000) and Third Eye (104,000) had particularly successful years. The gallery public, which had totalled 194,000 in 1985/86, was almost two and a half times larger (473,000) (including the McLellan and Tramway) in 1990.
- 4.28 An area of even stronger growth was the independent museums which increased their overall attendance by 47 per cent in 1990. The Hunterian Art Gallery (up 80 per cent to 108,641) and the Hunterian Museum (up 90 per cent to 67,167) showed very significant gains.

Figure 35 Museums and galleries: attendance gains and losses

Percentages and thousand

	Percentage change		1989-90 gain/loss
	1986-89	1989-90	(thousands)
Burrell Collection	-53	+77	382
Kelvingrove	+29	-2	-24
Other Glasgow City sites	+66	+4	49
Other local authorities sites	-11	-4	-5
Independent museums	+52	+47	135
Specialist galleries	+21	+18	53
McLellan Galleries	n.a.	n.a.	130
1990 central projects*	n.a.	n.a.	647
All	+9	+39	1,368

* Tramway, Glasgow's Glasgow, Dome of Discovery.

4.29 The Burrell attendance almost returned during 1990 to the high levels attained when it originally opened. The year saw extra attendance of 382,000, representing a 77 per cent increase on 1989. This was much stimulated by the new programme of temporary exhibitions, though attendance figures for each exhibition are not available separately. With 879,000 attendance, the Burrell was still 171,000 short of the 1986 peak and remained second to Kelvingrove, the most attended museum in Scotland, in terms of its overall appeal. Kelvingrove experienced a 2 per cent fall to 1.017 million in 1990 but basically held on to the substantial gains of the late 1980s.

4.30 The other Glasgow District Council museums experienced a modest 4 per cent growth in attendance up to 1.363 million. Within this figure the two big attractions had a contrasted year. Whilst the Peoples' Palace (467,000) jumped 116,000 on 1989, the Museum of Transport (536,000) fell 98,000.

4.31 Other local authority museums in the Glasgow region (e.g. Paisley, Lillie) could not compete with the central attractions. As a group, they saw attendance fall during 1990 from 116,000 to 111,000, which continued the gentle decline experienced during the late 1980s.

D. THEATRES, HALLS, ENSEMBLES

(i) 1990 features

4.32 Within the performed arts market of 1.738 million, the 1990 features contributed some 393,000 attendance (including centrally-initiated projects 159,000 and the Glasgow Royal Concert Hall 179,000). This represents 23 per cent of the total performed arts market in 1990.

Attendance details of the central projects were as follows:

	Attendance	Performances	Average attendance
The Ship	36,000	56	642
Bolshoi	27,000	6	5,400
Tramway performances	70,000	224	312
Arches	18,000	165	109
Sinatra	8,000	1	8,000
Total	159,000	452	352

- 4.33 Attendance at the World Orchestra Series (promoted by the Festivals Office) at the Glasgow Royal Concert Hall) is included in the "concerts" in Figure 36. The details were:

	Attendance	Performances	Average attendance
Berlin Philharmonic	6,341	3	2,114
Bolshoi Orchestra	2,275	1	2,275
Orch of Age of Enlightenment	1,364	1	1,364
London Philharmonic	2,069	1	2,069
Leipzig Gewandhaus	4,218	2	2,109
Israel Philharmonic	2,296	1	2,296
Orchestra de Paris	3,962	2	1,983
Total	22,525	11	2,048

- 4.34 As another aspect of concert market growth, attendance at Pavarotti and the Rolling Stones further added roughly 55,000 to the year's gain. These events were commercially promoted.

- 4.35 Mention should also be made of the special 1990 international programming at the Theatre Royal. The attendance for this season is included under "receiving theatres" in Figure 36. The individual details were:

	Attendance	Performances	Average attendance
Five Theatres of the World	3,207	26	123
Dance Season	3,353	11	305
The Stuttgart Ballet	3,807	4	952
Glyndebourne Opera	4,509	5	902
Total	18,436	46	401

(ii) Progress of institutions

- 4.36 Within the established theatrical organisations, the small venues and arts centres saw their market expand by 44 per cent in 1990. This extended the considerable growth which the sub-sector experienced in the late 1980s (58 per cent from 1986 to 1989, see Figure 38).

Figure 36 Theatres and concerts: attendance*

	Thousand		
	1986	1989	1990
Producing theatres	136	155	174
Scottish Opera/Scottish Ballet	104	106	97
Receiving theatres ^{b, c}	616	509	518
Small venues/arts centres, etc. ^c	100	158	227
Glasgow Film Theatre	98	125	124
Concerts ^d	130	139	384
1990 central projects ^e	n.a.	45	214
Total	1,184	1,237	1,738

* Festival attendance included under venues.

^b Includes special seasons at Theatre Royal; excludes Scottish Opera/Scottish Ballet performances; Pavilion figure estimated.

^c Includes attendance at amateur shows.

^d Includes World Orchestra Series at Glasgow Royal Concert Hall.

^e Tramway, The Ship, Bolshoi, Arches, Sinatra; also includes commercial promotions.

- 4.37 The producing theatres continued their growth of the 1980s, with the Tron adding 37 per cent to its audience (44,190). The larger scale Citizens Theatre, which undertook challenging repertoire during 1990, advanced by 6 per cent on 1989 to 130,161. Scottish Ballet's total attendance rose slightly in 1990 (37,000 compared with 36,000 in 1989), but average attendance was brought down by playing difficult repertoire in the King's, away from the company's traditional home at the Theatre Royal. With rather fewer performances in 1990 than in 1989, Scottish Opera's attendance fell. A decline in average capacity from 87 per cent to 82 per cent was the result of the poor public for separate performances of the two parts of the Trojans. Nevertheless, Scottish Opera still achieved the highest average attendance (1,271) amongst the theatres.
- 4.38 The receiving theatres after several years of decline grew 2 per cent in 1990. Experience varied at the individual venues. The King's added over 50,000 to its public, whilst the Theatre Royal attendance fell by 13,000 and the Pavilion went into administration at the end of the year. Average attendance rose at the King's and there were many more performances. The Theatre Royal averages were reduced from 1,119 in 1989 to 904 in 1990 by low scores (401) for the 1990 special programming.

Figure 37 Theatre attendance; performances and average attendance

Number, thousand and number						
	Perfs (nos)	1989 Attend (thou)	Av.att (nos)	Perfs (nos)	1990 Attend (thou)	Av.att (nos)
Producing theatre						
Citizens	326	123	377	295	130	441
Tron	271	32	118	316	44	139
Receiving theatre*						
Theatre Royal	177	198	1,119	178	161	904
King's Theatre	213	235	1,103	248	303	1,222
Scottish Opera ^b	52	70	1,353	49	62	1,271
Scottish Ballet ^b	29	36	1,294	34	37	1,097

* Includes Scottish Opera and Scottish Ballet.

^b Main company only.

Figure 38 Theatres and concerts: attendance gains and losses

Percentages and thousand			
	Percentage change		1989-90 gain/loss (thousand)
	1986-89	1989-90	
Producing theatres	+ 14	+ 12	19
Scottish Opera/Scottish Ballet	+ 2	- 8	- 9
Receiving theatres	- 17	+ 2	9
Small venues/arts centres, etc.	+ 58	+ 44	69
Glasgow Film Theatre	+ 28	- 6	- 1
Other concerts	+ 7	+ 47	66
Royal Concert Hall	n.a.	n.a.	179
1990 central projects ^b	n.a.	+ 376	169
Total	+ 4	+ 40	501

* Total attendance; includes pop, variety entertainment.

^b Tramway, The Ship, Bolshoi, Arches, Sinatra; includes commercial promotions.

4.39

The Glasgow Royal Concert Hall drew 179,000 admissions in the three months or so it was open during 1990. Concert audiences rose by 176 per cent in 1990. The growth between 1985/86 and 1989 had been 7 per cent. Orchestras benefitted considerably from higher average attendances. The RSO averaged 1,042 for 60 concerts in the City Hall and other venues in 1989 rising to an average of 1,999 at

the GRCH. The opportunity to see visiting orchestras brought a positive response from the public. Attendance at the 11 concerts in the International Orchestra Series totalled 22,525, averaging 2,048.

- 4.40 The Scottish Chamber Orchestra averaged 732 for 18 concerts in City Hall in 1989/90. For the same number of concerts in 1990/91 (6 in the RCH, 12 in City Hall), the SCO averaged 954. Market growth was not confined to the Royal Concert Hall. The Royal Academy of Music and Drama and the Henry Wood Hall gained over 36,000 on their 1989 attendance. Independent promoters and new festivals also found new audiences (over 16,000 in the case of Westbourne Music) during the year.
- 4.41 The 1990 experiences of the established festivals were varied. Attendance at the 1990 Tryst was 8,756 for 78 events. The 148 events in the 1990 The Glasgow International Jazz Festival (including a major concert at the SECC) drew attendance of 25,000 compared with 16,000 in 1989. On the other hand, Mayfest was less successful in 1990. Though its "community attendance" increased from 63,252 to 74,047, audiences for the main programme fell from 107,279 in 1989 to 100,501 in 1990. Sales for Mayfest-promoted events dropped from 97,896 to 81,166.

E. 1990 EXTRA ATTENDANCE

(i) Role of new infrastructure and central projects

- 4.42 As for the extra attendance achieved in 1990, some 16 per cent was associated with the new infrastructure, more so in the case of the performed arts (36 per cent) than in the visual arts (10 per cent). Centrally-initiated projects had a greater role in the visual than in the performing arts, contributing 47 per cent of the gain in museums and galleries and 34 per cent in theatres and halls. (If Pavarotti and the Rolling Stones are excluded from the calculations, the new infrastructure accounted for 40 per cent of the gain, central projects 26 per cent and the existing institutions 34 per cent).

(ii) Existing institutions positive role

- 4.43 It is a finding of some significance that the existing institutions achieved a positive share of the extra 1990 attendance. In general terms, they were harmed neither by the new infrastructure nor the centrally-initiated projects. The existing institutions were responsible for 43 per cent of the gain in museums and galleries and 31 per cent in the performed arts. If an allowance is made for displacement from the City Hall to the GRCH, the latter proportion might be estimated at 42 per cent, with the new infrastructure share falling to 25 per cent. The new hall will have taken some attendance from other venues (e.g. RSO concerts from the City Hall), but it will also have stimulated general interest. Displacement from the City Hall to GRCH is estimated at not more than 54,000. The net additional concert attendance attributable to the RCH was at least 125,000 in the first three months. No displacement estimate was made for the McLellan Galleries.

Figure 39 Glasgow 1990: extra attendance, by special projects and new infrastructure

	Existing institutions	1990 central projects	New infrastructure	Total extra attendance
Attendance (thousands)				
Museums, galleries	591	647	130	1,368
Theatres, halls	153	169	179	501
Total	744	816	309	1,869
Percentages				
Museums, galleries	43	47	10	100
Theatres, concerts	31	34	36	100
Total	40	44	16	100

* Gross figures; excluding displacement from City Hall to GRCH; estimated at 54,000.

* Includes 55,000 at IMG promotions.

F. SEASONAL FACTORS

(i) Museums and galleries

- 4.44 There were significant variations in the market for Glasgow's arts programme over the 12 months of 1990. For Kelvingrove, the Burrell and the independent museums, the peak was in the third quarter (July-September). The independent museums attracted as much as 40 per cent of their annual attendance in these three summer months. Whilst Kelvingrove had the largest proportion of its public in the third quarter (28 per cent), it showed the lowest overall seasonal variation, with much to attract different interests throughout the year. The specialist galleries and the other Glasgow local authorities sites were at their peak in the second quarter. Gallery attendance is much affected by the timing of temporary exhibitions. The local authority sites benefitted from many school visits and so April to June was the heavy quarter. For most museums/galleries the final quarter of the year was the low point.

Figure 40 Museum and gallery attendance: quarterly analysis by institution, 1990

	Percentages				
	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	Year
Burrell Collection	20	27	32	21	100
Kelvingrove	23	26	28	23	100
Other local authority sites	20	34	30	16	100
Independent museums	13	21	40	25	100
Specialist galleries	25	30	26	19	100

- 4.45 Quarterly comparisons with 1989 show the strong effect of temporary exhibitions. At the Burrell fourth quarter attendance was 123 per cent higher in 1990 than 1989 (representing over 100,000 additional attendance), mainly an effect of the successful van Gogh exhibition. Otherwise, the Burrell attendance was well up for the rest of the year by some 70-80 per cent a quarter. The independent museums and specialist galleries did relatively best in the third quarter compared to the previous year. Kelvingrove attendance increased in the first two quarters of 1990 and fell back somewhat in the subsequent two quarters. Some interest most probably switched to the Burrell.

Figure 41 Museum and gallery attendance: quarterly comparison with 1989, by selected institutions, 1990

	Percentages				
	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	Year *
Burrell Collection	+82	+68	+74	+123	+77
Kelvingrove	+6	+2	-7	-9	-2
Other Glasgow City sites	-18	+19	+6	+8	+4
Other local authority sites ^b	-11	-19	-17	+23	-4
Independent museums ^c	+8	+60	+146	+65	+47
Specialist galleries ^d	+63	-9	+171	+16	+18

* All sites.

^b Excluding Lochwinnoch

^c Hunterian Art Gallery, Hunterian Museum, Cameronians, Royal Highland Fusiliers, Springburn.

^d Collins Gallery.

(ii) Theatres, halls, etc.

4.46 Not surprisingly, seasonal variation in the performed arts market was greater than for museums/galleries. In three established institutions (the Citizens, Theatre Royal and King's) October-December was the busiest period of the year. Both the King's and the Citizens achieved a third of their annual attendance in this last quarter of the year and for the Theatre Royal (including Scottish Opera performances) some 43 per cent of the annual market was contributed by the last three months of 1990. The July-September quarter was generally the low point though the Citizens Summer Season attracted some 23 per cent of the Citizens' 1990 attendance. The Five Theatres of the World at the Theatre Royal did not generate much practical interest, but the success of both the Bolshoi and The Ship confirmed that a public could be found for the right product in Glasgow during the summer. Third quarter attendance at the Citizens, Theatre Royal, King's and Tramway (together with The Ship and the Bolshoi) totalled 185,000 compared with 248,000 for the three regular venues plus the Tramway in October-December.

Figure 42 Theatre attendance: quarterly analysis, by selected institution, 1990

	Percentages				
	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	Year
Citizens Theatre	25	19	23	33	100
Theatre Royal	26	20	11	43	100
King's Theatre	30	20	17	32	100
Tramway	26	37	16	21	100

- 4.47 Quarterly comparisons with 1989 reveal that the producing theatres made good progress during the first two quarters, but tailed off significantly later in the year, perhaps feeling the effect of The Ship and the newly opened Glasgow Royal Concert Hall. The Citizens 1990 third quarter was 7 per cent down on 1989. But there was no general evidence of fatigue as 1990 progressed. The King's audience built up well, as did that for the arts centres, and concerts were especially successful in the latter part of the year.

Figure 43 Theatre and concert attendance: quarterly comparison with 1989, by selected institutions, 1990

	Percentages			
	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec
Citizens Theatre	+ 7	+77	- 7	-15
Tron Theatre	+12	+18	-46	-10
Theatre Royal	-26	-25	-13 *	-13 *
King's Theatre	+ 3	+76	+37	+16
Third Eye	+35	+44	+200	+46
Concert promoters ^b	+16 *	+16 *	+17 *	+17 *

* Six month average.

^b Excludes Glasgow Royal Concert Hall.

G. BROAD ATTENDANCE

(i) Community events and celebrations

- 4.48 Finally, the many community events and celebrations in the region drew a public the size of which can only be estimated. It would be difficult to imagine the 1,400 local community events in the Glasgow city area generating attendance less than a

quarter of a million. For the major outdoor events, the Strathclyde Police have provided rough estimates of attendance. They are as follows:

Hogmanay party 1989/90	16,500
Special May Day celebrations	22,500
The Big Day	
daytime	650,000
evening	320,000
Glasgow All Lit Up (lantern procession)	18,000
Hogmanay party 1990/91	17,500
Other special galas, festivals, outdoor events (e.g. Kite Festival, Streetbiz, Lord Provost's procession, World Pipe Band Championships, Massed Bands, etc.)	380,000
	1,424,500

- 4.49 Attendance at educational and special needs programmes run by the arts institutions and organisations is generally included in core attendance statistics. Exceptions are workshops, visits and some special performances at theatres, etc. After making some allowance for the latter (75,000), a total attendance at the various community/education events not counted elsewhere might be estimated at not less than 1.75 million.

(iii) Broad estimate

- 4.50 A rough overall estimate for attendance at 1990 events and attractions in the wider sense, including the main programme (6.59 million) and community, etc. events (1.75 million) is 8.34 million. Estimates shown elsewhere in this report (see Section 8) put cinema attendance at 3.15 million, with pop/rock concerts estimated at 0.56 million in 1990. Thus, the total arts/entertainment/community attendance for cultural events and attractions in a broad sense might be estimated at some 12 million in 1990. There are no attendance figures available on the sports and religious programmes.

H. SUMMARY

- 4.51 In comparison with 1989, Glasgow 1990 achieved a much expanded annual programme of arts events and attractions. The public responded to the programme with a 40 per cent growth in attendance.
- 4.52 In museums and galleries, exhibition numbers increased by 56 per cent and hours of opening were extended. The McLellan was established as a centre for temporary shows. Challenging exhibitions were presented at Tramway. Two long-running special exhibitions were mounted in temporary accommodation.
- 4.53 Theatre and concert performances were 32 per cent more than in 1989. Centrally-initiated promotions accounted for almost half the extra events, with busy programmes at Tramway and the Arches, special programming at the Theatre Royal, not to mention the major spectaculars, such as the Bolshoi visit. Whilst the small venues/arts centres increased activity by 11 per cent and concert life exploded to

two and half times the 1989 level, activity in the producing and receiving theatres carried on at much the usual level.

4.54 Education and special needs programmes increased by 25 per cent in the museums and galleries and by 43 per cent in the theatres, halls and ensembles. Community events of various kinds numbered over 2,000.

4.55 The Glasgow 1990 extra attendance at arts events and attractions amounted to 1.87 million and lifted the annual total from 4.72 in 1989 to 6.59 million in 1990. Adding outdoor and community events (1.71 million), cinema (3.15 million), and pop/rock concerts (0.56 million) takes Glasgow 1990 attendance to around 12 million.

4.56 The existing institutions achieved a positive share of the extra 1990 attendance. In general terms, they were harmed neither by the new infrastructure nor by the centrally-initiated projects. The tide of extra activity did not engulf the system.

4.57 The rise in theatre attendance overall exceeded the growth in performance numbers. The percentage changes 1989-1990 were as follows:

	Performances	Attendance
All theatres/concerts	+ 32	+ 40
Producing theatres	+ 2	+ 12
Scot Op/Scot Ballet	+ 2	- 8
Receiving theatres	+ 6	+ 2
Small theatres/centres	+ 11	+ 44
Concerts	+ 156	+ 176
Museums/galleries	+ 56	+ 39 ^a

^a Temporary exhibitions.

^b All museums, galleries, exhibitions.

4.58 Some 43 per cent of the extra museum/gallery public came through the established institutions. The Burrell did exceptionally well and reversed the downward trend of the 1980s. The independent museums had a successful year building on progress of the 1980s. The public for modern art in 1990 was two and a half times greater than it had been in 1986 and the specialist galleries continued the growth of the previous decade.

4.59 In the performed arts, about a third of the extra public was achieved by the existing institutions. In particular, concert attendance expanded and the small venues/arts centres increased their public. Whilst they did not move forward during 1990, Kelvingrove and the other Glasgow City sites held onto substantial gains achieved in the late 1980s. The receiving theatres kept their audiences and there was modest growth in the producing theatres.

4.60 In contrast, local authority museums in Outer Glasgow did not rise on the success of 1990. Their attendance fell during the Year, reinforcing the decline experienced in recent years. Mayfest, too, saw attendance fall for its own events in 1990.

- 4.61 Taken together, the centrally-initiated 1990 projects (e.g. Glasgow's Glasgow) and the new facility of the McLellan Galleries generated 57 per cent of the net extra public. The Glasgow Royal Concert Hall was the dominant factor in the performed arts, achieving 36 per cent of the new business, and centrally-initiated projects (e.g. The Ship and Tramway) were responsible for 34 per cent of the extra public.

5. MARKET FOR GLASGOW 1990

A. MARKET PROFILE

(i) Visitors and residents

- 5.1 Half the visitors to museums/galleries (50 per cent) and the majority of theatre/concertgoers (70 per cent) were from the Glasgow region during 1990. Glasgow City residents were more evident than residents of the rest of the region, accounting for 31 per cent of museum/gallery attendance and 46 per cent of theatre/concertgoers. Outer Glasgow constituted 19 per cent and 24 per cent of the public, respectively.

Figure 44 Glasgow arts events and attractions: attendance profile, by type of attender, 1990

	Thousand			Percentages		
	Museums, galleries	Theatres, concerts	All	Museums, galleries	Theatres, concerts	All
Residents						
City of Glasgow	1,490	800	2,290	31	46	35
Outer Glasgow	950	420	1,370	19	24	21
Day visitors	1,101	330	1,431	23 ^a	19 ^b	23
Tourists	1,315	188	1,503	27	10	23
All	4,856	1,738	6,594	100	100	100

Source: System Three.

^a 8 per cent were tourists staying elsewhere in Scotland.

^b 2 per cent were tourists staying elsewhere in Scotland.

- 5.2 Day visitors to the region averaged 23 per cent of attendance at museums/galleries and 19 per cent at theatres/concerts during the year. Tourists were a major presence in museums/galleries (27 per cent) and a considerable feature (10 per cent) at theatres/concerts.

(ii) Attendance by type of visitor

- 5.3 Translated into admission figures, these percentages mean that the 1990 programme attracted 1.50 million attendances from tourists, 1.31 million at museums/galleries and 0.19 million at theatres/concerts. Day visitors totalled 1.43 million, 1.10 million for museums/galleries and 0.33 million for theatres/concerts. There were 1.49 million visits made by Glasgow City residents to museums/galleries and 0.80 million to theatres/concerts. Outer Glasgow residents recorded 0.95 million visits to museums/galleries and 0.42 million to theatres/concerts.

B. MARKET DEVELOPMENTS

(i) Changed profile

- 5.4 In addition to the sharp rise in attendance, 1990 saw a swing in market profile from residents to visitors. This applied to both museums/galleries and theatres/concerts. Tourists were up by 2 percentage points in museums/galleries and by a remarkable 8 points in theatres/concerts. The market share of Glasgow City residents in theatre/concert audiences rose by 5 points and fell slightly by 1 point in museums/galleries. In sharp contrast, Outer Glasgow residents fell in both cases by 5 points in museums/galleries and markedly so (20 points down) at theatres/concerts.

Figure 45 Glasgow arts events and attractions: attendance profiles, 1986 and 1990

	Museums, galleries			Theatres, concerts		
	1986	1990	Diff	1986	1990	Diff
Residents						
Glasgow City	32	31	- 1	41	46	+ 5
Outer Glasgow	24	19	- 5	44	24	-20
Day visitors	19	23	+4	13	19	+ 6
Tourists	25	27	+ 2	2	10	+8
All	100	100	n.a.	100	100	n.a.

Source: Policy Studies Institute; System Three.

(ii) Growth by type of visitor

- 5.5 Glasgow's arts events and attractions drew 81 per cent more tourists in 1990 than in 1986. Tourists at theatres/concerts increased seven times in comparison with the low starting point in 1986. Tourist visits to museums/galleries expanded by 64 per cent. Day visitors increased even more than tourists, up 89 per cent overall, more in theatres/concerts (125 per cent) than in museums/galleries (81 per cent). Glasgow City residents attendance in 1990 was 52 per cent above the 1986 level; theatre/concert-going increased by 66 per cent, more than museum/gallery attendance, which rose 45 per cent. The Outer Glasgow picture was less positive: attendance at museums/galleries rose 23 per cent; at theatres/concerts it fell by 19 per cent. Overall, Outer Glasgow's use of arts events and attractions was 6 per cent higher in 1990 than in 1986. This increase represented one ninth the growth of Glasgow City interest.

Figure 46 Glasgow arts events and attractions: admissions, by type of attender 1986 and 1990

Thousand and percentages

	1986*	1990	Difference (thousand)	(%)
Residents				
Glasgow City	1,510	2,290	780	+ 52
Outer Glasgow	1,294	1,370	76	+ 6
Day visitors	758	1,431	673	+ 89
Tourists	829	1,503	674	+ 81
All	4,391	6,594	2,203	+ 50

Source: Policy Studies Institute; System Three.

* 1985/86.

Figure 47 Glasgow arts events and attractions: admissions, by type of attraction and attender, 1986 and 1990

	Museums and galleries			Theatres and concerts		
	(thousand)	%		(thousand)	%	
	1986	1990	change	1986	1990	change
Residents						
Glasgow City	1,026	1,490	+ 45	484	800	+ 66
Outer Glsow	770	950	+ 23	524	420	- 19
Day visitors	609	1,101	+ 81	149	330	+ 125
Tourists	802	1,315	+ 64	27	188	+ 596
All	3,207	4,856	+ 52	1,184	1,738	+ 47

Source: Policy Studies Institute; System Three.

* 1985/86.

(iii) 1989 estimate

- 5.6 No comprehensive profile data exist for 1989. Figure 48 presents an analysis of the 1989 admission figures assuming the same attender profile as in 1986. In relation to the overall growth in attendance of 40 per cent, it might therefore be estimated that day visitor attendance rose by 75 per cent in 1990 and tourist visits to cultural attractions by 68 per cent. Glasgow City attendance increased by an estimated 41 per cent and Outer Glasgow attendance fell slightly, down by 2 per cent.

Figure 48 Glasgow arts events and attractions: estimated 1989 admissions, by type of attender

Thousand and percentages

	1989 *	1990	Difference (thousand) (%)	
Residents				
Glasgow City	1,625	2,290	665	+ 41
Outer Glasgow	1,392	1,370	-22	-2
Day visitors	816	1,431	615	+ 75
Tourists	892	1,503	611	+ 68
All	4,725	6,594	1,869	+ 40

Source: Policy Studies Institute; System Three.

* Analysis of attender type assumes same profile as 1986.

C. SEASON

(ii) Summer

5.7 The public for events and attractions contained higher proportions of tourists in the summer than in the winter. Tourists formed some 34 per cent of summer attendance at museums/ galleries, reducing to 20 per cent in the winter. The tourist proportion for the performed arts averaged 14 per cent in the summer and 8 per cent in the winter. But, after allowing for attendance differences across the year, it would appear that, whereas in museums/galleries some three quarters of the tourists volume was in the light months (April-Sept), only half the theatre/concert tourist visits occurred in this period. The summer figure in theatres/concerts is positive evidence in relation to any Glasgow wish to develop tourist traffic for the performed arts in what was previously a closed period of the year. But it should be remembered that the 1990 summer result related to outstanding programming, the Bolshoi and the Royal Shakespeare Company, as well as the Citizens.

Figure 49 Glasgow arts attractions: summer and winter attendance profiles, 1990

Percentages

	Glasgow City	Outer Glasgow	Day visitors	Tourists	All
Museums, galleries					
Summer	28	16	23	34	100
Winter	34	24	23	20	100
Year	31	19	23	27	100
Theatres, concerts					
Summer	41	25	19	14	100
Winter	49	24	19	8	100
Year	46	24	19	10	100

Source: System Three.

(ii) "Secondary tourists"

- 5.8 Season appeared to make no impact on the day visitor proportion. It was 23 per cent both in summer and winter in museums/galleries and 19 per cent throughout the year in theatres/concerts. But it should be noted that day visitors included tourists staying elsewhere in Scotland and their presence in Glasgow was affected by season like other tourists. These "secondary tourists" to Glasgow accounted for 11 points of day visits to museums in the summer and 5 points in the winter. Day visitors from home (from Glasgow's wider regional market) grew from 12 per cent to 18 per cent in winter. The performed arts showed the same pattern for the two types of day visitors. "Secondary tourists" amounted to 4 per cent in the summer and 1 per cent in the winter. The regional market of day visitors rose from 15 per cent in summer to 18 per cent in the winter.

(iii) Residents

- 5.9 The balance of attendance was found among Glasgow residents, who accounted for 14 points more of the museum public and 7 points more of the performed arts public in the winter than in the summer.

D. MARKET PROFILES BY INSTITUTION

(i) Museums and galleries: type of visitor

- 5.10 The Burrell Collection was the highest scoring Glasgow attraction for visitors to the region (68 per cent of its attendance). Tourists represented 33 per cent of Burrell attendance, the highest score in Glasgow. Some 58 per cent of the public for the van Gogh exhibition was from outside the Glasgow region, with slightly more day visitors (37 per cent) and markedly fewer tourists (21 per cent) than for the Burrell

over the whole year. Nonetheless, the tourism score was impressive given that the exhibition was held in November-December. Local interest in the van Gogh exhibition was strong from Glasgow City residents (29 per cent), less so from Outer Glasgow (13 per cent).

Figure 50 Museums and galleries attendance: attender origins, by institution, 1990

	Percentages				
	Glasgow City	Outer Glasgow	Day visitors	Tourists	All
Burrell Collection	18	14	35	33	100
Kelvingrove	33	20	19	29	100
Other museums ^a	31	20	21	28	100
Specialist galleries	50	16	16	18	100
McLellan Galleries	36	19	25	20	100
van Gogh exhibition	29	13	37	21	100
1990 central projects ^b	32	29	20	18	100
All	31	19	23	27	100

Source: System Three.

^a Local authority sites and independents.

^b Glasgow's Glasgow and Dome of Discovery.

5.11 The McLellan Galleries drew 45 per cent of its public from outside the region, as well as strong interest from City of Glasgow residents (36 per cent). This pattern was also reflected in Kelvingrove and the other museums, which attracted a considerable interest (48 and 49 per cent, respectively), from outside the region. Specialist galleries relied more on their particular public within the City (50 per cent) and had a modest market position outside the region (34 per cent).

5.12 In a 1990 context, it is important to note that the 1990 central projects found most of their market within the Glasgow region (59 per cent). The tourism proportion was relatively low as 18 per cent, as was the day visitor proportion at 20 per cent. The figures for Glasgow's Glasgow reveal rather more interest from city residents (35 per cent) and the non-Glasgow proportion was somewhat higher at 44 per cent, of which 23 per cent were tourists. Although Glasgow's Glasgow ran during the high season, the tourism proportion of 23 per cent was well below the 27 per cent average for Glasgow's museums and galleries attractions as a whole.

(ii) Museums and galleries: socio-demographics

5.13 Museums/galleries drew 59 per cent of their public from under 45s. Specialist galleries attracted a particularly young public with 27 per cent from the 15-24 age group, compared with a 14 per cent average. Under 25s adults were least

represented in the Burrell's public. The 1990 central projects scored low among the under 25s but very high for the 25-44 age group (59 per cent), which related to their appeal as "family attractions". The van Gogh public was distinctive for its concentration in the 45-64 group (39 per cent). Kelvingrove appealed most evenly to all age groups, both young (under 25s at 20 per cent) and old (over 65s at 15 per cent). The McLellan's public was above average amongst the over 65s (18 per cent) and below average for the under 25s (11 per cent).

Figure 51 Museums and galleries attendance: age profile, by institution, 1990

	Percentages				
	15-24	25-44	45-64	65 +	Total
Burrell Collection	8	39	36	17	100
Kelvingrove	20	40	26	15	100
Other museums ^a	12	46	29	13	100
Specialist galleries	27	51	14	8	100
McLellan Galleries	11	45	27	18	100
van Gogh exhibition	11	36	39	14	100
1990 central projects ^b	10	59	23	7	100
All	14	45	28	13	100

Source: System Three.

^a Local authority sites and independents.

^b Glasgow's Glasgow and Dome of Discovery.

- 5.14 The 1990 central projects successfully appealed to C2DEs, with 26 per cent of their public drawn from this section of the population against 24 per cent for museums/galleries overall. Other museums (including the Museum of Transport and Peoples' Palace) were more successful in this respect with 28 per cent of their public from C2DEs and the Kelvingrove score was exactly the same. The McLellan Galleries appealed most to ABC1s at 87 per cent of their market.

Figure 52 Museums and galleries attendance: class, sex and children, by institution, 1990

	Percentages					
	ABC1	C2DE	Male	Female	Children in party	
					Yes	No
Burrell Collection	85	15	51	49	12	88
Kelvingrove	76	28	47	53	19	81
Other museums ^a	72	28	53	47	25	75
Specialist galleries	79	21	57	43	12	88
McLellan Galleries	87	13	40	60	34	66
van Gogh exhibition	84	16	55	45	6	94
1990 central projects ^b	74	26	47	53	45	55
All	76	24	50	50	27	73

Source: System Three.

^a Local authority sites and independents.

^b Glasgow's Glasgow and Dome of Discovery.

^c Glasgow's Glasgow 29 per cent accompanied by children.

5.15 The 1990 central projects scored with parties containing children who formed some 45 per cent of their market. The McLellan Galleries were also successful with children; some 34 per cent of adults were accompanied by children compared with the 27 per cent average for museums and galleries. Surprisingly, the van Gogh exhibition attracted least interest (6 per cent) from parties with children. Kelvingrove (19 per cent) was slightly below average and the other museums (25 per cent) were more or less on average.

5.16 Overall, museums and galleries had equal success with the male and female markets. Detailed variations included a greater female interest in the McLellan (60 per cent). Males were most evident at the van Gogh exhibition (55 per cent) and at the specialist galleries (57 per cent).

(iii) Theatres and halls: type of visitor

5.17 The special seasons and one-off promotions which took place in the summer were generally successful in attracting tourists. Tourists formed 28 per cent of the small attendance for the Five Theatres of the World at the Theatre Royal. With a much larger public, the Citizen's Summer Season achieved a tourist proportion of 21 per cent. The one-off promotions, the Bolshoi and The Ship, had a smaller tourist score (11 and 10 per cent, respectively). Specialist programming of the small venues (included the Tramway) drew 18 per cent of attendance from tourists. It is not surprising that The Ship scored strongest with Glasgow City residents at 56 per cent of attendance. Tourist interest in The Ship was average and the Outer Glasgow and day visitor interest in the project was below average.

Figure 53 Theatre and concert attendance: attender origins, by institution, 1990

	Percentages				
	Glasgow City	Outer Glasgow	Day visitors	Tourists	All
Producing theatres	54	20	9	16	100
Receiving theatres	38	29	27	6	100
Small theatres, arts centres ^a	49	16	17	18	100
Concert halls	54	30	10	6	100
Scottish Opera ^b	41	29	21	8	100
Bolshoi	52	19	20	10	100
The Ship	56	17	15	11	100
Citizen's Summer Season	44	25	10	21	100
Five Theatres of the World	38	18	16	28	100
All	46	24	19	10	100

Source: System Three.

^a Includes Tramway.

^b At Theatre Royal.

5.18 As for the established institutions, the producing theatres (mainly the successful Citizens) appealed most to tourists (16 per cent), at the same time as attracting strong Glasgow City audiences (54 per cent). For the rest, the tourism appeal was less. The receiving theatres had a strong market in Outer Glasgow (29 per cent) and among day visitors from the wider region (27 per cent). This was Scottish Opera's pattern at the Theatre Royal, but with rather more tourists (8 per cent) than for the receiving theatres (6 per cent).

5.19 Concerts were much influenced by the impact of the new Glasgow Royal Concert Hall. The principal market was within the Glasgow region and the role of day visitors and tourists was quite modest in 1990 at 10 per cent and 6 per cent, respectively. But it should be noted that the growth in the market for concerts was so considerable that even these modest percentages do reflect major increases in day visitor and tourist numbers at Glasgow concerts.

(iv) Theatres and halls: socio-demographics

5.20 The Citizen's Theatre Summer Season attracted 22 per cent of attendance from over 65s, twice the performed arts average. The company developed particular objectives with Strathclyde Regional Council and made specific efforts in this market area. It was slightly surprising that over 65s represented only 4 per cent of The Ship's market. The Citizen's Summer was also successful with the under 25s, who formed 24 per cent of the Summer adult public. A young public was most evident for the small venues and arts centres (24 per cent under 25 and 53 per cent in the 25-44 years group). The concert audience was relatively older with 59 per cent over 45 years compared with an average of 42 per cent.

Figure 54 Theatre and concert attendance: age profile, by institution, 1990

	Percentages				
	15-24	25-44	45-64	65+	Total
Producing theatres	19	34	28	17	100
Receiving theatres	13	39	34	13	100
Small theatres, arts centres*	24	53	20	1	100
Concert halls	11	31	43	16	100
Scottish Opera	10	40	38	12	100
Bolshoi	9	40	41	10	100
The Ship	15	59	21	4	100
Citizen's Summer Season	19	34	26	22	100
All	16	41	31	11	100

Source: System Three.

* Includes Tramway.

5.21

It is a point of some significance that The Ship appealed most to social classes C2DE who represented 26 per cent of attendance, twice the average for the performed arts. The small venues and arts centres (including the Tramway) scored most heavily with the ABC1 public (93 per cent of attendance). The Ship also attracted parties with children (16 per cent), as did the producing theatres generally (18 per cent). For the rest, parties with children were very much in a minority, 6 per cent overall and as low as 2 per cent in the small venues.

5.22

A strong female presence emerged in the public for performed arts at 64 per cent of total attendance. This factor characterised every sector of market but it was most marked at the King's and the Theatre Royal where women formed 70 per cent of the audience. The figure was lower (60 per cent) for Scottish Opera at the Theatre Royal. Men were most in evidence at The Ship where they formed 44 per cent of the audience.

Figure 55 Theatre and concert attendance: class and children, by institution, 1990

Percentages

	ABC1	C2DE	Male	Female	Children in party	
					Yes	No
Producing theatres	85	15	39	60	18	82
Receiving theatres	85	15	30	70	6	94
Small theatres, art centres ^a	93	7	41	59	2	98
Concert halls	85	15	39	60	4	96
Scottish Opera ^b	90	10	40	60	3	97
Bolshoi	91	9	40	60	6	94
The Ship	74	26	44	56	16	84
Citizen's Summer	88	12	40	60	5	95
All	87	13	36	64	6	94

Source: System Three.

^a Includes Tramway.

^b At Theatre Royal.

E. SOURCES OF NEW BUSINESS

- 5.23 Analysis of the extra public (by visitor type) generated during 1990 (compared with 1986) shows that the 1990 central projects were more effective in the Glasgow resident market than in the day visitor and tourist markets. They generated some 45 per cent of Glasgow City and 88 per cent of Outer Glasgow net new business. The equivalent figures for 1990 central projects in the performed arts were 34 per cent City and 42 per cent Outer.
- 5.24 Most of the net new business in visitor markets came through the existing institutions. In museums and galleries, it is calculated that some 67 per cent of the day visitor gain and 72 per cent of the tourist market gain were in response to the existing institutions. The 1990 central projects generated 26 per cent of the net market growth in day visitors and 23 per cent of tourist growth. The picture was very similar for the performed arts, where 70 per cent of day visitor growth and 76 per cent of tourism new business came through the framework of existing institutions.

Figure 56 Glasgow 1990 attendance*: sources of new business

	Percentages			
	1990 central projects	Infrastructure New	Existing	Total
Museums and galleries				
Glasgow City	45	10	45	100
Outer Glasgow	88	12	n.a.	100
Day visitors	26	7	67	100
Tourists	23	5	72	100
Theatres and concerts				
Glasgow City	34	30	35	100
Outer Glasgow	42	58	n.a.	100
Day visitors	20	10	70	100
Tourists	18	6	76	100

* Compared with 1986.

- 5.25 The role of the new infrastructure in day visitor and tourist new business was small (between 5 and 10 per cent). The impact was greater on the Glasgow markets, especially the theatre and concert public, where the Glasgow Royal Concert Hall was responsible for 30 per cent of growth in Glasgow City attendance and 58 per cent of Outer Glasgow new business. It should be noted that the existing institutions in both sectors lost markets in Outer Glasgow between 1986 and 1990.

F. SUMMARY

- 5.26 The market for the arts in Glasgow underwent significant developments during 1990. In addition to the sharp rise in attendance (up 40 per cent), there was a marked swing in market profile from residents to visitors. The 1990 visitor proportion in museums/ galleries was 6 points more than in 1986; in theatres/concerts the swing to visitors was 14 points.
- 5.27 Day visitor admissions to arts events and attractions in 1990 were 89 per cent higher than in 1986 and tourist visits to Glasgow's arts events and attractions rose by 81 per cent. Whereas tourists at theatres and concerts had been a negligible factor in 1986, their number was seven times higher in 1990. We can only supply estimates of the rise in visitor numbers between 1989 and 1990; these were 75 per cent for day visitors and 68 per cent for tourists.
- 5.28 Developments in the resident market were on a lesser scale, albeit not inconsiderable. Between 1986 and 1990, resident attendance at arts events and attractions rose by 31 per cent. There was an important contrast between an expanding interest on the part of Glasgow City residents (up 52 per cent) and a weaker response from Outer Glasgow, which saw only a 6 per cent rise between 1986 and 1990.

- 5.29 Visitor markets were most developed by the existing institutions. They achieved 67-72 per cent of the new tourist and day visitor business in the performed arts and 70-76 per cent of new visitor business in museums/galleries. The role of major exhibitions was a factor in animating interest, as was enhanced programming and the strong promotional umbrella.
- 5.30 The local market was most influenced by the centrally-initiated projects. This applied to the museum/exhibition market where projects like Glasgow's Glasgow generated 45 per cent of the new business in Glasgow City and 88 per cent in Outer Glasgow. They had a particular success with C2DEs and children. The Ship and Tramway also made their biggest impact on local markets where they generated 34-42 per cent of the new business.
- 5.31 The resident market for theatres/concerts responded most to the new facility, the Glasgow Royal Concert Hall. The equivalent impact of the McLellan on the resident market for museums/galleries was less. The new facilities could only have a relatively modest impact on visitor markets, accounting for 5-10 per cent of new business from that source.
- 5.32 The major infrastructure developments are long term projects. Whilst programming of the McLellan was variable, it found a significant new market. It still needs to build a firm identity in the eyes of the public and to find a clear management focus. The Glasgow Royal Concert Hall (opened October 1990) had an immediate success with the local concert public. The honeymoon experience was boosted by super programming.

6. RESPONSE OF GLASGOW RESIDENTS

A. REACH OF GLASGOW 1990

(i) Survey

- 6.1 The response of the Glasgow resident population to the Year of Culture was examined by surveying a representative sample of adults in the region immediately on completion of the year. The questionnaire covered responses to the programme, attitudes to its promotion and perceptions of wider benefits.

(ii) Four out of five adults

- 6.2 The Year of Culture programme in tangible terms appears to have touched the lives of as many as 4 out of 5 adult residents of the region. Some 74 per cent of adults attended at least one arts event or attraction during the year. Museums/galleries exhibitions were visited by 61 per cent of adults. The reach of theatres/concerts was somewhat lower, with 54 per cent of adults attending during 1990. These figures exclude pop/rock and street entertainment. Inclusion of these elements lifts the score for at least one event/attraction from 74 per cent to 80 per cent. No figures are available on participation in the sports programme of Glasgow 1990.

Figure 57 Glasgow residents: reach of the arts, by place of residence, 1990

	All	Glasgow City	Outer Glasgow
Percentage of adults attending			
Any event/attraction*	74	79	69
Performed arts*			
At least once	54	55	53
Two or more	22	28	19
Museum/gallery	61	70	53
None	26	21	31

Source: System Three.

- * Excludes cinema, pop/rock, street entertainment.

(iii) City vs Outer Glasgow

- 6.3 Glasgow City responded to the arts programme more than the rest of the region. Some 79 per cent of City residents attended at least once, compared with 69 per cent of Outer Glasgow residents. The shortfall in Outer Glasgow was mainly in relation to museums/galleries which 70 per cent of Glasgow residents visited at least once in 1990 compared with only 53 per cent of Outer Glasgow residents. There was virtually no difference in the reach of theatres/concerts in the two parts of the

region, with 55 per cent of City and 53 per cent of Outer Glasgow adults going at least once.

- 6.4 But when more active involvement in 1990 is considered (attending at least two kinds of events during the year), the overall score for the performed arts falls from 54 per cent to 22 per cent. The difference between the centre and the periphery widens, with the Outer Glasgow figure for the performed arts (19 per cent) dropping well below the Glasgow City score (28 per cent).

B. SOCIAL FACTORS

(i) Sex, social class, age

- 6.5 A social analysis of the reach of the 1990 main arts programme contains few surprises. Females were slightly more likely (76 per cent) than males (72 per cent) to have attended at least one event or attraction in the previous 12 months. The difference was confined to the performed arts where some 62 per cent of females attended compared with 45 per cent of males. The 1990 programme reached some 67 per cent of C2DEs compared with 86 per cent of ABC1s. The social difference was greater for theatres and concerts than for museums and galleries and it was much more apparent among "heavy attenders" (two or more performed arts). Only 12 per cent of C2DEs claimed to be "heavy attenders", compared with 43 per cent of ABC1s.
- 6.6 Age was not a major factor in determining attendance during 1990. The main point was the high reach of the performed arts among the 35 - 54 year olds. Some 62 per cent of this age group attended the theatre etc., at least once during 1990 compared with an average of 54 per cent of adults of all ages. Under 35s were below average attenders during 1990.

Figure 58 Glasgow residents: reach of the arts, by social characteristics, 1990

	All	Male	Female	ABC1	C2DE	<35	35-54	55 +
Percentage of adults attending*								
Any event/attraction ^b	74	72	76	86	67	75	76	76
Performed arts								
At least once	54	45	62	72	45	51	62	50
Two or more	22	18	26	43	12	22	25	21
Museum/gallery	61	62	60	76	53	62	61	59
None	26	28	24	14	33	25	24	30

Source: System Three.

* At least once in previous 12 months.

^b Excludes cinema, pop/rock, street entertainment.

(iii) Children, TV, housing tenure

- 6.7 Figure 59 analyses the influence of other social factors on the reach of events and attractions. Children in the family had little influence on attending. Households with children achieved a slightly higher reach than households without, but the latter were more likely (23 per cent) than people with children at home (20 per cent) to have been to the theatres/concerts more than once during the year.

Figure 59 Glasgow residents: reach of the arts, by families with children, housing tenure and TV viewing, 1990

	Children in household		Housing		TV viewing	
	Yes	No	Owner	Rented	Light ^a	Heavy
Percentage of adults attending ^b						
Any event/attraction ^c	76	72	80	68	79	67
Performed arts ^c						
At least once	59	52	64	46	60	46
Two or more	20	23	34	12	29	13
Museum/gallery	62	59	71	52	68	50
None	24	28	20	32	21	33

Source: System Three.

^a Under 25 hours a week.

^b At least once in previous 12 months.

^c Excludes cinema, pop/rock, street entertainment.

- 6.8 Housing tenure reflected the social differences described above. The reach amongst those living in rented accommodation was broadly similar to the C2DE figures. The incidence of TV viewing was also socially related. Light TV viewers (under 25 hours a week) were more likely to have attended events/attractions during the year. In particular, light TV viewers were twice more likely (29 per cent) than heavy TV viewers (13 per cent) to have been "heavy" attenders at the performed arts.

C. ART FORM DETAILS

(i) Socio-demographics

- 6.9 The art form details of the reach of events and attractions are set out in Figures 60 and 61. Musicals/pantomimes were the most popular kind of live arts entertainment, attended by 34 per cent of adults, including 28 per cent of C2DEs. Some 23 per cent of adults went to plays during 1990. Opera and dance were minority interests attracting 5 and 6 per cent of adults respectively, much more popular with A8C1s (11-14 per cent) than C2DEs (1-2 per cent).

Figure 60 Glasgow residents: reach of the arts, by art form, 1990

	All	Male	Female	ABC1	C2DE	<35	35-54	55+
Percentage of adults attending*								
Plays	23	16	29	39	15	22	27	21
Musicals/panto	34	23	42	46	28	33	39	29
Dance	6	4	7	14	2	5	6	7
Opera	5	3	6	11	1	3	4	7
Classical concerts	10	10	10	23	3	6	11	15
Jazz concerts	8	11	6	12	5	9	8	14
Pop/rock	19	24	14	21	19	42	10	-
Museums	47	48	47	61	40	48	49	45
Galleries	44	45	43	61	35	44	47	40
Literary events	6	6	6	12	4	8	7	5
Street entertainment	33	31	35	36	31	42	35	19

Source: System Three.

* At least once within previous 12 months.

- 6.10 Whilst theatre in all its forms reached more women than men, this was not the case with music. One in ten of the population went to a classical concert during 1990, drawn equally from men and women. Other kinds of music were of more interest to men. Jazz reached 11 per cent of men compared with only 6 per cent of women, and pop/rock was also predominantly male in appeal. Some 24 per cent of men claimed to have attended a pop/rock concert during 1990 compared with only 14 per cent of women.
- 6.11 Pop/rock was the one form of entertainment which appealed roughly equally to all social classes (ABC1 21 per cent, C2DE 19 per cent). Interest in pop was markedly confined to the younger age group, especially under 35s, of whom 42 per cent attended during the previous 12 months. In other respects, under 35s attendance was generally below average. The 35-54 year age group was the most receptive to most forms of performed arts attraction.
- 6.12 Museums/galleries reached a higher proportion of residents than the performed arts and revealed less social variation in response. ABC1s and 35-54 year olds were the most active groups. The social differences were much less marked than for the performed arts; though galleries were less successful than museums at reaching C2DEs. Free street entertainment was another social leveller in terms both of sex and of class. Age was a factor here with 42 per cent of under 35s claiming to have attended a street entertainment event, compared with 33 per cent of adults overall.

(ii) City v Outer Glasgow

6.13 In all art forms a higher proportion of Glasgow City residents responded than Outer Glasgow dwellers. For example, some 30 per cent of City residents went to a play compared with 18 per cent of Outer Glasgow residents. The difference was less for the most popular forms of entertainment. Some 34 per cent of Glasgow residents went to musicals/panto, compared with 33 per cent of outer Glasgow residents. For street entertainment the respective figures were 38 per cent Glasgow City and 29 per cent Outer Glasgow.

Figure 61 Glasgow residents: reach of the arts, by art form and by place of residence, 1990

	All	Glasgow City	Outer Glasgow	Housing tenure Owned	Rented
Percentage of adults attending*					
Plays	23	30	18	33	14
Musicals/panto	34	34	34	41	28
Dance	6	7	5	8	4
Opera	5	6	4	8	2
Classical concerts	10	13	8	18	4
Jazz concerts	8	9	7	8	6
Pop/rock	19	21	19	25	14
Museums	47	56	40	58	38
Galleries	44	55	35	54	36
Literary events	6	8	5	7	5
Street entertainment	33	38	29	35	31

Source: System Three.

* At least once within previous 12 months.

(iii) Cross visiting

6.14 Figure 62 sets out the standardised probabilities of cross visiting between art forms during 1990. The publics for different art forms tend to overlap, but not in a simple way. Playgoers were twice as likely to go to musicals as the average resident; they were 3.2 times more likely to go to the ballet but only 2.8 times more likely to be found in the opera audience. The strong relationships were between opera and dance, opera and classical music and jazz and opera. The lowest propensity to attend other events was found in the pop/rock public. All existing attenders, including the pop and rock audience, were more likely than average residents to go to something else. The only negative association was between opera and pop/rock.

Figure 62 Glasgow residents: standardised cross attendance, by art form, 1990*

	Play	Musical	Dance	Opera	Classical concert	Jazz	Pop	Museum/ gallery
Average								
Play	-	2.0	3.2	2.8	2.5	2.0	1.4	1.62.2
Musical	2.1	-	1.7	1.8	1.6	1.1	1.1	1.31.5
Dance	3.2	1.7	-	7.8	5.4	4.1	1.4	1.83.4
Opera	3.0	1.8	8.3	-	6.9	2.4	0.9	1.93.4
Classical concert	2.9	1.6	5.3	6.4	-	2.6	1.2	1.32.8
Jazz	2.1	1.2	4.2	5.0	3.7	-	2.8	1.82.8
Pop	1.3	1.1	1.3	0.8	1.1	1.5	-	1.31.2
Museum/gallery	1.6	1.3	1.7	1.8	1.8	1.7	1.4	-1.6

Source: System Three.

* The figure is read across; play goers were 2.0 times more likely to attend a musical than the average resident, 3.2 times more likely to go to a dance event, etc.

(iv) Non-attenders

- 6.15 As indicated above, the 1990 main arts programme touched the lives of most but not all Glasgow residents. Some 26 per cent of adults attended neither event nor attraction during 1990. Figure 63 sets out the characteristics of these "non-attenders" and compares them with "attenders" and adult residents of the region as a whole. "Non-attenders" tended to be heavy TV viewers, to lack access to a car and be C2DE in social class terms. To a lesser degree, concentrations of non-attenders were also found in rented accommodation, in outer Glasgow, among the over 55s, in households without children and amongst males.

Figure 63 Glasgow residents: social characteristics of non-attenders, 1990

	Percentages		
	Attenders*	Non-attenders	All adults
Male	46	51	47
Female	54	49	53
ABC1	39	19	34
C2DE	61	81	66
Glasgow city	48	36	45
Outer Glasgow	52	64	55
Under 35 years	39	37	40
35-54 years	32	28	30
55+ years	29	34	30
Owner occupiers	50	34	46
Rented accommodation	50	66	54
TV viewing			
Under 25 hours	61	47	58
Over 25 hours	39	53	42
Access to car			
Own	50	27	44
Regular	13	17	14
None	37	55	42
Children in household	47	43	46
No children at home	53	57	54

Source: System Three.

- * Museums/gallery, theatre/concert at least once during previous 12 months; excluding cinema, pop/rock, free entertainment.

(v) Neighbourhood events

6.16 In addition to the main programme of art events and attractions, a range of local community and neighbourhood events took place during 1990, many with financial support from the District and Regional Councils. Some 24 per cent of those interviewed claimed to have attended a "special 1990 event in their neighbourhood". The question was couched in deliberately loose terms to encourage a wide interpretation of what a 1990 neighbourhood event might be. On the other hand, perceptions of "neighbourhood" may have been more tightly defined by some respondents than the "community" sense intended in the question, and this could account in part for the low score. Nevertheless, the finding suggests that local

community events achieved less penetration than the main programme (54 per cent) and free street entertainment (33 per cent).

- 6.17 On the other hand, neighbourhood events attracted participation by 10 per cent of adults who otherwise were "non-attenders" at the 1990 main programme. But only 18 per cent of C2DEs were reached, in comparison with 31 per cent reached by street events and 45 per cent by main programme events/attractions. Participation in neighbourhood events by Glasgow City residents at 38 per cent was considerably higher than by Outer Glasgow at 19 per cent.

Figure 64 Glasgow residents: reach of special events in your neighbourhood, compared with main programme, 1990

	Neighbourhood event	Street entertainment	Main programme ^a
Percentage attending among			
ABC1s	35	36	72
C2DEs	18	31	45
Glasgow City residents	30	38	55
Outer Glasgow residents	19	29	53
Non-attenders ^b	10	16	n.a.
Resident population	24	33	54

Source: System Three.

^a Performed arts; excluding cinema, pop/rock, street entertainment.

^b At theatre, concert, museum, gallery.

D. EXTENDED REACH

(i) 1988 comparison

- 6.18 Special analyses of Target Group Index data for the Glasgow region have been available since 1988, but, since the sample is somewhat small, the 1988 and 1989 figures have been averaged to provide a base for comparison with 1990. The detailed figures relate to those who "currently attend" (which includes attenders with a less than annual frequency), a looser notion than "visited at least once during previous twelve months". In terms of the System Three survey, "current attenders" can be compared with residents describing themselves as "regular" or "occasional" attenders or as "going for the first time during 1990".
- 6.19 The comparisons between 1988/89 and 1990 are set out in Figure 65. They reveal a marked increase in reach for all art forms, ranging from 10 percentage points for plays to 2 percentage points for opera. The growth in reach for classical concerts from 7 per cent of the Glasgow population to 13 per cent reveals the impact of the

opening of the Glasgow Royal Concert Hall. Though the figures for pop/rock and for museums are on a slightly different basis, they still show major gains in 1990.

Figure 65 Glasgow residents: reach of the arts in 1988-89 and 1990

	1988 ^a			1990			1990 difference		
	All	ABC1	C2DE	All	ABC1	C2DE	All	ABC1	C2DE
Percentage of adults attending ^b									
Plays	18	32	9	28	49	18	+10	+17	+9
Dance ^c	4	8	2	7	17	2	+3	+9	-
Opera	5	11	2	7	18	2	+2	+7	-
Class. conc.	7	13	4	13	29	5	+6	+16	+1
Jazz	5	8	4	9	15	6	+4	+7	+2
Pop/rock ^d	10	14	9	19	21	19	+9	+7	+10
Museums ^d	39	60	30	47	60	40	+8	-	+10

Source: System Three; ACGB TGI.

- ^a Two years' figures averaged.
- ^b Claiming 'currently attend'.
- ^c The average of ballet and contemporary dance.
- ^d At least once within previous twelve months; 1988 figures relate to 1986, taken from PSI study.

6.20 Increases were recorded by both ABC1s and C2DEs. The response of ABC1s to the performed arts in 1990 was particularly strong with increases ranging from 7 to 17 points. Amongst C2DEs there was progress in respect of plays, pop/rock and museums, but the result for classical concerts, was disappointing, a gain of one percentage point in comparison with the 16 percentage point rise for ABC1s. No change was registered in 1990 in the overall reach of opera and dance among C2DEs.

(ii) Comparison with British averages

(a) "Currently go"

6.21 The expanded reach achieved in 1990 put Glasgow residents ahead of the British average. The British and Glasgow figures for those who "currently go" and those claiming to have been "at least once during the previous twelve months" are set out in Figure 66. The Glasgow figures rise above the national average on both counts, more so in respect of the concrete measure of attendance "during the previous twelve months". Glasgow exceeded the national average in all the art form categories measured, plays (6 percentage points above average), dance (3 points above), opera (1 point more) and jazz and classical music (2 points each above average). As museum attenders Glasgow residents were 26 per cent above the national average.

Figure 66 Glasgow residents: reach of the arts, comparison with British average, 1990

	Glasgow		Britain		Glasgow difference	
	Currently go	Went in last 12 months	Currently go	Went in last 12 months	Currently go	Went in last 12 months
Percentage of adults attending						
Plays	28	23	24	17	+4	+6
Dance	7	6	6	3	+1	+3
Opera*	7	5	6	4	+1	+1
Classical concerts	13	10	12	8	+1	+2
Jazz	9	8	8	6	+1	+2
Pop/rock	26	19	..	..	..	..
Museums	55	47	29	..	+26	..

Source: System Three; ACGB TGI.

* The average of ballet and contemporary dance.

- 6.22 It is worth noting that the differences between the scores for "currently go" and "attended during the previous twelve months" were smaller in the Glasgow case than for Britain overall. For example, the difference between those claiming "currently to go" to dance and those attending "in the previous 12 months" was 1 point in Glasgow compared with 3 points in Britain overall. One effect of Glasgow 1990 would appear to have been to turn many of those loosely believing they "currently go" into actual attenders.

(b) ABC1s and women

- 6.23 Glasgow's above average score was mainly attributable to exceptionally high reach figures achieved for ABC1s and women. For example, 33 per cent of Glasgow women claimed currently to go to plays compared with the national figure of 25 per cent. Among Glasgow residents, plays reached 49 per cent of ABC1s, 12 percentage points higher than the national figure. This pattern was repeated in respect of each performed art form but Glasgow's exceptional museum reach was achieved on a socially more even basis.

Figure 67 Glasgow residents: reach of the arts, British average, by sex, 1990

	Glasgow		Britain		Glasgow difference	
	Male	Female	Male	Female	Male	Female
Percentage of adults attending ^a						
Plays	23	33	22	25	+1	+8
Dance ^b	5	9	4	6	+1	+3
Opera	5	8	5	7	-	+1
Classical concerts	12	14	11	12	+1	+2
Jazz	12	6	10	7	+2	-1
Pop/rock	29	21	..	..	..	..
Museums	57	53	31	27	+26	+26

Source: System Three; ACGB TGI.

^a Claiming 'currently go'.

^b The average of ballet and contemporary dance.

Figure 68 Glasgow residents: reach of the arts, British average by class, 1990

	Glasgow		Britain		Glasgow difference	
	ABC1	C2DE	ABC1	C2DE	ABC1	C2DE
Percentage of adults attending ^a						
Plays	49	18	37	13	+12	+5
Dance ^b	17	2	9	3	+8	-1
Opera	18	2	10	3	+8	-1
Classical concerts	29	5	19	6	+10	-1
Jazz	15	6	12	6	+3	-
Pop/rock	28	23	..	..	..	..
Museums	71	47	40	22	+31	+25

Source: System Three; ACGB TGI.

^a Claiming 'currently go'.

^b The average of ballet and contemporary dance.

(c) C2DEs

6.24 The 1990 gains brought Glasgow C2DEs more or less in line with the national average. In respect of plays, rather more Glasgow C2DEs claimed "currently to go", 18 per cent compared with the national average of 13 per cent. In respect of jazz, Glasgow's C2DEs were on the national average, with 6 per cent attending. C2DEs

currently going to dance, opera and classical concerts were one point below the national average.

- 6.25 But gender affected the score of Glasgow C2DEs (see Figure 69). For example, C2DE males were markedly less likely to go to the theatre than females. Glasgow men scored roughly two thirds the female level in play-going. The C2DE male score for opera and dance was only one third of the female. In contrast, C2DE males were much more likely to go to jazz concerts (10 per cent compared with 2 per cent females) and to pop/rock concerts (30 per cent compared with 18 per cent females).

Figure 69 Glasgow residents: reach of the arts among C2DEs, by sex, 1990

	All C2DEs	C2DEs Male	C2DEs Female	All residents
Percentage of adults attending*				
Plays	18	13	22	28
Dance	2	1	3	7
Opera	2	1	3	7
Classical concerts	5	4	6	13
Jazz	6	10	2	9
Pop/rock	23	30	18	26
Museums	47	50	45	55
Galleries	43	47	40	52
Literary events	5	6	5	8

Source: System Three.

- * Claiming 'currently go'.

(iii) First-timers

- 6.26 Glasgow 1990 succeeded in stimulating attendance by first-timers during the year in almost all art forms. Figure 70 shows that some 1-2 per cent of adult residents for the first time went in 1990 to plays, musicals, the opera, etc. Whilst the first-timers may seem a small proportion of residents overall, they did constitute a significant addition to the existing public for events and attractions. Compared with those attending in the previous twelve months, the first-timers formed 6 per cent of play-goers and 4 per cent of musical/pantomime attenders. The first-time gains in the dance and opera publics were more significant, at 19 and 16 per cent respectively, and first-timers formed 8 per cent of the classical concert market.

Figure 70 Glasgow residents: current, lapsed and first-time attenders, 1990

	Currently go	Used to go	Never been*	First time in 1990
Percentage of adults attending				
Plays	28	9	62	1
Musical/panto	42	13	44	2
Dance	7	4	85	1
Opera	7	5	88	1
Classical concerts	13	3	84	1
Jazz	9	2	89	0
Pop/rock	26	6	69	2
Museums	55	14	31	1
Galleries	52	12	36	1
Literary events	8	3	89	0

Source: System Three.

* Includes "don't knows".

- 6.27 The finer details relate to very small samples and should be interpreted with caution. Set out in Figure 71, they show that first-timers amongst male attenders were particularly apparent at the ballet (15 per cent) and the opera (33 per cent), as were first-timers amongst under 35s (27 per cent ballet and 40 per cent opera). It would appear that 1990 succeeded in creating some wider social opportunities for people wishing to try particular art forms for the first time. Among C2DEs playgoers during 1990, first-timers formed 19 per cent and a remarkable 43 per cent of C2DE dance goers and 33 per cent of C2DE opera goers were first-timers.

Figure 71 Glasgow residents: first time attenders as a percentage of all attending, 1990

	All	Male	Female	ABC1	C2DE<35	35-54	55+
First-timers as percentage of all attenders at							
Plays	6	3	7	2	11	4	6
Musicals/panto	4	4	5	3	5	6	4
Dance	19	15	21	15	43	27	7
Opera	16	33	8	14	33	40	-
Classical concerts	8	13	4	8	6	11	9
Jazz	2	-	5	3	-	-	5
Pop/rock	10	7	13	13	8	8	22
Museums	2	3	1	2	2	5	3
Galleries	3	4	2	3	3	4	4
Literary events	6	5	7	3	11	10	6

Source: System Three.

- 6.28 Museums and galleries have a broader based public and so the first-timers could not be expected to be as numerous in this area. They formed 2 and 3 per cent respectively, and were above average among the under 35s.

(iv) Lapsed and returners

- 6.29 Whilst first time attendance was an important development, the main extensions in reach achieved during 1990 came through renewed attendance on the part of residents whose active interest had previously lapsed. This effect can be seen in relation to classical concerts. Of the 6 points extra reach achieved in 1990 (see Figure 72) only 1 point was accounted for by first-timers. As a proportion of those currently going, the lapsed group of classical concert attenders after 1990 was the smallest among the different art forms.
- 6.30 The returning attenders accounted for 9 points of the growth in the reach of plays, 4 points of jazz, 7 points of pop/rock and 7 points of museums. The largest remaining pool of lapsed attenders was in the area of dance and opera, with 4 and 5 per cent of adults claiming to be lapsed attenders, compared with 7 per cent currently attending. Lapsed attenders (those who "used to go") still formed between 2-14 per cent of the population, depending on the art form, at the close of the year.

Figure 72 Glasgow residents extended reach: first timers and returners 1990

	First timers	Re- turners	1990 gain*
Percentage of adults attending			
Plays	1	9	10
Dance	2	1	3
Opera	1	1	2
Classical concerts	1	5	6
Jazz	0	4	4
Pop/rock	2	7	9
Museums	1	7	8

Source: System Three.

* Extra claiming "currently go" compared with 1988.

(v) Never attended

- 6.31 By the close of 1990, substantial sections of the population claimed never to have attended particular types of event or attraction (see Figure 70). It varies considerably according to the art form concerned. For example, whilst only 31 per cent claimed never to have entered a museum, as many as 89 per cent had never attended a jazz concert. By the same token, 44 per cent claimed never to have attended a musical/panto, but over four in five had never attended a classical concert, opera or dance performance.

E. PARTICIPATION

(i) Groups

- 6.32 Some 12 per cent of adults were involved in organised cultural activities during 1990. The most popular activities were art/craft groups (3 per cent of adults) and dance classes/groups (3 per cent of adults). Choirs attracted 2 per cent of adults; theatre groups only one per cent.
- 6.33 The figures do not appear to be particularly high. A comparable survey in Lancashire showed higher participation in dance groups (4 per cent), theatres/musicals (3 per cent) and writing groups (1 per cent). In no area did Glasgow exceed Lancashire. The main difference related to C2DEs in Glasgow who were generally less active than in Lancashire. Participation in this sense may not have been addressed particularly effectively by Glasgow 1990.

Figure 73 Glasgow residents: participation in cultural groups, 1990

	All	Male	Female	ABC1	C2DE	<35	35-54	55+
Percentage of adults participating in								
Art/craft group	3	2	3	6	1	1	3	4
Dance class/group	3	1	4	5	2	3	3	3
Theatre/musicals	1	1	2	2	0	1	1	1
Choir	2	1	2	4	1	1	2	3
Photography course/class	2	2	1	2	1	2	0	2
Writing group/course	1	1	0	1	1	0	2	0
Film/video class/group	1	1	1	2	0	1	1	0
Any of above	12	9	14	19	8	9	13	14

Source: System Three.

- 6.34 The ABC1 participation overall at 19 per cent was more than twice the C2DE figure (8 per cent). Females were more active than males, especially in performing groups (e.g. 4 per cent were active in dance classes). Choirs attracted 4 per cent of ABC1s.
- 6.35 The small involvement of ABC1s in amateur drama/musicals stands out. Surprisingly, the oldest group appears to have been the most active age cohort. Some 14 per cent of 55+ years were involved in one or more of the activities, as against only 9 per cent of under 35s and an average for all adults of 12 per cent.
- 6.36 Lapsed interest in organised cultural groups was very high for Glasgow residents. Some 37 per cent had taken part in one or more of these activities in the past, compared with 12 per cent involved nowadays in 1990. It is a point of concern that lost interest was greatest among the under 35s and C2DEs.

Figure 74 Glasgow residents: participation in cultural groups, nowadays and previously, 1990

	Nowadays	Previously
Percentage adults participating in cultural groups ^a among		
All residents	12	37
Male	9	28
Female	14	44
Under 35 years	9	38
35-54 years	13	33
55+ years	14	39
ABC1	18	50
C2DE	8	30
Attenders ^b	15	42
Non attenders	2	21

Source: System Three.

^a One or more of activities in Figure 49.

^b At least once during previous twelve months to theatre, concert, museum or gallery.

(ii) Evidence on participation v attending

- 6.37 There is no evidence that participation was a substitute for attendance. Some 15 per cent of attenders were active in groups, which was higher than the average of 12 per cent. Among Glasgow residents, attenders were also doers, as they tend to be elsewhere. Some 94 per cent of participants were also attenders and 38 per cent were "heavy" attenders. Only 2 per cent of non-attenders actively participated during 1990, though 21 per cent of non-attenders had been involved in such groups in the past.

F. REACTIONS OF RESIDENTS TO EVENT

(i) General benefits

- 6.38 Glasgow residents responded positively to the City of Culture celebrations. Some 89 per cent of residents agreed that "the 1990 programme was good for Glasgow because it improved the public image of the city", this included 53 per cent agreeing "strongly" with the proposition. Only 4 per cent disagreed and 7 per cent were undecided. Another positive result was a very clear rejection of the view that "the 1990 programme was only for visitors to the city". Some 74 per cent of residents disagreed with this statement, of which 38 per cent were in strong disagreement.

This view was supported by 16 per cent of residents and a further 10 per cent had no opinion.

Figure 75 Glasgow residents: reactions to 1990 programme

	Agree		Disagree		Neith-	Don't
	Strongly	Slightly	Strongly	Slightly	er	know
Percentage of adults responding to statements on 1990 programme						
Improved public image of city	53	36	1	3	4	3
Made city more pleasant place to live/work	25	36	4	9	17	8
Encouraged spending by visitors	26	41	3	6	12	13
Only for visitors to city	3	13	38	36	5	5
Plenty for <u>all</u> people of Glasgow	25	39	5	12	10	9
Too much to do	4	17	14	31	17	17
Tickets were good value	10	28	8	11	12	31
Too much public money spent	22	23	9	19	14	14

Source: System Three.

- 6.39 Other "functional benefits" of the 1990 programme were strongly supported by Glasgow citizens. Most residents agreed (67 per cent) that the "1990 programme brought a lot of money to the city because of the spending by visitors to the city", with only 9 per cent dissenting. By the same token, 61 per cent agreed (25 per cent strongly) that "the 1990 programme made the city a more pleasant place to live and work in". Disagreement was recorded by 13 per cent, with 26 per cent taking no view.

(ii) Programme content and management

- 6.40 On the content and conduct of the programme, views were less clear cut. Major assent was given to the statement that "there was plenty in the 1990 programme for all the people of Glasgow". Some 64 per cent agreed with this statement, 25 per cent strongly, and only 17 per cent disagreed. On the question of whether the programme was overloaded, some 21 per cent thought that there was too much to do, with 17 per cent neither agreeing nor disagreeing and 17 per cent don't know. A large minority (45 per cent) disagreed, 14 per cent strongly so. Whilst the balance of opinion was that tickets were good value for money (38 per cent), as many as 43 per cent felt unable to give either a positive or negative response.
- 6.41 A minority (45 per cent) of residents agreed that "too much public money was spent the 1990 programme", including 22 per cent holding the belief strongly. The majority of residents held other positions on this point. Some 28 per cent disagreed that "far too much was spent"; 14 per cent believed it was neither too much nor too little; and a further 14 per cent were don't knows.

(iii) Demographics of strong opinion

- 6.42 A more detailed analysis of the expressions of "strong" opinion is set out in Figures 76 and 77. They show that gender made very little difference to opinions, though more women (29 per cent) believed strongly that the 1990 programme had plenty for all the people of Glasgow than men (21 per cent). Young people appeared less to accept the "functional benefits" of 1990. Only 50 per cent of under 35s agreed strongly in the positive improvement to the public image arising from the 1990 programme, compared with 57 per cent of 35-54 year olds. Under 35s were also less certain that the programme catered for all the people of Glasgow.

Figure 76 Glasgow residents: "strong" views on 1990 programme, by social characteristics

	Male	Female	ABC1	C2DE	>35	35-54	55+
Percentage of adults "agreeing strongly" that 1990 programme							
Improved public image of city	54	51	64	47	50	57	52
Made city more pleasant place to live/work	24	26	36	20	22	26	28
Encouraged spending by visitors	26	27	28	25	28	30	26
Only for visitors to city	3	4	2	4	3	2	6
Plenty for <u>all</u> people of Glasgow	21	29	27	24	20	26	30
Too much to do	6	2	4	4	4	4	3
Tickets were good value	9	10	14	8	8	8	14
Too much public money spent	24	20	14	26	18	19	30
Percentage of adults "disagreeing strongly" that 1990 programme							
Only for visitors to city	38	39	47	37	34	45	37
Too much to do	14	14	11	16	18	14	9

Source: System Three.

- 6.43 Some 47 per cent of C2DEs agreed strongly that the image of the city was improved by 1990, a view held even more firmly by ABC1s (64 per cent). Over one third (36 per cent) of ABC1s believed strongly that Glasgow was a more pleasant place to live and work as a result of the 1990 programme, a view supported strongly by 20 per cent of C2DEs, with a further 38 per cent of C2DEs giving slight support to this proposition. Only 5 per cent of C2DEs disagreed strongly with this view.
- 6.44 On the matter of public money, the firmest views were held by the over 55s, of whom 30 per cent believed strongly that too much money had been spent. ABC1s (14 per cent) and the under 35s (18 per cent) were less concerned by this matter. Some 26 per cent of C2DEs felt strongly that too much was spent, with a further 22 per cent agreeing slightly with the proposition. Whilst the balance of clear C2DE opinion was critical of public money spent, this was still a minority view. Some 26 per cent of C2DEs disagreed and another 26 per cent held no opinion on the matter.

- 6.45 There was no systematic difference of opinion on the outcome of the 1990 programme between Glasgow City and Outer Glasgow residents. Attenders were somewhat more persuaded of the positive affects of the 1990 programme on the image and quality of life than non-attenders, which is hardly surprising. More attenders thought tickets were good value (12 per cent compared with 4 per cent of non-attenders) and that the programme had something for all residents (28 per cent compared with 16 per cent). On the cost of the programme, differences of strong opinion were smaller than might have been expected. Only 23 per cent of non-attenders believed too much public money had been spent, compared with 21 per cent of attenders.

Figure 77 Glasgow residents: "strong" views on 1990 programme, by place of residence and by attendance

	Glasgow City	Outer Glasgow	Events & attractions	
			Attender	Non-attender
Percentage of adults "agreeing strongly" that 1990 programme				
Improved public image of city	85	50	57	40
Made city more pleasant place to live/work	27	24	29	14
Encouraged spending by visitors	23	29	28	22
Only for visitors to city	5	2	4	3
Plenty for <u>all</u> people of Glasgow	26	24	28	16
Too much to do	3	5	4	2
Tickets were good value	10	9	12	4
Too much public money spent	25	19	21	23
Percentage of adults "disagreeing strongly" that 1990 programme				
Only for visitors to City	38	38	43	24
Too much to do	16	13	15	15

Source: System Three.

(iv) Highlights

- 6.46 In an unprompted question, residents were asked to name one particular event which they remembered as a personal highlight of Glasgow 1990. The results are set in Figure 78.

Figure 78 Glasgow residents: personal highlight of 1990 programme

	All	ABC1	C2DE	>35	35-54	Glsqw 55+	Outer City	Glsqw
Percentage of adults mentioning								
Big Day	12	10	13	24	6	2	16	9
Pavarotti	4	6	3	2	5	5	4	4
Glasgow's Glasgow	5	7	4	5	5	5	5	5
Opening of GRCH	2	3	1	-	1	4	1	2
Other	20	23	21	18	26	16	21	19
None	55	51	58	48	55	66	51	59

Source: System Three.

- 6.47 As many as 45 per cent of residents volunteered a highlight, rather more in the case of City residents (49 per cent) than for Outer Glasgow (41 per cent). The year appeared to have made a bigger impression on under 35s, of whom 52 per cent named an event, with much smaller responses from 35-54 year olds (45 per cent) and the 55+ group (34 per cent). The Big Day, cited by 12 per cent, made the biggest impression, particularly on under 35s (cited by 24 per cent). Pavarotti (4 per cent) and Glasgow's Glasgow (5 per cent) were the only other events making much of an overall impression. Some 4 per cent of over 55s remembered the opening of the Glasgow Royal Concert Hall as a personal highlight though this was mentioned only by 2 per cent overall and none under the age of 35 years.

G. MARKET

(i) Social profile

- 6.48 Finally, the market for arts events and attractions amongst Glasgow residents as it emerged during 1990 is considered here. The principal social characteristics of the resident market for museums/galleries and theatres/concerts are detailed in Figure 79 alongside the structure of the adult population.

Figure 79 Glasgow residents at museums/galleries and theatres/concerts: social profile, compared with all adults

	Percentages		
	Museums, galleries	Theatres, concerts	Glasgow adult residents
Age			
15-24	14	16	17
25-44	44	40	40
45-64	28	30	27
65 +	13	12	16
Male	50	36	47
Female	50	64	53
Social class			
ABC1	67	86	34
C2DE	33	14	66

Source: System Three.

- 6.49 The Glasgow market for arts events and attractions broadly reflected the age structure of the population. While some 40 per cent of adults were in the 25 - 44 age group, they provided some 44 per cent of the museum public and some 40 per cent of the theatre and concert attendance. There was some concentration in the 45-64 year age group, especially at theatres and concerts (30 per cent of attendance compared with 27 per cent of the population). The over 65s (16 per cent of adult residents) were under represented at museums and galleries, where they accounted for 13 per cent of visits, and at theatres and concerts 12 per cent). Under 25s, who constituted 17 per cent of adults, accounted for only 16 per cent of attendance at theatres and concerts and only 14 per cent at museums and galleries.
- 6.50 In terms of gender, the Glasgow market for museums and galleries was split equally between males and females. The theatre/concert audience overall was heavily skewed towards women who accounted for 64 per cent of admissions (compared with 53 per cent females in the adult population). Males at 36 per cent were very much in the minority. This is a summary analysis and more details would show variations between the different kinds of attraction.
- 6.51 ABC1s, who formed roughly one third of the adult population, were in the majority among resident attenders at both museums/galleries and theatres/concerts. They contributed 67 per cent of attendance at museums/galleries and 86 per cent at theatres/concerts. Some 33 per cent of Glasgow residents' visits were by C2DEs, more than twice the proportion (14 per cent) to be found in theatre and concert audiences.

(ii) First visits

- 6.52 Significant proportions of the Glasgow public were first time visitors to the particular venues. At museums and galleries, some 32 per cent of total Glasgow attenders claimed it was their first visit to the site they were interviewed. Glasgow's Glasgow, the Dome of Discovery and the McLellan were new venues for all visitors, but the relatively high score is a significant result. At theatres and concerts some 18 per cent were first timers at the particular survey points. Again, the Royal Concert Hall as a new venue for all does not diminish the significance of the finding that almost one in five visits were by first timers to the venue in question.

Figure 80 Glasgow residents at museums/galleries and theatres/concerts: first visits to particular venues, 1990

	Percentages	
	Museums, galleries	Theatres, concerts
First time at venue	32	18
Been before*	67	82

Source: System Three.

* Excludes 'no answer'.

- 6.53 Well established venues attracted first-timers. Taking day visitors and residents together the proportions of first visitors to selected institutions were as follows:

	Percentage visits
Burrell	24
Kelvingrove	18
Citizen's	19
Theatre Royal, King's	7
Scottish Opera	3

(iii) Primary and secondary reasons

- 6.54 Most of the attendance was by individuals on dedicated visits, that is to say, they were primarily in that area of Glasgow to visit the particular venue. This applied particularly (92 per cent) to theatre and concert attendance. In the case of museums, some 62 per cent of attendance arose from 'dedicated' visits. Whilst 'casual' visits formed only 9 per cent of theatre/concert attendance, they were far more important to museum/galleries at 38 per cent of the total. 'Casual' visits to museums/galleries arose from residents at work (9 percentage points), on shopping trips (6 percentage points), general sightseeing and other cultural visits (9 percentage points), and on other personal business (9 percentage points).

Figure 81 Glasgow residents at museums/galleries and theatres/concerts: reason for being in this part of Glasgow, 1990

	Percentages	
	Museums, galleries	Theatres, concerts
To visit venue	62	89
Other cultural visits	6	3
General sightseeing	3	-
Work	9	2
Shopping	6	-
Other personal business	9	2
Other	6	6

Source: System Three.

(iv) Transport

- 6.55 Car was the main form of transport to events and attractions, more so for theatres/concerts (61 per cent) than museums/galleries (51 per cent). Taxis were used by 7 per cent of Glasgow residents attending theatres/concerts, with many less (1 per cent) visiting museums/galleries by taxi. Coaches were used by 3 per cent of Glasgow's museum/gallery-goers and 5 per cent of the theatre public, indicating the importance of large parties and affinity groups in these markets. As for the principal form of public transport, bus was used more in the day (19 per cent of museums/gallery visits) than in the evening (11 per cent of theatre/concert visits). The train/underground was less popular at 9 per cent of museums and gallery visits and 10 per cent of theatre and concert visits. Some 11 per cent of Glasgow residents walked to their museum/gallery and 5 per cent went on foot to the theatre or concert.

Figure 82 Glasgow residents at museums/galleries and theatres/concerts: method of transport used to venue, 1990

	Percentages	
	Museums, galleries	Theatres, concerts
Private car	51	61
Taxi	1	7
Coach	3	5
Bus	19	11
Train/underground	9	10
Foot	16	5
Other	1	1
All	100	100

Source: System Three.

(v) Party size and children

- 6.56 Glasgow residents at theatres/concerts were more gregarious than museum and gallery visitors. Only 16 per cent of the theatre public attended on its own. Some 46 per cent of residents attended in pairs and 26 per cent in parties of four and over. But children were largely excluded: a mere 6 per cent of adult parties to theatres/concerts were accompanied by children.

Figure 83 Glasgow residents' attendance at arts events and attractions: party size, 1990

	Percentages	
	Museums, galleries	Theatres, concerts
Party size (adults)		
1	43	16
2	44	46
3	7	12
4	6	26
Accompanied by children		
Yes	27	6
No	73	94

Source: System Three.

- 6.57 On the other hand, 27 per cent of residents visiting museums and galleries were accompanied by children. There were also many more residents visiting

museums/galleries on their own (43 per cent) with only 6 per cent attending in large parties of four or more.

H. SUMMARY

- 6.58 The Year of Culture programme touched the lives of four out of five adults in the region, more so residents of the City than people in the rest of the Glasgow region. Some 74 per cent attended at least one arts event or attraction during the Year. As for individual art forms, 34 per cent went at least once to a musical/panto, 23 per cent to a play, 10 per cent to a classical concert and 19 per cent to a pop/rock concert. Some 61 per cent visited a museum/ gallery and 33 per cent sampled free street entertainment.
- 6.59 Responses to the event were broadly positive. Some 89 per cent of residents agreed that the 1990 programme was "good for Glasgow", including 53 per cent "strongly" supporting the proposition. The practical benefits were strongly supported, with even 40 per cent of non-attenders agreeing strongly that it "improved the public image of the City". Views were less clear cut on the content of the programme and its management, including the issue of whether too much public money had been spent. Whilst the over-55s were strongly of the opinion (30 per cent) that too much had been spent, the majority of residents thought otherwise.
- 6.60 The proportion of the resident population claiming they "currently attend" increased in all art forms during 1990, ranging from 10 percentage points for plays to 2 points for opera. Current attenders at classical concerts rose from 7 per cent of the Glasgow population to 13 per cent, which demonstrates the impact of the opening of the Glasgow Royal Concert Hall. Progress was most marked among ABC1s (up between 7 and 17 points). C2DEs responded positively to 1990 with increases in the range of 1 to 10 points.
- 6.61 Glasgow exceeded the British average reach in all the categories measured, plays by 6 points, dance by 3 points, opera by 1 point, and jazz and classical music by 2 points each, and museums by an exceptional 26 points. Glasgow ABC1s were well above their national average; C2DEs roughly reached their national average. Glasgow females were exceptionally active; the males less so, especially C2DE males, except for an above average interest in pop/rock and jazz.
- 6.62 Glasgow 1990 stimulated first time attendance in all the art forms, amounting in each case to 1-2 per cent of the adult population. In terms of the established public, the first timers ranged from 2 per cent of attenders at museums to 16 per cent at opera and .19 per cent at dance. The wider social opportunities created by 1990 were demonstrated in the 40 per cent of under 35s who were attending opera for the first time and the 11 per cent of C2DEs at plays who were there for the first time.
- 6.63 Whilst first time attendance was an important development, the main extensions of reach during 1990 were achieved by renewed attendance on the part of residents whose active interest had previously lapsed. For example, returning attenders accounted for 9 points of the increased reach of plays, compared with 1 point from first timers.

- 6.64 Specific initiatives to develop targetted interest appear to have met with some success. A good example is the 22 per cent of audiences for the Citizens Summer Season drawn from over 65s, twice the average for theatres and concerts as a whole. The Ship represented a different approach which was successful in attracting twice the average attendance from C2DEs.
- 6.65 On the other hand, "neighbourhood events" appear to have had a limited success. Some 24 per cent claimed to have attended and the figure included 10 per cent who had not attended arts events or attractions during 1990. But the reach was far below "street events" (35 per cent) and the main performed arts programme (54 per cent), and it was particularly weak in relation to the response of C2DEs in Outer Glasgow.
- 6.66 By the same token, the levels of participation in cultural groups were not particularly high. Some 12 per cent of adults took part in at least one kind of organised activity (e.g. 2 per cent sang in choirs). It was not a positive sign that the over 55s were the most active group, and that the overall level of lapsed interest was as high as 37 per cent.

7. VISITORS TO GLASGOW

A. VISITOR MARKETS

(i) Increase

- 7.1 Glasgow's visitor market for events and attractions falls into three parts: tourists (staying overnight in the Glasgow region), day visitors to Glasgow (travelling from home, not staying overnight, mainly a regional market), and "secondary tourists" (day visitors to Glasgow staying away from home, mainly tourists based elsewhere in Scotland). It is calculated that during Glasgow 1990 the visitor market amounted to 2.93 million admissions for arts events and attractions in the Glasgow region. The market was 85 per cent larger than in 1986 when admission of this kind had totalled 1.59 million. The estimated increase between 1989 and 1990 was 72 per cent, tourists up 68 per cent and day visitors 75 per cent.

(ii) Components in 1990

- 7.2 The breakdown of the 1990 visitor market is set out in Figure 84. Tourists accounted for 1.50 million visits, day visitors 1 million and "secondary tourists" some 0.42 million visits. The tourist market was more important to museums/galleries, with 1.31 million visits; and day visits numbered 1.12 million including 0.38 million visits from "secondary tourists". Day visitors were the larger part of the theatre/concert visitor market accounting for 310,000 admissions (including 40,000 "secondaries"). An estimated 188,000 admissions were by tourists.

Figure 84 Glasgow visitor markets: admissions to arts events and attractions, by tourists, day visitors and secondary tourists, 1990

	Thousands		
	Museums, galleries	Theatres, concerts	All
Tourists	1,315	188	1,503
Day visitors	736	270	1,006
Secondary tourists	385	40	425
All	2,416	518	2,934

Source: System Three.

(iii) Visitor proportions at museums/galleries

7.3 All Glasgow 1990 attractions succeeded to some degree in visitor markets. Visitor proportions at museums/galleries ranged from the Burrell at 68 per cent to the specialist galleries at 34 per cent. The scores can be summarised as a proportion of total attendance, as follows:

	Day visitors	Tourists	Percentages All visitors
Burrell Collection	35	33	68
Van Gogh exhibition	37	21	58
Other museums	21	28	49
Kelvingrove	19	29	48
McLellan Galleries	25	20	45
1990 special projects	20	18	38
Specialist galleries	16	18	34

(iv) Performed arts: visitor penetration

7.4 By the same token, the established institutions in the performed arts made considerable inroads in visitor markets. The Summer Season at the Citizens achieved a 21 per cent tourist rate. The Five Theatre Season scored 28 per cent but with a much smaller audience. The 8 per cent tourist score for Scottish Opera in the Autumn compares well with 10 per cent for the Bolshoi in the Summer. The specialist interest of the Tramway together with the other small theatres and arts centres is reflected in the 18 per cent tourist score. It should be remembered that the higher volumes of attendance at established institutions mean that their lower tourist percentages can still produce bigger numbers of tourists:

	Day visitors	Tourists	Percentages All visitors
Five Theatres of the World	16	28	44
Small theatres/centres	17	18	35
Receiving theatres	27	6	33
Citizens Summer	10	21	31
Bolshoi	20	10	30
Scottish Opera	21	8	29
The Ship	15	11	26
Producing theatres	9	16	25
Concert halls	10	6	16

B. DAY VISITORS

(i) Socio-demographics

- 7.5 The characteristics of the day visitor market were not dissimilar from the Glasgow residents market for events and attractions described in Section 6 above. Day visitors at theatres/concerts were 67 per cent female and concentrated in the 25-44 age group (43 per cent). The age profile of the day visitors to museums was much the same (44 per cent aged 25-44 years), but males were in the majority (57 per cent).

Figure 85 Glasgow day visitors at arts attractions: social profile, 1990

	Percentages	
	Museums, galleries	Theatres, concerts
Male	57	33
Female	43	67
Social class:		
ABC1	83	83
C2DE	17	17
Age (years):		
15-24	10	12
25-44	44	43
45-64	31	35
65 +	15	10

Source: System Three.

(ii) Regulars

- 7.6 For the most part, day visitors to Glasgow 1990 were familiar with the City and less than 5 per cent were new to the City. Nevertheless, a significant proportion of day visitors were encouraged to explore unfamiliar venues (25-46 per cent) during the Year of Culture.

Figure 86 Glasgow day visitors at arts attractions: first timers to Glasgow and to venue, by art form, 1990

	Percentages	
	Museums, galleries	Theatres, concerts
Been in Glasgow during previous 5 years		
Yes	96	97
No	4	3
First time at venue		
Yes	46	25
No	54	78

Source: System Three.

(iii) Origin

- 7.7 Strathclyde beyond the boundaries of the study region (Greater Glasgow) was the principal place of origin for day visitors, more so for theatres and concerts (57 per cent) than for museums and galleries (45 per cent). Museums/galleries tended to draw from further afield. Some 15 per cent of day visitors to museums came from Edinburgh/Lothian, compared with 10 per cent of theatre/concertgoers. Elsewhere in Scotland (including the rest of Central Belt) provided 33 per cent of museum/gallery day visitors and 30 per cent of theatre/concert day visitors. A handful of day visitors travelled from England, more for museums and galleries (7 per cent), which could be reached in a day's drive, and rather smaller numbers for the performed arts (3 per cent).

Figure 87 Glasgow day visitors at arts attractions: visitor origin, by art form, 1990

	Percentages	
	Museums, galleries	Theatres, concerts
Rest of Strathclyde	45	57
Lothian	15	10
Elsewhere in Scotland	33	30
North of England	3	1
Elsewhere in England	4	2

Source: System Three.

(iv) Party size and transport

- 7.8 Operational features of day visiting to Glasgow 1990 are detailed in Figure 64. Significant proportions of day visitors were in parties of four or more, 16 per cent at museums/galleries and 35 per cent attending theatres/concerts. This is reflected in the choice of transport methods. Private coaches were used by 12 per cent of day visitors to museums and 17 per cent to theatres. Unsurprisingly, in a regional context, trains were the most popular method of public transport. Some 26 per cent of day visitors to museums and galleries were accompanied by children, but only 7 per cent took children to theatres/concerts.

Figure 88 Glasgow day visitors at arts attractions: party detail and methods of transport, by art form, 1990

	Percentages	
	Museums, galleries	Theatres, concerts
Size of party		
1	33	13
2	44	41
3	7	11
4 or more	16	35
Accompanied by children		
Yes	26	7
No	74	93
Method of transport to venue		
Car	57	57
Taxi/hire	2	1
Bus	4	4
Private coach	12	17
Train	23	18
Other	2	1

Source: System Three.

(v) Reasons for visit

- 7.9 The reasons cited by day visitors to Glasgow 1990 visiting the City are set out Figure 89. Visiting the particular venue was the main point for 51 per cent of museum and gallery day visitors. A further 20 per cent of visits were linked to other cultural events or general sightseeing. "Secondary reasons" applied to under a third of day visitors to museums/galleries e.g. work (9 per cent), other personal business (11 per cent) and shopping (3 per cent). The relatively low score for casual visits partly reflects the non-central location of most of the major museum/gallery sites in Glasgow. Unsurprisingly, for day visitors at theatres/concerts the overwhelming reason (94 per cent) was to visit the particular venue.

Figure B9

Glasgow day visitors at arts attractions: reason for being in Glasgow, by art form, 1990

Percentages

	Museums, galleries	Theatres, concerts
Visit venue	51	94
Other cultural visiting	14	2
General sightseeing	6	-
Work/conference	9	1
Shopping	3	0
Other personal business	11	2
Other	6	0

Source: System Three.

C. TOURISM STRATEGY

(i) Economic benefits

- 7.10 In a tourism context, the Year of Culture initiative relates to longer-term strategies to exploit the wide benefits tourism can generate in the regional economy. With the latter in mind, tourism is included in the Strathclyde Integrated Development Operation (IDO) as Objective 5: "support the development of a vigorous tourist industry". It is also recognised that tourism contributes to other Strathclyde IDO objectives including the creation of a modern "metropolitan heart" (Objective 7), the "improvement of the region's image" (Objective 8), the "growth of local enterprise" (Objective 2), and the "attraction of further inward investment" (Objective 4).

(ii) Progress in 1980s

- 7.11 According to figures from the Scottish Tourist Board (STB), tourist domestic trips to Glasgow did not expand from the mid 1980s, but Glasgow's share of the Scottish domestic market did increase, from 13.7 to 16.1 per cent (1984-1988). In contrast, overseas trips to Glasgow were on the increase according to the International Passenger Survey and Glasgow's share of this Scottish market also increased, from 16.7 to 22.5 per cent between 1983 and 1989. In 1989 STB changed its survey methodology for estimating domestic trips. STB's 1989-90 figures put Glasgow's share of domestic trips to Scotland considerably lower (12 per cent) than was thought previously (14-16 per cent) to prevail.

Figure 90 Glasgow and Scottish tourism: trips and bednights, by domestic and overseas tourists

Thousand and million

	1984	1985	1986	1987	1988	1989
Glasgow						
Trips (thousand)						
Domestic	1,834	1,600	1,760	1,800	1,780	..*
Overseas	200	240	(260)	280	320	320
Bednights (million)						
Domestic	5.0	5.0	5.4	5.0	6.0	..*
Overseas	1.5	2.2	1.8	1.8	2.2	2.3
Scotland						
Trips (thousand)						
Domestic	13,100	12,600	11,900	13,400	11,050	..*
Overseas	1,100	1,200	1,300	1,400	1,360	1,420
Bednights (million)						
Domestic	62.7	57.1	55.6	58.1	52.7	..*
Overseas	11.0	13.1	12.8	13.4	13.3	13.7

Source: Scottish Tourist Board.

* Change of methodologies.

- 7.12 Glasgow experienced positive developments within the trade in the 1980s. Several large city-centre hotels were commenced and there were other investments in both the budget and quality ends of the market. Conferencing advanced strongly and an events led strategy, including the 1988 Garden Festival, was evolved. The tourism strategy for Glasgow as reported to the Coordinating Committee of the IDO took full account of the potential significance of cultural tourism. It contributed to a new market segment to the City's tourism business with distinctive demand and trip characteristics in which museums and galleries (especially the Burrell were the major attraction). Generally, changes in tourism markets towards shortbreaks, more sophisticated tastes, urban tourism and activity holidays reinforced the cultural tourism opportunity.

(iii) Greater Glasgow Tourist Board and Convention Bureau

- 7.13 Greater Glasgow Tourist Board and Convention Bureau continued to build credibility in the trade and delivered significant advances in the professionalism and focus of its destination marketing activities. During the 1980s, unmistakable signs of improvement in the image of the City began to appear. "Miles Better" was a well timed campaign which boosted confidence in Glasgow. Tourism promotion pursued the repositioning of Glasgow on a cultural platform by playing to the strengths of its cultural assets. But a degree of realism informed these developments, especially an understanding that Glasgow must prove itself capable of delivering consistent and

high quality services to visitor markets and avoid overselling itself. Efforts were made to repair the seasonal gaps in Glasgow's cultural programming with newly established festivals and the development of summer programming in existing venues.

D. GLASGOW 1990 TOURISTS

(i) Tourist admissions

7.14 Greater penetration of the tourist market by arts organisations was an important achievement of 1990. As indicated previously (see Figures 46 and 47), tourists accounted for 1.5 million admissions to Glasgow's cultural attractions in 1990 representing 27 per cent of the museums/galleries public and 10 per cent of theatre/concert attendance. Tourist visits to museums/galleries were 64 per cent higher than in 1986; at theatres/concerts they were seven times above the 1986 level.

7.15 Tourist attendance at theatres/concerts of 10 per cent was a major step. The starting point for addressing tourist opportunities in relation to regular theatre programming had been the 2 per cent level achieved in the mid 1980s. Mayfest had shown that festival programming could reach a visitor market with a score of 27 per cent (6 per cent tourists). The 1988 performances of Peter Brook's *The Mahabharata* had proved that for particular events it was possible to access specialist theatre markets in London and the South East. The visitor score was 48 per cent (29 per cent tourists). Glasgow 1990 confirmed that this market could be addressed for sustained periods and at different times of the year.

(ii) Overseas v. domestic

7.16 British tourists accounted for 59 per cent of admissions, with overseas tourists generating the remaining 41 per cent. Overseas tourists were more evident in museums and galleries (where they represented 43 per cent of tourist visits) than at theatres and concerts where they accounted for 27 per cent of the tourist presence). In 1986 the overseas proportions had been much lower: 27 per cent of tourists in museums/galleries; and 4 per cent of tourists at theatres/concerts.

Figure 91 Tourist admissions: British and overseas, by art form, 1990

	Percentages	
	Museums, galleries	Theatres, concerts
British	57	73
Overseas	43	27
All	100	100

Source: System Three

Figure 92 British and overseas tourists to Glasgow 1990: cultural visits per trip

	Number	
	British	Overseas
Museums/galleries	2.17	2.61
Theatres/concerts	0.39	0.35
Cultural visits per trip	2.56	2.96

(iii) Trips and aggregate value

- 7.17 Tourist trips to Glasgow 1990 (defined as a trip, for whatever purpose, which involved attendance at one or more arts event and/or attraction) are calculated to have been 555,000. Average cultural visits per tourist trip are set out in Figure 92. Aggregate tourist admissions at arts events and attractions in 1990 were divided by average cultural visits per tourist trip to give the numbers of tourist trips involving some contact with the 1990 programme. Overseas tourists accounted for 208,000 or 37 per cent of trips and British tourists 347,000 or 63 per cent of trips. They spent an estimated 3.05 million nights in the City and their expenditure totalled £179.9 million. Overseas tourists accounted for 1.25 million nights in Glasgow. The bednight totals for British tourists sampling the 1990 programme was 1.8 million.

Figure 93 Glasgow 1990 tourists: trips, bednights and expenditure

	Thousand and £ million		
	British	Overseas	All
Trips (thousand)	347	208	555
Bednights (thousand)	1,804	1,248	3,052
Expenditure (£ million)	87.13	92.73	179.86

(iv) Origins

(a) Domestic

- 7.18 England was the main source of British tourists to Glasgow 1990, with London & the South East accounting for 42 per cent of trips. The North of England was another important source, especially for trips with a performed arts focus, at 15 per cent of the total. The Scottish market provided only 21 per cent of Glasgow 1990 British tourists. In comparison, tourism overall in Scotland depended more on the

home Scottish market (41 per cent) and was much weaker in London & the South East (16 per cent) and the North of England (8 per cent).

Figure 94: British tourists to Glasgow 1990: region of origin, compared with all Scottish market

	Percentages	
	Glasgow 1990 tourists	All tourists to Scotland
Scotland	21	41
London & South East	42	16
North of England	15	8
Midlands	12	10
Elsewhere in Britain	9	25
All	100	100

Source: System Three; Scottish Tourist Board.

(b) Overseas

7.19 Unlike domestic tourists, overseas visitors to Glasgow 1990 were very similar in origin to the overall Scottish overseas market. One third of overseas trips to Glasgow 1990 were by visitors from North America and 11 per cent originated in Australia/New Zealand. The proportion of continental visitors (11 per cent from France, 9 per cent from Germany) roughly matched the national picture.

Figure 95 Overseas tourists to Glasgow 1990: by country of origin, compared with all Scotland market

Percentages

	Glasgow 1990 tourists	All tourists to Scotland
USA	20	26
Canada	13	8
Australia/NZ	11	8
France	11	7
Germany	9	12
Other	35 *	39
All	100	100

Source: System Three; Scottish Tourist Board.

* Eire and Northern Ireland 6 per cent.

(v) Socio-demographics

(a) Domestic

7.20 Glasgow 1990 attracted more British tourists in social class AB (42 per cent) than Scotland (26 per cent) as a whole. In terms of age Glasgow 1990 tourists followed the national pattern, but there were rather more females in the Glasgow 1990 market (51 per cent) than in the Scottish market as a whole (46 per cent).

Figure 96 British tourists to Glasgow 1990: social profile, compared with all Scotland market

	Percentages	
	Glasgow 1990 tourists	All tourists to Scotland
Age (years):		
15-24	14	19
25-44	43	47
45-64	29	26
65 +	13	9
Male		
	49	54
Female		
	51	46
Social class:		
AB	42	26
C1	35	29
C2	11	28
DE	12	17

Source: System Three; Scottish Tourist Board.

(b) Overseas

- 7.21 The age profile of overseas tourists to Glasgow 1990 followed the national pattern, with a good distribution across all age ranges. However, a significant difference emerges between English speaking and non-English speaking tourists. Figure 97 shows the non-English speaking market was more youthful (39 per cent aged 15-24) and more male (59 per cent) than the English speaking market (7 per cent and 44 per cent, respectively).

Figure 97 Overseas tourists to Glasgow 1990: social profile by English and non-English speaking

	English speaking	Non-English speaking
Age (years):		
15-24	7	39
25-44	52	39
45-64	28	19
65 +	13	3
Male	44	59
Female	56	41
Social class:		
AB	58	49
CI	33	39
C2	7	10
DE	2	1

Source: System Thrae.

(vi) Length of stay

(a) Domestic

- 7.22 Glasgow 1990 tourists stayed in the City an average of 5.6 nights. British tourist stays were shorter at 5.2 nights, comparable with a 5.1 night average for all tourists to Scotland. The short stayers (1-3 nights) formed 51 per cent of the market with 36 per cent staying 4-7 nights.

Figure 98 Glasgow 1990 tourists: length of stay in Glasgow, by British and overseas

Percentages and number

	Glasgow 1990 tourists British	Overseas
Percentage staying		
1-3 nights	51	43
4-7 nights	36	29
8+ nights	12	28
Average length of stay (days)*	5.2	6.0

Source: System Thrae.

* Excluding those staying more than 28 days.

(b) Overseas

- 7.23 Glasgow 1990 overseas tourists' average stay in Glasgow was 6 nights, which is again comparable with the figure for all overseas tourists to Scotland (1989) of 7.2 nights. The Glasgow figure could have been much influenced by a few very long staying tourists (including some students). Those staying over 28 days have been excluded from the calculations.

(vii) Accommodation

(b) Domestic

- 7.24 Accommodation used by Glasgow 1990 British tourists followed fairly closely the Scottish national pattern. One difference was that Glasgow 1990 tourists made less use of self-catering accommodation. Another was a somewhat higher reliance on non-commercial accommodation (44 per cent staying with friends and relatives). Some 30 per cent overall stayed in hotels, half in the larger establishments.

Figure 99 British tourists to Glasgow 1990: by type of accommodation

	Percentages	
	Glasgow 1990 Tourists	All tourists to Scotland
Hotel: 50+ rooms	15	
10-49	8	28
small	7	
Bed & breakfast	9	5
Self catering	5	16
Friends/relations	44	38
Other	12	13

Source: System Three; Scottish Tourist Board.

(b) Overseas

- 7.25 Overseas tourists made more use of commercial accommodation at the two extremes, with greater reliance on large hotels (19 per cent compared with 15 per cent by British tourists), as well as bed & breakfast (21 per cent compared with 9 per cent by British tourists).

(vii) Average daily expenditure

- 7.26 Average daily expenditures by visitors to Glasgow 1990 are set out in Figure 100. Day visitor spending was £29.50. British tourists averaged £48 and overseas

tourists £74. Higher spending on shopping accounted for most of the larger overseas average.

Figure 100 Glasgow 1990 tourists: spend per 24 hours, by category

£

	Tourists		Day visitors
	British	Overseas	
Travel*	3.90	4.20	7.35
Entertainment/tickets	2.30	1.90	4.65
Food/drink	11.00	12.40	6.60
Accommodation	14.60	16.50	n.a.
Shopping	10.60	35.00	8.80
Other	5.60	4.00	2.10
Total	48.00	74.00	29.50

Source: System Three.

* Within region.

E. TOURISM PATTERNS

(i) Role of cultural attractions

- 7.27 Not all Glasgow tourists attending cultural events and attractions during 1990 visited the City in whole or part to enjoy its cultural attractions. But the pulling power of arts events is illustrated by the fact that two in every five visitors (39 per cent) claimed that cultural events were the "sole" or "very important" reason for the decision to visit Glasgow. A further 27 per cent claimed that cultural attractions were "quite important" in the decision. For as many as 19 per cent of British tourists, theatres/museums, etc. were the "sole reason" for the trip to Glasgow. For overseas visitors theatres/museums, etc. played a significant role (influencing 65 per cent overall), though for only 5 per cent was it the "sole reason".

Figure 101 Glasgow 1990 tourists: importance of cultural attractions in decision to visit Glasgow

	Percentages	
	British	Overseas
Sole reason	19	5
Very important	26	26
Quite important	22	34
Not very important	14	14
Not at all important	19	21

Source: System Three.

- 7.28 Another indication is that over two-thirds (68 per cent) of tourists visiting cultural events in Glasgow gave cultural reasons for being in the City on that particular day. Visiting a specific cultural venue was the main reason for 50 per cent of British visits compared with 39 per cent of overseas visits. "To experience City of Culture" was the reason given by 7 per cent of British tourists and 12 per cent of overseas tourists. Amongst the non-cultural reasons, general sightseeing was the most common (16 per cent); 5 per cent were on business; 6 per cent were visiting friends or relatives.

Figure 102 Glasgow 1990 tourists: reasons for being in Glasgow on that particular day

	Percentages	
	British	Overseas
Visit venue	50	39
Other cultural visits	13	12
Experience of City of Culture	7	12
General sightseeing	10	25
Other	20	12

Source: System Three.

(iii) Cultural tourism destination

- 7.29 Whilst general features of Glasgow as a destination were cited by significant numbers as a reason for making the trip, it was more common to refer to specific attraction and to particular venues/programmes as explanations for the trip. On the other hand, credence was given to the positioning of Glasgow as a cultural tourism destination in its own right by the fact that Glasgow was the sole destination for some 55 per cent of 1990 tourists from Britain. In contrast to British tourists, overseas tourists were more committed to wider touring. Some 84 per cent of those staying in Glasgow intended visiting elsewhere. Edinburgh was highest on the list

of extra destinations with 62 per cent of those visiting elsewhere intending to include it on their trip. Amongst British tourists engaged in wider touring, less (44 per cent) intended to go to Edinburgh. The pattern for overseas tourists was the two cities plus countryside; for British tourists was one city plus countryside. The Highlands and Islands were the other destination most often cited by British tourists (23 per cent). The Highlands and Islands were even more popular with overseas visitors (60 per cent).

Figure 103 Glasgow 1990 tourists: Glasgow only or visiting elsewhere

	Percentages	
	British	Overseas
Glasgow only	55	16
Visiting elsewhere	45	84

Source: System Three.

(iii) Secondary tourists

- 7.30 Whilst Glasgow 1990 contributed to the wider pattern of Scottish tourism, it was also a beneficiary of tourists based in other parts of Scotland. "Secondary tourists" (staying elsewhere and visiting Glasgow for the day) were responsible for 425,000 admissions to events and attractions during 1990, the equivalent of 30 per cent of the day visitor market. Secondary tourists were especially important to the museums and galleries representing 34 per cent of their day visitor market.
- 7.31 In terms of their origin, 1990 secondary tourists were similar in profile to Glasgow's primary tourists. London & the South East showed strongly in the British market and North America was the principal market for secondary overseas tourists. Most secondary tourists were drawn to Glasgow to visit particular attractions (52 per cent); though general sightseeing was the motivation for 19 per cent and some 9 per cent cited "taking advantage of the City of Culture celebrations".

Figure 104 Glasgow 1990 tourists: primary and secondary British tourists, by origin

	Percentages	
	Glasgow 1990 tourists	Secondary tourists*
Scotland	21	18
London/South East	42	41
North of England	15	15
Midlands	12	11
Elsewhere in Britain	9	11
All	100	100

Source: System Three.

* Staying elsewhere.

Figure 105 Glasgow 1990 tourists: primary and secondary British tourists, reasons for being in Glasgow

	Percentages	
	Glasgow 1990 tourists	Secondary tourists*
Visit this venue	46	52
Other cultural visits	13	9
Experience City of Culture	9	9
General sightseeing	16	19
Visiting friends/relatives	6	5
Business	5	1
Other	5	5

Source: System Three.

* Staying elsewhere.

(iv) Edinburgh festivals

7.32 Further evidence on the Glasgow secondary tourism market is provided by the Scotinform study of attenders at the various Edinburgh festivals during 1990. Awareness of Glasgow 1990 was remarkably high in Edinburgh with 96 per cent of International Festival-goers from Britain (excluding Scotland) claiming to know of the City of Culture celebrations. Some 98 per cent of Festival-goers from the continent claimed to know of Glasgow 1990. Awareness was lower among North Americans at 78 per cent. Comparable levels of awareness were evident among Fringe Festival-goers, but visitors to the Tattoo were much less conscious of Glasgow 1990.

Figure 106 Edinburgh tourists: awareness of Glasgow 1990 and intention to visit, by International Festival and Fringe Festival attenders

Percentages

	Aware of 1990 celebrations		Intend to visit Glasgow	
	Festival	Fringe	Festival	Fringe
Britain (excluding Scotland)	96	100	29	34
Europe	98	96	46	43
North American	78	62	39	50
Other	88	69	50	28

Source: Scotinform.

- 7.33 Among Edinburgh Festival attenders, British tourists were less likely to visit Glasgow (29 per cent) than tourists from continental Europe (46 per cent). North Americans were both less aware and somewhat less likely to visit. This survey result suggests that between third and a half of Edinburgh Festival tourists could have visited Glasgow as part of their 1990 trip.

F. REACTIONS AND MARKET POTENTIAL

(i) New markets and repeat visits

- 7.34 A positive feature of Glasgow 1990 was the new overseas tourist market it reached. Some 52 per cent of the English speaking overseas market had not been to Glasgow in the previous five years. The figure for the non-English speaking market was 71 per cent, implying significant new inroads for Glasgow into the European short stay market.

Figure 107 Glasgow 1990 tourists: previous visits to Glasgow

Percentages

	British tourists	Overseas tourists		All
		English	Non-English	
Percentage visited previously				
Yes	57	44	27	35
No	41	52	71	62
DK	1	2	2	2

Source: System Three.

- 7.35 The British market showed the reverse picture. Some 41 per cent were new to Glasgow and 57 per cent were on repeat visits. It might be thought slightly disappointing for Glasgow that there were not more first-timers in the British market. But, in the context of longer term tourism promotion of Glasgow, 1990 gave a positive indication that repeat visits could be achieved on a significant scale.

(ii) Responses to the City

- 7.36 Responses to Glasgow as a destination continued to improve. If anything, overseas tourists rated the City rather higher than British tourists, particularly its "overall attractiveness". Some 63 per cent of British and 67 per cent of overseas tourists agreed following their visit that Glasgow was an "attractive city full of old buildings and things to see". Rather fewer found Glasgow a modern city, though 51 per cent of both British and overseas visitors held with this view. All tourists rated the choice of Glasgow's museums and galleries as high, but the musical and theatrical events were still not perceived by more than 25-26 per cent of tourists as offering high quality or variety.

Figure 108 Glasgow 1990 tourists: reactions to the City since visiting

	British	Overseas
Percentage agreeing Glasgow is		
An attractive city full of old buildings and things to see	63	67
Modern city with lots to see and do	51	51
Offers variety of musical and theatrical events of high quality	26	25
Little choice in terms of museums and galleries to visit	2	5
Rough and depressing place	5	4

Source: System Three.

- 7.37 The changes of perception brought about by tourist contact with the City were uniformly positive. The biggest changes were in respect of the modernity of the City which showed a 24 percentage improvement on the part of overseas tourists following their visit. Some progress was made in respect of the perception of the quality and range of its theatrical and musical programme, especially among the non-English speaking tourists, who came to Glasgow with pretty low expectations of Glasgow's musical and theatre offer. But there is still much room for improvement in this area. Following their visit, roughly a fifth of British and overseas tourists who had previously thought the City rough and depressing changed their mind. Only a negligible 4-5 per cent still held this view following their visit to Glasgow after contact with the City.

Figure 109 Glasgow 1990 tourists: change in response to City since visiting

	British	Overseas
Percentage point difference following visit		
An attractive city full of old buildings and things to see	+ 15	+ 16
Modern city with lots to see and do	+ 11	+ 24
Offers variety of musical and theatrical events of high quality	+ 5	+ 10
Little choice in terms of museums and galleries to visit	- 2	-
Rough and depressing place	- 18	- 20

Source: System Three.

(iii) Future visits

- 7.38 While some 28 per cent of respondents were uncertain about holidaying in the Glasgow area in the next three years, half thought they were likely to do so. British tourists were most likely to return (74 per cent), with as few as 14 per cent firmly set against. Overseas visitors were less likely to return (English speaking 53 per cent) and others (45 per cent). Amongst the latter, 35 per cent were still uncertain of their future intentions.

Figure 110 British and overseas tourists to Glasgow 1990: likelihood of repeat visit within next three years

	British	Overseas tourists		All
		English	non-English	
Percentage likely to return*				
Yes	74	53	45	50
No	14	27	21	23
Don't Know	12	20	35	28

Source: System Three.

- * Within next three years.

G. GENERAL SUMMER TOURISM

(i) Summer survey

- 7.39 As a check on the impact of Glasgow 1990 on Glasgow's broader leisure tourism market, System Three were commissioned to undertake a limited number of interviews with a sample of holiday visitors to the City. This work paralleled the exit survey interviews of tourists carried out at museums/galleries and theatres/halls throughout the City.

(ii) Socio-demographics

- 7.40 Interviews were conducted in the centre of the City during the first two weeks of September and the profile of visitors would have been influenced by the timing, being outwith the schools' summer holiday period. The demographic profile of the sample proved to be much closer to Scottish tourists as a whole than the Glasgow 1990 tourists surveyed in cultural venues. The age profile implied some success in attracting younger visitors to Glasgow.

Figure.111 Central Glasgow summer tourists: social profile, 1990

		Percentages			
		Central Glasgow summer tourists	Glasgow 1990 tourists	Glasgow holiday trips ^a	Scotland all trips ^b
Male		44	49	50	54
Female		56	51	51	46
Age	15-34	59	36 ^c	44	41
	35-54	24	34 ^c	36	40
	55+	18	30 ^c	21	20
Class	AB	31	42	37	26
	C1	36	35	26	29
	C2DE	33	23	37	45

Source: System Three; Scottish Tourist Board.

- 1989/90 rolling average of British tourists.
- ^b British tourists.
- ^c Museums/galleries only.

(iii) Origins

- 7.41 The majority (63 per cent) of those interviewed were visitors from overseas.

	Percentages
Rest of Scotland (not Glasgow area)	4
England/Wales/Ireland	33
USA/Canada	18
Australia/New Zealand	11
Europe	29
Other	5

- 7.42 Almost half of the overseas visitors were from Europe but there were also substantial proportions from the USA, Canada, Australia and New Zealand. Only a very small proportion (4 per cent) of the sample were from Scotland, but exactly one-third (33 per cent) of respondents were from other parts of the British Isles. The relatively small proportion of British visitors is probably due to the fact that the survey took place at the very end of the main summer holiday period when children had returned to school. Also, the City centre locations of the interviews may have contributed to this high proportion of overseas visitors. Many of these were on their first visit to the City and thus would be more likely to be found in and around the City centre. In contrast, visitors from Britain who may well have been to the City before would be more likely to go directly to the various visitor attractions, several of which are outwith the City centre.

- 7.43 There were some variations in the age profiles of respondents from different parts of the world. Generally, it appears that visitors from Europe tended to be younger than those from the rest of the British Isles and the USA and Canada. Some 79 per cent of Europeans interviewed were under the age of 35 years.

(iv) Destination

- 7.44 The majority (60 per cent) of respondents were staying in the Glasgow area while 37 per cent were "secondary tourists", staying elsewhere in Scotland and visiting Glasgow for the day. These figures suggest that Glasgow is an important holiday destination as well as being a place to visit for a day while on holiday elsewhere. Those most likely to be staying in the Glasgow area were:

- in the 35-54 age group (74 per cent);
- in the AB social class (64 per cent);
- from English speaking countries outside the British Isles (64 per cent).

In contrast, it was the younger respondents, particularly those in the 25-34 age group (45 per cent) who were most likely to be visiting Glasgow for the day.

- 7.45 Only 18 per cent of those staying in Glasgow treated it as the sole destination. Irrespective of where they were staying, the majority (81 per cent) of respondents were planning to visit other parts of Scotland during their holiday. Those not intending to visit other areas were most likely to be British (27 per cent) and those who had been to Glasgow before (26 per cent). Edinburgh and the Highlands and Islands were the two most popular destinations, not only for holidaymakers in general but also for those staying in Glasgow. Some 63 per cent of those staying

in Glasgow intended to visit Edinburgh and almost half (49 per cent) intended to go to the Highlands and Islands.

(v) Accommodation

7.46 As the table below shows visitors stayed in three main types of accommodation in Glasgow:

	Percentages
Hotel/guest house	36
Bed and Breakfast	25
Self-catering	11
Friends/relatives	29

Almost a third (29 per cent) of those who stayed at least one night in Glasgow made use of friends and relatives. Hotels appeared to be the main type of commercial accommodation used in the City, but a substantial proportion (19 per cent) also stayed in bed and breakfast accommodation. Both of these types of accommodation offer flexibility for those on "touring" holidays. Hotels, as the most expensive type of accommodation available, appeared to be favoured by the older respondents, particularly those in the 35-54 age group (38 per cent), and those in the highest social class (31 per cent).

(vi) Visits to Museums, galleries and other cultural events

7.47 Almost three-quarters (74 per cent) of those interviewed already had visited or were intending to visit a museum, gallery or special exhibition during their stay in Glasgow. Rather fewer overseas visitors attended museum/galleries (71 per cent) than British residents (75 per cent). While the younger respondents, visitors from overseas and those who had not been to the City before appeared to be attracted to Glasgow because of the City of Culture initiative, it was the older respondents, British visitors and those who had been to Glasgow before who were most likely to visit a museum, gallery or one of the special events. Some 86 per cent of those staying in Glasgow on holiday visited a museum or gallery compared with 55 per cent of those who were staying elsewhere.

7.48 The main venues visited are listed below:

	Percentages
Burrell Collection	52
Glasgow's Glasgow	28
Kelvingrove	20
McLellan Galleries	19
Museum of Transport	16
Hunterian	5
Museums and exhibitions connected with Mackintosh	5

The Burrell Collection was by far the most cited venue. It was visited by 52 per cent of those who went to any museum or gallery. Glasgow's Glasgow was visited

by 28 per cent of respondents and the Kelvingrove and McLellan Galleries were each visited by approximately one-fifth of respondents.

- 7.49 Some 31 per cent of the summer leisure tourists had been to the theatre, a concert or some other form of live entertainment in Glasgow. In this case rather more overseas visitors (34 per cent) attended compared with British residents (25 per cent). Once again, it was those who had been to the City before and intended to visit it again in the future who were most likely to have been to the theatre or a concert. Due to the small sample size it is difficult to draw conclusions but it appears that the visitors most likely to have been to the theatre were those over 54 years of age and those in the AB social class. Concerts and other live entertainment seem to have appealed more to the younger respondents and those in the lower social classes.

(vii) Reasons for visit

- 7.50 To assess the relative importance of the role of the 1990 Cultural Capital of Europe initiative in attracting visitors to the City, respondents were asked, unprompted, their main reason for visiting Glasgow. This produced the following replies:

	Percentages
To visit city/one of largest cities/ never been before	36
To see family/friends	18
Sightseeing	16
Because it was Culture Capital	15
To visit museums/galleries	13
Touring/visiting Scotland	12
Been before/lived in area	12
To attend/take part in an event/activity	9
Shopping	8
En route/stopping off point	7

- 7.51 Although the majority of respondents, including both those staying in Glasgow and those staying elsewhere in Scotland, seem to have visited Glasgow simply to see the City and for general sightseeing, a substantial proportion (15 per cent) claimed they went to Glasgow specifically because it was the Cultural Capital of Europe 1990. A further 13 per cent were visiting museums or galleries which were part of the 1990 Cultural programme.
- 7.52 To investigate further their reasons for visiting Glasgow, respondents were shown a list of factors and asked which one was most important in influencing their decision to visit Glasgow. Responses are listed below:

Percentages

	Visiting museum/gallery		Total Sample
	Yes	No	
Recommended by friends/relatives	31	42	33
Previous visit/knowledge of City	20	22	21
European Capital of Culture	24	6	19
General advertising for City	7	1	7
Newspaper/magazine article for the City	3	1	3
Other	15	21	16

7.53 As a result of prompting the proportion of respondents who claimed that the European City of Culture 1990 initiative was the most important influence in their decision to visit Glasgow increased slightly to 19 per cent. Personal knowledge of the City gained from previous visits and the recommendation of friends and relatives were the most important factors influencing the decision to visit Glasgow. Press articles and general advertising for the City were cited as the most important factors by 10 per cent of respondents.

7.54 The European City of Culture 1990 appears to have been more of an attraction for those who had not been to the City before and for overseas visitors from Europe and other non-English speaking countries. It is perhaps significant that 22 per cent of those from Europe and the rest of the world were influenced by the City of Culture compared with 14 per cent of those from English speaking countries outside Britain possibly reflecting the European "link". Younger respondents under 35 years of age and those in the C1 social class also seem to have been more inclined to come to Glasgow because of the cultural events taking place there.

7.55 The summer survey gave some indication of the impact of the Glasgow 1990 promotion on general tourists with no interest in attending specific cultural events/attractions was obtained from this summer survey. Among those tourists not visiting any museums/galleries, some 6 per cent still claimed the City of Culture 1990 was the most important influence in the decision to visit (see para. 6.59). It would appear the campaign had registered Glasgow's interest as a destination even amongst non-attenders at the arts.

7.56 Visitors interviewed were asked about the importance of museums, theatres and other cultural events available in Glasgow were in the decision to holiday there. For just 1 per cent of respondents they were the sole reason; 51 per cent claimed they were important; and 46 per cent stated they were either not very important or not at all important. The proportion at this stage who claimed the cultural events were important was more than double the proportion who earlier mentioned the City of Culture 1990 as a factor influencing their decision to come to Glasgow. The table shows that those interviewed at arts events and attractions placed a much greater importance on cultural events in the decision to visit.

	Central Glasgow summer tourists	Glasgow 1990 tourists
Sole reason	1	13
Very important	21	26
Quite important	31	27
Not/not at all important	47	34

7.57 It is not surprising that the cultural events taking place in Glasgow generally seem to have been more important for those groups of respondents who were more likely actually to visit a museum or gallery or go to the theatre or a concert during their stay: those in the 25-54 age group; British visitors; those staying in Glasgow and those who had been to the City before.

7.58 However, there were a few surprising points - 53 per cent of visitors from other English speaking countries claimed the cultural events were important but the proportion who claimed the European City of Culture was the most important influence was smaller than for other visitors. Among these general leisure tourists, cultural events were important for 58 per cent of the C2DE class compared with 47 per cent of those in the ABC1 class. Although the cultural events might have been expected to be of more importance for the higher social classes, 77 per cent of the C2DE classes visited a museum or gallery compared with the average of 74 per cent and 30 per cent who went to the theatre, a concert of some kind of live entertainment.

(viii) Response to City

7.59 In an attempt to measure visitors' impressions of Glasgow and any change in these which took place as a result of their visit, respondents were read a series of statements about Glasgow and asked which they thought applied to Glasgow before and after their visit. The procedure was identical to that followed in the exit surveys at the venues (see paras. 6.43 and 6.44 above). The statements and the reactions to them are detailed below:

	Percentages	
	After	Change before and after
Glasgow is an attractive city, full of old buildings and things to see	70	+ 23
Glasgow is a modern lively city with lots to see and do	47	+ 13
The city offers little choice in terms of museums and galleries to visit	1	-3
The city offers a variety of musical and theatrical events of high quality	25	+ 9

7.60 Generally these figures suggest that Glasgow has been successful in its efforts to project the image of an attractive city offering visitors lots to see and do. The other significant finding relates to the change in visitors' impression of the City because of their visit. Without exception, there was a significant increase in the various positive statements about the City and a decline in the negative statements. Although the proportion of visitors whose impression of Glasgow was of a "modern lively city with lots to see and do" did not increase by quite as much as a result of

the visit, almost half (47 per cent) of those interviewed agreed that, having been to the City, this was an apt description of it.

- 7.61 Examining the reaction to the cultural activities reveals that even before their visit almost all respondents seemed to be under the impression that Glasgow offers a wide choice of museums and galleries to visit. However, even after their visit only one quarter (25 per cent) of visitors agreed that "the City offers a variety of musical and theatrical events at high quality". A similar discrepancy was found among Glasgow 1990 tourists. Although these figures may seem a little disappointing at first it should be remembered that only 31 per cent of summer leisure tourists actually went to the theatre, a concert or some live entertainment in Glasgow.

(ix) Previous and future visits to Glasgow

- 7.62 Some 68 per cent of those interviewed were visiting Glasgow for the first time. These first time visitors were most likely to be under 25 years of age (78 per cent) and from overseas (76 per cent). Although such a large proportion of first time visitors is encouraging, it may be a little disappointing that those on their first visit were the least likely to return within the next 3 years. On the other hand, these were general leisure tourists and, whilst 28 per cent of respondents were uncertain about holidaying in the Glasgow area again in the next 3 years, almost half (46 per cent) of those interviewed thought they would be likely to do so. 71 per cent of those who had been to Glasgow before claimed they would return compared with 35 per cent of first time visitors. Those most unlikely to return were the older respondents in the 55+ age group (29 per cent) and the overseas visitors.

- 7.63 It is widely recognised that the holiday decision process is a complex one with various factors interacting to determine the choice of a particular destination. On the basis of this summer survey with its limited sample size, the conclusions to be drawn must be regarded as indicative rather than a definitive assessment.

H. MARKETING CAMPAIGN

(i) Practical response

- 7.64 The practical impact of the marketing campaign appears to have been positive. Specific responses to the advertising campaign received by the Greater Glasgow Tourist Board in the form of letters, coupons or telephone inquiries numbered 87,708. The details were:

Main campaign	41,582
FI file	28,692
ST8/GG Winter campaign	11,098
ST8/GG London underground (Summer 1990)	3,695
Mayfest	940
Glasgow International Jazz Festival	1,158
Shortbreaks	543

(ii) Influence on visitors

- 7.65 Glasgow 1990 tourists and day visitors were asked about factors affecting their decision to visit the City. Among tourists, some 28 per cent cited advertising as an influence, 22 per cent mentioned specific City of Culture advertising and 6 per cent "general advertising" for Glasgow. Tourists interviewed at theatres and concerts were most influenced by City of Culture advertising (32 per cent). By the same token, museum/gallery tourists were more likely to cite City of Culture advertising (27 per cent) than British tourists (13 per cent). Press articles were mentioned by 5-8 per cent. Previously knowledge of the City was an important factor for 30-35 per cent of tourists and recommendations by friends or relations were another important influence, especially with overseas visitors.

Figure 112 Factors influencing decision to visit Glasgow 1990.

	Tourists at mus's/gall's Brit. O'seas		Tourists at theatres, concerts	Day visitors Mus's,Thea's galls con's	
Percentage mentioning					
Previous knowledge of city	35	30	30	32	34
Recommendation by friends/relations	23	37	29	13	16
Advertising for:					
City of Culture	13	27	32	5	11
Glasgow generally	5	6	8	2	9
Press articles	5	6	2	4	9

Source: System Three.

- 7.66 City of Culture advertising had much less influence on day visitors. General advertising of Glasgow was almost as important (9 per cent) as City of Culture advertising (11 per cent) for theatre and concertgoers. Museum and gallery attenders claimed to be little influenced by either form of advertising; (5 per cent cited City of Culture, 2 per cent general advertising). In recognition of the success of the Glasgow 1990 marketing campaign, the Greater Glasgow Tourist Board was given four major marketing awards in 1990: the Scottish Marketing Award, the Scotmedia Advertising Award, the Scottish Tourism Oscar, and the UK Tourism Award.

I. TOURISM CONTEXT

(i) Role of Cultural tourism 1990

- 7.67 The best available estimates of total tourist trips to Glasgow are set out in Figure 113. There were approximately 1.22 million trips, some 0.9 million by British residents in 1990 and 0.3 million by overseas tourists in 1989 (the latest available

figure). Figures, which are rolling averages, were supplied by the Scottish Tourist Board.

Figure 113 Glasgow tourism: purpose of trip, 1989/1990

	Number of trips (thousand)		
	British ^a	Overseas ^b	All
Holiday	396	160	556
Visiting friends/relatives	162	67	229
Business	252	58	310
Other	90	35	125
All	900	320	1,220

Source: Scottish Tourist Board.

^a 1989/1990 average.

^b 1989.

7.68

According to our calculations, some 555,000 trips involved attendance at arts events and attractions (Glasgow 1990 tourists). These constituted some 45 per cent of total trips. The figures imply a role for "cultural tourism" in Glasgow much greater than previously appreciated. Perhaps four in five holiday/VFR trips to Glasgow by overseas tourists included some attendance at 1990 events. The equivalent of 76 per cent of British holiday trips to Glasgow (or 57 per cent of holiday and VFR trips taken together) included an element of arts attendance during 1990.

(iii) Inadequate local trend information

7.69

There exists very little basis for comparing 1990 cultural tourism with previous years. The only trend data on tourism to Glasgow relate to overseas tourists and because of the small samples they cannot be regarded as a precise measurement. In any case, the 1990 figures are not yet available. Because of a recent (1989) change of survey methodology, no trend data exist for British tourists in Scotland at the regional or city level. Figures arising from the surveys under the new methodology may well give cause to revise previous assumptions about the scale and nature of tourism in Glasgow. The most recent survey of cultural tourism can be found in the PSI study which relates to the Glasgow situation in 1986. The main changes subsequently arising were the overall growth in tourist visits to cultural attractions (up by 81 per cent), and a rise in the proportion of visits attributable to overseas tourists (up from 27 per cent in 1986 to 41 per cent in 1990). Otherwise, the various survey changes make it impossible to say more on current trends at present with any precision.

(iii) National context

- 7.70 Whether the changed balance of overseas and domestic tourists and the jump in visits were effects of 1990, or were to any degree anticipated by some rising trend in the late 1980s, cannot be measured. But it would seem likely that the bulk of the change was confined to 1990 and this was the assumption behind the tourist visits estimated for 1989 in para. 5.6 above. The background to the positive outcome for Glasgow 1990 is set by a poor year for British domestic tourism, with a 13 per cent fall in trips to all destinations (according to UKTS data supplied by the Scottish Tourist Board) in 1990 compared with 1989. Though Scotland experienced the sharpest drop, down 23 per cent, cultural tourism to Glasgow 1990 appears to have bucked the trend. The movement 1989-1990 in British resident tourists trips by trip destination can be summarised as follows:

	Percentage change
Northern Ireland	-6
England	-12
Wales	-12
Scotland	-23
All UK destinations	-13
Non UK destinations	-7
All destinations	-12

- 7.71 The business sector in Scotland experienced a severe fall (down 43 per cent). Visiting friends and relatives also dropped sharply:

	Percentage change		
	Scotland	UK	Non UK
Holiday			
1-3 nights	-12	-13	-6
4+ nights	-17	-7	-10
All	-15	-9	-10
Visiting friends/relatives	-43	-20	+16
Business	-43	-20	+7
All	-23	-13	-7

J. TRADE

(i) Hotel occupancy

- 7.72 An indirect indication of the wider boost given to tourism by the Glasgow 1990 promotion can be gained from several other sources. The Scottish hotel occupancy survey, commissioned by the Scottish Tourist Board, shows that room occupancy in Glasgow increased one percentage point from 60 to 61 per cent in 1990. Average length of stay rose from 2.1 to 2.2 nights, and bed occupancy by overseas visitors increased from 6 to 8 per cent of the total. In contrast to the UKTS figures for 1990, the occupancy survey would appear to show Scottish hotels operating in a relatively stable climate, though in Edinburgh room occupancy fell from 57 to 54 per cent and the overseas bed occupancy dropped from 11 to 8 per cent.

- 7.73 On further analysis, Glasgow hotels went through two distinct periods during 1990. For the first seven months occupancies were above 1989 levels. Figures ranged from one percentage point up in June to 17 points up in February. However, August recorded a fall of 6 points on 1989 and each subsequent monthly occupancy was below the previous year's figure. Much of the boost in the earlier part of the year has been attributed to expanded conference trade. It seems that an effect of Glasgow 1990 may have been to protect the Glasgow hotels from the full impact of emerging difficulties with business traffic.

Figure 114 Glasgow Hotel occupancy: Glasgow, Edinburgh and Scotland

Percentages and numbers

Area	Room occupancy		Average length of stay (days)		Overseas bed occupancy (%)	
	1989	1990	1989	1990	1989	1990
Glasgow	60	61	2.1	2.2	6	8
Edinburgh	57	54	2.0	1.9	11	8
Scotland	56	57	2.0	2.0	7	6

Source: Scottish Tourist Board.

(ii) Visitor enquiries

- 7.74 Another indirect indication of the wider boost given to tourism by Glasgow 1990 is the number of enquiries at the Tourist Information Centre (TIC) in central Glasgow. Visits to the TIC increased from 452,676 in 1989 to 605,065 in 1990. Enquiries showed strong growth from both British (up 50 per cent) and overseas (up 46 per cent) tourists. Initially, enquiries from overseas tourists fell in relation to 1989 each month from January to May, an overall fall of 23 per cent. But a surge of interest followed. September and October were exceptional months when enquiries more than doubled in relation to 1990. The overall growth for the June to December period was 97 per cent. British enquiries also saw an acceleration in the latter part of the year, up 70 per cent June to December, compared with 25 per cent January to May. As with overseas tourists, October was an exceptional year for British enquiries when they rose 147 per cent, presumably from people seeking to squeeze in a Glasgow visit before the year was out.

Figure 115 Glasgow Tourist Information Centre enquiries: by British and overseas visitors

	Percentages	
	Enquiries change 1989 - 1990 British visitors	Overseas visitors
January-May	+15	-23
June-December	+70	+97
Year	+50	+48

Source: Greater Glasgow Tourist Board

(iii) Conventions and conferences

- 7.75 The growth in conference and convention business was part of a longer term tourist strategy for the City. It would appear that Glasgow 1990 proved an exceptional year in which, according to information available to the Greater Glasgow Tourist Board (GGTB), Glasgow hosted some 120 conferences, accounting for some 48,000 delegates. The 1989 figures were 44 conferences and an estimated 16,500 delegates.

Figure 116 Glasgow conferences and conventions

	Number			
	1988	1989	1990*	1991-97*
Conference size				
Under 500	23	38	82	46
550-999	9	4	30	14
1,000-1,999	3	1	7	13
2,000 plus	2	1	1	12
Total	39	44	120	85

Source: Greater Glasgow Tourist Board.

* Bookings known to the Greater Glasgow Tourist Board.

- 7.76 The fruits of the longer term strategy can be seen in conference bookings through to 1997, which include 12 conferences of 2,000 plus delegates, mainly in the areas of scientific and professional congresses and business gatherings. According to GGTB, at least 21 specialist conferences in the cultural field were held in Glasgow during 1990, drawing some 7,500 delegates. GGTB listed the following:

<u>Conference</u>	<u>Location</u>	<u>Delegates</u>
Association of British Orchestras	Forum Hotel	300
Practical Arts Conference	Swallow Hotel	100
BAFTA Awards	SECC/Forum Hotel	500
Arts Council Conference	SECC	750
UK Comic Art Convention	City Chambers	300
BETA Centenary Conference	Hospitality Inn	400
Int'l Soc. of Performing Arts		
Administrators	Holiday Inn	500
The Museums Association Conf.	Theatre Royal/Hospitality Inn	600
Assoc. for Military & Army Mus.	Kelvingrove/Burrell	150
European Blind Union Art		
Horizons Conference	Strathclyde University	100
Miniature Book Society Conclave	Hospitality Inn	200
New Music World Conference	Various city centre venues	700
European Design Education		
Network	Strathclyde University	150
Int'l Computer Music Assoc. Conf.	City Halls	400
Patronage, Censorship & the Arts	Strathclyde University	200
Int'l Assoc. Music Info. Conf.	Glasgow University/RSAMD	200
The 1990 Nat'l BASBWE Conf. &		
The Boosey & Hawkes European		
Wind Bank Festival	RSAMD/Hospitality Inn	500
Theatre Management Association	Theatre Royal/Hospitality Inn	250
Nat'l Soc. for Education in		
Art and Design	Forum Hotel	500
European Film Awards	Glasgow Royal Concert Hall	700
Box Office Computer Users Assoc.	Copthorne Hotel/Town House	
	Hotel/SECC	100

(iv) Great British Cities Marketing Group

7.77 Evidence of improvement in Glasgow's image as a tourism destination is contained in a Travel and Tourism Research (TTR) study which examined the factors shaping perceptions of holidays in British cities. This was carried out for the Great British Cities Marketing Group (GBCMG), a marketing consortium dealing in short city breaks with hotel packages. Glasgow is a member of the group alongside "industrial" cities, such as Bradford, Birmingham and Leeds. The study was carried out mainly with focus groups in various parts of Britain.

The study revealed a high level of awareness amongst consumers of Glasgow's renaissance, but Glasgow was still capable of provoking conflicting responses. Whilst it was the second most popular destination among the sixteen GBCMG cities, it also came fifth in the list of places respondents "would not like to visit". TTR checked impressions of cities in membership of GBCMG against cities with "less of an image problem". Cambridge came top as place people would like to visit, with Edinburgh second. Whilst 28 per cent of respondents indicated they wished to visit Glasgow, this should be compared with the 56 per cent and 52 per cent who wished to visit Cambridge and Edinburgh respectively.

7.78 But the views of consumers were generally that Glasgow lived up to its expectations:

"I'd like to go. It's all been redone, hasn't it, and it seems nice, a 'City of Culture' or something".

"It's had a big clean up, hasn't it?"

"A few years ago you wouldn't have thought of going to Glasgow, but they're revamping it, and I'd probably consider going there now."

"It's a changed place".

"I have heard it's all been redone and there always seems to be something going on there. It's the City of Culture this year, isn't it? There was the Garden Festival. On the television, the shopping centres seem absolutely super."

"Glasgow, I would have said a couple of years ago I wouldn't want to go there, but now it's had its cultural renaissance, it's a place I think I'd like to go to."

"We had a stay in Glasgow - we went to that big museum outside Glasgow - its name escapes me. We'd heard so much about it, on the television mainly. Glasgow turned out to be a remarkable nice city."

"I've been before and it's a smashing place. I'd like to go again."

7.79 The attitude of coach operators towards Glasgow's new image as reported by TTR tended to be more cautious:

"Ten years ago you would put a tour in Glasgow at your peril ... but my parent company has now introduced it in its brochure ... Glasgow has altered its image dramatically over the last 10 years ... you can see it and feel it in the city ... the taxi drivers' attitude to their city, the bus drivers, etc."

"Glasgow is another of these places that's trying to convince people that it's a tourist centre ... I'm not sure if it's for our sort of people".

7.80 TTR concluded that, whilst it takes a great deal of time and money to change the image of a city, "this has been achieved to a remarkable extent by Glasgow". It was also observed that "there is still some way to go before universal acceptance that [Glasgow] is an attractive destination".

K. SUMMARY

7.81 Glasgow 1990 was a success in tourism terms. Tourist trips to Glasgow which involved attendance at arts events and attractions are calculated at 555,000, the equivalent of 45 per cent of total trips. Visits to arts events and attractions by tourists were 81 per cent above the 1986 level. TIC inquiries in 1990 were 48-50 per cent higher than the previous year.

- 7.82 A major development was the growth in the overseas market which accounted for 38 per cent of total trips and was possibly three times larger than in 1986. Some 77 per cent of non-English speaking visitors were first timers in Glasgow.
- 7.83 The domestic market had more repeat business (57 per cent) than the overseas. Over half were on short trips (51 per cent 1-3 nights). Glasgow 1990 tourists were drawn more from prime markets than average tourists to Scotland. They were 77 per cent ABC1s compared with the Scottish average of 55 per cent and 42 per cent from London and the South East compared with the 16 per cent average.
- 7.84 The pulling power of cultural attractions among Glasgow 1990 tourists is illustrated by the fact that two in every five visitors claimed that cultural events were the "sole" or "very important" reason for the decision to visit Glasgow. A further 27 per cent claimed that cultural attractions were "quite important" in the decision. For as many as 19 per cent of British 1990 tourists, theatres/museums were the "sole reason" for the trip. Cultural attractions influenced 65 per cent of overseas visitors, but were the sole reason for only 5 per cent.
- 7.85 Glasgow 1990 established a significant tourist public for theatres/concerts, so that they accounted for 10 per cent of audiences throughout the year compared with 2 per cent in the mid 1980s. Museums and galleries remained the central attraction for tourists, drawing seven times the theatres/concerts visits.
- 7.86 Whilst one-off special events proved capable of drawing up to 28 per cent of attendance from tourists (and acted as "markers" for the Year's programme), the 1990 tourist market responded more to the work of existing institutions (with their enhanced programmes) and the promotional campaign. The tourist scores of 8 per cent for Scottish Opera, 16 per cent for the Citizens and 33 per cent for the Burrell are important indicators for future opportunities.
- 7.87 Exhibitions of stature in well established institutions (e.g. the Burrell) achieved tourist results even in the 'off' season. Glasgow 1990 further showed that, with the right kind of quality programming, a summer tourist audience for the performed arts could be found. But programming needs the most rigorous selection.
- 7.88 Good prospects were indicated for repeat business. Domestic tourists were most likely to return (74 per cent), with as few as 14 per cent set against. Overseas visitors were less likely to return, English speaking (53 per cent) and others (45 per cent).
- 7.89 Responses to Glasgow as a destination continued to improve. If anything, overseas tourists rated the City rather higher than British tourists. The changes of perception brought about by tourist contact with Glasgow were uniformly positive. But questions remain about the understanding and appreciation of the range and quality of musical and theatrical events of high quality in the City. In the light of the evident market opportunities in this area, there is much room for progress on this point.
- 7.90 There is widespread recognition that Glasgow is changing for the better. But in London and the South East (a prime target area) one third of ABC1s still think the City is "rough and depressing". TTR concluded on the basis of researching factors which shaped perceptions of holidays in British cities that, whereas a change of image "has been achieved to a remarkable degree by Glasgow ... there is still some way to go before universal acceptance that it is an attractive destination".

- 7.91 Glasgow 1990 helped build the positioning of Glasgow as a cultural destination in its own right. It was the sole destination for 55 per cent of Glasgow 1990 domestic tourists. Some tourists cited the City of Culture sobriquet (10 per cent), or general sightseeing (7 per cent) in justifying the trip. But it was far more common to refer to specific events or attractions. In cultural tourism, destinations register themselves as much through events and specific attractions as through general name and reputation.
- 7.92 The practical impact of the marketing campaign would appear to have been positive. It was more successful outwith Scotland than inside. Some 28 per cent of tourists cited it as an influence, more so overseas visitors and theatre-goers than domestic tourists and museum attenders. Some interest in the destination was registered even by non-attenders at the arts. Day visitors claimed to be much less influenced by any form of advertising for Glasgow, though press articles were cited as a factor by 9 per cent of day visitors at theatres and concerts.

8. CULTURAL SECTOR

A. STRUCTURE OF SECTOR

(i) Summary

- 8.1 With a turnover of £374 million, Glasgow's cultural sector was responsible for providing some 8,705 direct jobs in 1990. Museums and galleries accounted for 720 jobs, and theatres, halls and ensembles almost double the number at 1,410. Much the biggest share of the sector (82 per cent of turnover and 66 per cent of jobs) related to the so called "cultural industries" (publishing, broadcasting, etc). A further aspect was independent employment in the arts estimated at 865 jobs.

Figure 117 Cultural sector: turnover and direct jobs, 1990

Number and £ million			
	Companies (number)	Turnover (£ million)	Jobs (number)
Museums, galleries	38 *	21.1	720
Theatres, halls, ensembles	49	39.4	1,410
Independent employment	n.a.	9.4	865
Cultural industries	<u>299</u>	<u>304.0</u>	<u>5,710</u>
Total	386	373.9	8,705

* Sites.

B. EVENTS AND ATTRACTIONS

(i) Creative heart

- 8.2 Within the museums and galleries subsector, the Glasgow District Council sites (including the reopened McLellan Galleries) were the main employer (over 400 full time staff). This sector overall generated 630 jobs, of which 507 were full time. Theatres, halls and ensembles constituted a larger sector with a total turnover of £33.47 million. The creative heart of the sector (namely, producing theatres, opera, ballet, drama companies, and musical ensembles) accounted for 850 out of 1,295 full time equivalent jobs. Scottish Opera and Scottish Ballet alone had a turnover of £10.9 million. Almost two-fifths of the employment was in the form of casual, part-time and short contract work for performers, designers and producers.
- 8.3 The figures relate to the "institutional framework" as described in paras. 2.8 and 2.9. They take account of extra 1990 revenue support and income received by these organisations. Elements of the infrastructure opened during 1990 (e.g. Glasgow Royal Concert Hall) are included in these figures, as are the 1990 central

projects with a turnover of £11.74 million and 205 jobs. But they capture only partially the impact of independent projects generated during the Year.

Figure 11B Arts events and attractions: turnover and jobs, 1990

	Turnover (£ million)	Jobs (number)
Museums, galleries, visual arts		
Glasgow City Council	12.03	403
Other local authorities, independents	<u>3.21</u>	<u>227</u>
All	15.24	630 ^a
Theatres, halls, ensembles		
Producing theatres, independent companies	2.54	305
Scottish Opera/Scottish Ballet	10.90	345
Music ensembles	4.62	200
Theatres, halls, arts centres ^b	12.81	405
Promoters/festivals	<u>2.60</u>	<u>40</u>
All	33.47	1,295 ^c
1990 central projects		
Museums/exhibitions ^d	5.84	90
Theatres, concerts ^e	<u>5.90</u>	<u>115</u>
All	11.74	205
All	60.46	2,130

^a Of which 507 full time.

^b Includes Glasgow Film Theatre.

^c Of which 802 full time.

^d Glasgow's Glasgow, Dome of Discovery.

^e Tramway, The Ship, World Orchestras, Sinatra, Bolshoi.

(ii) Income sources

8.4 The income sources of the arts events and attractions sector are summarised in Figure 119. Trading income (excluding sponsorship) accounted for £17.95 million, roughly 30 per cent of total turnover in 1990. Public sector contributions were of major importance, especially for museums and galleries. Local authorities contributed some 76 per cent of income to the latter compared with 23 per cent of income in theatres, halls and ensembles. Unsurprisingly, galleries achieved a significant proportion of their income from sales (53 per cent). "Other government income" for the independent sector represented the University of Glasgow's contributions to the Hunterian Museum and Gallery.

Figure 119 Arts events and attractions: income sources, 1990

	Percentages					
	Admis- sions	Sales, fees	Sponsor -ship	Local authorities	Other gov't	Other
Museums, galleries, visual arts						
Glasgow City Council ^a	0	10	3	85	2	-
Other local authorities	0	1	1	97	0	0
Independents	2	12	6	13	61	6
Galleries	0	53	7	18	16	5
All	1	12	4	76	7	1
Theatres, halls, ensembles						
Producing theatres	22	14	0	34	27	2
Scottish Opera/Ballet	21	6	11	8	51	3
Ind. drama, dance	3	5	0	47	43	2
Music ensembles	18	12	5	9	53	2
Receiving theatres	72	1	-	24	2	1
Arts centres/small	20	28	3	35	14	0
Concert halls ^b	33	5	5	51	-	5
Film theatre	50	10	5	15	19	-
Promoters/festivals	27	2	8	60	1	1
All	33	7	6	23	29	2
1990 central projects						
Museums/exhibitions	14	-	5	80	0	1
Theatres/concerts	28	2	8	61	1	1
All	21	1	6	71	1	1

^a Including McLellan Galleries.

^b Including Royal Concert Hall.

8.5 Scottish Arts Council (SAC) support was important to the producing companies, such as Scottish Opera, Scottish Ballet, and the Royal Scottish Orchestra. Major contributions were made by local authorities to the producing theatres and to independent drama/dance companies. The latter were among the most reliant on public sector support, which amounted to 90 per cent of their income, obtained equally from the local authorities and the SAC.

8.6 Unsurprisingly, trading income was more important to the theatres and halls, and for such local facilities the bulk of their extra support came from local authorities. Promoters and festivals fell into a similar pattern. The 1990 centrally-initiated projects were heavily dependent on local authority support. The theatre/concert projects required 61 per cent support compared with the 23 per cent average for the established institutions. The 1990 exhibitions did better on admission income (14

per cent) than the established institutions (1 per cent), but still required 80 per cent support.

(iii) Trend in income since mid 1980s

- 8.7 Since the mid 1980s, it is clear that arts events and attractions have been successful at building income from trading activity, up 5 percentage points in the case of museums and galleries and 2 percentage points for theatres, halls, etc (see Figure 120). Bigger changes took place in public sector support. Local authorities' share of income increased, but this was much influenced by 1990 special funding. The proportion of other public funding (e.g. from the Scottish Arts Council) was markedly down.

Figure 120 Arts events and attractions: changes in income source

	Percentages					
	Museums, galleries			Theatres halls, etc.		
	1985/86	1990	Change	1985/86	1990	Change
Admissions, sales, spon., other	13	18	+5	46	48	+2
Local authority	72	76	+5	9	23	+14
Other public	15	97	-8	45	29	-16
All	100	100	-	100	100	-

Source: PSI.

(iv) Expenditures

- 8.8 Expenditures are set out in Figure 121. The salary proportion was highest for museums and galleries and least for the 1990 projects. Theatres, halls, ensembles (especially festivals) spent the highest proportion on fees (28 per cent, compared with 18 per cent for the central projects) and negligible sums in museums/galleries.

Figure 121 Arts events and attractions: expenditure, 1990

	Percentages		
	Salaries	Fees	Other
Museums, galleries, visual arts			
Glasgow City Council	41	0	59
Other local authorities, independents	43	2	55
All	41	0	59
Theatres, halls, ensembles			
Producing theatres, independent companies	50	15	35
Scottish Opera/Scottish Ballet	36	20	44
Music ensembles	64	11	25
Theatres, halls, arts centres	29	43	28
Promoters/festivals	10	46	44
All	38	28	34
1990 official projects			
Museums/exhibitions	9	5	87
Theatres, concerts	20	32	48
All	14	18	68
All	34	19	47

C. CULTURAL INDUSTRIES

(i) Summary

8.9 Glasgow's cultural industries had an estimated turnover of £304 million in 1990. This related to some 299 companies spread over a range of activities. The largest subsectors were broadcasting (valued at £164 million) and publishing (£99 million). The design trades, the music industry and the art trade were on a smaller scale. The figures do not include advertising, architecture and the press, though Glasgow, with good reason, could claim to be the UK's second newspaper city. Nor do they include any estimate of the economic value of advertising, architecture, education or training each of which could be considered as an aspect of the cultural industries.

Figure 122 Cultural industries in Glasgow, 1990

	Companies (numbers)	Turnover (£ million)	Jobs (number)
Art trade	37	9.5	95
Publishing	11	98.9	1,590
Designer trades	197	10.5	1,070
Music industry	19	2.0	75
Broadcasting	3	164.0 ^a	2,170 ^b
Independent film and video	19	8.3	420 ^c
Cinema	<u>13</u>	<u>10.3</u>	<u>290</u>
	299	304.0	5,710

^a Net of spending on independent producers.

^b Direct employment 1,820; freelance contracts 350 Fte.

^c Direct employment 90; freelance contracts 330 Fte.

(i) Art trade

- 8.10 The art trade consisted of some 22 galleries, 3 auction houses and 12 antiques dealers (those operating the special VAT scheme according to Antiques Shops in Britain, 1991). Though the auction houses underwent some retrenchment in the late 1980s, the number of galleries increased (e.g. the Original Print Shop, Cormund Gallery, etc.). The art trade became more organised in 1990 through the establishment of a Galleries Group which arranged joint press advertising and produced some joint print.

(ii) Publishing

- 8.11 The main employer in Glasgow publishing was Collins (now part of Harper Row) with 1,510 staff. Its Glasgow plant was responsible for group printing and distribution, together with editorial work on reference and cartographic books and bibles. Employment increased by almost a fifth since the mid 1980s. Blackie was an established smaller publisher. The Scottish Publishers' Association identified a further nine small Glasgow-based publishers.

(iii) Designer trades

- 8.12 Scottish Enterprise listed some 197 crafts companies in the Glasgow region in 1990. The specialisms are set out in Figure 123. There were heavy concentrations in textiles/knitwear, jewellery and ceramics.

Figure 123 Craft companies in Glasgow region: by craft type, 1990

	Companies
Bookbinding	1
Casting: metal and resin	8
Ceramics	31
Textiles	29
Knitwear	20
Leather	3
Enamel	4
Furniture	6
Glass: engraved	3
blown	2
stained	10
Jewellery	32
Musical instrument making	2
Paper	3
Tapestry	2
Toys: soft and wooden	6
Wood: carved and turned	13
Metalwork	5
Miscellaneous	17
Total	197

Source: Scottish Enterprise.

- 8.13 The number of businesses in the sector had doubled over the decade and grown by 19 per cent since 1986. The recent growth would appear to have been concentrated amongst smaller companies involved in producing one-off items, as opposed to batch makers. A Glasgow District Council survey of crafts interests (carried out by the Estates Department) showed average employment to be 2.75 per business.

(iv) Music industry

- 8.14 Most aspects of the popular music industry were represented in Glasgow. Some 15 Glasgow-based bands had national/ international reputations alongside the "hundreds" of semi-professional groups. Key names among Glasgow groups include: Love and Money, Wet Wet Wet, Hue and Cry, Simple Minds and Pastels. According to industry sources, there are upwards of 30 recording "studios" in the region. The professional studios were Cava, Park Lane and St Clair. Smaller studios numbered four, Sensor City and Power Studios. Pet Sounds was part of the Precious Organisation providing management, agency, recording and rehearsal services to the music industry. Most of the named bands had their own 8-track recording set ups. "Cottage studios" numbered 20-30. Local promoters included King Tuts Wah Wah Hut, Tower Promotions, Paul Cardo and Sean Webster, George Duffin and Tennants

Live. Among Glasgow record labels were Lismore, Country House, Linn, Jammy, Klub, Cathexis and Egg Records.

- 8.15 A survey of the entertainment press estimated some 1,818 pop/rock, 1,466 jazz/blues and 957 folk concerts in 1990, 4,241 overall. Major rock venues were Barrowlands (55 concerts) and the SECC (24 concerts). A variety of popular music events were featured at the Glasgow Royal Concert Hall and at the Pavilion Theatre. But about 4,000 concerts took place in small venues, with a low admission charge or none at all, and many were given by local musicians. Glasgow International Jazz Festival accounted for 148 concerts with 25,000 attendance; the Glasgow International Folk Festival had 16 concerts with an estimated 4,000 attendance. Excluding the Rolling Stones (40,000) and the Big Day (970,000), overall 1990 attendance was estimated at 561,000.

(v) Broadcasting

- 8.16 Glasgow broadcasting companies (BBC Scotland, Scottish Television and Radio Clyde) had a turnover of £151.1 million in 1990 with staff numbers totalling 1,822. BBC staff totalled 1,216 (of which 1,020 were employed in Glasgow), STV 500 and Radio Clyde 106. Direct employment in broadcasting showed a 15 per cent fall since 1986, down from 2,143 to 1,822. Reductions in STV staff were substantial, with a lesser fall in BBC Scotland. Over the same period Radio Clyde staff numbers rose from 67 to 106.
- 8.17 These years saw television switch from core employment to greater use of casual staff and independent programme commissions. Numbers of casual contracts and independent productions are set out in Figure 124. Contracts for individuals were roughly equivalent to 350 full-time staff compared with 244 in 1986. In 1991 STV issued 36 contracts to independent producers for 130 hours of television; the BBC issued 23 contracts in 1990 for 41 programme hours. These might be estimated to have produced 160 Fte jobs in the independent sector. If the employment effect of casual contracts and independent productions is added to the core, broadcasting employment still appears to have fallen from 2,387 in 1986 to 2,332 in 1990.

Figure 124 Broadcasting companies in Glasgow: independent productions and contracts, 1990.

	Number	
	BBC	STV
Independent productions		
Programme contracts	23 ^a	36 ^b
Hours	41	130
Independent contracts		
Actors Equity (contracts)	2,340	5,492
Musicians' Union (sessions)	2,350	483
Writers (contracts)		30
Technical crews (days)	50	5,250

Source: BBC; STV.

^a 1990.

^b 1991.

- 8.18 Arts programmes in a narrow sense (arts features, drama, variety and music including pop music) from the BBC in Scotland amounted to 130 hours of television and 2,400 hours of radio in 1990. The STV equivalent figure was 128 hours. Broadcasting companies undertook some exceptional work in connection with 1990. For example, Radio Clyde presented a daily series (The Ball in the Tree) and BBC Scotland expanded its Music and Arts Department with many Glasgow originated items being networked in the UK.

(vi) Independent film and video

- 8.19 More commissions from broadcasting companies were a factor affecting development in the independent film and video sector. This meant that more small independents could make a living from broadcasting. According to entries in Film Bang, the number of Glasgow companies rose from 13 in 1986 to 19 in 1990. Estimated staff numbers increased from 72 to 96. On the other hand, because no feature films were made in Glasgow in 1990, there was little growth in overall business in the independent film and video sector. The core business of corporate videos, etc. sustained the two largest companies.

- 8.20 At an institutional level, important developments in 1990 were the creation of Scottish Screen Locations and the Scottish Screen Training Initiative. A major change in facilities support was the closure of the Rank Laboratories, the only one in Scotland.

(vii) Cinema

- 8.21 The Glasgow region was served by 51 cinema screens on 13 sites in 1990. Its three multiplexes included two UCI operated sites and the first Canon multiplex in

the UK which was opened at Parkhead Forge in 1989. Cinema provision in the Glasgow region had expanded considerably since the mid 1980s. By the same token, UK cinema admissions began expanding again in 1985, growing 85 per cent between 1986 and 1990. On the basis of national screen averages, the Glasgow region's cinema attendance in 1990 might be estimated at 3.15 million.

D. ARTISTS

(i) Creative centre

8.22 A further aspect of Glasgow's cultural sector was independent (and other) employment. Self employed individuals were the main element. It is estimated that Glasgow has some 300 visual artists living in whole or part on their earnings from art. The figure was arrived by reference to the Scottish Arts Council, Glasgow Art Club, WASPS, Glasgow Print Studio and Glasgow Sculpture Studio and the Scottish Society of Artists. The Scottish Arts Council Writers Register contains 44 Glasgow names. This lists writers willing to read and discuss their work in public and so should be regarded as a minimum estimate for professionals based in Glasgow. Composers living in the Glasgow region number 17 in the British Music Year Book.

8.23 These figures all show a marked increase on the mid-1980 levels, up 20 per cent for visual artists, 16 per cent for writers, and 31 per cent for composers. None of the sources purports to be comprehensive and so the figures should be treated with care, but the rising trend in the 15 and 30 per cent range indicates the increasing role of Glasgow as a centre for "creative" activity.

(ii) Performers

8.24 The figures for performers also showed some increase. Actor's Equity membership rose 38 per cent from 1986 to 1990. Industry sources suggest that the pool of freelance symphony musicians remained at 30-40. Estimates of pop and rock musicians were much higher in 1990 than in the five years previously.

(iii) Service organisations

8.25 The figures for service organisations relate to independent Glasgow-based bodies (e.g. Scottish Film Council, Gaelic Book Council, Scottish Music Information Centre and the Book Trust for Scotland) but do not include the Festivals Office (at its peak employing 50 individuals) or other local authority employees.

Figure 125 Independent and other employment in the arts in Glasgow, 1990

	Turnover (£ million)	Jobs (Fte)
Independent employment		
Creative artists ^a	2.6	360
Actors, musicians ^b	3.9	260
Other employment (service organisations, community arts, etc.)	<u>2.9</u>	<u>245</u>
	9.4	865

^a Visual artists, writers, composers.

^b Includes symphony, pop, rock and jazz musicians; excludes 455 (Fte) artists and 225 (Fte) technicians in broadcasting, independent productions.

E. GROWTH IN SECTOR

8.26 Comparison with 1986 shows that 1990 employment in the cultural sector was 7.8 per cent greater. The strongest growth was in theatres, halls and ensembles, up 20.2 per cent, and in independent employment, up 13.5 per cent. Museums and galleries jobs increased by 7.4 per cent. The cultural industries expanded by 3.9 per cent. If the effect of 1990 official projects is taken into account, the growth in theatre, halls, ensembles falls back to 14 per cent. The same calculation for museums and galleries produces a 3 per cent reduction in employment between 1986 and 1990. This disguises a strong growth in core employment in the Glasgow Museums and Art Galleries and a marked reduction in what used to be Manpower Service Commission-funded staff in the independent sector.

Figure 126 Cultural sector employment in Glasgow

Number and percentages

	1986	1990	Percentage change
Museums, galleries	675	720	+ 6.7
Theatres, halls, ensembles	1,146	1,410	+23.0
Independent employment	762	865	+13.5
Cultural industries	<u>5,493</u>	<u>5,710</u>	<u>+ 3.9</u>
Total	8,076	8,705	+ 7.8

Source: Policy Studies Institute.

Figure 127 Employment in Glasgow's cultural industries

	Number and percentages		
	1986	1990	Percentage change
Art trade	97	95	- 2
Publishing	1,356	1,590	+ 17
Design	985	1,070	+ 9
Music industry	40	75	+ 87
Broadcasting*	2,387	2,170	- 9
Independent film/video	362	420	+ 16
Cinema	<u>250</u>	<u>290</u>	<u>+ 16</u>
	5,493	5,710	+ 4

Source: Policy Studies Institute.

* Includes 244 Fte short contract employment in 1986 and 350 Fte in 1990; excludes employment from independent commissions in 1990.

- 8.27 Within the cultural industries sector, important differences in trends can be identified. Figure 126 shows that broadcasting employment fell by 9 per cent between 1986 and 1990. The decline was not compensated for by the estimated 16 per cent growth in independent film and video employment. With the exception of the art trade, the other sub-sectors showed positive signs of expansion. Publishing (mainly Harper-Collins) expanded by 17 per cent, the cinema by 16 per cent and design by 9 per cent. The music industry, a much smaller sector, almost doubled in size.

F. SUMMARY

- 8.28 Direct employment in Glasgow's cultural sector in 1990 was 8,705, 7.8 per cent greater than in 1986. If the 1990 central projects are discounted, the growth was 4.9 per cent overall, 14 per cent up in theatres, halls and ensembles, and 3 per cent down for museums and galleries. The latter resulted from the marked reduction in MSC-funded staff in the independent sector which masked strong growth in core professional employment elsewhere.
- 8.29 Some 66 per cent of the jobs in the cultural sector related to the so-called cultural industries (publishing, broadcasting, the art trade, etc.) and this was a growth area expanding by 3.9 per cent since 1986. The effect of structural changes in broadcasting was to reduce direct employment by 9 per cent, a decline not compensated for by 16 per cent growth in the independent film and video sector. Otherwise, with the exception of the art trade, the sub-sector showed strong signs of expansion, including the designer trades and the music industry.

8.30 The numbers of individual artists resident in Glasgow appears to have risen in the range of 15 to 30 per cent since the mid 1980s. This indicates the increasing role of the City as a centre for "creative" activity.

8.31 When account is taken of indirect and induced effects (including the effects of ancillary visitor spending), Ecotec Research and Consulting estimate that the cultural sector supported a total of approximately 21,400 jobs in Glasgow in 1990. It should be stressed that, because of differences in assumptions and methodology, this figure is not directly comparable with the earlier estimates of 14,735 for 1985/86. Nevertheless, it indicates that the cultural sector is a significant component of the Glasgow economy, accounting for the equivalent of 2.84 per cent of the economically active population in the region.

9. IMPACTS OF GLASGOW 1990

- 9.1 This section considers the quantifiable economic benefits arising from the Glasgow 1990 initiative, alongside the range of less tangible, but nevertheless important, longer term impacts. The latter may prove to be more significant in due course, but the evidence from which to make an assessment is limited at this stage.

A. ECONOMIC IMPACT OF GLASGOW 1990

(i) Issues involved in estimating short term impacts

- 9.2 The analysis which follows was prepared by Ecotec Research & Consulting Ltd. It focuses on assessing the total impacts of Glasgow 1990 on local expenditure, employment and incomes. We look at the wider impacts associated with additional visits to arts attractions by day visitors from outside the study region, tourists proper and by local residents and at the impact on arts venues themselves.

- 9.3 The generation of estimates of the impacts of Glasgow 1990 is facilitated by the range of survey work undertaken by System 3 Scotland and by the availability of other information collected for monitoring purposes. Deriving reliable estimates, in particular of the impact of the ancillary expenditure associated with Glasgow 1990 visits, is complicated by a range of factors, including:

the fact that Glasgow 1990 related to the entire cultural programme of the City for a full year; indications are that the major impact of Glasgow 1990 arose through the increased numbers of visitors to established attractions as much as to particular special events mounted as part of Glasgow 1990; accordingly, determining how far attendance at the established venues increased as a result of Glasgow 1990 becomes a crucial step in the analysis;

the particular importance of determining how significant Glasgow 1990 was in the decision to come to Glasgow by tourists and day visitors who attended arts events since this determines how far their expenditure in the sub-region and its impacts should be attributed to Glasgow 1990;

the question of on what, if anything, the local expenditure by residents visiting arts related events would have been spent had Glasgow 1990 not taken place;

the issues involved in determining the extent of the benefits to the local economy associated with additional local expenditure;

the issues of dis-entangling the impact of the opening of new venues such as the Concert Hall; an allowance is made for the effect of new venues in x.x below.

- 9.4 These issues, and the relatively limited amount of data available from which to draw conclusions on some impacts, mean that, as in most impact studies, significant uncertainty necessarily attaches to some of the estimates. We have sought to counter this where possible by considering alternative approaches and by checking the estimates against other contextual data.

9.5 The focus of the analysis is on the wider impacts of Glasgow 1990. However, it can be argued that this entails a focus on some of the incidental benefits of the initiative, ignoring the more direct benefits accruing to those visiting events. To the extent that those involved received benefits which were not reflected in admission or other payments, the analysis will tend to understate the overall benefits of Glasgow 1990. This is technically the uncaptured consumer surplus accruing to visitors.

(ii) Direct impacts on expenditure and employment

9.6 We consider the impacts on visits and attendances by tourists, day visitors, and local residents in turn:

(a) Tourists

9.7 The approach to estimating the impact of Glasgow 1990 on numbers of visits and expenditure by tourists was by three alternative methods:

o Method 1

9.8 This involved:

projection forward to 1990 of the growth in visits to arts attractions by tourists suggested by comparison of the 1986 survey figures and an estimated 1989 attendance figure. The latter was generated by applying the proportion of visits by the two categories of tourist, domestic and overseas, as indicated by the 1986 survey to the 1989 total attendance. Projection forward gives an expected number of visits by domestic and overseas tourists in 1990 of 677,000 and 251,000, respectively. Comparisons with the actual number identified in the survey of 947,000 and 556,000 suggests an impact on visits of 270,000 and 306,000 respectively. These additional visits are translated into additional trips and then into visitor days using 1990 survey data for average attractions visited per trip and average days stayed per trip. (A caveat is that this approach does not allow for the possibility that one effect of Glasgow 1990 was to increase this propensity of the existing base of tourists to visit arts events.) The additional days are:

Domestic	550,000
Overseas	620,000

application to this additional number of tourists of the average daily, local tourist expenditure figures from the survey work (see Figure 100 above).

application of the assumption that £16,000 in tourist expenditure creates one job (see "Tourism and the tourist industry: latest statistics", B. Baty, Employment Gazette, September 1990).

application of the assumption that the local income component in tourism expenditure is 36 per cent; this reflects the fact that not all local expenditure can be regarded as a benefit and it includes allowance for:

- indirect taxation which means that part of the expenditure (assumed to be 15 per cent since not all goods are subject to VAT) will be lost to the local economy;
- the degree to which imports to the region meet the demand generated by the expenditure involved; the regional impact component is assumed to be one third; and
- the opportunity cost of the local resources involved, representing the extent to which the same resources might have been beneficially utilised elsewhere; since labour represents a high proportion of the resources required to meet tourist demand (perhaps 70 per cent of demand) and unemployment remains high in Glasgow, the opportunity cost of labour is low, and could be argued to be negative.

9.9 The figures for gross local income component for tourism are not based on any definitive evidence but appear to be "reasonable assumptions" for the Glasgow sub-region. The local income component is then:

	Percentages
Total	100
Indirect taxation	-15
	85
Regional income component	-33
	52
Opportunity cost	x 0.7
Gross local income component	36

9.10 Application of the various assumptions above then yields the following overall impact assessment:

	Domestic tourists	Overseas tourists	Total
Expenditure	£24.8m	£44.7m	£69.5m
Employment	1,550	2,790	4,340
Income	£8.9m	£16.1m	£25.0m

9.11 It is noteworthy in this context that Glasgow hosted 21 specialist arts-related conferences in 1990 with some 7,500 delegates. The likelihood is that a substantial proportion of the delegates concerned will have visited arts events and will have therefore been picked up by the above analysis. Making further allowance for their expenditure would therefore risk double counting.

o Method 2

9.12 As an alternative, the impact of Glasgow 1990 on tourist expenditure was calculated utilising responses to the questions on the importance of attendance at arts events in the decision of the tourist to visit Glasgow. Following a procedure in the 1986 work, the proportion of the tourists' expenditure attributable to the visit to the facility or event was based on the following scale:

Proportion attributed (%)

Sole reason	100
Very important	90
Quite important	60
Small importance	30
Not all important	

9.13 The work then involved the following steps:

projection of an overall "expected" 1990 attendance figure based, as before, on the 1986 and 1989 attendance figures; this was then converted first into a tourist days figure using 1990 data on average arts visits per trip and average days stay per visit and then into an expenditure figure using the actual 1990 daily expenditure figures; this was then scaled down utilising the responses on the importance to the overall visit of attendance at the arts event indicated by the 1986 survey (based on the tabulated proportions above); this provides an estimate of the baseline level of the arts related tourist expenditure in the sub-region which might have been expected in 1990 had Glasgow 1990 not taken place;

estimation of an actual 1990 figure for the tourist days associated with actual 1990 attendances derived using the same figures for average arts visits per trip and average days stay per trip; the 1990 survey figures on the importance of the arts to the trip (see Figure 101) and on daily expenditure (see Figure 100) were then applied to the estimated number of additional tourist days to generate an actual arts related tourism expenditure figure;

comparison of the expected baseline and the actual expenditure figures and the application of the same expenditure/jobs ratio and local income component figures utilised above.

9.14 Method 2 gives the following impact assessment:

Expenditure	£47.9 million
Employment	2,995
Income	£17.2 million

o Method 3

9.15 This involved:

scaling down the total number of tourist trips associated with arts visits in 1990 on the basis of responses to the question about the importance of the arts event in the overall visit using the scale in Method 2 and converting the resulting figure into estimates of tourist nights and tourist spend as in Methods 1 and 2;

scaling these figures down by an estimate of the proportion of total arts related tourist nights in 1990 which were associated with Glasgow 1990; this was derived by comparing the actual figure for arts related tourist nights in 1990 with a projection of what would have been anticipated from the 1986 and 1989 estimates.

- 9.16 Using the same expenditure per job and local income proportions the approach, which suggests that Glasgow 1990 resulted in some 580,000 additional visitor nights, indicates the following impacts:

Expenditure	£33.0 million
Employment	2,065
Income	£11.9 million

o Cross-check and discussion

- 9.17 The three methods produce significantly different answers. As a cross-check on the plausibility of the estimates, the bed room and overseas bed occupancy figures for the Glasgow and Edinburgh areas and Scotland as a whole were examined for 1989 and 1990 together with estimates of average length of stay and average length of stay of overseas visitors (see Figure 1.14 above). It is significant that the performance of Glasgow in 1990 improved, with higher occupancy rates, greater proportions of overseas visitors and increasing lengths of stay. Whilst it is difficult to place much weight on such small changes, the contrast in trends with Edinburgh, whose performance declined on every indicator, is clearly of interest.
- 9.18 The limitations of the figures must obviously be borne in mind. However, in conjunction with the estimated increase of 654 hotel bedspaces in Glasgow between 1989 and 1990, the apparent 2 per cent increase in hotel bed occupancy rates would imply, if applied to total tourist nights in 1989, an increase of some 675,000 visitor nights to Glasgow between 1989 and 1990. This calculation implicitly assumes that the proportionate impacts of Glasgow 1990 on numbers of tourists staying in commercial accommodation and those, for example, staying with friends and relatives was similar. This is a very large assumption but not one that can be checked on the data available. The estimated figure does, however, appear reasonably consistent with the higher of the three estimated impacts on tourist days calculated above.
- 9.19 Some probably slight upward biases to the estimated impacts may have been introduced by the inclusion of minors in the visitor figures. The respondents to the surveys - who were all over 16 years - were asked about expenditure which they had incurred personally. In the case of family groups, this will often have involved expenditure relating to minors, leading to some overstatement of the overall average daily expenditure per visitor.
- 9.20 Methods 2 and 3 are potentially biased downwards by limitations on data which make it impossible to separate the motivation for visits by domestic and overseas tourists. This means that these methods do not take account of the indications that overseas arts related visits increased much more substantially in proportionate terms relative to the baseline projection than did domestic arts tourist visits (estimated 120 per cent compared with 40 per cent). This is particularly significant because of the higher local spending profile of the overseas tourists.
- 9.21 Method 1 is probably biased upwards because it cannot allow for any tendency of Glasgow 1990 to increase the propensity of the existing tourist base to visit arts events. On the other hand, the indications are that domestic tourism trips generally declined in Scotland in 1990 (see para. 7.70). Glasgow appears to have bucked this trend. The procedure of projecting 1990 expected figures on the basis of growth between 1986 and 1989 will therefore tend to exaggerate the baseline and

understate the impact of Glasgow 1990. The balance of evidence tends to favour a figure towards the higher set of impact assessments above. For the purposes of preparing a central estimate, we therefore think it reasonable to take a figure towards the middle of the range defined by the assessments above. On this basis the central impact estimates based on Method 2 are:

Expenditure	£47.9 million
Employment	2,995
Income	£17.2 million

(b) Day visitors

- 9.22 The number of additional day visitors is calculated by a broadly similar methodology. The growth in visits to arts events by day visitors, which rose from 758,000 in 1986 to estimated 816,000 in 1989 is used to produce an expected number of visits in 1990 of 836,000. Comparison with the actual 1990 figure, including special events, of 1,431,000 suggests an impact due to Glasgow 1990 of 595,000 visits. It is assumed that each day visitor on average attended 1.2 events; this translates into 496 additional visitor-days in Glasgow.

- 9.23 Applying the survey evidence on expenditure (see Figure 100) to the number of additional visits, and applying the assumptions of £16,000 of visitor expenditure being required to create a job and a 36 per cent local income component in additional visitor expenditure as described in Method 1 above, gives the following estimated impacts:

Expenditure	£12.3 million
Employment	770
Income	£4.4 million

(c) Local residents

- 9.24 This estimate is produced by a broadly similar approach. Visits to arts events by local residents increased from 2.80 million in 1986 to an estimated 3.01 million in 1989. Projecting a similar rate of growth forward would have led to an "expected" 1990 attendance figure of 3.09 million. The actual figure, however, including special events was 3.66 million. On this basis, the impact of Glasgow 1990 can be regarded as the 568,000 difference between the expected and actual figures.

- 9.25 The maximum impact of this increase in attendance on local expenditure may be estimated by multiplying the additional visits by the average expenditure in the area by local residents visiting events from the System Three survey. They were as follows:

	£
Travel	1.50
Food/drink	4.10
Shopping	5.40
Other	0.80

9.26 This suggests that the total local expenditure by these attenders was some £6.7 million. On the assumption that each additional £16,000 of local expenditure supports one job this would have directly supported some 420 jobs. The 36 per cent local income component assumption suggests that £6.7 million in additional expenditure by local residents will have produced additional local incomes of £2.4 million.

9.27 This analysis, however, implicitly assumes that the money spent by local residents which visiting events would have otherwise been spent outside the area or would have been saved. Although we think it reasonable to assume that the type of services which people purchase when visiting local events have a significantly higher local employment and income component than the general consumer goods on which the money might have otherwise been spent, we think it unrealistic to assume that much of the expenditure is truly additional to the local economy. Bearing in mind the high local content of much of the associated expenditure, it is felt to be more reasonable to regard 25 per cent of the estimated impacts as indicative of the net additional effect of Glasgow 1990. On this basis the estimated impacts are:

Expenditure	£1.7 million
Employment	105
Income	£0.6 million

(iii) Employment and income generation at facilities and events

9.28 The estimates in Section (ii) relate solely to the impact of ancillary spending by those visiting arts facilities and events. To this must be added an estimate of additional expenditure, incomes and employment generated at facilities and events. Through generating additional expenditure at events, Glasgow 1990 will have created or retained employment. This effect can be estimated through:

combining the estimated number of additional tourist, day visitors and local residents with the figures for average daily spend on entertainment/ tickets from the survey work; the survey figures were as follows:

	£
Local residents	3.20
Day visitors	4.80
Tourist:	
domestic	2.30
overseas	1.90

9.29 Application of the expenditure per job and local income component, gives the following impact assessments:

	£
Expenditure	6.9 million
Employment	430
Income	£2.5 million

9.30 This compares with the overall increase in employment in these sectors of 309 between 1986 and 1990. Whilst this increase is known to embody some temporary increases in employment in museums and galleries (33) and the performed arts (30 full-time equivalent), not to mention the 205 in 1990 central projects, it may well understate the casual and temporary employment which was generated. From the viewpoint of the public sector, it will also be important to consider the total impact on revenue for both publicly maintained and publicly underwritten facilities, especially since the figures in paras 9.50ff relate to gross public sector costs. The total increase in revenue suggested by combining the additional admissions due to Glasgow 1990 and average expenditure on admissions is £6.9 million. Part of this will accrue to private venues, many of which were non-profit-making.

9.31 As an alternative:

the estimated proportion of total visitors to facilities and events as a result of Glasgow 1990 was calculated by comparing the estimate 1990 impact visits figure for local and day visitors and tourists combined with the difference between 1986 and 1990 total attendances; this suggests that some 76 per cent of additional attendances were related to Glasgow 1990;

application of this percentage to the total estimated combined growth in employment in museums, galleries, theatres, halls, etc. between 1986 and 1990; this approach gives an estimate employment impact of 230 jobs;

application of the estimated 76 per cent of the 1986-1990 attendance growth accounted for by Glasgow 1990 to the 1990 salaries bill of relevant sectors of 21.1 million.

9.32 The procedure is subject to a range of caveats but suggests a local income impact of £5.8 million.

(iv) Indirect and induced impacts

9.33 Two types of impact need to be distinguished.

(a) A supply linkages multiplier

9.34 The supply linkage multiplier is defined here narrowly to relate to the local sourcing of additional inputs by the facilities and events immediately concerned with Glasgow 1990. The fees paid and other inputs purchased by these sectors in 1990 totalled £41.7 million. It is assumed that 50 per cent of this expenditure was incurred in the study area (this is broadly in line with the estimates in the earlier PSI work; a somewhat lower figure has been chosen to reflect the assumed greater non-total components in some of the 1990 expenditure, especially the independent project programming). The estimated proportion of total visitors to facilities and events as a result of Glasgow 1990 was calculated by comparing the actual attendance data with the 'expected' visits figures for local residents, day visitors and tourists combined. This suggests that some 26 per cent of total attendances were related to Glasgow 1990. Applying this percentage to the estimated local sourcing of inputs in combination with the general assumptions in relation to expenditure/job ratios and local income component from above indicates that the first round impact of the local expenditure potentially involved would be to generate £2.0 million in

incomes and 340 jobs. To the extent to which there will be elements of fixed costs involved, this part of the procedure may risk some overstatement of impacts.

- 9.35 There is no evidence on which to base judgements on second and subsequent supply linkage round effects. However, if a multiplier of 0.1 of the total first round purchases is assumed to apply to capture these effects, the total supply linkage multiplier impacts are:

Employment	-	375
Income	-	£2.2 million

(b) Expenditure/income multiplier impacts

- 9.36 The expenditure in the local economy by visitors to arts events, the additional local incomes generated at facilities and events, and the supply linkage impacts as estimated above will all be subject to a general income/expenditure multiplier effect. This arises as those receiving additional incomes as a result of Glasgow 1990 spend a part of this in the local economy, creating further incomes and employment in a continuing, but rapidly diminishing in scale, ripple effect.

- 9.37 There is little firm local evidence on which to base judgements on the size of this multiplier. However, a value of 1.2 would be anormal assumption for a local area of this type. Utilising this implies the following overall impacts:

Employment	-	895-935 million
Income	-	£5.4 - £6.0 million

(v) Impact of new facilities

- 9.38 During 1990 two major new venues were opened in Glasgow: the Glasgow Royal Concert Hall and McLellan Galleries. In the preceding analyses all of the attendance generated by these venues/ attractions has implicitly been included as a net additional benefit of Glasgow 1990, probably overstating the impact of the Year of Culture. These facilities could have been established in the absence of Glasgow 1990. The impact of these facilities is a complex issue since they will have taken some attendance from other venues but also played a role in stimulating interest in the arts in Glasgow.

- 9.39 It is estimated that in total the new infrastructure accounted for at least 4 per cent net of arts events and attractions attendance during 1990. The implications of the removal of this percentage from the estimated impact of Glasgow 1990 which provides a rough means of adjusting for their effect is taken into account in para. 9.42.

(vi) Impact on general tourism

- 9.40 Some 6 per cent of respondents in the survey of summer leisure tourists who were not visiting museums/galleries stated that the most important influence on their decision to visit Glasgow was the European City of Culture. This figure, derived from on-street survey work in Glasgow in September 1990, suggests that Glasgow 1990 may have helped promote awareness of the City amongst general potential

tourists. There are obviously, however, questions here about the validity of the responses and the extent to which these can be generalised. However, if the 6 per cent figure is applied to 25 per cent of those leisure tourists to Glasgow who were not visiting arts events, it would suggest the following impacts inclusive of multiplier effects:

Expenditure	-	£3.3 million
Employment	-	205
Income	-	£1.2 million

- 9.41 It is interesting in this context to note the sharp jump in the number of conferences in Glasgow between 1989 and 1990. According to Greater Glasgow Tourist Board figures, the number of major conferences increased from 44 to 120, with the total number of delegates growing from 17 to 48 thousand. As only 21 of the increase in conference numbers were apparently arts based events, this again suggests that Glasgow 1990 may have had an important general promotional effect.

(vii) Summary of income and employment impact of Glasgow 1990

(a) Summary estimate

- 9.42 The readily quantifiable income and employment estimated benefits of Glasgow 1990 are summarised in Figure 128:

Figure 128 Employment and income benefits of Glasgow 1990

	Number and £ million	
	Including 1990 new infrastructure	Excluding 1990 new infrastructure
Direct impact on employment and income		
Tourists		
Employment	2,995	2,875
Income	£17.2m	£16.5m
Day visitors		
Employment	770	740
Income	£4.4m	£4.2m
Local residents		
Employment	105	100
Income	£0.6m	£0.6m
Employment and income/generation at facilities & events		
Employment	235-430	225-415
Income	£2.5m - 5.8m	£2.4m - 5.6m
Indirect and induced impacts		
Employment	1,270-1,310	1,220-1,260
Income	£7.6m - £8.2m	£7.3m - £7.9m
General tourism impact		
Employment	205	195
Income	£1.2m	£1.2m
Total		
Employment	5,580-5,815	5,350-5,580
Income*	£33.5m - £37.4m	£32.2m - £36.0m

* In addition it is assumed that the net value of the media exposure was £3.2 million (see para. 9.71).

- 9.43 No specific allowance has been made for construction related employment, although it is likely that the expenditure on locally provided inputs by the facilities and events already taken into account in the analysis would include some element of construction-related activity. No major construction projects have been brought into the analysis.
- 9.44 The analysis focuses purely on the Glasgow sub-region, with no explicit attempt to assess the extent to which expenditure by tourists and day visitors was displaced from other parts of Scotland or the UK. The focus of the assessment of impacts on

the Glasgow sub-region, needs, of course, to be borne in mind in interpreting the cost benefit estimates

- 9.45 Allowance is made in the analysis for the likelihood that a substantial part of the expenditure by residents represents displacement from other parts of the local economy and other sectors, although there is little real evidence on which to base judgements. Day visitors and tourist displacement from other visitor attractions in Glasgow would appear to have been of a negligible significance. Visitor numbers at a group of attractions not included in the Glasgow 1990 analysis averaged 5 per cent growth in 1990. This was 2 points below the Scottish attractions average. In a variable picture, the success of the Mackintosh Hill House at Helensburgh (outside the boundary of this study) and the Glengoyne Distillery stand out.

Percentage change
1989-1990

Glasgow Zoo	- 8
Greenbank	- 2
Hutcheson Hall	+ 3
Botanic Gardens	+ 9
Glengoyne Distillery	+ 22
Hill House	+ 33

- 9.46 The assessment of displacement effects is clearly a complex issue. It may be assumed that the majority of the expenditure by day visitors represents displacement at the level of Scotland. The evidence on hotel occupancy rates is also consistent with the hypothesis that an element of displacement of tourists from Edinburgh to Glasgow occurred.
- 9.47 The limited evidence in Figure 129 suggests that the major effect (at least in terms of visits to attractions) was not one of displacement. The categories of attraction identified in Scotland excluding the City of Glasgow all showed significant growth. It is particularly interesting that museums and galleries in the rest of Scotland exhibited substantial growth in numbers of visits since this suggests that Glasgow 1990 may have had a wider effect in stimulating interest in the arts in Scotland. Over this period, Scottish attractions as a whole performed substantially better (+ 7 per cent) than their counterparts in the UK as a whole (+ 3 per cent).

Figure 129 Visitor numbers at tourist attractions in Scotland: percentage changes 1989-1990

	All Scotland	Excluding Glasgow City
Historic houses/heritage	+ 6	+ 5
Museums/galleries	+ 15	+ 13
Wild life/botanical	+ 5	+ 7
Miscellaneous	+ 6	+ 6
All	+ 7	+ 7

Source: British Tourist Authority.

- 9.48 Much of the immediate measured benefit arose through developments in visitor markets achieved through the Year of Culture promotion. The potential for longer term benefits will depend to a degree on maintaining the momentum and capitalising on the market gains made during 1990. In relation to the facilities, it is noteworthy that, according to the institutional survey, museum/gallery staffing expectations for 1991 were relatively optimistic. None of the local authority institutions expected staff cuts and in three cases rises were anticipated. The independent sector was more divided with 5 anticipating a fallback to earlier years, 2 an increase and the remainder expecting similar levels to be maintained. Some 6 of the 8 reporting galleries expected the same level or increases in 1991.

- 9.49 In contrast to the museums, the balance of expectation in the performed arts was pessimistic about 1991. For obvious reasons, City Hall and Tramway expected retrenchment, as did the Theatre Royal and some of the smaller groups. Most of the bigger organisations believed the future would see level staffing, though Scottish Ballet, the Tron and two of the festivals expected increases.

B. ECONOMIC COSTS OF GLASGOW 1990

(i) Public sector costs

- 9.50 The relevant additional public sector expenditure on the City of Culture by Glasgow City Council, Strathclyde Regional Council and Scottish Office funded bodies was estimated to be £21.84 million. Over 70 per cent of this expenditure was spent on 1990 arts events and attractions, the remainder going on marketing and administration as follows:

	£ million
1990 arts events & attractions	15.99
Marketing	4.93
Administration, public relations	0.92
Total	21.84

9.51 In addition to this expenditure, monies were also spent under the following headings:

	£ million
Pre 1990 programming	2.09
Community events, celebrations	5.05
Education and social work programmes	3.74
Total	10.88

9.52 Summing these figures gives a figure for total public sector expenditure on Glasgow 1990 of £32.7 million. However, the pre-1990 programming related to activities before the Year under analysis here. Much of the cost associated with the wider expenditure on Year of Culture, as set out in para. 9.51, cannot be associated with arts events and attractions. It is debatable how far it should be included in the analysis, especially since the estimates summarised in Figure 129 cannot take into account the benefits associated with this type of expenditure.

9.53 The offsetting benefits to the public sector in the form of increased revenue are taken into account in the analysis above. It is anticipated that there will also have been some offsetting revenue from other sources (e.g. increased parking receipts) but it is thought that these will have been relatively small compared with the costs set out above.

(ii) Private costs

9.54 Additional private expenditure would have been incurred on sponsorship and specific loss-making events. The estimated value of private funding was £6.01 million, in form of sponsorship cash and kind, donations and corporate memberships. In general, it may be assumed that these yielded the donors at least an equivalent level of benefits in the form of publicity, etc.

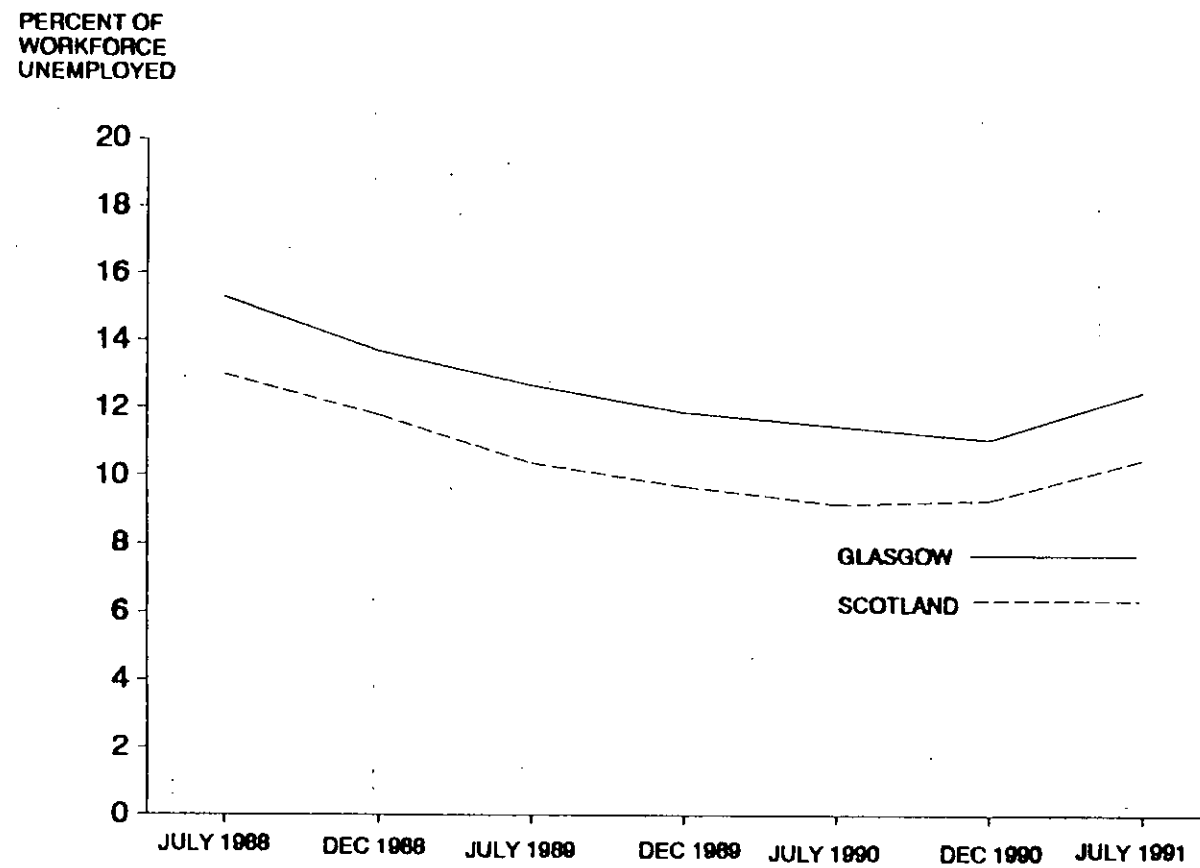
(iii) Other public sector costs

9.55 In addition to the money costs described in para 9.50, there are likely to have been some wider costs to the community from factors such as increased traffic congestion related to special events and increased attendances generally, and perhaps from problems such as litter. There is however no real information from which these costs could be assessed within the resources of the study.

(iv) Cost-benefit summary

9.56 The readily quantifiable costs and benefits estimates are brought together and summarised here:

FIGURE 3: UNEMPLOYED IN GLASGOW AND SCOTLAND JULY 1988 - JULY 1991



Source: Employment Gazette

Costs		
Total additional public costs	£21.9 million	
Benefits		
	Income	Employment
Direct impact on income	£21.3m	3,715
Income generation at facilities and events	£2.4 - 5.6m	225-415
Indirect and induced impacts	£7.3 - 7.9m	1,220-1,260
General tourism impact	£1.2m	195
Total	£32.2 - 36.0m	5,350-5,580

The net quantifiable benefits of the project, in terms of the short term direct and indirect/induced impacts is therefore estimated to be in the range of £10.3-14.1 million.

- 9.57 In total it is estimated that the initiative generated some 5,350-5,580 person years employment. The majority, over 3,800, of these jobs will have been supported in a range of ancillary service activities such as hotels, catering and retailing as a result of expenditure outside events by tourists, day visitors and local residents. This growth in employment would have been equivalent to around 1.5 per cent of total employment in Glasgow City 1989, or 8 per cent of total unemployment (although many of the jobs involved would be likely to have gone to people not formally registered as unemployed) in the Glasgow Travel to Work Area (TTWA).
- 9.58 One issue in assessing the gross public sector cost per job is the uncertainty over how many of the jobs created will prove permanent and how many will simply prove temporary. In this context, the analysis is cast in terms of person years and it is frequently assumed that ten person years of employment can be equated with one permanent job.
- 9.59 Taking employment created to be 5,465 and the relevant public expenditure on Glasgow 1990 to be £21.9 million, the cost per job would range from £4,007 if all the jobs were permanent to £38,488 if they were all temporary. If it is assumed that half of the jobs will be permanent and half temporary, the net cost per job will be roughly £6,980, which compares very favourably with estimates of £20,000 plus per job found in earlier research on initiatives such as Regional Policy and Enterprise Zones. Seen in these terms, however, the crucial determinant of the cost effectiveness of Glasgow 1990 in creating jobs will be the extent to which visitors drawn to the region by Glasgow 1990 will make repeat visits and how far the initiative has improved the image of the City as a place to visit in the eyes of other potential visitors.
- 9.60 The chart shows the movements in unemployment in Scotland and the Glasgow TTWA over the period July 1988 to July 1991. Whilst the two rates have moved fairly closely together, it is interesting to note that unemployment in Glasgow fell from 2.2 percentage points above the Scotland rate in December 1989 to 1.8 percentage points above in December 1990 before widening again to two percentage points above in July 1991. Clearly a wide range of factors will have influenced trends in relative unemployment rates but the outcome does at least appear to be broadly consistent with the scale of the impacts estimated above.

(v) Wider and longer term economic impacts

9.61 In addition to the quantifiable income and employment benefits, there will also have been a range of less tangible, but nevertheless important, longer term benefits from Glasgow 1990. Public agencies had reasons other than purely employment related ones for making financial contributions to the Year of Culture. Wider objectives included:

- benefits in terms of image and publicity;
- the development and furtherance of the arts in Glasgow;
- sustained change in the cultural infrastructure in Glasgow;
- lasting changes in the city's image of itself; and
- changes in the perception of Glasgow held by visitors and others, and what this may mean in terms of future tourism and other investment.

The wider impacts may prove much more significant in the longer term than the immediate employment benefits. The little evidence from which to assess their significance at this stage is presented in the following sections.

C. EXTERNAL PERCEPTIONS OF GLASGOW

(i) Marketing campaign

9.62 The strategic objectives set for the marketing campaign underlined that Glasgow 1990 was always intended to be about more than just one year. Objectives of the campaign were to:

- establish an awareness of Glasgow as European City of Culture 1990;
- persuade prospective customers to visit Glasgow in 1990;
- establish long term customer loyalty to Glasgow within the target markets;
- demonstrate that Glasgow 1990 is about the culture of an entire city;
- exploit fully the strategic social and economic opportunities presented by Glasgow 1990.

9.63 Some of the objectives related clearly to the purpose of building visitor numbers, an underlying intention was to use Glasgow 1990 as a means of contributing to the longer term economic development of the City. The marketing campaign was meant to communicate the "new reality" of Glasgow and help lay to rest older images of the place.

(ii) Preliminary impressions

- 9.64 Whilst it is too early for any longer term effects to be assessed, the preliminary impressions were positive. Glasgow Action observed that the "1990 Capital of Culture programme itself has had an enormous impact on the image of the City.... Millions of visitors have been attracted, including national and international colleagues of Glasgow business people, who were invited to the City to attend various flagship events which took place throughout the year".

(iii) Tracking study

- 9.65 It was possible to track the degree to which awareness developed and attitudes changed during 1990. Saatchi & Saatchi surveyed ABC1 adults in London and the South East on four occasions, October 1989, February and September 1990 and again in January 1991. The figures show that perceptions of Glasgow improved markedly during 1990. The biggest change was in awareness that Glasgow was European City of Culture. This increased from 21 per cent of those interviewed in October 1989 to 62 per cent in February 1990 further rising to 77 per cent by September 1990. There was also substantial recognition of Glasgow's increasing importance for the arts. This was the view of 54 per cent in September 1990, a gain of 31 points over the previous 12 months.

Figure 130 Perceptions of Glasgow*: its cultural standing and reputé as a place to visit, live and work

Percentages

	Oct 89	Feb 90	Sept 90	12 month change
Percentage agreeing Glasgow				
European Cultural Capital 1990	21	62	77	+ 56
Increasingly important for the arts	23	45	54	+ 31
Has interesting museums/galleries ^b	23	37	41	+ 18
Has wide variety of theatre/ musical events	17	26	29	+ 12
Exciting place to visit	18	25	28	+ 10
Happy to live & work there	9	11	12	+ 3

Source: Saatchi & Saatchi.

* Among adult ABC1s resident in London and the South East.

^b ABC1 theatre goers at least twice a year.

- 9.66 A point to note is that the main changes seem to have taken place early and suddenly between October 1989 and February 1990. Whilst further improvement in perception was recorded later in the year (September 1990), the principal step change in attitude was already evident in February 1990, linked to the onset of the Year of Culture and commencement of its promotion.

9.67 Glasgow's individual attractions improved their rating in the minds of respondents. But there remained some reservations, especially about the City's standing in the performed arts. Whilst 54 per cent recognised Glasgow's growing importance for the arts, only 41 per cent thought the "City has interesting museums and galleries" and a mere 29 per cent could agree that "Glasgow has a wide variety of theatrical and musical events".

9.68 Improved perceptions of Glasgow were registered in terms of its appeal as a place to visit, live and work. Some 22 per cent of London/South East ABC1s agreed in September 1990 that Glasgow would be "an exciting place to visit", 10 points more than in October 1989. Less than half this number (12 per cent) thought they would be "happy to live and work there", but this too was higher (by three points) than 12 months previously.

(iv) Rapidly changing for the better

9.69 Perhaps the most encouraging overall result was the strong perception that Glasgow was changing for the better. Almost half (49 per cent) of those interviewed in September 1990 believed Glasgow was "rapidly changing for the better". This score represented a 15 point gain over October 1989. Correspondingly, whereas almost half (48 per cent) had originally believed that Glasgow was a "rough and depressing place", twelve months later a substantial proportion (13 per cent) had changed their minds. Only 35 per cent of respondents retained a negative perception and 65 per cent now took the more positive line on Glasgow. The results are set out in Figure 131.

Figure 131 Perceptions of Glasgow*: changing for the better

	Percentages			
	Oct 89	Feb 90	Sept 90	12 month change
Percentage agreeing Glasgow:				
Rapidly changing for the better	34	48	49	+15
Is rough and depressing	48	40	35	-13

Source: Saatchi and Saatchi.

* Among adult ABC1s resident in London and the South East.

9.70 Perceptions of Glasgow are set in the context of several comparator British cities (Edinburgh, Birmingham, Bristol and Manchester) in Figure 132. Glasgow stands out clearly as the city rapidly changing for the better. This was the view of 48 per cent of those interviewed. Birmingham was its closest rival at 18 per cent. At the same time, Glasgow was still thought to be rough and depressing by 40 per cent of respondents. Whilst this negative image was shared with its industrial rivals (Birmingham (45 per cent) and Manchester (29 per cent)), Glasgow was far ahead as a place both to visit and to live and work in. Some 36 per cent wanted to visit Glasgow, compared with 12 per cent Birmingham and 19 per cent Manchester. As

a place to live and work Glasgow was a happy prospect for 11 per cent of respondents, compared with 6 per cent Birmingham and 8 per cent Manchester.

Figure 132 Perceptions of British cities, February 1990

	Percentages				
	Glasgow	B'ham	Bristol	E'brgh	M'ch
Percentage agreeing					
Increasingly important for arts	45	13	7	42	9
Rapidly changing for better	48	18	11	11	17
Is rough and depressing	40	45	9	3	29
Has interesting mus/gals	31	6	14	57	10
Has wide variety theatre/music	26	17	14	60	18
Has good pubs/rests/nightlife	23	17	20	27	31
Would like to visit	36	12	32	67	19
Would be happy to live & work in	11	6	30	31	8

Source: Saatchi and Saatchi.

* Among ABC1 residents in London and the South East.

- 9.71 The interest and variety of Glasgow's cultural attractions set it apart from most of its rivals (Birmingham, Bristol and Manchester), and put it ahead as a place to visit. But, despite the progress made in promoting Glasgow, the reputation of its museums and galleries, theatres and concerts still fell short of Edinburgh's well established position. Edinburgh's theatres were rated by 60 per cent of respondents (compared with 26 per cent for Glasgow) and Edinburgh's museums and galleries were thought interesting by 57 per cent of respondents (compared with 31 per cent for Glasgow). Both Edinburgh and Bristol had virtually no negative image (3 per cent and 9 per cent). Accordingly, they scored specially high as places to live and work (31 per cent and 30 per cent respectively). This gives some indication of the ground still to be gained by Glasgow in the external perceptions of the City.

(vi) Press coverage

- 9.72 Glasgow 1990 generated significant press and television coverage. The value of the favourable coverage worldwide on an advertising equivalent basis was estimated by Glasgow District Council at £12.9 million. In economic impact terms, we believe it would be appropriate to include only 25 per cent of this sum on two grounds:

there is obvious risk of double counting the value of the media exposure and its impact in terms of tourism and other benefits;

the value of advertising would exhibit diminishing returns, and if it were decided to spend this sort of amount on advertising it is not clear that the profile and focus of the coverage achieved is that which would have been chosen.

9.73 The estimated commercial value of the publicity won for Glasgow 1990 related to material gathered by the Festivals Office Press Centre. The Press Centre material consists of 9,418 UK press cuttings (resulting in 177,327 column inches of coverage); 168 foreign press cuttings; 27 special overseas features; and 41 hours of television coverage and 12 hours of radio coverage. This could not be comprehensive, especially for overseas coverage.

9.74 Figure 133 shows that 82 per cent of the column inches were in the Scottish press and 18 per cent in the rest of the UK. The balance between general coverage and reviews was roughly similar in the Scottish and the rest of the UK press, with reviews accounting for some two-fifths of column inches.

Figure 133 Press coverage of Glasgow 1990: by cuttings and column inches, in Scotland and rest of UK

	Percentages	
	Number of cuttings	Column inches
Scottish press		
General	51	49
Reviews	35	33
Rest of UK		
General	7	11
Reviews	7	7
All	100	100

Source: Glasgow District Council.

9.75 In terms of estimated value of press coverage, the most important individual events were the opening of the Royal Concert Hall (£264,000), followed by Mayfest (£226,000) and, someway behind, by the Big Day (£95,000), the Bolshoi visit (£81,000) and the inauguration of the Year (£63,000). Press interest reached a peak in June (16,997 inches). Interest remained at a significant level to the end of the year. December saw 10,744 column inches of coverage, including 1,027 inches of reviews in the English, etc. press, compared with a 1990 monthly average of 14,777 inches.

9.76 According to the District Council, hostile comments were confined mainly to the Scottish press and accounted for 5.8 per cent of general coverage column inches over the year in Scotland. The museum staffing affair, Glasgow's Glasgow's financial situation and general concern about the 1990 programme were the main issues. At its height in June, hostile comment amounted to 16.5 per cent in column inches of Scottish general coverage.

(vii) British and overseas press

- 9.77 Although the City was somewhat disappointed by the level and nature of press coverage outside Scotland, it is not possible to assess such a feeling without equivalent data for a previous year or an analogous event. The City may be correct to observe that Glasgow 1990 was perceived by the English press as a regional event rather than a significant national and European event. Nevertheless, Glasgow succeeded in presenting itself as a "positive and forward thinking cultural city in the Scottish and the UK press".
- 9.78 Perhaps the scale of foreign press interest was a point of greater significance. Foreign correspondents visiting the Press Centre numbered 426 during 1990, drawn from 48 countries. "Sceptical curiosity" was the thrust of most initial interest. The resulting coverage was generally positive, relaying a picture of Glasgow as a city of character and vision addressing economic challenges on a cultural platform.

D. BUSINESS IMPACT

(i) Excellent backdrop

- 9.79 Whilst the particular contribution of the City of Culture to the enhancement of Glasgow as a business destination would be difficult to evaluate (and it is almost certainly too soon to tell), informal soundings in Glasgow's business community revealed a positive view of the event. Some indication of the value placed on the event is given by the level of financial contribution made by the business community through sponsorship and other forms of practical support (see Section 3).
- 9.80 The corporate spirit among business leaders in Glasgow is strong and 1990 proved another catalyst for action. The event was most appreciated as an expression of the self confidence, capability and effectiveness of the City, reinforcing the notion that Glasgow is a good place to live. One senior executive confirmed "he had met no one who said it was a waste of time". Another believed it produced "an excellent backdrop for business". "It takes a long time to turn around existing perceptions"; "anything that brings forward the name of the City helps".

(ii) Getting people to visit

- 9.81 Insofar as the Glasgow 1990 promotion emphasised lasting achievements and permanent assets, the event brought public relations back in line with (if not ahead of) the "new reality" of the City's improving situation. To this end many business executives took the view that simply getting people to visit the City was a beneficial effect of the City of Culture promotion. The changes were there to see and visitors to the City were constantly being pleasantly surprised. One chief executive, recruiting personnel in the UK national pool, commented on changing attitudes from the South. There was much less resistance to moving to Glasgow in pursuit of career opportunities. "Five years ago 50 per cent would drop out of recruitment from the South East when faced with a move to Glasgow. The marketing push of the last five years has made a change".
- 9.82 Glasgow 1990 signalled an intention to reclaim Glasgow's European status as a good place to live and work. It was part of an evolving strategy. The Miles Better

campaign both caught the mood and was a catalyst. The events strategy (the Garden Festival in 1988 and the European City of Culture in 1990) reinforced the message. Several observed that, following the success of Glasgow 1990, perhaps it is the moment to switch the emphasis away from "events" towards a concentration on indigenous activity and on the permanent assets of the City.

(iii) Inward investment

- 9.83 It is not surprising that for Locate in Scotland (LIS), the City of Culture year had no discernable impact on its business. Attracting inward investment (relocations and mover firms) is a specialist business. LIS's focus is on US, Japanese and overseas companies and it could not recall any company registering interest on the basis of 1990. Decisions by companies to relocate in Scotland, as anywhere, are driven by core business interests first and foremost. Cost adjustment is the main motive. Attracting mobile investment to the area depends upon a suitable location package, involving access to a labour force, good communications, sites and property, and in most cases government financial assistance.
- 9.84 Lack of suitable sites and property for modern industry has made it rather difficult over the years to attract overseas manufacturing companies (which are LIS's main targets) to Glasgow. Nevertheless, Glasgow has been a popular location for incoming companies in the office/business sector. This has been significantly helped by a plentiful supply in Glasgow of good quality office accommodation and the availability of what is widely recognised as a flexible and productive labour force. These are attractions to which more companies in London and the South East have been paying attention. The vibrant financial services sector provides a range of career opportunities. High tech links for back-office work are excellent. Software support and air links are increasingly positive features.
- 9.85 Whilst any immediate link between the promotion of the City of Culture and the city as a business location could not be expected, the resulting general improvement in Glasgow's image at home and abroad has been helpful. Overall awareness of the city may not generate business leads, but it helps "down the line". The Glasgow experience of "mover" firms has been outstanding, reinforced by the demonstrably improving quality of life, and the effect of successful examples has been extremely positive. In this context, the perception of improved amenity is a major benefit. Other features, such as education and spouse careers, where Glasgow has significant advantages complement the City's cultural strengths in 'soft factor' appeal.
- 9.86 LIS takes the view that in marketing efforts to London-based and overseas businesses it is helpful to demonstrate that cultural activities can be pursued in Glasgow. But it is important to be able to do so on an ongoing basis, and not by reference to one single year. It should be noted that the Irish Republic (which is Scotland's principal international competitor for mobile inward investment) is certainly promoting Dublin's City of Culture mantle in its international marketing activity in 1991. Furthermore, in other UK contexts, investment in cultural facilities has been seen as a relevant mechanism for regional development. Examples of grant funding of theatres etc under the aegis of the European Regional Development Fund can be cited in Cardiff, Plymouth, Newcastle, Bradford and Birmingham.

(iv) Quality of life ranking

- 9.87 Among many city ranking studies, the Healey & Baker European Real Estate Monitor most recently published new information on business attitudes to major locations. The findings showed that the three most important factors affecting decisions on business locations relate to communications (access to markets, clients or customers; transport infrastructure; and quality of telecommunications). Cost factors are of less importance. The quality of life for employees was considered "absolutely essential" by 14 per cent. Considering all the factors together, London led the list of European cities in 1991. Glasgow was tenth overall and ranked first in value for money office space. But, it still scored only fifteenth in the "quality of life" list.

(v) Catalyst for involvement

- 9.88 It has been observed in the past that the support given to Glasgow's arts institutions and organisations by the business community is exceptionally strong, and relates to a long tradition of interest and commitment. It must be seen as rather exceptional in a British context. Glasgow 1990 acted as a catalyst for further involvement. The Glasgow Chamber of Commerce played a role in seeking to awaken the business community to the value of Glasgow 1990. According to the Chamber, the "wish to be involved" was a main motive, as much as direct commercial justification.
- 9.89 Scottish ABSA believes the scale and professionalism of sponsorship in Scotland advanced markedly during the year. The value of arts sponsorship was more widely appreciated by the business community, assisted by much improved press coverage. Those involved believe that significant learning took place on the part of both sponsors and recipients during the year. The opportunities created by 1990 made the arts organisations more competitive among themselves. The spread of good professional practice was fostered by a number of new appointments (e.g. in the Glasgow Museums and Art Galleries). Another case in point was Scottish Airports which engaged a public relations consultancy to maximise the benefit of their sponsorships.
- 9.90 The number of Scottish awards made by ABSA rose from 38 in 1989/90 to 62 in 1990/91. This 63 per cent jump (compared with 25 per cent growth in the UK overall) was almost entirely the result of the growth of first time sponsorship in Glasgow. Levels of sponsorship which, according to ABSA in Scotland had earlier been thought outstanding became usual during 1990, and sums were committed which had previously been "only dreamt of".
- 9.91 The BSIS figure might be regarded as very much a minimum estimate of extra arts sponsorship stimulated by 1990. New sponsors were encouraged by the 1990 celebrations, and many existing sponsors made a special effort in relation to 1990. Attractive projects drew exceptional levels of support. Many companies joining the donor/benefactor scheme were first timers in supporting cultural activity.
- 9.92 Glasgow based arts organisations have driven the growth of arts sponsorship in Scotland since the mid 1980s. The Glasgow preponderance of first-time sponsors in 1990 is consistent with that achievement. There was a £312,000 fall in SAC client sponsorship in the rest of Scotland during 1990, 72 per cent of which occurred because of a decline in two organisations, the Edinburgh International

Festival and Edinburgh Literature Festival. The £379,000 sponsorship growth of SAC's Glasgow clients in 1990 overrode this reduction.

- 9.93 Put in context, Glasgow 1990 sponsorship of £4.32 million (including £0.42 million corporate memberships) actually exceeded SAC client sponsorship of £3.51 million for the whole of Scotland. ABSA's new assessment of sponsorship for 1990/91, the first to be based on returns rather than estimations, puts Scotland at £6.18 million for sponsorship and £0.46 million for corporate memberships. These represent respectively 13.8 per cent and 3.7 per cent of the equivalent British total. Glasgow 1990 contributed some 63 per cent of Scottish total sponsorship and 91 per cent of corporate membership income.

E. CITY'S IMAGE OF ITSELF

(i) Public services

- 9.94 The influence of Glasgow 1990 helped change the city's image of itself. This fed through into public services and led to a number of initiatives aimed at extending and improving the quality of provision. This applied most notably to the fields of education and social work and, among others, to public transport:

(ii) Public transport

(a) Transport art

- 9.95 The 1990 initiatives of Strathclyde Regional Council Passenger Transport Executive (SPTÉ) covered a range of publicity/marketing activities as well as new services and discount promotions. One of the aims was to stimulate an interest in the operation of public transport and to use it creatively for illustrating art, poetry and graphic design on rail and underground services and stations. A number of schemes addressed this aim including:

Young Authors Project: a competition entered by 900 young people for poems to be displayed on the underground stations;

dance performances: these sold-out performances were staged on the underground after the finish of passenger services;

murals on new rolling stock: these depictions of city life were commissioned from the Glasgow School of Art;

Underground Heritage Trail: a guide to places of architectural interest included a ticket providing unlimited travel on the underground.

Other promotional initiatives included posters and models of rolling stock and new transport maps and guides, including for the first time French and German editions.

(b) Incentive services

- 9.96 Another aim was to encourage people to travel by public transport. Special services were run on the Big Day and Hogmanay 1990. New school party discount fares

were introduced. A "culture bus" operated between cultural attractions and was so popular it was extended for an extra four weeks. Most important were "evening half price railfares". These were offered on the locally supported ScotRail network to encourage more people (both residents and tourists) to travel by train to cultural events in and around Glasgow and elsewhere in the region.

(c) Evaluation

- 9.97 A survey of rail passengers was carried out August/September to gauge the demand for the service. It was found that 14 per cent interviewed were travelling on a special half price return ticket. According to SPTE, despite considerable effort, it proved very difficult to clarify the financial consequences of the initiative, as this depended upon projections of the revenue that would have been collected in the absence of the special offer. The SPTE has a responsibility to uphold ticket revenue on the locally supported rail network, which requires a subsidy from the regional council of £28.73 million (1991/92). However, the spirit of the initiative was to encourage people from all over Strathclyde to attend cultural events and, in that respect, the initiative was regarded as successful. In the opinion of SPTE, "the Year of Culture ... acted as a catalyst to sustain interest in what I should like to think is our open-minded approach to cultural and artistic ideas which members of the community can build on, with us, in future years".

(d) ScotRail and Glasgow Airport

- 9.98 This finding is not out of line with the experiences and opinions of other transport operators. ScotRail confirm a growth in SPTE traffic, which showed an increase of 5.5 per cent in 1990/91 compared with 1989/90. There was no indication of growth on the Edinburgh/Glasgow route or on intercity services. On the other hand, Glasgow airport passengers numbers in 1990/91 were 4.26 million, an 8.2 per cent increase on the previous year. The airport was reluctant to attribute any of this rise specifically to Glasgow 1990. This was the year which saw the introduction of direct trans-Atlantic passenger services to Glasgow, with the consequent displacement of activity from Prestwick Airport.

(iii) Education programmes

(a) Objectives

- 9.99 Strathclyde Education Department had well-established programmes of work in the cultural field before 1990. The Department set the following specific objectives for 1990:
- enhancing the experience of learning;
 - producing new opportunities for learning;
 - developing new skills;
 - encouraging self development among pupils.

(b) Evaluation

- 9.100 According to the Education Department's own evaluation of the programme, which highlighted its range and diversity of activity, "there were many opportunities (for many thousands of school pupils) to develop new skills and provide new learning opportunities. A whole series of partnerships were developed which were of importance both to the corporate identity of the authority and its capacity to generate and participate in partnerships with a variety of groups and organisations to the benefit of the region as a whole. Many schools had never undertaken performances in certain areas of the arts, but will now have more confidence in so doing." Within the Department "an operational structure was created that enabled both the development of the Department's internal programme as well as the expansion of educational activities into the main 1990 programme".
- 9.101 This assessment seems likely to be correct. Whilst no statistical evidence is available on the reach of these projects, or on pupil/parental response, the remarkable imagination and pedagogic success of such projects as the Strathclyde Concertos has been much praised. The efforts to link challenging new music with existing work in the education system have been imitated elsewhere. The long term results of the quantum change in service is likely to be positive. One feature which is likely to develop is the devolution to schools of funding and responsibility for arts initiatives. Another positive outcome of 1990 must be the reinforcement and development of relevant professional skills and practices.

(iv) Social work programme

(a) Objective

- 9.102 The Strathclyde Social Work Department had little or no previous professional experience in the field of culture. The Department's 1990 programme of activity reflected both the Council's policy objective on "self development" and COSLA's arts and disability code of practice which recommends that emphasis be on the "integration of the able bodied and disabled people and where this is not appropriate, local authorities and arts organisations should aim to meet these needs through in-house or through out-reach work".

(b) Evaluation

- 9.103 It is clear that the 1990 programme made a major impact on the Department's service. For clients, the direct benefits of the cultural projects included:

- enhancing self-confidence;
- allaying public ignorance and fear of handicap;
- first involvement in arts activity;
- visits to events and attractions and improved access to facilities.

- 9.104 The Department's assessment of its programme came to positive conclusions in relation to the policy objective of enhancing the cultural experience of special needs groups. The results have been favourably summarised as follows:

- "many people who had never been involved in arts activities were able to take part;
 - quality tuition from specialists brought results which surprised and delighted staff and participants;
 - special talents were identified, and given the opportunity to develop;
 - integration into everyday life was made possible through improved access in all senses; special needs workers gave support to the less confident participants;
 - personal and social development of many hundreds of individuals improved significantly;
 - educative and experiential approaches both found success".
- 9.105 "The arts have now been absorbed and integrated within the pattern of social care experience by mainly disabled or handicapped people. In most locations, they are not an extra, an optional addendum to the day, but part of every day experience enriching the other aspects of their lives".
- 9.106 "By encouraging self expression in people who are so often too passive in their relationships, the arts have helped them to exert a greater degree of control over their own live and the establishments in which they work or reside. There are adult training centres in Strathclyde where the entire atmosphere and regime have been transformed in the past year or two, always for the better. Similar benefits have been felt in some elderly peoples' homes and intermediate treatment centres".
- 9.107 As a result of its programmes over the past two years, the Department is now regarded as the pioneer in this field, demonstrating what can be achieved. It broke new ground and has successfully integrated the new approach into its standard thinking. In the last twelve months its achievements have been recognised in many awards from professional journals and other bodies. The publication, Streets, Schemes and Stages, by Mary McCabe and Ewan McVicar, describes "social work's year of the arts".

F. CREATIVE PERSPECTIVE

(i) Recognition

- 9.108 We were not asked as part of this monitoring exercise to undertake a cultural assessment of 1990. Nevertheless, a relevant perspective may be gained by some reflections on the creative impact of the year. These are based on discussion with key informants and on information provided by Glasgow's cultural organisations and institutions in response to our survey questionnaires.
- 9.109 In general terms, Glasgow 1990 can be said to have improved the climate for the arts in the city. Glasgow's established cultural institutions were given recognition in the award of the City of Culture title and the year drew attention to the cultural vitality of the city. According to one arts administrator, the scale of the event

boosted the standing of the arts in ways which "will allow more to grow than was previously imaginable".

(ii) Performed arts

- 9.110 The momentum of creative work in the larger institutions went on much as usual during 1990. The year appears to have afforded only a few extra artistic opportunities for the key institutions. Scottish Ballet took the opportunity to develop the company technically by preparing new triple bills. The extra funding at Scottish Opera was used to undertake "a heavier repertoire" (e.g. The Trojans and the Force of Destiny) and prepare a new opera by Judith Weir. The Citizens Theatre introduced "some less usual plays" into its repertoire and for the first time announced its play list for the whole year in advance but the Citizens declined invitations to do "special" projects. According to the Royal Scottish Orchestra, there was "no material change" to its usual programming during 1990.

(iii) Other companies

- 9.111 For some companies Glasgow 1990 was the main reason for their existence. Streetbiz, for example, was established to fill a programme gap for 1990. The City of Culture was the catalyst for Ensemble 90 and an enabling factor for Scottish Youth Theatre in acquiring the old Athenaeum Theatre as a home. Small companies and ensembles were generally more enthusiastic about the year, undertaking programming on a larger scale than usual. Paragon is typical of the small institutions boosted by the year. It now has a full-time administrator, an office and is arranging foreign tours. For some independent drama companies, 1990 was a one-off, special year. Whilst the achievements and expectations of the companies were raised during 1990, some were left after the year in no better position than previously.

(iv) Museums and galleries

- 9.112 Of the major institutions, the Glasgow Museums and Art Galleries had an impressively active year. The appointment of a new director and a substantial rise in core funding gave the institution a major boost, in which a professional restructuring took place alongside a rehang of Kelvingrove, a major expansion in exhibition activity (92 temporary shows astonishingly were initiated in 1990) and a greatly increased programme of other activities (concerts, workshops, etc.). The year also saw the establishment of a purchase fund valued at £3 million, the interest of which will be available annually to buy "new art". Other local authority museums did not rise on the back of Glasgow 1990 as effectively as might have been expected.
- 9.113 The independent sector's success at increased programming should be remarked on. The Hunterian Art Gallery was another institution to have an exceptional year in 1990, with physical improvements, an expanded exhibition programme, new publications and a commissioned sculpture. The experiment of seven day opening has led to permanently extended opening for the gallery. Glasgow Print Studio benefited from inclusion in the Cultural Year laying the foundation for a considerable expansion of its international activity and reputation.

(v) Commissions

- 9.114 Spending on new commissions is perhaps the narrowest indication of creative impact. The District Council spent £119,000 on new works in the performed arts and £110,000 on the visual arts (including the TSWA Four Cities project), a total of £229,000. This represented some two per cent of the City of Culture external grants awarded by the City. However, other new works were commissioned by companies themselves (e.g. Tron, RSO).

(vi) Events

- 9.115 During 1990 Glasgow gained experience in staging and promoting major events. This was made much easier by the provision of new facilities. But it was a change of policy which enabled the Burrell to be established as a centre for temporary exhibitions (e.g. the Age of Van Gogh exhibition). This showed that there is a sizeable audience for historical exhibitions of quality. Whilst the renovation of the McLellan was a major achievement, the programming was variable (due mainly to the rush). It still needs to build a firm identity in the eyes of the public and to find a clear managerial focus. It is hoped that it will be possible to provide clear-cut programming and to join in the international market for top quality events. Tramway was established on a firm footing as an international venue for the visual and performed arts. In this flexible and informal space it was possible to explore the important links between the different arts.
- 9.116 The new Glasgow Royal Concert Hall gave the biggest benefit to music and it contributed significantly to increased audience levels. All musical organisations reported more public awareness. The jointly produced orchestral brochures may have contributed to this, though some of the participants begrudged the way it was financed. The World Orchestra Series showed that a sizeable audience still exists for international concert programming, as was the case in the old St. Andrews Hall.

(vii) International links

- 9.117 In the visual arts, exchange programmes for some three dozen artists offered studios, accommodation, money for living, travel and materials. This involved such facilities as WASPS and Glasgow Sculpture Workshop and is likely to produce lasting international links and liaisons. Eurocreation, the French Government's agency for young creative artists, selected Glasgow as the first British city to join its 'pepinieres' scheme for artists aged 20 - 35. Some 19 exchanges and international collaborations with different cities covered print making in Moscow and the Berlin Book Project. For the first time, the Venice Biennale featured a separate Scottish presence.

(viii) Public art

- 9.118 In the words of one observer "the populist strand in the 1990 programme led to some emphasis on public art and interventions in social situations". According to the District Council, some 56 non-gallery based original projects were organised, e.g. the flags scheme and painted taxis and buses. Among the relatively few public art projects which have remained, the Garnethill project is an outstanding example of the work of the German environmental artist Dieter Magnus, the fruit of collaboration

between the Goethe Institute, the Festivals Office, Glasgow District Council's Department of Parks and Recreation, and local community groups. Two of the TWSA four cities project have remained, together with stained glass windows in the Jewish synagogue and Gwyneth Leech's murals at St. Mary's Episcopal church. Another positive step was the use of Glasgow's parks for sculpture displays. The Henry Moores in Pollok Park were accompanied by an "orbiting exhibition" which visited several outlying areas.

(ix) Artistic penetration

- 9.119 Various experiments with audience development required creativity of a different kind. Several performances at the Theatre Royal by Scottish Opera were given over to specially arranged first-time audiences. Based on a similar idea, the Strathclyde Summer Season at the Citizens Theatre, originated in 1988, has become an established event. The Seasons experimented with a range of measures to encourage attendance, including creches, free admission, more matinees, plays for the deaf, as well as the usual discounts. In the 1990 Summer Season parties were arranged from some 171 organisations. The attendance amounted to 22,052 of which 54 per cent was free, 11 per cent used the regular discounts and only 35 per cent paid the full price. Experiences learned in the Summer Season, such as the value of audio description of performance for blind people, are being integrated into the regular season.
- 9.120 A remarkable scheme was the Scottish Chamber Orchestra's Strathclyde Concertos project. The Regional Council, like a latterday Salomon, commissioned no less than ten concertos from Peter Maxwell Davies to be premiered in Glasgow. The framework of musical material related to each concerto was made available to schools in the region for teaching staff and pupils to use as the basis of further development of their own compositions. This process was enhanced through the appointment of composers in residence (e.g. James MacMillan) to give practical assistance to staff and pupils to develop their ideas and skills in this field. Through the combination of the commissioned work and the schools extension, hundreds of pupils and teachers experienced an intensive period of tuition in the field of musical composition. The first concerto (for oboe) was premiered in 1989. The fourth concerto (for clarinet) was reached in November 1990. The scheme continues.
- 9.121 The Scottish Chamber Orchestra took further advantage of the Year of Culture to introduce a new concert series in the run up to the year aimed at reaching new audiences. It also undertook various special projects, ranging from music theatre performances to a gamelan project, new commissions and musicals performed from "scratch".

(x) Stimulus to artists

- 9.122 It is impossible to believe that the range of visiting performances and exhibitions presented in Glasgow during 1990 will not have made an impression on a generation of Scottish artists. This is likely to be especially true of the exhibition programme e.g. the remarkable Temperamenti exhibition of 10 artists associated with Arte Povera, or Le Cinq grouping five individual artists from five towns in France aiming to dismiss 'the preconception that all avant garde work is made in the capital'. The range of dance presented in the city continued to build interest and expectation in that art form.

(xi) Cultural identity

- 9.123 Glasgow residents in conjunction with their artistic community were encouraged through the variety of exhibitions, performances and activities to find out more about their past. Questions of local identity and regional culture were raised in a wider European context. Changing hierarchies were explored and the concept of culture itself was debated (and ironised) by artists and others during the year. Glasgow was the setting for many conferences and wider debates, including Points East, Art in Confinement, Charles Rennie Mackintosh and Art without Frontiers. According to one estimate 153 meetings on cultural questions were held during the year.

(xii) Issues

- 9.124 Benefit from the overall promotion of the arts in the city was felt and acknowledged (albeit grudgingly on occasion) by almost all cultural organisations and institutions. It was observed above that the larger companies were less involved in the year than the smaller ensembles and one-off organisations. Despite good intentions in 1988, perhaps too little attention was paid to consolidating the base. Many would have preferred to see more focus on a developmental approach selecting projects more for their growth potential.
- 9.125 Efforts were made to involve the entire cultural sector but inevitably, some elements felt that 1990 passed them by and some resentments have been expressed. It was a small venue which commented "we do not have the 1990 Office to thank for our success during the year". Another institution, a small local museum, reported that "1990 made no impact whatsoever on our operation". A common complaint was that the intensive programming of 1990 at times had an overkill effect and led to some inevitable clashes of repertoire and events. There were examples of "horrible clashes" in orchestral repertoire. Another case in point was the Paris Africa Season funded by the Festivals Office at the Tramway a week before Mayfest with its Frontline States project.
- 9.126 It is possible that too much was attempted and the scale of the vision came too late in relation to 1990. Perhaps more might have been done to achieve integrated planning and build on the "co-operative attitude and goodwill that existed between companies in Glasgow prior to 1990". Contrarily, the active role of the Festivals Office as a promoter and initiator (despite self-imposed restrictions) was resented in some quarters, creating jealousies and an unhelpful atmosphere of competition.

(xiii) Legacy

- 9.127 The legacy for the future from 1990 is considerable. This includes the establishment of the McLellan Gallery (as a prestige venue for temporary exhibitions), Tramway (as a large and adaptable space for performances, installations and mixed media events), and the Glasgow Royal Concert Hall (boosting the ambitions and profile of Glasgow's musical life). A number of imaginative commissions have left their mark on the urban landscape. Several smaller institutions were invigorated by the year's experience. The Glasgow Art Gallery and Museums are addressing the future with particular energy. Planned developments beyond 1991 include an "open museum" (outreach service) and the creation of a "collecting centre" (housing reserve

collections, conservation studios, research facilities, open stores for the public), as well as programmes to improve permanent displays especially in Kelvingrove.

- 9.128 According to a key informant, "the greatest hope for the future is the re-invigoration of institutions through the international contacts which have now been established and the benefits to Scotland's life and culture which will accrue, over the years, from the many personal and artistic links which have been established." Perhaps the biggest opportunity relates to the task for all institutions of continuing to build public interest in the arts (especially modern and contemporary work) capitalising on the gains made during 1990.

G. CULTURAL INDUSTRIES

(i) Screen industries

- 9.129 It was explained above that Glasgow's cultural industries experienced both mild growth and structural change during the late 1980s. Whilst the cultural industries were not made a prime focus of the Year of Culture, the event was not without its impact on some areas of the sector. Bringing the European Film Awards to Glasgow was a particular case in point. According to the Scottish Film Council (SFC), the event "drew attention to film in Scotland as never before" and was used to launch a number of important initiatives. The value of new international contacts in a European context was evident "in that we and our aspirations are recognised to a much greater degree than before". Apart from the promotional impetus of 1990, the Glasgow Film Theatre opened its second screen as a permanent legacy of the year. The Glasgow-based SFC acquired a new independent constitution during 1990 and was given a new sense of direction in its role as the central agency for film in Scotland. It may well wish to ensure an enhanced public profile in this new phase of its work.

- 9.130 The Culture Year brought an increased awareness of the screen community, including closer contact than before with the local authorities, Scottish Enterprise and the Scottish Office. The Strathclyde Tapes will help reinforce the Region's educational interest in the sector. Unfortunately, during the year Blackcat Studios found itself in increasing difficulty and Rank Laboratories, the only one in Scotland, closed. Two important industry and training achievements were the creation of Scottish Screen Locations and Scottish Screen Training, the one to attract outside productions to Scotland, and the other to co-ordinate professional training throughout the country. But these were based elsewhere in Scotland.

(ii) Architecture

- 9.131 Good efforts were made to publicise architecture following the appointment of a co-ordinator in that subject. An attractively produced Glasgow Architecture Guide paralleled the Glasgow Gallery Guide and the Glasgow Theatre Trail (a University initiative). The City of Culture Year was made the occasion for publishing the Glasgow volume of the Buildings of Scotland with financial support from Glasgow District Council. A number of events, competitions and exhibitions were mounted, including the World Day of Architecture and Doors Open Day (buildings of architectural interest opened their doors to the public). Whilst there were no single Charles Rennie Mackintosh or Alexander Thomson exhibition celebrating the genius

of these key figures, a number of shows and events addressed different aspects of Mackintosh's influence, including the exhibition Contemporary Visions in which seven leading architects (e.g. Hans Hollein and Arata Isozaki) made installations in the Glasgow School of Art in personal homage to him. The scheme to construct Mackintosh's House of an Art Lover was incomplete at the end of 1990. Other aspects of design were featured in the exhibition "Scotland Creates: Scottish Art and Design through the Ages" held at the McLellan Galleries.

(iii) Broadcasting

- 9.132 The Glasgow-based broadcasting companies undertook some exceptional projects related to the Year of Culture. The Ship was part-sponsored and filmed by BBC Scotland. Radio Clyde created a daily serial "The Bell in the Tree". BBC Scotland received additional programme money and was able to expand short-term employment in its Glasgow-based television Music and Arts Department. But in the view of one senior executive "the important thing about 1990 was not the exceptional items but rather those which (perhaps in a modified form) are available throughout every year. To that extent 1990 did not so much give fresh indications of Glasgow's potential as a broadcasting centre. It simply confirmed earlier views on the subject." A project of particular artistic interest was a series of 19 four-minute films made for Channel 4 by British and Continental artists (e.g. David Mach, Bruce McLean, Paul Rodriguez). This was commissioned by the Festivals Office.

(iv) Art trade

- 9.133 The art trade claimed on balance to have experienced no particular commercial boost from 1990. Long term public relations benefits were recognised and industry sources reported many more people through the doors. This led to "good business" for some, whilst others thought it a "commercial disappointment". Tourists were highly visible but were not necessarily spenders. 1990 had no tangible effect on auction prices, though it was "a very good year". At the close of 1990 some three galleries ceased trading, doubtless victims in part of the recession.

(v) Music industry

- 9.134 The music industry response was similarly qualified. According to an industry source, "1990 was good for pop music and young people", especially the Big Day promotion. The Glasgow Royal Concert Hall will be a lasting asset, attractive to some promoters and good for artists. The main effort went into concert life. But no "lasting effect" was evident in the first four months of 1991. The pop business is "personality led" and promoters of world stars expect to achieve their public wherever the concerts take place. The availability of venues and locations is obviously necessary but the successes of 1990 did not make Glasgow (or Scotland) any more or less attractive world tour promoters. On the other hand, it was suggested that the promotional boost given by Glasgow 1990 most probably contributed to the exceptional success of the Rolling Stones and Pavarotti concerts.

H. SUMMARY

- 9.135 The net return to the regional economy of the Glasgow 1990 initiative (in terms of the short term direct and indirect/induced impact on net income) was in the range of £11.6-15.5 million. This result is after taking account of the additional public sector cost of £21.9 million.
- 9.136 It is estimated that the initiative generated some 5,580-5,815 person years employment. The majority - over 3,800 - of these jobs would have been supported in the ancillary service activities such as hotels, catering and retailing as a result of expenditure outside events by tourists, day visitor and local residents. Gross public sector cost per job was calculated at £6,980 which compares favourably with estimates of £20,000 plus per job in other initiatives.
- 9.137 This growth in employment would have been equivalent to around 1.5 per cent of total employment in Glasgow City in 1989, or 8 per cent of total unemployment (although many of the jobs would be likely to have gone to people not formally registered as unemployed) in the Glasgow travel-to-work area.
- 9.138 Unemployment in Glasgow fell from 2.2 percentage points above the Scotland rate in December 1989 to 1.8 percentage above in December 1990, before widening again to 2 percentage points above in July 1991. Clearly, a wide range of factors would have influenced trends in relative unemployment rates, but the outcome does at least appear to be broadly consistent with the scale of the impacts estimated above.
- 9.139 Public agencies had reasons other than purely employment related ones for spending on Glasgow 1990. A range of less tangible additional impacts were achieved which may prove more significant in due course than the immediate readily quantifiable impacts. Changes in attitudes, interest and access are considered elsewhere. Other developments were examined in this Section.
- 9.140 Glasgow 1990 achieved positive changes in the perception of the City held by visitors and others. Perhaps the most significant result was the 15 per cent increase among London & South East ABC1s in those believing that Glasgow was "rapidly changing for the better". By the same token, there was a 13-point fall in those thinking the City was still "rough and depressing".
- 9.141 In relation to comparator cities, Glasgow stood out for the quality of its museums, galleries and theatres and music, and as the place on the move. Yet, other cities, especially those without an "image problem" (such as Bristol and Edinburgh), still ranked higher as places to live, work and visit. Despite the progress made in promoting Glasgow's cultural attractions, they fell short of Edinburgh's well established reputation in the eyes of London & South East ABC1s.
- 9.142 Glasgow 1990 generated significant press and television coverage. The international press coverage of Glasgow 1990 was particularly strong. It was a valuable achievement of the Year that Glasgow registered so positively in international eyes. There is an obvious risk of double counting the value of media exposure which has an impact in terms of tourism and other benefits, and the value of such advertising exhibits diminishing returns. Accordingly, the net value of this coverage has been set at £3.2 million.

- 9.143 The business community responded positively to Glasgow 1990. The Year was regarded as an expression of the City's capability which provided an "excellent backdrop for business". The general improvement in Glasgow's image at home and abroad was thought helpful. Overall, awareness of the City may not generate business leads but helps "down the line" and has proved a positive influence in relation to personnel recruitment. Simply attracting people to visit the City to see the changes for themselves was a much appreciated outcome of Glasgow 1990.
- 9.144 Glasgow 1990 helped change the City's perception of itself. Some 61 per cent of residents agreed that the 1990 programme made the city a more pleasant place to live and work. This fed through into a number of initiatives aimed at extending and improving public services.
- 9.145 Public art and incentive services (e.g. evening half price fares) were introduced on the regional rail system. These were sufficiently effective to encourage the SPTE to build on them in future years. As for the other transport services, ScotRail saw no indication of growth arising from Glasgow 1990 on the Edinburgh or inter-city routes. Passenger numbers at Glasgow Airport increased 8.2 per cent in 1990, the year when direct trans-Atlantic passenger services were introduced to Glasgow.
- 9.146 The education programme, which built on well established areas of work in the arts, created numerous extra opportunities for school pupils. The remarkable imagination and pedagogic success of the projects (including the on-going Strathclyde Concertos) has been much praised, and imitated. It is difficult to believe that the long term results of the quantum change in the service will be anything other than very positive.
- 9.147 The social work programme broke new ground for the Department which is now regarded as a leader in the field of integrating the arts into patterns of social care. This is an outcome of the Year which brought direct benefits to clients, including first involvement in arts activities for many and further progress in allaying public ignorance and fears of handicap.
- 9.148 Development and furtherance of the arts in Glasgow was a further impact. Perhaps the main creative outcome of Glasgow 1990 was the recognition given to the achievements of its cultural institutions and the boost to the standing of the arts in the City. This alone "could allow more to grow than was previously imaginable".
- 9.149 It was not only a question of the major institutions. The community of writers, composers, performers and especially visual artists has expanded since the mid 1980s, increasing Glasgow's role as a centre for creative activity.
- 9.150 It is difficult to believe that the range of visiting performances and exhibitions presented in Glasgow during 1990 will not have made an impression on future generations of Scottish artists. Benefits to Scottish artistic life will accrue from the many personal and professional links established during the Year.
- 9.151 The establishment of a purchase fund for "new art" will compensate for some of the disappointments felt in relation to the relatively few public art projects remaining from Glasgow 1990 and the need still to establish a Public Art Trust for Glasgow.
- 9.152 Several smaller institutions were invigorated by the Year's experience. The Glasgow Museums and Art Galleries are addressing the future with particular energy on the basis of expanded core funding.

9.153 The larger institutions in the performed arts may have been less involved in the Year than smaller ensembles and one off organisations. Some artistic opportunities were created which would not have been possible in the normal year. But the momentum and volume of their creative work went on much as usual. For the Citizens this included the third Strathclyde Summer Season.

9.154 The legacy of 1990 included important infrastructure developments. This included the establishment of the McLellan Galleries as a prestige venue for temporary exhibitions, the Tramway as a large and adaptable space for performances, and the Glasgow Royal Concert Hall providing a major boost to the ambitions and profile of Glasgow's musical life.

9.155 Whilst the cultural industries were not made the prime focus of the Year of Culture, some sectors did benefit. The European Film Awards "drew attention to film in Scotland as never before". Efforts made to publicise architecture and the broadcasting companies undertook some exceptional projects. However, generally, the sector felt no particular boost from 1990. One senior broadcasting executive put it "1990 did not so much give fresh indications of Glasgow's potential as a broadcasting centre. It simply confirmed earlier views on the subject".

10. OUTCOMES AND OPPORTUNITIES

10.1 This section summarises some specific outcomes and opportunities arising from Glasgow 1990.

A. OUTCOMES

10.2 The monitoring exercise tracked outcomes in six main areas:

- o System boost.
- o Market development.
- o More access and interest.
- o Tourism development.
- o Cultural sector development.
- o Other impacts.

1. SYSTEM BOOST

10.3 (a) The Year gave added impetus to Glasgow's artistic life:

- . there was a much expanded annual programme of events and attractions;
- . exhibition numbers increased by 56 per cent on 1989 and hours of opening were extended;
- . important developments took place in the scale and significance of exhibitions presented in the City;
- . theatre and concert performances were 32 per cent more than in 1989; and
- . concert life alone exploded to two and a half times the 1989 level.

10.4 (b) The public responded to the expanded programme with a 40 per cent rise in attendance:

- . attendance at arts events and attractions expanded from 4.72 million in 1989 to 6.59 million in 1990;
- . the rise in attendance compares very favourably with events and attractions in the rest of Britain; and

on a wider definition of culture, adding to the arts programme cinema, pop/rock, outdoor/celebrations/community event, the Glasgow 1990 attendance totalled at least 12 million.

10.5 (c) The tide of extra activity neither engulfed the system nor harmed existing institutions:

existing institutions achieved a positive share of the extra 1990 attendance, 43 per cent museums/galleries and 31 per cent for theatres/concerts;

the specialist gallery public (mainly for modern art) was two and a half times greater in 1990 than it had been in 1986;

the Burrell did exceptionally well, reversing the downward trend of the 1980s; the independent museums (e.g. the Hunterians) had a successful year building on the progress of the 1980s;

whilst they did not move forward during 1990, Kelvingrove and the other Glasgow City sites held on to substantial gains achieved in the late 1980s;

concert attendance expanded and the small venues/arts centres increased their public by 43 per cent; the receiving theatres held their audiences and there was modest growth in the producing theatres;

there was an adverse effect on local authority museums in outer Glasgow reinforcing the decline in attendance experienced in recent years; perhaps, Mayfest, too, fell back a little in 1990; and

the centrally-initiated 1990 projects were a major stimulus, achieving 47 per cent of the net extra public for museums/galleries/exhibitions and 34 per cent in the performed arts; the new concert hall had a major impact on audiences, less so the McLellan Galleries.

2. MARKET DEVELOPMENT

10.6 (a) The momentum of the Year achieved significant developments in the market for the arts:

all sectors of the market expanded in 1990; but there was a swing in composition from residents to visitors;

resident attendance rose by 31 per cent; the Glasgow City increase of 52 per cent contrasted with the weaker response of Outer Glasgow which experienced a 6 per cent rise;

day visitor admissions to arts events/attractions were 89 per cent higher in 1990 than in 1986; tourist visits rose by 81 per cent;

theatres/concerts established a visitor base in the tourist market; a negligible factor in 1986, tourists averaged 10 per cent of theatres/concerts attendance in 1990; and

the tourist share of museum/gallery attendance increased from 25 to 27 per cent.

10.7 (b) Different markets responded to different stimulæ:

visitor markets were most effectively developed by the existing institutions, in which enhanced programming and the strong promotional umbrella of 1990 played a part;

new facilities made their greatest impact on the local market; the Glasgow Royal Concert Hall generated major interest amongst residents; and

the local market responded most to the new experiences offered by the centrally-initiated projects, such as Glasgow's Glasgow and The Ship.

3. MORE ACCESS AND INTEREST

10.8 (a) Glasgow's residents were engaged by the 1990 programme:

the Year of Culture programme touched the lives of 4 out of 5 adult residents of the region; and

54 per cent went to the theatre or a concert at least once in the Year; 61 per cent visited a museum/gallery.

10.9 (b) Access to the arts increased during the Year:

the proportion of residents claiming they "currently attend" (the "reach") increased in all art forms in 1990; Glasgow exceeded the British average "reach" in plays, dance, opera, classical concerts and jazz;

increases in "reach" ranged from 10 percentage points for plays to 2 points for opera;

progress was most marked among ABC1s; the response of C2DEs was positive, in the range of 1-10 points; there remained an imbalance of response between the sexes;

the main extensions in reach during 1990 were achieved by renewed attendance on the part of residents whose active interest had previously lapsed;

first-timers accounted for between 2 per cent (museums) and 19 per cent (dance) of attenders;

specific initiatives to develop interest among targetted social troupes appear to have met with success (e.g. Citizens Strathclyde Summer Season); and

"neighbourhood events" reached 10 per cent of residents who did not attend main programme; but the social reach of "neighbourhood events" was narrower than "street events" and the main programme.

10.10 (c) Residents responded positively to the Year of Culture:

almost all residents agreed that the 1990 programme "improved the public image of Glasgow";

61 per cent thought the programme "made the City a more pleasant place to live and work"; but

views on the programme and its management were positive, if less uniformly so; some 22 per cent believed strongly that too much public money had been spent.

4. TOURISM DEVELOPMENT

10.11 (a) Glasgow 1990 expanded the region's tourism base:

visits to arts events and attractions by tourists were 81 per cent above the 1986 level;

some 555,000 tourist trips involved attendance at arts events and attractions;

progress was made in overseas markets which accounted for 38 per cent of Glasgow 1990 trips, including inroads into the European markets; 77 per cent of overseas visitors were first-timers in Glasgow;

Glasgow 1990 tourists represented the equivalent of 71 per cent of all Glasgow-bound holiday/VFR trips; and

the advertising campaign's impact was positive outside Scotland cited as an influence by 28 per cent of Glasgow 1990 tourists.

10.12 (b) Market strengths of the destination were developed during 1990:

the domestic market was 57 per cent repeat business, and over half were on short breaks; 1990 tourists were concentrated in prime market areas, ABC1s and London & the South East;

2 in every 5 Glasgow 1990 domestic tourists claimed that cultural events were the "sole" or "very important" reason for their trip;

whilst museums/galleries remained the central attraction, a significant tourist public was established for theatres/concerts;

1990 "marker events" drew up to 28 per cent of attendance from tourists; but the extra business from the tourist market registered mostly at the established institutions; and

a significant tourist presence was achieved in the off-season (autumn/winter), mainly at museums/galleries (20 per cent) but also at theatres/concerts (8 per cent).

- 10.13 (c) Significant tourism prospects were confirmed by 1990:
- prospects for repeat business were high (74 per cent of domestic tourists);
 - consumer responses to the destination improved during 1990;
 - Glasgow 1990 helped to develop the positioning of the City as a cultural destination in its own right; and
 - whilst the image of the City has changed, there is still some way to go; the quality of its performed arts programmes remains under appreciated.

5. CULTURAL SECTOR DEVELOPMENT

- 10.14 (a) The capacity of the sector continued to increase in 1990:
- direct employment in the cultural sector in 1990 (including the centrally-initiated 1990 projects) was 7.8 per cent greater than in 1986;
 - excluding the 1990 projects, direct employment grew 4.9 per cent in relation to 1986;
 - the cultural industries were a growth area (apart from broadcasting), expanding by 3.9 per cent since 1986;
 - whilst the cultural industries were not made the prime focus of the Year of Culture, some aspects of the sector (e.g. film) did receive promotional benefits from the initiative;
 - the capital projects completed in 1990 (the McLellan Galleries and the Glasgow Royal Concert Hall, etc.) equipped the City better to address future opportunities, reinforcing investments made in 1980s; and
 - the increasing numbers of individual artists (in the visual arts, etc.) based in Glasgow indicated its growing role as a "creative centre".
- 10.15 (b) Extra creative opportunities were provided:
- Glasgow 1990 improved the climate for artistic activity in the City by celebrating the achievements of the sector;
 - in the major institutions, whilst artistic opportunities were created which would not have been possible in a normal year, the momentum of their work went on much as usual during 1990;
 - some smaller performed arts organisations were galvanised by the year and most of the art galleries and museums in Glasgow City had a very active 1990; in the case of the Glasgow District Council's Museums & Art Galleries Department, this was supported by a substantial rise in "core" funding;

international contacts were expanded and the range of visiting performances/exhibitions will have made an impression on a generation of Scottish artists; and

new commissions amounting to 2 per cent of the City's external grant value were arranged, including a small legacy of public art projects.

10.16 (c) Promotional experience was gained:

Glasgow broadened its experience in promoting special arts events and attractions, including cultural spectacles:

some opportunities were given to specialist agencies to develop niche festivals; some proved to be one-offs; others repeated in 1991 (e.g. Streetbiz and Glasgow Mela);

there were important developments in the scale and significance of temporary exhibitions presented during the Year; the Burrell was established as a centre for such shows and the renovation of the McLellan was a major achievement;

Tramway proved its worth as an international venue for the visual and performed arts;

the Glasgow public responded generously to the new concert hall; it is another long-term project for which challenges remain in securing long-term customer loyalty, a clear promotional focus, and accessing visitor publics; and

Glasgow 1990 was "good for pop music and young people", especially the Big Day promotion; but this made no material difference to Glasgow as a potential world tour date.

6. OTHER IMPACTS

10.17 (a) Glasgow 1990 was a valued backdrop for business:

improved awareness of the City at home and abroad was regarded as a positive business influence;

the Year attracted people from home and abroad who saw for themselves the changes in the City; and

the Year was a catalyst for further involvement by Glasgow's business community and support of the arts.

10.18 (b) The Year of Culture gave the City's image another lift:

there was a 15 per cent increase among ABC1s in London & the South East believing Glasgow was "rapidly changing for the better";

in relation to comparator cities, Glasgow stood out as the place on the move;

the considerable foreign press interest in Glasgow 1990 relayed a positive picture of Glasgow as a city using a cultural platform effectively to address economic challenges; and

Glasgow gained an enhanced perception of itself in the light of the Year of Culture.

10.19 (c) Public service investment in cultural processes moved forward:

cultural initiatives fed through into expanded and improved public services;

the experience of 1990 reinforced and developed relevant professional skills and practices in social work and education;

the social work programme broke new ground in integrating the arts into patterns of social care; and

the educational programme created extra opportunities which should yield long term benefits.

B. OPPORTUNITIES

10.20 In addition to the various outcomes summarised above, the initiative generated measurable net economic benefits for the Glasgow region. The net return in terms of income benefits is estimated in the range £11.6-15.5 million. Further, the initiative is estimated to have generated some 5,580 to 5,815 person years employment.

10.21 The majority of this benefit was delivered through the impact of the extra spending by visitors (tourists and day visitors) brought into the region by Glasgow 1990. Generally the visitor market (from which most short term economic benefits arose) responded most to the work of the existing institutions (with their enhanced programming) and the marketing campaign. The major spending on centrally-initiated projects and cultural spectacles made an impact mostly on markets within the region.

10.22 The City's cultural capacity was expanded during 1990. For example, the cultural infrastructure was extended and improved and the City acquired some experience of ways to supplement arts programming, including promoting cultural spectacles. A number of areas of opportunity were highlighted by Glasgow 1990. They relate, among others, to:

- o sustaining market development
- o developing cultural tourism
- o a cultural industries strategy
- o cultural investment.

- 10.23 The major development achievement of the Year was in relation to markets and associated areas, such as extended access for the people of Glasgow. The nature of the opportunities highlighted by Glasgow 1990 in such areas means that action will be needed to maintain the momentum and capture the benefits. There are important related challenges in continuing to realise the benefits of the major investment in education and social work.

C. SUSTAINING MARKET DEVELOPMENT

(i) 1990 opportunity

- 10.24 Glasgow 1990 demonstrated how access could be extended and markets could be developed. The value of the marketing campaign was felt most in relation to tourists. Within the region the local momentum of the year clearly contributed much to extending involvement. There were achievements with socially targetted access programmes, inroads into lapsed markets and success with first-timers.

(ii) Latent demand

- 10.25 A major outcome of Glasgow 1990 was the widespread aspiration to "try art forms" not currently attended. Between 3 and 10 per cent of adult residents across the art forms wanted to try something not currently attended. These included 10 per cent each for opera and dance. Particular opportunities were signalled in relation to the high figures for C2DEs (e.g. 9 per cent wished to try the opera) and the under 35s (e.g. 13 per cent indicated a wish to try dance). Generally, the "latent" demand for museums and galleries was less pronounced.

Figure 134 Glasgow residents: those not currently attending who would like to try, by art form

Percentages

	All	Male	Female	ABC1	C2DE	<35	35-54	55 +
Would like to try								
Plays	9	7	11	8	10	11	10	6
Musicals/ panto	6	5	7	5	7	7	5	7
Dance	10	5	14	11	9	13	9	6
Opera	10	8	11	11	9	11	11	7
Classical concerts	8	6	9	9	7	7	5	3
Jazz concerts	5	5	5	5	5	7	5	3
Pop/rock	7	6	8	4	8	11	7	2
Museums	3	3	3	1	4	2	3	5
Galleries	5	4	6	4	5	5	6	4

Source: System Three.

- 10.26 Figure 133 shows that much of the expression of interest came from people who were already active in other areas. Thus, the opportunity relates to realistic prospects rather than theoretical expressions of interest which might never materialise.

Figure 135 Glasgow residents: current and "real latent" demand

	Percentage		
	Current demand ^a	Real latent demand ^b	Total real demand
Plays	28	7	35
Musicals/panto	7	5	12
Dance	7	9	16
Opera	7	9	16
Classical concerts	13	7	20
Jazz concerts	9	4	13
Pop/rock	26	5	31
Museums	55	1	56

Source: System Three.

^a Currently-going.

^b Those who would "like to try" among residents currently attending one or more other art forms.

(iii) Programme of market development

10.27 Both building on the 1990 opportunity and tapping the latent demand represent major challenges. This might be addressed with a targetted programme of market development. Despite important achievements in marketing print and newspaper listings, Glasgow 1990 did not develop integrated marketing arrangements for use in the future. The programme of market development would require, among other things:

- a corporate approach to arts marketing in the region, including re-examination of the previous arts marketing unit proposals;
- exchange and pooling of professional experience on 1990 access programmes;
- continuation (and replication in relevant areas) of successful access programmes (e.g. at the Citizens);

(iv) Relative costs

10.28 In terms of market development, the undoubted success of some of the 1990 in drawing visitors to the region must be set against the net costs involved. It is not easy to establish public spending costs per attendance on a consistent or meaningful basis. In particular, most of the arts institutions provide important services (e.g. production, touring, scholarship) in addition to the performances and displays offered to the Glasgow public. Such a spread of activity is not easy to reflect in costings. The following figures are merely intended to give some indication of the ranges involved. The high cost of certain kinds of special promotions is apparent:

Local authority spend per attendance (£)

All museums/galleries	2.41
All theatres/concerts/ensembles	4.43 *
Glasgow's Glasgow	9.47
Tramway (exhibitions & spectacles)	13.18
The Ship	13.89
Theatre Royal Special Seasons	32.17
Bolshoi	43.07
Sinatra	83.12

* Scottish Arts Council contributed the equivalent of a further £5.87 per Glasgow attendance.

(v) Promotional initiatives

10.29 As a guide to the kinds of further initiatives which might encourage more development in the resident market, a range of suggestions and relevant responses are set out in Figure 134. The "good buy" option (discount tickets) appealed most, together with "convenience programming" (more events in your area). Secondary interest was strong for better information to be made available. There was some support for festival programming/or more events like Glasgow 1990. Figure 135 shows that non-attenders were most likely to respond to convenience programming. A strong plea for better public transport, good buys and convenience programming was registered by Outer Glasgow. Under 35s were most likely to react to convenience programming, discount tickets and more street/free entertainment. The young were also the most likely supporters of "another event like Glasgow 1990".

Figure 136 Glasgow residents: factors likely to encourage more attendance at theatres, etc.

	Percentages		
	Very likely	Quite likely	Not at all likely
Percentage of adults			
Better information	25	44	11
Better public transport	26	26	19
Discount tickets	34	32	12
More events locally	38	32	9
More street/free entertainment	24	30	17
Learning opportunities	5	20	39
Festival programming*	23	36	14

Source: System Three.

* Another event like Glasgow 1990.

Figure 137 Glasgow residents: "very positive" responses to promotional initiatives, by market type

	Attendees		Glasgow		Outer			
	All	Yes	No	city	Glasgow	<35	35-54	55+
Percentage of adults responding very positively to:								
Better information	25	26	12	21	24	24	27	17
Better public t'port	26	28	20	21	30	29	28	20
Discount tickets	34	39	20	29	38	39	36	25
More events locally	38	43	23	32	43	46	38	26
More street/free entertainment	24	26	17	24	23	37	21	10
Learning opport's	5	6	1	6	4	6	6	2
Festival programming	23	27	11	23	23	29	24	13

Source: System Three.

(vi) Positive opinion base

10.30 Positive attitudes to the importance of theatres, museums, concerts, etc were reinforced by Glasgow 1990. Some 95 per cent of adults believed that the availability of these facilities was "important" or "very important" for the people of Glasgow. The Year of Culture saw a 5 per cent swing from "quite important" to "very important", in comparison with 1986; the opinion base on this subject was exceptionally strong with 71 per cent of respondents in 1991 claiming their availability was "very important". The level of agreement on the importance of "availability" remains striking. Even 90 per cent of non-attenders responded that they believed availability was "important for the people of Glasgow".

(vii) No growth in personal interest

10.31 Compared with responses on general "availability", fewer residents (69 per cent) indicated that theatres, etc. were important to them "personally". The result was strikingly similar to 1986. The positive 1990 swing on "general availability" was not repeated at the "personal" level where the 1991 figures were virtually unchanged in relation to 1986. The Year appeared to generate no growth in expressions of personal interest in theatres, museums, etc. Even the balance between "very important" and "quite important" showed no significant change.

Figure 138 Glasgow residents: importance of theatres, museums, etc. "for the people of Glasgow" and "for you personally"

Percentages

	For the people of Glasgow			For you personally		
	1986	1991	Difference	1986	1991	Difference
Adults responding availability is						
Very important	66	71	+5	38	37	-1
Quite important	29	24	-5	33	32	-1
Not important	5	6	+1	29	31	+2

Source: Policy Studies Institute; System Three.

Figure 139 Glasgow residents: importance of theatres, museums, etc. "for the people of Glasgow", by social characteristics, 1991

	All	Male	Female	ABC1	C2DE	<35	35-54	55+
Adults responding availability is								
Very important	71	69	72	77	67	67	74	71
Quite important	24	24	23	18	26	27	21	22
Not important*	5	6	5	5	7	6	5	8

Source: System Three.

* Includes 'don't knows', 'neither important nor unimportant' and 'not very important'.

Figure 140 Glasgow residents: importance of theatres, museums, etc. "for the people of Glasgow", by attendance and place of residence

	All	Attender		Glasgow	Outer
		Yes	No	city	Glasgow
Adults responding availability is					
Very important	71	75	59	73	69
Quite important	24	21	31	20	27
Not important*	6	5	11	7	5

Source: System Three.

* Includes 'don't knows', 'neither important nor unimportant' and 'not very important'.

D. CULTURAL TOURISM

(i) Strategy

10.32 On the basis of the achievements of Glasgow 1990, there is every reason to continue developing the cultural tourism strategy for Glasgow. This should be based on the following:

- promotion of Glasgow as a "European cultural tourism destination" (especially in short breaks markets);

- group marketing of Glasgow's cultural facilities in priority seasons at appropriate times of the year to specific tourist markets (including special interest groups);

- further developing appropriate cultural tourism products (including short breaks and an element of a two city promotion) for specific markets.

(ii) Destination marketing on cultural platform

10.33 The image of Glasgow was so strengthened by 1990 in national and international market places, that it may well be the moment to switch emphasis from the events strategy and concentrate on destination marketing, which focuses more on the permanent assets of the City. The intention should be to present more strongly existing product in the inward and domestic markets. More needs to be made of the performed arts programming in the City. Mature destinations continue to register themselves through specific attractions as well as general name and reputation. In this context, there will be a role for "prime seasons" identified by strong cultural programming from Glasgow's cultural institutions. Any extra cultural events or "marker events" will need very careful devising. They will be best conceived in the framework of existing festivals, institutions and venues.

(iii) Corporate approach

10.34 The main challenge is to build on the permanent creative assets of Glasgow on the basis of consistent programming. Amongst other things, this will require a more corporate approach amongst institutions, including efforts to develop:

- strengthened links and liaisons between arts organisations and the tourist trade;

- integrated ticketing and marketing of the arts in the City;

- corporate consideration of the annual programming pattern;

- identified prime seasons (characterised by strong programming) for special promotion.

(iv) Two cities

- 10.35 For British tourists travelling on to other places, 2 out of 5 were off to Edinburgh. Overseas tourists were more inclined to tour and Edinburgh was an extra destination for 3 in 5 of them. By the same token, perhaps a third to a half of Edinburgh Festival tourists visited Glasgow as part of their 1990 trip. The joint attraction of Glasgow and Edinburgh has yet to be effectively addressed. Two-centre marketing and joint product/programming development for promotion in appropriate leisure tourist markets (short and long stay) deserves serious consideration.

(v) Loss of momentum

- 10.36 A danger is that the momentum established during 1990 will start to drop off. As pointed out by Saatchi and Saatchi, the tracking study data comparing September 1990 with January 1991 seem to confirm this possibility. Of particular concern is the five point slide in those thinking Glasgow is an 'exciting place to visit'.

Figure 141 Perceptions* of Glasgow: change at close of 1990

	Percentages		
	Sept 1990	Jan 1991	Difference
Percentage agreeing Glasgow			
Increasingly important for the arts	54	51	- 3
Exciting place to visit	28	23	- 5
Rapidly changing for the better	49	48	- 1
Rough and depressing	35	36	+ 1
Wide variety of theatrical and musical events	29	29	-
Good pubs, restaurants & nightlife	23	21	- 2
Happy to live and work there	12	12	-

Source: Saatchi and Saatchi.

(vi) Withdrawal from market place

- 10.37 Following an intense period of advertising Glasgow had no presence in the market place for six months. The positive public relations programme virtually dried up with the closing of the Festivals Office and there was some switch of focus to Dublin, the City of Culture 1991. Nevertheless, the rating and awareness of Glasgow in January 1991 still represented a considerable gain over the position at the outset of 1990.

(vii) Difficult time

- 10.38 But the evidence of a slide comes at a time when prospects in the travel trade are particularly difficult. Many factors affect projects in the Tourist trade. Scottish Tourist Board occupancy data confirm the scale of the challenge. Room occupancy in Glasgow

was down by ten percentage points January to June 1991 compared with the same period in 1990. For Scotland overall room occupancy also fell, but only by one percentage point.

Figure 142 Hotel occupancy: Glasgow and Scotland, January-June, 1990 and 1991

	Percentages		
	1990*	1991*	Difference
Glasgow			
Bed occupancy	47	34	-13
Room occupancy	64	54	-10
Overseas bed occupancy	6	4	-2
Scotland			
Bed occupancy	41	38	-3
Room occupancy	53	52	-1
Overseas occupancy	5	5	-

Source: Scottish Tourist Board.

* January - June.

(viii) Hard work already done

10.39 The opportunity is compounded by the fact that the hard work has already been done. Though there is still some way to go before Glasgow in the market place is regarded universally as an attractive destination, there is high awareness of Glasgow and a pre-disposition towards the City. A relatively low level of spending might secure these gains for years to come. On the other hand, withdrawing from the market place can only lead to long term decline, erosion of image, and Glasgow 1990 will come to seem like a "flash in the pan".

(ix) Challenge

10.40 In the domestic market, advertising was shown to work. On the other hand, the major gains made in overseas markets were achieved without overseas advertising. The overseas markets may have been accessed in the UK by the British advertising campaign (not to mention the Glasgow 1990 desk in the British Travel Centre in London), as well as by the overseas press campaign. Ensuring that Glasgow holds on to these gains will be a particular challenge. Strong public relations and further product development will have a role to play as much as advertising and schemed direct mail campaigns. The emphasis on permanent assets and indigenous activity of Glasgow must be consistent with approaches adopted in the broader social and economic promotion of the City.

E. CULTURAL INDUSTRIES

(i) Effects of Glasgow 1990

- 10.41 Whilst the cultural industries were not made the prime focus of the Year of Culture, some sectors did benefit. The European Film Awards "drew attention to film in Scotland as never before". Efforts made to publicise architecture and the broadcasting companies undertook some exceptional projects. Generally, the sector felt no particular boost from 1990. One senior broadcasting executive put it "1990 did not so much give fresh indications of Glasgow's potential as a broadcasting centre. It simply confirmed earlier views on the subject".

(ii) Strategy

- 10.42 From an economic development perspective, Glasgow District Council and the Glasgow Development Agency have been addressing a range of initiatives in the cultural industries field. These include:

- Media Centre: a resource for promoting the media industry citywide, including industry facilities and accommodation for relevant agencies (e.g. Scottish Film Council);
- Design Museum: a resource, forum and shop window for Scottish industrial design;
- Crafts Business Development: a possible initiative incorporating information services, marketing support, property supply (workshops, exhibition spaces and retail areas) and financial assistance;
- Strathclyde Media Training: a review of training needs, carried out in consultation with the industry, making proposals for filling gaps.

(iii) Sector of opportunity

- 10.43 Perhaps a chance was missed in the City of Culture celebrations to promote and secure Glasgow's standing as the UK's principal cultural industries centre outside London. It is still a sector of opportunity. The potential for Glasgow and for Scotland, building on existing training strengths and business resources (especially in the designer trades and screen industries) remains considerable. A cultural industries strategy for Glasgow should become an important priority for the City and its region.

F. CULTURAL INVESTMENT

(i) A phase of asset development

- 10.44 None of the above areas of opportunity will be fully realised without firm resolve to nurture the creative energies of Glasgow. The Year of Culture drew attention to the

City's achievements on many levels in a European context. It is now necessary to return to building Glasgow's creative base - a phase of asset development.

(ii) Targetted investments

10.45 The aim should be to strengthen the creative base of the City and expand relevant artistic opportunities for its institutions. One approach might be to undertake (TIs) Investments Targetted on specific objectives agreed with the institutions. Relevant target areas for discussion on TIs might include:

- new work;
- extra performances;
- national/international artistic collaboration and exchange;
- education goals;
- training;
- increased access;
- fabric/administrative support.

(iii) Aftermath of 1990

10.46 A range of specific issues arose in the aftermath of Glasgow 1990. Among the more important are the ways and means of:

- sustaining an integrated approach to the visual arts in Glasgow;
- achieving public art programmes through appropriate arrangements;
- operating the McLellan Galleries as a prestige venue for temporary shows, joining in the international market for quality events;
- consolidating audience development (including visitor markets) and the artistic focus of the Glasgow Royal Concert Hall;
- utilising effectively the Arches and its studio theatre;
- establishing a cost effective role for Tramway, including extensions to provide production and studio facilities;
- consolidating the promotional experience of Glasgow 1990, including the work of the new festivals created in that Year.

(iv) Scottish Opera : Scottish Ballet

10.47 Glasgow is the only city in Britain outside London with both a mainscale opera and mainscale ballet company. This is one of the City's most competitive features and it should be a priority to take more advantage of it. In terms of further capital projects which would extend the scope of existing organisations, proposed developments at the Theatre Royal represent an important opportunity. The City's largest creative organisations are constrained by the arrangements at the Theatre Royal. In particular, the Theatre's use by Scottish Opera for rehearsal purposes sets limits to the numbers of performances which can be presented.

10.48 Glasgow would benefit greatly from more performances by Scottish Opera and Scottish Ballet which should be presented on a more regular and consistent basis. As was shown above, the latent demand for opera and dance/ballet in the region is substantial. A more active Theatre Royal is needed to play a positive role in the cultural tourism context. This will also require upgraded front of house provision which has fallen behind the standards being set in other cities (including Edinburgh).

(v) Further schemes

10.49 Further schemes under consideration by the District Council and others include:

the refurbishment of the City Hall as part of an integrated commercial development on the Candleriggs site with provision for extra cultural facilities;

major "framework developments":

- Gallery of Contemporary Art
- Contemporary Dance School for Scotland
- Design Museum (see para. 10.44)

further works at the King's Theatre;

improved facilities for staging "events" e.g. at the SECC or outdoors;

Other projects currently in the pipeline include two studios at the Citizens Theatre. An auditorium is being created in Dowanhill Church and a studio space at Ranshon Church.

(vi) Precincts

10.50 Many of these schemes have tourism implications. We think there is a need for the City to continuing pursuing the issue of cultural precincts. By promoting designated areas of the City, defined by clusters of arts attractions, as cultural precincts, it is possible to turn them into destinations in their own right. Among the benefits arising would be:

reinforced commercial opportunities;

a boost to the City's appeal to residents and tourists;

consumers attracted to shops, restaurants, etc.;

increased access for people who might not otherwise be attracted to such areas.

10.51 Glasgow's relevant opportunities relate to three parts of the City:

an arts and entertainment district: on the Cowcaddens Ridge, encompassing the Theatre Royal, the Glasgow Royal Concert Hall, the Glasgow Film Theatre and the Royal Scottish Academy of Music and Drama;

a design quarter: effectively part of the Merchant City, building on the Print Studio, WASPS, the Tron; with scope for additional elements (e.g. Design Museums, refurbished City Hall scheme);

a museums quarter: the area running from the Hunterian Art Gallery to the Museum of Transport, including Kelvingrove.

(vii) Corporate approach

10.52 The Glasgow Museums & Art Galleries Department has addressed its future plans with considerable energy on the basis of expanded core funding. Glasgow District Council has established a new Performing Arts Department, which is already considering many of the above issues and opportunities. Related matters described above include:

the programme of market development (especially adopting a corporate approach to arts marketing in the region);

consideration of the annual programming pattern (in particular the identification of prime seasons for special promotion, in a cultural tourism context), among others;

a cultural industries strategy.

10.53 In addressing the economic and social opportunities afforded by the arts in Glasgow, some means of drawing together the relevant institutions, interests and agencies to focus on the potential of the arts across the region may be necessary. For the City there would be merit in considering the matter on a corporate basis. In particular, Glasgow District Council may wish to explore ways of systematically channelling relevant expertise on to the various opportunities from its economic development, planning, and tourism/promotion functions, as well as from its Museums and Performed Arts Departments.

10.54 The significant corporate response of Glasgow's business community to 1990 represents an enormous opportunity for the arts organisations in the City. The process of building further support in Glasgow on the basis of mutual interest is a major challenge for both parties in which ABSA Scotland, in partnership with others, should have a constructive role to play.

G. CONCLUSION

(i) Ambition

- 10.55 The Year of Culture was conceived both as a celebration of cultural achievement and an exercise in development with an eye to longer term targets. More than many British cities, Glasgow has used the arts to communicate its regeneration and addressed the role of events strategies in economic development through tourism.
- 10.56 The significant corporate response of Glasgow's business community to 1990 represents an enormous opportunity for the arts organisations in the City. The process of building further support in Glasgow on the basis of mutual interest is a major challenge for both parties in which ABSA Scotland, in partnership with others, should have a constructive role to play.
- 10.57 The Garden Festival proved that events on a large scale could be managed in Glasgow. But the Year of Culture was envisaged in a quite different way involving a twelve month period and a comprehensive approach. This monitoring exercise was intended to provide a statistical picture of the effects of the Year, with a focus on arts events and attractions.

(ii) Outcome

- 10.58 The Year delivered a major boost to Glasgow's cultural system. The resident population was engaged by Glasgow 1990 and responded positively to the programme. Questions of local culture and regional identity were raised in a European context and people were encouraged to find out more about their past. The momentum generated in the Year achieved significant developments in local attendance and involvement in the arts.
- 10.59 Glasgow 1990 substantially improved external perceptions of the City at home and abroad. Major developments took place in visitor markets for arts events and attractions in Glasgow. The expanded tourist interest in Glasgow was an achievement which signalled significant future opportunities. The initiative generated substantial net economic and social benefits. Extra employment was estimated at 5,350 - 5,580 person years. The cultural sector supported approximately 21,500 jobs in the Glasgow region in 1990 equivalent of 2.8 per cent of the economically active population.
- 10.60 In development terms, the main achievements related to market growth, increased access to the arts and improved perceptions of the City. The legacy of capital projects (the McLellan Galleries and the Royal Concert Hall, etc.) reinforced the investments of the 1980s and expanded Glasgow's ability to address various opportunities.

(iii) Opportunities

- 10.61 The nature of the opportunities highlighted by Glasgow 1990 means that action will be needed to maintain the momentum and capitalise on the gains made during 1990. The developments in interest and access will need reinforcement. By the same

token, prime tourist market awareness of Glasgow had already begun to diminish with the termination of the 1990 promotion.

10.62 The areas of opportunity identified in the study relate to:

market development (including access);

cultural tourism; and

cultural industries.

10.63 Glasgow 1990 drew attention to existing achievements in the European context. It is now necessary to return to building the creative base and establish a phase of asset development. A programme of "targetted investments" is needed to extend the artistic opportunities for the main institutions. None of the identified opportunities will be effectively realised without firm resolve to nurture the creative energies of Glasgow.

10.64 Glasgow 1990 depended on collaboration and cooperation. The two local authorities took the lead, and a range of agencies and organisations were galvanised into delivering projects and programmes. As an exercise in corporate purpose, the success of the Year was all the more impressive because there was neither a strong central corporate mechanism nor a set of corporate objectives formally agreed between the two local authorities or the key agencies and organisations involved. Effective working relationships and liaisons amongst the relevant institutions, agencies and interests (including the business community) will be important in capitalising on the gains of 1990.

10.65 Glasgow's Year of Culture was conceived as both a celebration of achievement and an exercise in development. For longer than most British cities, Glasgow has used the arts to strengthen and communicate its regeneration. The positive outcome of Glasgow 1990 has created further opportunities for the City to address in pursuing its chosen future as one of the Great Cities of Europe.

GLASGOW 1990
MUSEUMS & GALLERIES

Burrell Collection (GDC)

Art Gallery & Museum, Kelvingrove (GDC)

Other local authority museums

Museum of Transport (GDC)
People's Palace (GDC)
Pollok House (GDC)
Provand's Lordship (GDC)
Rutherglen Museum (GDC)
Haggs Castle (GDC)
Clydebank Museum
Hamilton Museum
Paisley Museum
Lochwinnoch Community Museum
Coats Observatory
Lillie Art Gallery
Auld Kirk
Heatherbank Museum of Social Work

Independent museums

Hunterian Museum
Hunterian Art Gallery
Mackintosh Museum - Glasgow School of Art
Cameronians Museum
Royal Highland Fusiliers Museum
Charles Rennie Mackintosh Society
Summerlee Heritage Trust
Springburn Museum
Tenement Museum
David Livingstone Centre
Art Lovers House

McLellan Galleries (GDC)

Galleries, studios, temp. exhibition spaces

Compass Gallery
Transmission Gallery
Glasgow Print Studio
Glasgow Sculpture Studios
Collins Gallery
Glasgow School of Art (Newbery Gallery)
Open Circle
Street Level Gallery and Workshop
WASPS Gallery and Studios

Glasgow Arts Centre
Third Eye
Tramway

Glasgow's Glasgow
Dome of Discovery

GLASGOW 1990

PRODUCING COMPANIES/ENSEMBLES

Opera

Scottish Opera
Music Theatre Scotland

Dance/Mime

Scottish Ballet
Glasgow Independent Dance
Rotating Dancers
Long Dog
Gregory Nash Dance Group
Panoptic

Drama

Citizen's Theatre
Tron

Wildcat Stage Productions
7.84 Scottish People's Theatre
TAG Theatre Company
Performance Project
Theatre in the Sand
Clyde Unity Theatre
Fablevision
Pen Name Production
Welfare State International
Project Ability (Jigsaw)
Street Biz
Big Noise

The Ship
Arches
Third Eye

Orchestras/Ensembles

Scottish National Orchestra
BBC Scottish Symphony Orchestra
City of Glasgow Philharmonic
Glasgow Festival Strings
Scottish Early Music Consort
Scottish Ensemble
Capella Nova
Paragon Ensemble
Ensemble 90

GLASGOW 1990

PERFORMING ARTS VENUES/PROMOTERS

Producing theatres

Citizens Theatre
Tron Theatre
Clyde Theatre, Clydebank (Wildcat)

Receiving theatres

King's Theatre
Theatre Royal
Pavilion Theatre

Arts centres and small venues

Old Athenaeum Theatre
Crawfurd Theatre
The Arches Theatre
Mitchell Theatre
Tramway
Third Eye
Glasgow Arts Centre
Paisley Arts Centre

Pearce Institute
Mary Hill Arts Centre

Concert Halls

Glasgow Royal Concert Hall
Royal Scottish Academy of Music and Drama
City Hall
Henry Wood Hall
Concert Hall Broadcasting House
Scottish Exhibition & Conference Centre
Kelvin Hall

Other

Glasgow Film Theatre

Festivals and other promoters

Mayfest
Glasgow International Jazz Festival
Glasgow International Early Music Festival
Chorus International
Paisley International Organ Festival
International Folk Festival
National Association of Youth Orchestras
Musica Nova
Westbourne Music
Music in University of Glasgow
East End Arts
Festival of Jewish Culture
Glasgow Tryst

1990 COMMISSIONS

Composer

John Cairney
Stewart Conn
Gordon Crosse
Martin Dalby
Carl Davis

James Dillon
Norma Malcolm MacGuire
James MacMillan
James MacMillan
Thea Musgrave
Nigel Osbourne
Wilma Paterson
John Purser
Wolfgang Rhim
John Tavener
Judith Weir
Thomas Wilson

Performed by

Glasgow & District Burns Association
Not yet performed
Scottish National Orchestra Chorus
Kings College Choir
British Association of Symphonic &
Winds Ensembles
Paragon Ensemble
Paragon Ensemble
Scottish National Orchestra
Paragon Ensemble
Scottish National Orchestra
Scottish Chamber Orchestra
paragon Ensemble
Glasgow Orchestral Society
Scottish National Orchestra
Capella Nova
Scottish Opera
Paragon Ensemble

Author

Peter Arnott
Neal Ascherson
Anne Downie
Peter Nardini
Tony Roper
11 Govan Writers - Govan Story
6 playwrights including, Tom
McGrath, Jessie Kesson, wrote The
Highland Man's Umbrella.

Tron Theatre
Test Department
Tron Theatre
Cumbernauld Theatre
Tron Theatre
7.84 Theatre Company
Eden Court Theatre

Artist

Boyle Family

Peter McCaughey
Dieter Kagnus
Jim Buckley
Shona Kinloch
Doug Cocker
Daniel Trevor
Dhruva Mistry
Alistair McCallum and
Jane Carroll
Duncan Shanks
Kathleen Chambers
John Clark
Ian Hamilton Finlay
Ian McCulloch
Stephen Broadbent
Gwyneth Leech

Location

Road Study (Urban Renewal,
Glasgow 1990)
Pollok Park
Garnethill Park
Milestones, Dennistoun
Milestones, Woodlands
Milestones, Drumchapel
Maryhill Central Halls
University of Glasgow

Scottish Trades Union Congress
Glasgow International Concert Hall
Buchanan Street
Queens Park Synagogue
River Clyde Bridge piers
Glasgow International Concert Hall
Pollok Shopping Centre
The Cathedral Church of St Mary the
Virgin