



APPLICATION DOSSIER

SUBMITTED TO UNESCO
CREATIVE CITIES NETWORK

JUNE 2008



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The Lord Provost



A Message from Councillor Bob Winter, the Rt Hon Lord Provost of Glasgow.

As Lord Provost, I see every day and in every part of Glasgow, the enjoyment and fulfilment that music brings to our citizens. Glaswegians love their music – in all of its forms.

This reflects a long history of musical excellence in the City, which continues up to this day. It is the combination of creativity and enthusiasm which makes all music memorable, and the same qualities give Glasgow its character: we are a City of Music *par excellence*.



A Message from Alex Salmond, Scotland's First Minister.

I am delighted to support Glasgow's application for UNESCO City of Music status. As a mark of international recognition this title will put Glasgow on the musical map as a hub of talent and tune. Music has always played an important role in communicating Scotland. This will showcase our rich cultural identity at home and abroad. I am incredibly proud of the wealth of talent in Scotland and look forward to celebrating every success it brings.

Scotland's First Minister



A Message from Gordon Brown, UK Prime Minister.

The UK Government fully supports Glasgow's bid. Glasgow has a diverse and dynamic music scene and a strong tradition of celebrating home-grown talent and welcoming international performers. We hope Glasgow succeeds in securing UNESCO City of Music status. This will be positive for music, positive for Glasgow and positive for the UK.

UK Prime Minister



Glasgow City of Music is managed by:

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Simon Woods, Chief Executive, RSNO
Rob Woodward, Chief Executive, SMG
Ruth Wishart, Writer and broadcaster
Zoe van Zwanenberg, Chair, Scottish Ballet

Executive Summary

This bid has been prepared by Glasgow City of Music (GUCM) to make a detailed case for bestowing the title of **UNESCO City of Music** on Glasgow in recognition of:

its local, national and international importance as a musical centre;

the historic and current importance of music to the City;

the outstanding excellence of its musicians and practitioners;

the depth, creativity and commitment of its policy both with regard to music itself, and also to music as a tool of social regeneration, improvement and education.

In preparation for this bid extensive research was undertaken (attached as appendices to this bid) to examine the current state of health of Glasgow's music and also to offer an analysis of the economic impact of music in the City. It confirms that Glasgow is the musical capital of Scotland, and a major player on the world stage.

In a typical week, an impressive 127 music events are presented in Glasgow more than any other Scottish City.

Five of the six biggest Scottish employers in the music industry are in Glasgow. Over half of the country's entire music workforce is based there.

Five of Scotland's six National Companies (including Scottish Opera and the Royal Scottish National Orchestra) make their home in Glasgow alongside other national organisations including the BBC Scottish

Symphony Orchestra, BBC Scotland, National Youth Orchestra of Scotland, Royal Scottish Academy of Music and Drama (RSAMD) and the Scottish Ensemble.

Glasgow has the highest density of higher education institutions offering courses in music and the largest population of music students in Scotland.

Glasgow's music businesses generate proportionately more output than anywhere else in Scotland. Music adds an estimated £74.6 million worth of output to Glasgow's economy annually.

Glasgow's music scene is growing and has been steadily expanding since 1999.

City of Music does not rest solely on economic research, impressive though that is. The truth is this: The power of music - to free the imagination, enrich the inner life and bring people together - unites a City of vast social, economic and ethnic diversity.

Examine Glasgow's history over the past two centuries and you find a City in constant flux as immigrant populations come, settle or move on. Prosperity has ebbed and flowed and even today Glasgow is a City divided by extremes of wealth and poverty. However it has addressed its problems with imagination and flair and in 1990, as Europe's Capital of Culture, the City caught the world's attention and showed how powerful

a tool the arts can be for social and economic improvement.

That year-long festival was notably supported by all sections of Glasgow's population. As any visitor or newcomer will quickly notice, the (very talkative!) Glaswegians love their City. For them, what was once the fourth largest City in Europe and the "Second City of the British Empire" remains a place bigger and better than the sum of its parts; for any remaining weaknesses it is still one of the world's great places to live. Yet this civic pride should not suggest an insularity: perhaps as a consequence of the global connections forged by the Scottish diaspora, its citizens have proven to be most welcoming to others. The conferment of the European Capital of Culture offered Glaswegians a welcome context to diversify the expression of their civic pride. This bid is the latest such expression.

Glasgow is already a world class musical City. To become a UNESCO City of Music would offer it fresh opportunities to share its expertise and spread the benefits that can come from ever-widening cultural collaboration. Wherever music is loved Glasgow would 'sing' to the world and invite the world to sing with it.



In the vision set out below we see Glasgow, as UNESCO City of Music, enhancing the City's music world, bringing sectors together, sharing information, representing music in other forums, and sparking new initiatives to benefit music making and the citizens who will hear it.

In 2014, Glasgow reaches another historic landmark in its presentation of the 2014 Commonwealth Games. Characteristically, the City is already putting its plans in place not solely for its sports events but also for an extensive cultural programme. Music naturally takes its place as a key part of this programme – to do so as a UNESCO Creative City would be a well-deserved privilege.

The Objectives of GUCM are to:

- enhance the City's creative potential by using the title to promote ambition and excellence in music of all genres;
- stimulate interest in musical education with the resulting social benefits;
- culturally transform the City by using the universal language of music;
- improve access to music for all ages and social and ethnic background;
- actively contribute to the UNESCO Creative Cities network.

We are grateful for financial support towards the production of this bid from;

- BBC Scotland
- Glasgow City Council
- Glasgow Caledonian University
- Glasgow University
- Glasgow Edinburgh Collaboration
- Royal Scottish Academy of Music and Drama
- Strathclyde University

Overview of the City

Glasgow is the largest of Scotland's cities, and third largest city in the UK.

Glasgow is the largest of Scotland's cities, and third largest City in the UK.

The Glasgow City Area is 17,639 hectares and is situated on the banks of the River Clyde.

It currently has a population of 580,690 residents.

It lies at the heart of Scotland's only conurbation, and is Scotland's principal commercial centre.

Geographical layout

Glasgow developed on the banks of the Clyde around the site of St Kentigern's church in what is now the East End of the City. It experienced especially intensive expansion between 1750 and 1900. As it grew, distinct areas developed within the City, each with its own distinct profile.

Merchant City A historic area of markets and warehouses, now the heart of Glasgow's cultural quarter embracing The Tron Theatre, Old Fruitmarket, The Trades Hall, Hutchesons Hall, The Panopticon (Scotland's last Music Hall) the City Halls, Glasgow Print Studio and Merchant City Festival.

City Centre The best-preserved Victorian City centre in Britain, home to the Theatre Royal, Glasgow Royal Concert Hall, Glasgow Film Theatre, and CCA.

Four of Glasgow's higher education institutions are also here: University of Strathclyde; Royal Scottish Academy of Music and Drama; Glasgow School of Art; Glasgow Caledonian University.

Financial District The third largest financial quarter in the UK.

West End Bohemian cafés, alternative culture, bars, boutiques, upmarket hotels, clubs and restaurants suit the many students and creatives who make it their home. Venues include Henry Wood Hall and Òran Mór. Major museums include Kelvingrove Art Gallery & Museum and the Hunterian Museum. West End Festival is held annually in June.

East End Containing some of the most deprived areas in the UK, the East End has been the focus of intensive regeneration in the past 20 years and benefits further from plans around the 2014 Commonwealth Games. Barrowlands Ballroom – considered by many top bands to be their favourite venue – is here.

South Side Predominantly residential, it still boasts notable public buildings including Mackintosh's Scotland Street School and House for an Art Lover, the Burrell Collection and Pollok Country Park. The docklands area has been redeveloped in the

past decade and is now a Media Park home to BBC Scotland and Scottish Media Group. Tramway and The Citizen's Theatre are among its venues, and Scottish Ballet recently opened its new home there.

North Glasgow Primarily residential and affluent, it also contains some of the City's poorest residential areas, which have benefited from large-scale regeneration.

Glasgow's History and Character

Glas Cu

Since the Stone Age, people have settled on the banks of the Clyde, but Glas Cu's ("Dear Green Place") wider importance dates from the arrival of St Kentigern in 543AD. Where he established his church you will now find the thousand-year-old Glasgow Cathedral.

By 1145 Glasgow was important as a trading and ecclesiastical centre. Throughout the Middle Ages its prestige rose, marked by the residence of bishops then archbishops, and the founding of the University in 1451. Despite the religious strife of the Reformation, trade flourished during the 16th and 17th centuries, especially in coal and fish. By 1670 this was the second largest burgh in the land, exceeded only by the capital, Edinburgh. City merchants exploited their easy access to the Atlantic Ocean to develop trade in the



New World. First tobacco and then sugar made some of them Scotland's first millionaires.

Dredging the Clyde

A single feat of engineering transformed Glasgow's fortunes for good in 1770. For centuries the sole real threat to trade had been the shallowness of the river and its tendency to silt up. In 1770, civil engineer John Golborne devised a way to flush the silt layers from the shallow Clyde riverbed, so that by 1772 large vessels could sail right into the City, allowing for dramatic industrial expansion. Glasgow soon became the Second City of the British Empire. Its businesses diversified into soap-making, distilling, glass-making, sugar, bleaching, dyeing and textiles. The cotton industry alone employed almost one third of Glasgow's huge workforce. Heavy industry, shipbuilding, locomotive construction, and engineering were equally important. Between 1870 – 1914 Glasgow produced almost one fifth of all the world's ships and one quarter of all locomotives in use anywhere in the world.

A Golden Age

One price of this industrial productivity was slum housing, overcrowding and the attendant problems that faced many workers who flooded in from elsewhere in Scotland, Ireland, Italy and Europe. Even so, the period 1840 – 1930 was a golden age for Glasgow. Its vast industrial wealth translated directly into civic pride and cultural enterprise.

The impressive new city centre was laid out; gracious terraces and mansions housed the affluent in the West End. Grand public buildings, concert halls, museums, galleries and libraries opened. Prestigious artistic and scientific institutions flourished.

Around 1900 the City was at its peak – the 4th most densely populous city in Europe. It was home to internationally acclaimed architects such as Charles Rennie Mackintosh and Alexander 'Greek' Thomson who contributed intensely distinctive and personal buildings to the City.

Its artists, the Glasgow Boys, waged war on the visual arts establishment much as the Impressionists did in Paris, and brought cosmopolitan influences to bear on Scottish painting generally.

Glasgow boasted more parks and open spaces than any other comparable European city, along with such mundane but utterly modern conveniences as a regulated telephone system, water and gas supplies.

The Great Exhibitions of 1888 and 1901 brought millions to the City.

Decline and Resilience

From 1914, war and the Great Depression began to erode Glasgow's economy. By the 1930s, Glasgow's economic downturn became serious enough to lead to the City being

classed as a "depressed area". Between then and the mid-1990s the City's population dwindled, its traditional industries dissipated, crime rates rose and poverty levels soared.

Despite all of this, its cultural life continued to flourish, and some of the most important developments in Glasgow's cultural world took place between 1930 and 1980.

Its musical audiences demonstrated a keen curiosity to discover what was new elsewhere in the world. They crowded into the concert halls to welcome great visiting performers. They created organisations precisely to give an airing to new work from far and wide. Correspondents in the press complained of overcrowding in the halls and theatres.

Also during this period, in 1962, Scottish Opera was founded. The Citizen's Theatre presented landmark productions and acquired an international reputation. The Apollo Theatre played host to a constant stream of the top pop and rock acts of any given year between 1968 and 1985. Glasgow's longstanding love affair with jazz gave rise to an annual festival which continues to this day to bring major artists to the City.

Regeneration

Since the early 1980s the City, recognizing that the great days of heavy industry were past, has worked strategically towards regeneration by attracting new kinds of industry – finance,

production, tourism and events. It integrated culture as a key part of its strategy: in order for the world to want to come to Glasgow, the whole City needed to be an exciting, vibrant, high profile centre. Glasgow is now associated with internationally acclaimed urban renewal with an impressive track record both for investing in its own infrastructure and for promoting itself through major titles, awards, events and publicity campaigns. It has effectively wedded this to an ongoing determination to improve the quality of life for its residents.

To name but a few major landmarks:

1983 Burrell Collection Opening A magnificent gallery was constructed to house millionaire ship owner Sir William Burrell's collection of some 9,000 artefacts.

1983 Glasgow's Miles Better Campaign Its aim was to communicate a fresh and tangible buzz about the city – it won the International Film and Television of New York Award four times.

1985 SECC Opening The UK's largest integrated exhibition and conference centre is also a major music venue.

1988 Glasgow Garden Festival Wastelands were transformed to accommodate 112 different gardens containing thousands of shrubs, trees and plants. More than 3 million visitors came, along with many Glaswegians. An estimated £100 million was injected into the local economy.

1990 European City of Culture A magnificent success for Glasgow that transformed the city's image;

- Over 3,400 public events took place
- Performers and artists came from 23 countries.
- 40 major works were commissioned in the performing and visual arts
- 60 world premieres
- 3979 performances
- 656 theatrical productions
- 1901 exhibitions
- 157 sporting events.

Huge investments were made in Glasgow's cultural infrastructure;

- £5.8m was spent on renovating the historic McLellan Galleries
- Tramway was secured as a major performance and visual arts venue
- Concert Hall was built at a cost of £29.4 million
- King Tut's Wah Wah Hut opened its doors for the first time

1996 Gallery of Modern Art (GoMA) GoMA's collection includes Warhol and Hockney alongside major Scottish talents. Now the second most visited contemporary art gallery outside London.

1997 Glasgow Auditorium Opening Sir Norman Foster's Glasgow Auditorium has already become a Glasgow icon, known as "the Armadillo" for its inspired silver shell design.

1999 UK City of Architecture and Design A year of events bringing an estimated economic benefit of £34 million to the City and provided a further catalyst for urban regeneration. Scotland's Centre for Architecture and Design and the City opened in The Lighthouse – Charles Rennie Mackintosh's first public commission.

1999 Clyde Maritime Centre Opening

2001 Glasgow Science Centre Opening Glasgow is a leading location for hi-tech industries and developing fields such as biotechnology. Glasgow Science Centre increases the public's awareness through interactive displays and projects.

2001 Glasgow Harbour Project 10-year development is one of the largest waterfront regeneration projects in the UK with an end value of £500m. 120 acres of redundant shipyard and dockland will be transformed into residential, commercial, retail and leisure space.

2002 Lighting Strategy Although highly practical – addressing simple street lighting issues – this has also given rise to Radiance: a spectacular city-wide biennial festival of lights.

2003 Queen's Dock 2 Project Regeneration of the riverside continues with plans for a £50m entertainment arena to seat 12,500.

2003 European Capital of Sport This award recognised Glasgow's efforts to promote sport, participation and fitness to produce a healthier population.

2006 Glasgow City Halls and Old Fruitmarket reopened after £13 million transformation (please see venues)

2006 SMG studios and offices opened at Pacific Quay

2006 Kibble Palace in Glasgow Botanic Gardens reopened following refurbishment, as did Kelvingrove Art Gallery & Museum. It attracted more visitors than the Louvre in 2007.

2007 Glasgow hosted Europe's largest comedy festival, and the UEFA Cup Final at Hampden Park

2007 BBC Headquarters at Pacific Quay opened



Glasgow Now

Population

Total Population (2006): 580,690

0-19 Age Group (2006): 22%

20-39 Age Group (2006): 33%

40-Retirement Age Group (2006): 28%

Retirement Age + Age Group (2006): 17%

Number of Households (2006): 281,000

Average Household Size (2006): 2.02

Broad Trends

In its heyday - the late 19th and early 20th centuries - Glasgow was the fourth largest city in Europe (after London, Paris and Berlin). Its population exceeded one million - a figure which has since dropped, to 580,690 in 2007. A declining jobs market in the 1970s and 1980s hastened this process. In recent years, the City's strategies to reverse this trends have shown positive results: the 2006 GROS population estimate shows an increase in the City's population of 1,900 compared to the previous year.

Population Age

The Glasgow population is distinctively younger than the rest of Scotland: 42% of the population is aged 20-29, and this number is projected to be virtually stable over the period to 2014.

Pensioners now make up 16.7% of the City's population - 13% lower than the average for Scotland (19.2%). This difference is projected to increase in the next decade.

Diversity

In Scottish terms, Glasgow's population is notably diverse. Minority ethnic groups account for 5.5% of the population. There are substantial Pakistani, Indian,

Chinese, African and Caribbean communities and an increasing number of people from Eastern Europe. These groups make a notable contribution to the social, cultural and economic wellbeing of the City. The City's asylum seeker contract has been an important factor in this regard, as has, more recently, in-migration from EU Accession Countries.

Social Planning

For all its successes, Glasgow still faces challenges in encouraging all of its population to fully participate in society. The Council's key objectives include as one of their main aims, "the need to tackle the poverty, social exclusion and poor health experienced by some of Glasgow's citizens and provide accessible and relevant services to the City's diverse communities through the development of Glasgow as a caring City. This includes partnership working with public sector agencies and communities to improve health and secure high quality care in the community and to ensure children and young people throughout Glasgow have access to the services needed for the best possible start in life."

Culture - and specifically music - is a significant part of this strategy because of its ability to bring all sectors of the community together.

Economy

Glasgow's annual economic output currently stands at £13.5 billion.

Employment

Between 1950 and 1996, the number of jobs in the City fell from 559,000 to a low point of 352,200 jobs. Since then the City has recovered impressively, and in 2005 it supported 431,300 jobs with over 50% of Glasgow residents employed within the City. Traditional mercantile, engineering and marine activities have contracted, while production industries have modernised around new technologies and City Centre business services and knowledge-based activities have increased in importance. Over the past decade a strong economic performance has created more than 79,000 additional jobs (24.4% growth at a time when average UK growth was 14.5%) and the number of residents in work has risen by around 39,000.

Of the 431,300 jobs recorded in 2005, service industries accounted for 362,900 (89%), manufacturing totalled 23,500 (6%), other production and construction jobs stood at 19,400 (5%).



Creative Industries

In preparation for this bid, The Glasgow-Edinburgh Partnership commissioned a study of the Creative Industries in Glasgow which is attached as Appendix I. It reveals that the Creative industries in Glasgow play a larger role in the economy than elsewhere in Scotland:

In 2006 24,412 people were employed in the sector in Glasgow, equivalent to 6.2% of the City's workforce: a higher share than in Scotland as a whole.

In 2006, the sector contributed an estimated £707 million to the Glasgow economy, and £3,385 million to the Scottish economy: a higher share than in Scotland as a whole.

Between 1999 and 2006, creative and cultural employment in Glasgow rose at an average rate of 3.2% per annum, significantly above the growth rates recorded across Scotland as a whole, and above the 1.8% annual increase recorded across Glasgow's total workforce.

Within the sector, the 'creative experiences' sub-sector has shown the most significant rate of employment growth, with providers of such experiences, including music venues, theatres, museums and cinemas taking on an increased importance in the City's labour market.

The sector in Glasgow grew at an average annual rate of 2.7% per annum, representing a faster rate of growth than that

recorded across Scotland as a whole, and a faster rate of annual growth than the 2.5% recorded across the Glasgow economy as a whole over the same period.

Scottish Enterprise Glasgow and Glasgow City have long recognised the importance of the Creative and Cultural Industries (CCIs) to the health and vibrancy of the City economy and have developed innovative approaches to encourage growth. Creative Industries have been identified as one of the eight 'spikes of high-value economic activity' in Glasgow's ten-year economic development strategy and are thus one of the strategic development priorities of the Glasgow Economic Forum. The Creative Industries are a designated priority for the Scottish Parliament Enterprise network. In 2004, £25m was invested in them by Scottish Enterprise Glasgow and £3.5m by Glasgow City Council. Added to this is the £14m investment from the national arts and screen agencies and £20m from public and private sources.

Tourism

In the past 20 years, tourism has become an increasingly important part of Glasgow's economic success. During 2005, tourism in the City supported 30,336 jobs (representing over 7% of all employment) and generated expenditure of £708 million.

UK tourists made 2.1 million overnight visits to Glasgow in 2005, representing about 14% of all UK trips taken in

Scotland. The average length of stay was 3 nights, resulting in a total of 6.3 million bednights and generating expenditure of £512 million.

Around 29% of overseas tourist trips to Scotland included an overnight visit to Glasgow (0.7 million). Overseas tourists spent an average of 6 nights in Glasgow in 2005, resulting in a total of 4.2 million bednights and generating £196 million expenditure. The key overseas markets for Glasgow are the USA, Germany, France and Sweden, but the number of visitors coming from accession countries is growing.

A significant factor in Glasgow's development as a tourism destination is the City's extensive supply of museums, galleries, theatres, concert venues and visitor attractions. It also has the best-preserved Victorian City centre in the UK and a vibrant performing arts sector.

Future developments

Encouraged by the achievements over the past 10 years, a new joint economic development strategy, 'A step change for Glasgow', was introduced in Autumn 2006 to move Glasgow forward over the next decade. The Strategy identifies the need to create and support high-value jobs, innovation and higher productivity and for corresponding improvements to be made to the City's physical, cultural and social environments.

The currently implemented City Plan 2 plans ahead for the next 20 years to address a number of strategic priorities for

action that have been identified by the Council which relate to the core aims of:

- improving the City's physical environment and quality of life;
 - increasing economic investment and the numbers of jobs;
- and
- maintaining population growth.

International City

Glasgow is innately international. It has always welcomed large immigrant communities. The constant turnover of its student population – which includes foreign nationals of more than 100 countries – ensures that the character of the population is constantly changing. The ever-rising volume of foreign tourists and business travellers visiting the City adds to the mix, complementing the 5.5% or so of the total resident immigrants who are mainly from Asian and East European backgrounds.

It is also a city which reaches out to the world. It enjoys a reputation as a committed, serious, imaginative and effective partner and collaborator with cities worldwide, not least through citywide initiatives such as City Twinning. In this way it assists with the creation of the best possible conditions for Glasgow's European and international economy to grow.

1. Nuremberg, Germany (1985)

Regular school, citizens, sports and cultural exchanges. Glasgow musicians participated in the Nuremberg Meeting the World Festival.

2. Rostov on Don, Russia (1986)

Cultural, trade and education exchanges in Glasgow and Rostov. The two cities' Building Partnership Programme (IBPP) Project provided grant funding of €168,000 to Professional Development to Combat Youth Drug Addiction.

3. Dalian, China (1997)

A trade mission in 2008 will focus primarily on sport and education.

4. Havana, Cuba (2002)

Bilateral trade missions and associated cultural and educational events.

5. Lahore, Pakistan (2006)

This twin city relationship has been enthusiastically welcomed by Glasgow's minority ethnic community of Pakistani origin. Trade missions.

6. Bethlehem, Palestine (2007)

Transfer of knowledge to assist the improvement of economic and social conditions within Bethlehem, trade development, and educational exchanges.

7. Turin, Italy (2003)

Cultural and urban development, housing, regeneration and arts projects.

8. Marseilles, France (2006)

Projects and exchange of information about urban regeneration, cultural exchanges, education, health, sport and economic and business exchanges. A number of cultural groups also participated in Glasgow festivals.

9. Amathole, South Africa (2006)

Senior officers from Glasgow City Council are working with colleagues from Amathole to assist in the establishment and strengthening of Amathole's Local Economic Development Agency and their Urban Renewal Programme.

10. Malawi (2004)

A number of projects since 2004 including construction of the City of Glasgow Maternity unit in Lilongwe; builders and IT specialists from City Building (Glasgow) LLP and the Chief Executive's Corporate ICT travelled to Malawi recently to install IT equipment in four Teacher Development Centres and train of teachers. The building team constructed a HIV/AIDS Clinic as well as extending offices in the ground of Chikwawa Hospital.



Part 2 Glasgow's Cultural Infrastructure

Glasgow's international standing as a home to the creative and performing arts has never been higher.

In the past three decades, investment in creating and rejuvenating venues has gone hand in hand with wider city regeneration and development strategies. Recognising the benefits to be gained from high profile cultural events, the Council has continued to build on the success of 1990 European City of Culture, by attracting further major events and titles to the City and then making the best of the opportunities they create.

Glasgow's Museums and Galleries

Glasgow's museums draw around 3 million visits every year, and 5 of the 10 most visited Scottish museums are Glaswegian. The most important institutions are:

View map on back page.

15

Kelvingrove Art Gallery and Museum The most popular gallery and museum in the United Kingdom, outside London, it houses a great civic art collections including Scottish artists alongside Botticelli, Rembrandt and Dali.

01, 04

The Tramway, The Arches and Centre for the Contemporary Arts are performing arts venues and gallery spaces hosting innovative work from all over the world, and offering a platform for live art.

01, 06

Gallery of Modern Art The City's extensive collection of contemporary work one of the most visited galleries in the UK.

03

The Burrell Collection A superb collection of artworks including paintings by Degas and Rembrandt.

21

Pollok House holds an important collection of Spanish art.

Glasgow's Museum of Transport Glasgow's history through its transport.

31

The People's Palace celebrates the social history of Glasgow.

25

St Mungo Museum of Religious Life and Art is the first museum in the UK to explore the world's major faiths.

Scotland Street School Museum celebrates the work of Glasgow's most famous architect, Charles Rennie Mackintosh.

17

The Lighthouse is a centre for design and architecture that transforms an existing Charles Rennie Mackintosh building into a contemporary space for displays, debate and events.

A cluster of nine visual arts organisations are located in King Street. A major refurbishment project is now underway which will provide state-of-the-art facilities for these organisations in 2008.

For those sections of the community which do not, or cannot, visit museums, Culture and Sport Glasgow, on behalf of Glasgow City Council, operates the **Open Museum**, which takes displays into the community.

In addition to the art inside the galleries, public art is inextricably linked to Glasgow's built heritage, where there is a rich tradition of sculptural decoration of buildings, stained glasswork and free-standing monuments in civic parks and squares.

Libraries

Glasgow has 36 local libraries serving different communities across the City. Additionally there are many private and institutional libraries with music collections including those of the educational institutions.



The central library of Glasgow is **The Mitchell Library**. With 1,213,000 volumes alongside a substantial lending facility, it is the largest public reference library in Europe.

Its collection boasts many exceptional rare books and manuscripts as well as the City's archives, which date back to the 12th century. The 'Treasures of the Mitchell' include the world's largest Robert Burns Collection and the Glasgow Collection which tells the story of the City through more than 50,000 books, maps and newspapers.

In addition to traditional and digital library facilities, the Mitchell is a fully fledged music centre with a theatre and 2 recital rooms as well as numerous practice rooms among its facilities. Currently it also offers office space to the National Choir of Scotland.

Special Collections

Glasgow's libraries hold many special collections of manuscripts, letters, objects and ephemera.

The Mitchell holds numerous music collections including the **Kidson Collection** (5,000 vols. of 18th and 19th century song, dance and ballad opera), the **Moody-Manners Collection** (opera scores), **STV Collection** (6,000 song sheets and 1,000 song albums from the 1950s, 60s 70s). It is also home to archives which map Glasgow's musical past. All of the concert programmes of Glasgow Choral

Union and the Royal Scottish National Orchestra are archived there. Music criticism and features from the press offers delightful insights into concert life from the 19th century to the present.

Glasgow University's special collections are of international standing. They include a number of Mozart relics including the portrait of Mozart's wife Constanze by Josef Lange (in the care of the Hunterian Art Gallery) and Mozart's penultimate letter mentioning the first performance of the Magic Flute. **The Euing Collection** is the bequest of William Euing (1788-1874), a Glasgow insurance broker. It includes 2,500 rare volumes of early printed music, many of them unique. Many of Scotland's most significant composers have left papers and scores to the University including Hamish MacCunn, Frederic Lamond, Sir John Blackwood MacEwen, Sir Hugh Robertson, and Alexander Campbell Mackenzie.

A brief history of music in Glasgow

The traceable history of music in Glasgow is really the story of the City that grew from a provincial centre to become the Second City of the British Empire. Music, once established in the City, has flourished even in the face of adversity, and come to be central to the City's idea of itself.

From Obscurity...

The full history of Glasgow's music before the 19th century has yet to be written. Archives conceal a wealth of evidence which, pieced together, would create a fascinating picture of distant times. Without doubt the City enjoyed the kind of musical life common to all cities of comparable size: domestic, church and civic performances of a secular or sacred nature, complemented by occasional touring companies. Music was studied at the university and church accounts show that numerous choirs were active in the City and that instruments were made. Homes held instruments for domestic music-making and festive gatherings. Until further research is undertaken, we have only tantalising glimpses into the past.

Major Developments

With the 18th and 19th centuries we reach the age of extensive documentation and records of many different kinds: newspapers, diaries, programme books, playbills, police reports, licences... As a result the picture is vivid and full.

Glasgow's first theatre opened in 1752, built on the ruins of an Archbishop's palace. Like every Georgian city of note, it had to have an imposing Assembly Rooms, and these opened in 1796. In its various rooms

dancing, music and conversation could be enjoyed in the season. These two major public projects stand at the threshold of Glasgow's golden age – a period of extraordinary prosperity and growth in the City.

Two key events of the 1840s were to transform Glasgow's musical life.

1841: the City Halls opened. With its grand auditorium which could accommodate 3000 people it was bigger than any other Glasgow hall. All agreed that it was magnificent, and within a short time organisations were created to fill it with concerts.

1844: the Glasgow Choral Union (GCU) was founded to give fundraising concerts for charities. Their performance of Handel's Messiah was the first in Glasgow. 200 singers and 50 players were proudly advertised, and the concert's success created sufficient impetus for the organisation to be officially constituted. It went on to dominate concert life in Glasgow for 50 years, not only with its choral concerts, but also orchestral concerts and chamber music. As the century rolled on its orchestra grew from 50 to 80, then 90. The roll call of visiting soloists and conductors is impressive. Sir Arthur Sullivan – a Victorian megastar – conducted in 1876. In 1889, Sarasate played his own arrangements of gypsy

melodies as well as the concerto by Mendelssohn. He returned a year later to play Pibroch by Scottish composer, Alexander Mackenzie. Noted Wagnerian, George Henschel sang Wotan's Abschied in 1890, and a year later, Europe's greatest living violinist, Joseph Joachim – the man for whom Mendelssohn, Brahms and Schumann wrote concerti, came with chamber music. Clearly the people managing the business of the GCU kept their fingers on the pulse of what was going on elsewhere in Europe, ensuring a steady flow of distinguished visitors. New work also was important – there were always 'novelties' in the programmes of the GCU, and an absence of them provoked negative comment in the press. This spirit of curiosity matched by discrimination characterises Glasgow's music scene to this day.

Further Expansions

Impressive though it was, the GCU was not the sole promoter in the City and in the 1870s the City Halls lost its place as the premiere music venue: St Andrews Halls opened its doors to the public in 1877. For the next 85 years, this building held a special place in the hearts of Glaswegians – and it is still remembered fondly, especially for its wonderful acoustic. It was no larger than the City Halls – its auditorium also accommodated 3,000 people – but its stage could



hold 100 players, and its chorus gallery had room for 500 singers. This was the place where the world came to play. The Berlin Philharmonic appeared there with Furtwängler, the Philadelphia Orchestra came with Ormandy. Jelly d'Aranyi, Myra Hess, Vaclav Talich, Weingartner, Solomon, Dochnanyi, Barbirolli, Beecham, Ferrier, Arrau and Szell all appeared there and most returned for further performances. By the time it was destroyed in a fire in 1962, it had enjoyed 85 years of glorious music making

St Andrews Halls stole the spotlight from City Halls, but the older venue remained immensely popular, featuring all kinds of concerts including the popular 'Bursts.' These were concerts staged by the Glasgow Abstiners with the aim of tempting people away from the bars on a Saturday afternoon. During the interval a cup of tea and a bun in a paper bag were served. Audiences would save the bags up for the final applause, fill them with air and burst them to add to the din. Such concerts happened on most Saturday afternoons and for years offered a diet of popular classics and novelties to packed halls.

They had stiff competition from the bars. The urban tradition of Scottish popular entertainment might be said to have originated in the streets around Glasgow Green. Public houses along the Saltmarket often had "free and easies" - rooms where anyone at all could get up and sing. They were eventually closed down by the licensing

authorities, which assisted the development of the Music Halls. A rash of these opened all over the City, and ranged from the grand and respectable Alhambra to the downright tawdry Whitebait. Here, the entrance charge of 6d included free gin or a cigar. All female performers needed protection from the rough audience by a wire cage. Still, it was from this world that some of the first major stars of Glasgow popular music emerged. Will Fyffe (1885 – 1947), though born in Dundee, became Glaswegian by adoption and gave the City one of its enduring anthems, his signature song *I belong to Glasgow*.

Opera

Although Scotland had to wait until well into the 20th century before its own national opera company was founded there was a healthy appetite for it long before. Scotland's major Romantic composers all created successful operas, and the City was regularly visited by touring companies like the Carl Rosa Company and the D'Oyly Carte. A special highlight in the 1920s was the visit by Thomas Beecham with his own opera company who gave an extensive season of work including *Marriage of Figaro* and *Madama Butterfly* – a work which has a special place in the subsequent history of opera in Scotland. Besides the companies, the big opera stars such as Patti and Tetrazzini regularly visited to perform arias to huge crowds.

Music all around

From 1850 onwards Glasgow's newspapers give an impression of a city where music was readily available and eagerly consumed. There are regular notes in reviews of the 'packed house' or a 'distinguished crowd.' Away from the halls, music could be heard in the handsome Victorian bandstands of the City's many public parks. Fairs took place on the greens and had their own jolly attractions, and other large public buildings like the Kibble Palace – a superb glasshouse in the Botanic Gardens – were frequently used for concerts.

Advertisements for schools and colleges rarely fail to mention music as a key attraction, and the institution we now know as the Royal Scottish Academy of Music and Drama evolved over more than a century from The Glasgow Educational Association (1845) into the Scottish National Academy of Music (1929) to which 'Royal' was added in 1944 by King George VI.

There is also one very concrete piece of evidence from the 1890s by which to measure musical enthusiasm in the City: the size of the amateur sector. In the late 19th century it was perfectly possible to muster several amateur symphony orchestras for any given Saturday night – though by 1902 they were suffering from comparison with the professionals. As one review noted:

“The Glasgow amateurs have the disadvantage of appearing practically side by side with a highly trained professional band, and the critical outsider, his ears filled with the rich tones of the Scottish Orchestra, is apt to regard the brave efforts of the amateurs with an interest more curious than sympathetic...”

Glasgow's biggest celebration of amateur music-making, the Glasgow Festival took place for the first time in 1891 attracting 8,000 competitors. To this day it takes place annually, and although the population of Glasgow has halved since 1891 it continues to attract around the same number of participants. It was a huge ferment of activity, though slow to give rise to professional talents. Only one 19th century musical star stands out: Frederic Lamond (1868-1948), one of the great pianists of his age, studied with Franz Liszt and Brahms. Tchaikovsky requested him to perform the first piano concerto in 1893, and Lamond traveled to Moscow in 1893 to fulfill that wish. Above all he was famous for his interpretation of Beethoven. He lived a good long life, and though he traveled constantly, he appeared regularly in his hometown.

Turbulent 1890s

As Glasgow's musical world and its ambitions grew, organisations evolved – not always easily. In the early 1890s the orchestra of the GCU decided that it had spent long enough as the support for what was essentially an amateur choir. It struck out on its own and set up its own 25 week season in competition to the GCU. The outcome was disastrous for both organisations, and they subsequently re-united – though from now it was the orchestra that was in control. Ultimately, it would become the Scottish Orchestra in 1951 and the Glasgow Choral Union would cease to exist in its grand form.

Nothing seemed to dent the City's enthusiasm in the first half of the new century not even war. In 1918, during World War I, The Herald commented;

“Music in Glasgow at the moment seems to be very much in the position of certain necessary kinds of food. The demand far exceeds the supply.”

There are reports of hundreds being turned away from sold-out concerts and new entertainments opened up all the time. In 1917, cinema added its own musicians to the field: we have reports of performances by the Glasgow Picture House Symphony Orchestra. More and increasingly lavish music hall-style venues opened. In 1904, a veritable palace for popular culture opened called The Pavilion Theatre. It was ostentatiously luxurious and presented such stars of the day as Marie Lloyd, Little Titch, Will Fyffe, Sarah Bernhardt and the young (and unknown) Charlie Chaplin. This flamboyant building quickly inspired competitors and within two years Britannia Theatre of Varieties and Panopticon (formerly Britannia Music Hall) opened. That year a comedian called Stanley Arthur Jefferson made his debut there - he would later change his name to Stan Laurel.

By the turn of the 20th century, Glasgow's wealth and confidence stood at an all time high. The critic of The Herald boasted:

“The important orchestral concerts in Glasgow have given her a reputation as a music-loving city. Glasgow has facilities for hearing good music that are enjoyed by scarcely any other provincial town in the three kingdoms, and her music students may practically keep their finger on the pulse of modern musical life and follow nearly all of its movements.”

The next stage

In the 1920s and 1930s Glasgow's – and Scotland's - music entered a new, mature phase.

Native musicians emerged who had never known Glasgow as anything other than a vibrant and busy international musical city. Now they wanted to re-shape it, sometimes with a strong nationalist agenda to create more opportunities for themselves and their fellows.

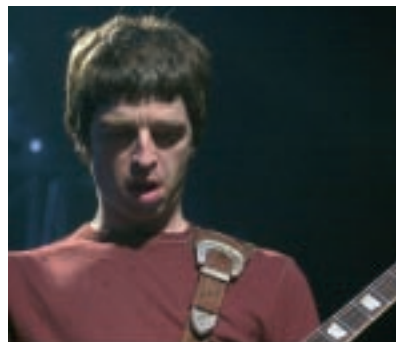
Erik Chisholm (1904-1965) was a key figure. He was inspired to play the piano by hearing Beethoven's Moonlight Sonata played by Frederick Lamond. He went on to study with Rachmaninov, then returned to become influential in Glasgow as composer, mentor, entrepreneur and internationalist. Perhaps his greatest achievement was the creation of the Active Society of Music in 1929 for the propagation of contemporary music. For 10 years he brought major musicians from all over the world, more than 200 of them including Hindemith, Szymanowski, Bartók, Medtner, Busch, Casella and Sorabji. With the Grand Opera Society he gave the first complete performance of Berlioz's The Trojans for which a specially scheduled train brought people from London. He came to be referred to as MacBartok, a reflection both of his passion for the Hungarian composer's music, but also for his utter belief in the importance of creating a Scottish classical music rooted in the traditional music of the land – much as Bartok had done in Hungary.

Ian Whyte (1901-1960) was a kindred spirit- and equally important. Like Chisholm, he was versatile: composer, conductor, pedagogue, political wheeler-dealer. He was the first conductor of the BBC's Studio Orchestra, the first full-time orchestral ensemble in Scotland. Its path was neither straight nor easy, but under Whyte it grew into a full scale symphony orchestra, committed to playing the latest music by Scottish composers alongside orchestral work of all ages and countries.

Both of these men were important in the musical development of perhaps the single most influential man in the history of Scottish music.

Sir Alexander Gibson (1926-1995)

Like Will Fyffe, Gibson was an adopted Glaswegian. He studied at the Royal Scottish Academy of Music, and later at the Royal College of Music. Denied entrance to the conducting class, he responded with typical entrepreneurial flair by forming his own orchestra to practice with. He returned to Glasgow in 1952 as Assistant Conductor of the BBC Scottish Orchestra working closely with Ian Whyte.



In 1959 he was offered and accepted the post of Conductor of the Scottish National Orchestra – an extraordinary event. The headline in The Scotsman read: 'The SNO gets a new conductor - and he's a Scot!'

Three years later Gibson founded Scottish Opera, with the SNO in the pit, and their first production was *Madama Butterfly*. A string of ambitious and memorable productions followed for which Gibson called on major international talents to come to Scotland and appear with his new company. The impact was huge. Its staging of the *Ring Cycle* (the first in Scotland) has been cited by composer James MacMillan as “a life changing experience”. *Les Troyens* and *Così fan tutte* with Janet Baker and Elizabeth Harwood followed. The company also invested in Scottish composers, commissioning many new operas.

Gibson took his Glasgow musicians around the world. Both Scottish Opera and the SNO recorded extensively, and toured internationally. In 1975 the SNO made the first North American tour by any non-London British orchestra. Bringing the best of international work back to Glasgow, he gave first performances of works by Peter Maxwell Davies and Harrison Birtwistle, Berio, Henze, Ligeti, Lutoslawski, Schoenberg and Stockhausen. He was a Fellow of the Royal Scottish Academy of Music and Drama and President from 1991. Long before his death in 1995, Gibson was a figurehead not just for music in Glasgow but for Scottish music generally. Thanks to his stature he was able to achieve feats beyond any other musician in the land. It is all the more impressive that the years of his greatest achievements coincided with those years in which the City as a whole was in temporary economic decline. His legacy in opera, concerts and in education continues to flourish in Glasgow to this day, and the companies and institutions with whom he was most closely associated are all in fine health

Rock and Roll

Just as Gibson was transforming the operatic and concert life in Glasgow, the City was also emerging as a force in rock and pop. There is a strikingly similarity to the ways that Glasgow's

classical and rock worlds developed – but whereas the classical world took over 80 years to mature, its rock world shot from parochial to global in a matter of decades.

In both cases, it was the presence of excellent venues and superb visiting international artists in the City that ignited the fires.

Rock legends

Two Glasgow rock venues have become genuine global legends.

The Apollo started life as a cinema, Green's Playhouse, but made the transition to music in the 1960s. In 1973 it changed owners and its name became the Apollo. Throughout its 28 years as a venue it was the venue of choice for performers such as Jimi Hendrix, Pink Floyd, The Nice, The Move, T-Rex, The Who, The Rolling Stones, Led Zeppelin, Black Sabbath, David Bowie, Roxy Music, Lou Reed, King Crimson, Status Quo, Neil Young...

Its special attractions were odd to say the least. People speak of its strange smell, the ferocious passion of the crowd – and their equally intense cheering and shouting. The stage was extremely high – for which many performers were thankful: it prevented all but the most determined punters from getting onstage. The bouncers were among the fiercest ever, and the whole building shook when a gig was in full swing. By 1985 the fabric of the building was in serious decline, and it closed its doors with a final gig by Paul Weller's Style Council. When it was eventually demolished in 1989, hundreds of fans attended the destruction and left with souvenirs – mostly bricks and chairs. It is said that Robert Plant of Led Zeppelin sent five pounds to the demolition company and asked them to pour a large whisky over the site as a final goodbye.

Barrowlands, thankfully, is still with us. It was built in the 1960s as a ballroom and to this day boasts a ceiling full of glitzy stars and a sprung dance floor. It still hosts the occasional tea dance, but it is its rise as rock and pop venue that has brought it global fame, and it has repeatedly

been voted 'best venue in the world.' Among the artists who appeared there are REM, Oasis, Björk, Justin Timberlake, Blondie and Elvis Costello.

Talk to any Glasgow rock or pop musicians and they will have tales to tell about the Apollo or Barrowlands. Those venues were hugely influential not only by exposing Scottish musicians to international acts, but also by offering a credible platform for native talents: Primal Scream, Travis, Mogwai, Lloyd Cole, Big Country, Deacon Blue, The Fratellis and most recently Franz Ferdinand. It amounts to a rock renaissance which reached a climax in the late 1980s and early 1990s when bands like Texas and Simple Minds dominated charts, major festivals and airwaves worldwide. They brought it all home too, playing to huge crowds at major outdoor events like Glasgow's Big Day.

Folk Revival

Parallel to the rock explosion, interest in folk music surged in the 1960s. The folk revival was more of a global phenomenon – but Scots were good and ready for it.

The division between folk and classical music has never been as hard and fast in this country as it could be elsewhere. Folk tunes and songs have been collected and published since the 17th century, and this only increased in the early 20th century. What made the 1960s different was that the musicians not only claimed the folk heritage for themselves, and also had major – often global – means of distribution and promotion. Although the image of the intimate local folk club endured, many of the new bands and singers were traveling world wide and playing prestigious venues like Carnegie Hall, New York. The Scottish diaspora, hungry for music from the old country offered an instant international market. Many of the musicians active in Glasgow in the early 1960s went on to become major international artists: Ewan MacColl, Jean Redpath, Dick Gaughan, The Clutha, The Whistlebinkies and Boys of the Lough.

One figure who for many embodies the spirit of Glasgow's radical folk music was Matt McGinn (1928-1977): a songwriter, singer and political activist. He was

championed internationally by American folk singer Pete Seeger who presented him in Carnegie Hall. His work was rooted in daily life of Glasgow and he took his songs and monologues worldwide.

As more and more musicians emerged, the sector diversified. Purists might keep to the traditions of their childhood but fusions with rock, jazz and other nations' traditions proliferated. The whole sector took off, and has never ceased to flourish. Now, Glasgow is the centre of the folk music industry in Scotland. It is home to its largest festival (Celtic Connections) and many of its key performers and businesses are based there.

The Glasgow School

Another sign of the maturity of Glasgow's musical life in the 1980s was the emergence of a 'school' of composers who attracted international attention. James MacMillan, Bill Sweeney, Gordon MacPherson were among them. Like many such schools, this was actually little more than a loose affiliation, but they did have in common:

- passionate commitments to different political, faith and moral agendas reflected in their music;
- an engagement with Scottish traditional music, albeit seen through an urban, classical filter;
- a stylistic eclecticism, an individualism, a refusal to be bound into a particular category ;

For Macmillan particularly, these years offered the launch-pad for an international career.

Threshold of the present

With the maturing of its folk and rock music sectors, the growth and improvement of its infrastructure and the expansion of its broadcasting, recording and film industries, Glasgow's music scene as a whole attained a recognizable outline that endures to this day. Venues, artists, whole industries and genres have come and gone and fortunes have certainly risen and fallen. Acoustic technology was superceded by digital, vinyl has given way to the CD and

then to the download revolution; but in its essence musical Glasgow today is largely a more developed, vibrant, international and sophisticated city cut to the pattern established by the start of the 1980s. In one very significant area a truly new and innovative aspect of its activities has developed.

New developments

We have said that in Glasgow music was always viewed as an integral part of life – not just something to put on a stage. It could be;

- A tool of defiance by marching bands or political songsters
- Hymns of praise in churches of all denominations
- Tribal chants for fans and aficionados
- Badges of identity for clubs and organizations of many sorts
- An instrument of moral and social improvement since the early 19th century
- A consoling memory of home for the many immigrants who settled by the Clyde
- An educational tool
- A matter of civic pride.

In looking over Glasgow's musical history, the sense of the entire City in dialogue with music is impossible to ignore. In the past 40 years this dialogue has taken on new and exciting meanings as Glasgow has climbed out of the depression that demoralized the City for so many decades. A key part of its urban regeneration strategies has been the encouragement of the arts in the community, and the use of the arts as a tool for improvement in many different ways. Glasgow's engagement with the arts on these terms coincided with the rise in the UK of 'Arts Outreach.'

The term 'Arts Outreach,' denotes activities which take the arts out of their conventional homes – the concert hall, gallery or theatre – to meet new audiences in different places and on different terms. A player taking his violin to a classroom to talk and play with children is working in

outreach. A composer giving time and skills to aid old people in turning their memories into songs is working in outreach. An ensemble inviting asylum seekers to share their native traditions with pride and find common ground is working in outreach. The UK is recognised internationally as leading the way in this field, and it continues to inspire imitation throughout the world.

Glasgow as a city blazed a trail in exploring the possibilities of music as an essential tool for urban regeneration, improving quality of life and personal development. In the winter of 2005 it took a step further and opened the first UK venue dedicated equally to world-class musical performance and music outreach: Glasgow City Halls.

Glasgow's Music World Now

In preparation for this bid, a new database has been collated from diverse existing databases of music and musicians in the City to offer as accurate and comprehensive a portrait of Glasgow's musical world as possible. Unless otherwise stated, all of the figures below are drawn from this new database which is referred to as the GUCMD (Glasgow City of Music Database). All entries were verified by phone to ensure accuracy and currency of data. A full listing of organisations by category is included as Appendix 2, but in summary:

Performing Companies and Venues

The community of musicians in Glasgow is well established, huge and prestigious in its professional, amateur and educational sectors. Specific factors favour the existence of so large a musical world, and enable it to draw on both local and national resources to sustain itself. By the same token, Glasgow serves both the whole nation and the City itself.

Four of Scotland's five National Companies are based in Glasgow:

Royal Scottish National Orchestra
Scottish Opera
Scottish Ballet
National Theatre of Scotland

Scotland's 5th National Company, the Scottish Chamber Orchestra, has a permanent base in the City at City Halls which also is home to the BBC Scottish Symphony Orchestra.

All of the National Companies present full seasons of concerts and other work in Glasgow, they undertake outreach and educational work, and participate in the City's life in other ways. They all have a remit to present performances throughout Scotland and to represent Scotland internationally. On a smaller scale exactly the same set of functions is served by the following

Glasgow-based performing organisations of national significance:

Capella Nova
Concerto Caledonia
Scottish Ensemble
National Youth Orchestra of Scotland
National Youth Choir of Scotland
National Youth Jazz Orchestra of Scotland
NYOS Futures

Glasgow as a city has integrated culture into its regeneration and development strategies. Through Culture and Sport Glasgow it annually invests more than £3 million to provide core support for 32 organisations including festivals, theatre companies, dance groups, music ensembles and visual artists and support for 145 organisations on a project basis.

Of these the most important music organisations are:

RSNO
SCO
Scottish Ensemble
Scottish Opera
Celtic Connections
West End Festival
River Festival
Merchant City Festival

Glasgow
Inspiration Festival
International Jazz Festival
Triptych Festival
Sufi Festival
Glasgow Mela
National Youth Orchestra
National Association of Youth Orchestras
National Youth Choir
Glasgow Senior Citizens Orchestra
Paragon Ensemble
Cappella Nova
Westbourne Music
Sounds of Progress
Indonesian Gamelan
International Piano Competition
Arika Music Festival
Russian Cultural Centre
The Arches
Glasgow Cultural Enterprises
Children's Classic Concerts
RSAMD Stringfest and Cossack Connections

The Council's Events team separately co-ordinates many other major events and festivals including Glasgow's annual Hogmanay Party, Winter Festival, the World Pipe Band Championships and Summer in the City.



Glasgow's Performers and Creators

Creators

The GUCMD shows a total of:

- 123 rock and pop Bands most of whom create their own material and arrangements.
- 79 Composers and composer/arrangers working primarily in the classical sector
- 27 Singer/songwriters working primarily in the rock/pop and folk sectors

Four Distinguished Residents:

James MacMillan, Scotland's most famous living 'classical' composer (and a member of our Steering Committee) MacMillan is internationally active as a conductor and in 2000 was appointed Composer/Conductor with the BBC Philharmonic. He was awarded a CBE in January 2004. In addition to *The Confession of Isobel Gowdie*, which launched MacMillan's international career at the BBC Proms in 1990, his orchestral output includes the percussion concerto *Veni, Veni, Emmanuel*, premiered by Evelyn Glennie in 1992 and which has since received over 350 performances. MacMillan's music has been programmed extensively at international music festivals, including the Edinburgh Festival in 1993, the Bergen Festival in 1997, the South Bank Centre's 1997 Raising Sparks festival in

London, the Queensland Biennial in 1999, and the BBC Barbican Composer Weekend in 2005. A triptych of orchestral works commissioned by the London Symphony Orchestra: *The World's Ransoming*, a Cello Concerto for Mstislav Rostropovich, and Symphony: 'Vigil' premiered under the baton of Rostropovich in 1997. Recent MacMillan works include Piano Concerto No.2 first performed with choreography by Christopher Wheeldon at New York City Ballet, *A Scotch Bestiary* commissioned to inaugurate the new organ at Disney Hall with soloist Wayne Marshall and the Los Angeles Philharmonic conducted by Esa-Pekka Salonen, and *The Sacrifice* premiered and toured by Welsh National Opera in 2007. Future premieres include *St John Passion* co-commissioned by the London Symphony Orchestra, Royal Concertgebouw Orchestra, Boston Symphony Orchestra and Berlin Radio Choir, and new works for the Takács Quartet and Minnesota Orchestra. Glasgow remains MacMillan's base, and he is currently in the process of composing a complete setting of the Gradual for the choir of his local church.

Craig Armstrong passed through the ranks of his native City's band culture (a band member of Hipsway, Texas and The Big Dish) to become one of the world's most sought-after and respected composers and arrangers. He has worked with Madonna, U2, Björk and Massive Attack. He is a skilled and experienced writer for theatre and film.

Amongst his many credits are the scores for the Baz Luhrmann hits, William Shakespeare's *Romeo & Juliet* and *Moulin Rouge*. Craig has written for the Northern Sinfonietta, the Scottish Chamber Orchestra, the Scottish Ensemble and the Royal Scottish National Orchestra, who premiered his concert work 'When Morning Turns To Light' in December 2002. In 2004 Craig Armstrong won his second Ivor Novello award for his score to Phillip Noyce's *The Quiet American* starring Michael Caine. This award joins a long list of accolades and nominations which include *The Bone Collector*, the Oscar-winning 'One Day In September', and 'Orphans' (voted Best Film at 1999's Venice Film Festival). Armstrong is a member of Glasgow City of Music's Steering Committee.

Franz Ferdinand is perhaps Glasgow's most successful current pop band. It formed in 2001, and first experienced chart success when its second single reached #3 in the UK Charts. NME named its eponymous first album as album of the year. The band went on to win the 2004 Mercury Music Prize and two BRIT AWARDS in 2005 for Best British Group and Best British Rock Act. It reached No.12 in the Australian album charts in April 2004 and the top 5 of the Indie Rock chart in the USA (where it sold over a million copies). The band's second album went straight to No.1 in the UK, selling 101,884 copies in its first week. The disc won a host of awards including an Ivor Novello Award in 2004. NME placed it 38th on their 100 Best Albums of All Time list.



At time of writing their third album is in production. Alex Kapranos is a member of Glasgow City of Music's Steering Committee.

Capercaillie have one of the most distinctive sounds of any traditional music band anywhere. The foundation of the band has been the peerless voice of co-founder Karen Matheson, described by Sean Connery as having "a throat that is surely touched by God". Universally recognised as one of the finest Gaelic singers alive today, Karen's exquisite voice has been at the centre of the band's music, whether breathing new life into 400-year old Gaelic songs or bringing her luscious vocals to the band's contemporary compositions. There have been many milestones for a band who have sold over a million albums worldwide. These include three silver and one gold album in the UK, the first Gaelic Top 40 single, writing the music for, and appearing in the Hollywood movie "Rob Roy", and performing in over thirty countries including Iraq, Macedonia and the Sudan. Capercaillie have been credited with being the major force in bringing Celtic music to the world stage, and their unique fusion of Gaelic culture and contemporary sound has always stretched boundaries in their quest to keep the music evolving. However, their greatest achievement has been to mould a central strand of their Gaelic heritage into a fresh, new sound, capable of reaching out to the ears and hearts of people all over the world. Donald Shaw, a key member of the band and Director of Celtic Connections was a key contributor to the vision for the future of Glasgow City of Music outlined in Section III.

Besides these notable current residents, famous living Glaswegian musicians include:

Altered Images
Big Country
Simple Minds
Donovan
Texas
The Delgados
Del Amitri
Midge Ure

Deacon Blue
Lulu
Jimmy Somerville
Clare Grogan
Jim Diamond
Angus & Malcolm Young, guitarists in AC/DC
Hipsway
Travis
The Blue Nile
The Bluebells
Love and Money
Mogwai
Camera Obscura
Jack Bruce, (Bassist in Cream)
The Silencers
The Fratellis
Frankie Miller
Hamish Stuart
Aztec Camera
Iain Mackintosh
Maggie Reilly
Maggie Bell
Brian Robertson
Primal Scream

Orchestras

GUCMD records 38 Orchestras or large ensembles currently active in Glasgow. Of these:

- 8 are fully professional
- 10 are amateur or community based
- 6 are based in a university or academy
- 14 are youth or training orchestras, or ensembles

Choirs

GUCMD records 49 Choirs currently active in Glasgow, of which:

- 1 is fully professional
 - 3 are church choirs
- (This is a question, rather than to be included)

- 31 are amateur or community based
- 7 are based in a university or academy
- 5 are youth or training orchestras or ensembles
- 2 are linked with a professional orchestra

Bands

This sector is among the hardest to report on reliably, partly because the turnover is so fast (bands come and go with great speed), but also because only a proportion of bands are organised and entrepreneurial enough and have the resources to promote themselves through websites and other shared sources of information.

- 123 Rock and pop bands
- 21 Jazz Bands
- 44 Traditional and folk bands
- 7 Dance Acts
- 31 Groups belonging to smaller or cross-over categories

Ensembles

73 instrumental ensembles feature on the database, but this includes some umbrella categories so the actual total is likely to be closer to 90.

Amateur Theatricals

This has historically been an important sector for Glasgow and Scotland generally. In the years before regular provision of professional opera in the country, these companies were the main providers, and their productions could be ambitious and of exceptionally high standard. Since professional opera has become more available, and standards have naturally risen, these companies have faded a little but continue to appear and play to good-sized audiences.

13 amateur societies provide variety, music theatre and similar entertainments of different kinds.

Solo Performers

Because Glasgow has such an extensive musical infrastructure it supports some 281 musicians who operate mainly as soloists or freelance 'session' musicians in the broadest sense.

Understanding this sector is complicated as many musicians will have several jobs – the same player might have a solo career, play in a band, take on occasional session work, and – who knows - work in a bar, library, office or restaurant too. Also, they cross genres. Violinist Greg Lawson, for instance, plays in the major orchestras, has his own alternative klezmer band, plays solo, plays quartets and will also be booked for a whole variety of events from club nights to musicals.

Of the 281 soloists listed in GUCMD

- 174 are classical musicians
- 34 specialised in traditional music
- 28 are DJs
- 20 specialised in rock and pop
- 17 specialised in jazz
- 8 offer miscellaneous genres including Country and Ghanaian drumming

Music Venues

GUCMD lists 200 separate venues which present music regularly in Glasgow. Of these venues only 86 were able to give reliable data which is reflected below.

In terms of sheer number of gigs, ARTA is Glasgow's busiest venue in the City, with around 700 gigs per year in its 5 spaces. This bar, restaurant and club offers live bands, DJs and special one off nights in the Merchant City.

After Arta, the top busy venues are:

Name	Type of music	Average concerts per year	Spaces: capacity
Clutha Vaults & The Scotch Corner	Traditional / folk	648	1: 100 2: 80
13th Note	Indie	360	1: 200 2: 120
King Tut's Wah Wah Hut	Rock / Pop / Indie	360	300
Strathclyde Student Union	Mixed	300	1: 450 2: 500 3: 200
Oran Mor	Mixed / traditional	300	1: 550 2: 550
Bacchus Bar	Bands	300	1: 80 2: 130
Blue Dog	Jazz / MOR / DJs	300	151
Ivory Blacks	Bands	288	296
Capitol	Bands	288	220
Glasgow Royal Concert Hall	Mixed	272	1: 2475 2: 500 3: 300

Clearly this summary gives only the beginning of a beginning of a picture. For example, there are huge differences in capacity and ambition of the programmes. Some are almost completely dominated by DJ sessions, though all the venues listed do feature live music regularly. The point is that even if there were no other venues in Glasgow, the 10 places listed above would offer music lovers a varied and high quality musical diet every week of the year. Some are of international standing (King Tut's / Glasgow Royal Concert Hall) others are venerable Glasgow institutions (Clutha Vaults & The Scotch Corner / 13th Note) and one is an ambitious new comer, already making its mark on the City - Oran Mor.

The remainder of the venues for which we have data falls into the following bands:

No of performances annually	No of Venues
>500	2
>400	1
>300	8
>200	12
>100	11
>50	12
>10	18
<10	7

Major Venues

Over the past 30 years, there has been major investment in Glasgow venues – both by the Council and by individuals and companies. It currently enjoys an enviably diverse and substantial portfolio of performing arts spaces suitable for many kinds of musical performance. At one end of the scale, Hampden Park hosts the very biggest stadium gigs with audiences of around 45,000; at the other end of the scale the City is rich in tiny venues perfect for the most intimate one-man show. Below is a sample of the major venues in all genres. As this brief summary shows, important City venues are dispersed throughout the City, enhancing ease of access for different communities and audiences. Alphabetically...

The **ABC** occupies the distinctive Art Deco building that once housed Scotland's first cinema. With a capacity of 1600 it is one of Glasgow's top four rock and pop venues and its programme of touring artists and club nights complements the programmes of Carling Academy and Barrowlands.

The Arches is located in the spaces beneath the railway arches of Glasgow's Central Station. It was refurbished in

2001 and offers cultural adventurers a programme of mid-to small-scale theatre, music and club events.

Barrowlands was originally built as a ballroom – and still hosts the occasional tea dance – but has made its name as a major concert venue. Although small by comparison with many rock venues, it is a particular favourite of many noted rock / pop acts including R.E.M., Björk, INXS, Justin Timberlake, and U2. It has also traditionally offered a platform for the finest local talent including Primal Scream, Travis, Franz Ferdinand and Big Country.

Carling Academy This former cinema opened as a music venue in 2003 after a £3 million refurbishment. Bands appearing there include the Sugababes, Inspiral Carpets, Massive Attack, White Stripes, Public Enemy, Melanie C as well as many club and dance events with top Scottish promoters Slam and Inside Out.

In January 2006, **The City Halls** and **The Old Fruitmarket** reopened after a £13 million refurbishment. This visionary building combines performing arts with archives, information about music, education, outreach, social inclusion and regeneration. It is one the most high-tech venues in the UK offering possibilities of outreach to the most distant communities in Scotland via video links. It is home to the BBC Scottish Symphony Orchestra, the Council's Music Education Services, the Scottish Music Centre and the Scottish Chamber Orchestra.

Glasgow Royal Concert Hall dominates the centre of the City. It was opened in 1990 as part of the Year of Culture and functions as the main venue for the Royal Scottish National Orchestra. Additionally, it promoted the International Series which has featured such orchestras as the Kirov, Berlin Philharmonic, London Symphony Orchestra, Leipzig Gewandhaus, Philharmonia. Soloists featured in recent years have included Alfred Brendel, Ian Bostridge, Jessye Norman and Cecilia Bartoli. The world famous festival Celtic Connections is produced by Glasgow Concert Halls attracting 100,000 visitors to Glasgow during its three weeks. The year round programme of music also features major figures from the world of jazz, rock and pop.

Hampden Park since reopening in 1999 after refurbishment, Scotland's home of football has been the venue for vast stadium concerts featuring artists of the stature of Rod Stewart, George Michael, Robbie Williams, Rolling Stones, Oasis, U2, and Eminem.

Hutcheson's Hall, one of Glasgow's smallest venues, has a special place in the City's music history, as it was here that Chopin played when he visited Scotland in 1848.

King Tut's Wah Wah Hut is renowned UK-wide as an exciting showcase for new and emerging bands and as the venue that supported some of the UK music industry's biggest names at the start of their careers. Founded during the Year of Culture in 1990, it is owned and managed by Scotland's foremost music promoters DF Concerts and has played host to bands including Radiohead, Blur, Travis, Pulp and The Verve before they reached the heights of music superstardom. It created a piece of rock and roll history as the venue where Oasis were first spotted and signed in 1993.

The **National Piping Centre** presents a wide array of traditional and acoustic music, as well as holding national collections relating to piping, and offering courses and tuition.

Òran Mór is one of Glasgow's newest venues, Òran Mór (meaning the 'great melody of life') is a cultural centre and meeting place in the heart of Glasgow's West End. It regularly presents concerts and sessions of acoustic music alongside its theatre and events programmes.

The **Pavilion Theatre** is a Glasgow landmark and historically one of the most important venues for variety performances. Sarah Bernhardt appeared there, as did the young unknown Charlie Chaplin. More recently such popular Scottish artists as Lulu, Billy Connolly, Sheena Easton and Barbara Dickson appeared there.

The **RSAMD** has numerous spaces to suit different productions: the New Athenaeum Theatre seats 344 and is the principal auditorium for plays and opera. The Academy Concert Hall is much in demand by professional groups and seats 355. The Alexander Gibson Opera School houses a

further performance space used by music and drama students, while the Chandler Studio Theatre is used for more intimate or experimental theatre work. Finally, the Guinness Room is a recital hall for up to 108.

The Scottish Exhibition and Conference Centre is best known for hosting its concerts with acts such as The Rolling Stones, U2, Oasis, Britney Spears, Primal Scream, and many others in the 8,200 seat Hall 4 and 3,000 seat Hall 3. In 1997 the main building was complemented by the Clyde Auditorium – Sir Norman Foster's "armadillo".

The **Theatre Royal** is home to Scottish Opera. The site upon which it stands has been associated with opera since 1867 and every major Scottish Opera production appears there.

Tramway re-opened in 2008 as both a multi-functional arts venue and the permanent home of Scottish Ballet. It presents cutting-edge contemporary work and is the main location for two national festivals showcasing international experimental music and theatre: New Territories and TRIPTYCH

Music Promoters

Music Promoters within Glasgow may be divided into the following categories:

Venues promoting concerts within their own spaces (please see Venues above)

Musical companies promoting their own performances across the board from the National Companies to amateur choirs and orchestras, rock groups or soloists. (Please see various categories above)

12 Musical Clubs, Societies and Associations promoting music specific to their interest largely to their own membership. These are often managed by volunteers, but operate to a high standard.

33 entrepreneurial companies promoting music in a number of venues in the City. In this sector there is a degree of overlap with venues as several promoters manage venues as well as their wider operation.



Of these the largest in Scotland is DF Concerts. It is one of Europe's leading concert promotion companies, bringing the best live music and events to audiences in Scotland including Robbie Williams, The Eagles, N*E*R*D, Radiohead, Bon Jovi, Eminem and The Darkness. Working with a huge number and diverse range of artists, from cutting-edge unsigned talent to the music industry's biggest stars, the company is also the promoter behind Scotland's most successful music festival, T in the Park, a multi-stage music festival attracting hundreds of the music industry's top acts and a crowd that now exceeds 60,000 each day to its current site at Balado near Kinross. DF Concerts has grown to become a major player in the UK music industry, the scope of their activity has spread further afield into Europe, with 1996/7 concerts in Prague, Berlin, Valencia and Paris. DF Concerts also worked on Moscow's biggest ever concert, headlined by Prodigy in Red Square.

Music Festivals

Glasgow supports 24 well-established festivals which have music either as their sole focus, or as a core aspect of their programming.

Taken as a body, these festivals cater to a wide range of music genres and audiences from the highly specialist music lover to young audiences. It should be stressed that these are merely the well-established festivals: every year in

Glasgow festivals and special seasons are presented which add further variety to the musical diet without necessarily becoming established.

The single largest and most famous Festival in Glasgow is undoubtedly **Celtic Connections**.

Celtic Connections was founded in January 1994 and has since become an annual event. Its original strong focus on traditional music from the Celtic nations has gradually broadened in the past 14 years to embrace many different kinds of Roots music, and it attracts the superstars of the traditional music scene.

The first festival attracted around 32,000. In its 13th year (2006), over 100,000 people filled 10 venues seeing hundreds of artists brought to Glasgow from every part of the globe. Confirmed audience figures for 2008 are not yet in, but the festival featured more than 1,000 acts in more than 300 events.

Celtic Connections brings in visitors from throughout the world to Glasgow and has an economic impact on the City now exceeding £4 million during the normally quiet post-Christmas period. It also plays an important role for Glasgow internationally in promoting artistic links and cultural exchange across many lands, especially those of Celtic heritage. Through Showcase Scotland it promotes

Scottish musicians to international promoters and programmers and brought 160 international delegates to the event on 2006, all looking to book Scottish bands.

Celtic Connections also has an important Education Programme which both promotes the performance and appreciation of Celtic music and also plugs into the City's wider outreach strategies. Thousands of children attend free morning concerts given often by the top stars. Young performers are nurtured through its Young Tradition and Master & Apprentice series of concerts.

Additionally, a number of major Festivals are produced in Glasgow by Glasgow companies but take place elsewhere in Scotland:

- Big in Falkirk – a major showcase for street theatre and public arts managed by UZ Events
- Voices in Paisley – an annual choral festival in the nearby City of Paisley
- T in the Park – Scotland's largest summer rock festival, which takes place in Perth and Kinross but is managed by DF Concerts.

Record Companies

One excellent indicator of the health, scale and sheer entrepreneurial spirit of Glasgow's music scene is the number of small record labels based in the City: 91 at last

count. This sector is dominated mainly by indie and rock labels promoting rising young bands but includes traditional music (Lismor) and many experimental genres also.

Scotland's premiere classical and jazz record label, **Linn Records** is based just outside of the City and draws heavily on Glasgow's resources for its recording venues, artists and facilities. This award winning label has consistently championed Scottish talent including many musicians living and working in Glasgow, including jazz singer Claire Martin, Bach expert Dr John Butt, and early music ensemble Concerto Caledonia.

Recording Studios

Glasgow is outstandingly rich in recording studios and related facilities.

Exclusive Facilities

As the centre of Scotland's media Glasgow has a matchless array of studios and related technical facilities created by and for the use of specific organizations. Both the BBC and Scottish Media Group (SMG) have dramatically upgraded and updated their facilities to state of the art specification as part of their moves to new headquarters at Pacific Quay. These benefit the wider musical community through the music programming of both BBC Scotland and SMG as local bands are recorded for broadcast on various networks.

Most of the Glasgow's major educational institutions have recording facilities of different kinds intended primarily for the use of their students and staff.

Commercial Sector

The commercial sector is large (more than 20 companies within the City) and is concentrated in the West End of the City. It caters to all levels of the music industry from relatively simple facilities suitable for amateur use to prestigious facilities such as Cava and Park Lane Studio. This range is critical to the health of the music industry as a whole as it brings major talents to the City to record while at the same nurturing local talent. Many of Scotland's biggest

bands have recorded in the City, including Texas, G.U.N, Del Amitri, Big Country, Hipsway and Wet Wet Wet. Even the swankiest facilities continue to take pride in this role allowing rising talents with limited financial resources to access sufficient facilities to produce highly professional demos as a first step to making their names in the wider musical world.

Glasgow's most prestigious facilities include:

Park Lane Studio

The studio started life in 1980 and was used by such local bands as Deacon Blue, The Bluebells, Altered Images, Lloyd Cole and Love And Money to make their first demos. The studio also attracts bands from outwith Scotland, such as The Pet Shop Boys, INXS, the Fugees, and from the 'Pop' market, West Life, Gareth Gates, Darius, and the highly respected Sophie Ellis Bextor. The studio has managed to maintain respectability with the signed bands and its Record Company clientele while still attracting young demo bands many of who have gained major deals after one Park Lane demo, such as: Travis, The AC Acoustics, Whiteout, The Smiles, Hardbody and Baby Chaos. Due to the success of the studio these bands continue to return. The studio also serves many clients from the world of TV and FILM such as 20th Century Fox, Disney, BBC, Time Warner, and Channel 4.

CAVA

One of Glasgow's most respected facilities, CAVA has been at the heart of the City's musical life since the early 1970s. It serves an extensive client list including the BBC and SMG, advertising and production companies, and an impressive array of mainly Scottish bands including Mogwai, Runrig and Dougie Maclean.

Music Stores

Another excellent test of the musicality of a city is the number and range of its music shops. Online shopping has changed the way music lovers buy instruments and recorded and printed music, but the list of 27 outlets

indicates that there is still a healthy place in the market for the local and specialist supplier alongside the high street multi-nationals and trading websites.

In addition to this, many of the individuals and companies in every category of the GUCMD sell music direct either at events or through their own websites.

Artist Management

It was once asserted that a major obstacle preventing musicians resident in Scotland from breaking into wider markets was the lack of sufficient excellent artist management companies. This is not a problem unique to Scotland, but faced by every small country, including those like Sweden and Finland whose Governments invest particularly heavily in their music industries. The situation has not changed sufficiently for concerns to be entirely allayed, but a small number of new Glasgow companies (Bows Art / Logan Arts Management) are energetically tackling some of the problems of their respective sectors, and working to promote Scottish resident artists both in Scotland itself and abroad. There are 20 music management companies resident in Glasgow.

Music in the Communities

As noted in Part I, music has historically meant more than simply a form of art or entertainment to Glasgow. In particular, since the early 1980s it has formed part of city-wide strategies for outreach in education (at all levels and for all ages) individual and community development, and social inclusion. These projects have often been initiated by the City, but all publicly funded music organizations participate in some way in this work: it is a condition of their funding.

The UK Cultural Commission has identified a number of key social benefits associated with a City enjoying a strong cultural sector – all of which may be seen in action in Glasgow. These include:

- increasing confidence, creativity, human growth and transferable skills, by providing personal insight and

- stimulating regeneration by improving communities and community pride;
- improving collaboration and teamwork, thus contributing to well-being, quality of life and health;
- improving educational attainment;
- encouraging diversionary activity and supporting crime prevention;
- increasing employability; and
- encouraging volunteering.

These benefits are as relevant to the music industry as in any other form of creative activity, and research by the Scottish Executive has found that students who study music at standard grade level are likely to be more confident and more employable than their peers who do not.

In recognition of these benefits, and in acknowledgement of the Scottish Government's policy of facilitating the 'Cultural Entitlement' of all of Scotland's citizens Glasgow City Council have recently launched the Glasgow Cultural Pathfinder Project in 2007, with the objective of widening participation in music and other forms of cultural activity among disadvantaged older people and other under-represented groups.

Since the 1980s the UK has led the field in this kind of outreach work, and is still recognised as the leader in both its theory and practice worldwide. One reason it has achieved this position is that so many members of the music community recognised its value and worth early on. The best minds in the business were prepared to commit time and resources. Major composers such as Sir Peter Maxwell Davies, James MacMillan and Judith Weir participated. Organizations both national and local opened their first outreach departments to support the work administratively, to fundraise and to lobby nationally for wider, continued support.

The work has now been sustained for around three decades, and the depth of experience that has been gathered informs highly sophisticated understanding of the

benefits and possibilities of this kind of work, but conversely, of the training and development needs associated with it.

Outreach requires different skills from musicians than concert performance. Scotland led the way in training both students and established professional musicians. The RSAMD offers a course dedicated to this work, and also integrates training into the curriculum available to all students.

The sheer volume of work going on in this field makes it extremely difficult to quantify: if one imagines that each publicly funded organization is creating at least a minimum of four projects a year, and that the truly committed organizations have created far more extensive year-round programmes of work responding to the needs of widely divergent sectors of the population, one can grasp a sense of the degree to which music is woven into the fabric of life in the City. In order to offer a more concrete sense of the range, quality and value of this work we focus on one flagship operation in the City.

City Halls

There is no more tangible symbol for the importance of this work to Glasgow than the City Hall's redevelopment. Between the 1940s and 1980s the building suffered gradual decline, and ultimately question marks were raised over its future. In the 1990s, a number of different interests in the City came together to consider its future. The BBC Scottish Symphony Orchestra sought a new home in which to perform, rehearse and broadcast. The City's Music Services sought facilities for its many youth ensembles. The Scottish Music Centre needed a home for its archives and information services. The ongoing conversation between the partners gave rise to a visionary plan not only to save the building, but to transform it into a state of the art multi-media musical centre which should function both as an international concert hall, and a vibrant base for music of all kinds and at all levels in the City.

All the facilities of the hall are used by amateurs and professional musicians alike and include:

- A range of public performance spaces including the Grand Hall, The Old Fruitmarket and Recital Hall
- Scottish Music Centre's archive of Scottish music and info services
- Meeting rooms / hospitality suites: facilities for community, conference and hospitality use.
- Practice rooms: for use by all
- Education suites, including IT suites fitted with the most current digital music equipment.

The Outreach and development department based in the City Halls manages a year round *City Halls Learning and Participation* programme whose objectives are to:

- Facilitate discussion between the education partners
- Encourage collaborative working between the education - partners
- Devise, facilitate and deliver projects
- Develop external partnerships

They manage an eclectic portfolio of projects including:

Music for Early Ears: 18 Glasgow Nursery Schools access specialist early years music work. Their staff are offered regular training and practical experience, alongside trainee Music Leaders. The project which is led by Naheed Cruickshank, one of Scotland's finest early years' music specialists. Parents, too, get involved through weekly parent and child music classes.

Through this scheme 576 music workshops took place within the nursery schools, and 192 music workshops within City Halls by March 2008.

CITY Halls Fusion: Developing music technology skills - DJ techniques; live electronics; recording, mixing, mastering and production; podcasting - of young people from black, minority and ethnic communities by offering training and access to facilities in ways that they appreciate. Specifically targeted at young, unaccompanied asylum seekers currently living in Glasgow.



Achievements: delivered 130 workshops
involved 70 young people in new musical opportunities
worked with 2 trainees
worked with 2 peer mentors
shared the work of the participants through performances and displays
given young people from musically deprived backgrounds access to high quality creative music-making opportunities

Experience Days: enable children and young people to participate in top quality music education activities. The project provides the opportunity for children and young people to see/ hear professional musicians rehearsing and performing; get hands-on music experience (creative, instrumental or technology) and explore the Scottish Music Centre

SEN Optimusic: The main aim of the project is to use the Optimusic sound and light beam system to provide opportunities for Primary aged children at all of Glasgow's Special Educational Needs schools to access music in ways that are educational, fun and stimulating.

Musical Bridges

The main aim of the project is to offer inspirational music learning experiences for unaccompanied young people in Glasgow seeking Asylum.

A talented music professional delivers a varied and tailored programme of musical activity focusing on various aspects of song-writing and creative music making to suit the needs of the individual participants and the group. Young people between the ages of 14 and 17 participate in the project. A Music Technologist is also involved in the project and is able to offer the young people the chance to gain hands-on experience using state of the art music technology equipment, equipping the participants with new skills which they can apply to produce recordings of their original work.

Public Education Programme

In addition to its more targeted work, GCE provide a variety of opportunities within the *City Halls Learning and Participation programme* which are available to the general public. These have included after-school and evening activities, weekend activities and holiday programme activities.

Between January 2006 and May 2007, the projects run by *City Halls Learning and Participation Department* alone had reached almost 4,500 individuals, many of whom participated in projects requiring more than 8 sessions in the building.

In addition, the resident partners of City Halls offer additional projects of their own as part of the programme that includes:

Glasgow Education Services (GES)

This department of the council is responsible for delivering much of the practical orchestral and group music made available to young people in Glasgow:

- Voice Factory - weekend vocal sessions for P3 and P4 pupils
- 1st Experience Strings Programme - Voice Factory participants progress on to learn to play 'cello and violin
- Rare Instrument Programme - Instrumental instruction on Kinder-Horn
- Weekend rehearsals for:
GES String Ensembles (Junior and Intermediate)
GES Concert Band
GES Orchestra
- Teacher Training - Twilight training for specialist and non-specialist teachers.

BBC Scottish Symphony Orchestra

- Casting – creative project culminating in the first performance to mark the re-opening of City Halls, involving communities of Dennistoun and Bridgeton
- Full Score Seminar - Composer seminar for tertiary students.

- RSAMD Player Mentoring Scheme - RSAMD students to be mentored by BBCSSO players
- Making Tracks - Specialist concerts for children introducing the symphony orchestra and repertoire
- Discovering Music - BBC Radio 3's Discovering Music concerts analysing great works in performance.
- Video-conferencing - Piloting a wide range of initiatives using video-conferencing equipment as a way of providing two-way learning experiences to pupils and individuals in remote communities. Work has included general introductory workshop sessions for younger pupils, and more focused master-classes for more advanced pupils. Pilot projects have also included a live link up between City Halls and the SETT conference, LSO St Luke's, and New York

Scottish Music Centre

- Composition Chart - Online composition chart to which young people can upload their own original music to be accessed and listened to by other visitors to the site. Performances of music submitted to the chart have also taken place
- Composer Sessions - Presentations and interactive sessions with leading composers and songwriters involved in the Scottish Music scene for pupils
- Centre Visits - Visits to the centre for selected groups of pupils including SEN groups

Scottish Chamber Orchestra

- Education Fellowship Programme - An annual fellowship offered to a talented individual specialising in outreach. Each Fellow works within the City Halls to create 2 dedicated projects, and collaborate with other partners in City Halls.
- Scrapers And Tooters - An intensive weekend of orchestral music-making at City Halls for amateur musicians, culminating in a fully staged concert in the Grand Hall.

	Total Undergrads	Undergrad Degrees Awarded	Total Postgrads	Postgrad Degrees Awarded	Music Undergraduates	Undergrad Music Degrees Awarded	Music Postgrads	Postgrad Music Degrees Awarded
University of Glasgow	15407	3308	4751	2663	>200	<49	<21	5
Strathclyde University	11144	3191	4221	1892	95	16	<95	<16
RSAMD	585	150	165	105	347	80	134	93
Glasgow Caledonian University	12000	3500	4000	3000	<100	<100	<100	<100

On any given day you can enter City Halls and find world-class musicians and small children sharing this visionary building. At time of writing the department and partners are managing more than 40 different programmes based at the hall, engaging with musicians of all kinds.

Education and Research

The University of Glasgow was the fourth university to be founded in Britain. In the 19th century, a combination of philanthropists founded a variety of educational institutions to complement it, many of them with a specific commercial or business training objectives. The University of Strathclyde, Glasgow Caledonian University and the Royal Scottish Academy of Music and Drama all owe their origins to these enterprises. There are also specialist institutions such as Glasgow School of Art, and a number of training colleges offering specific vocational courses. The table above shows the number of students attending the key institutions offering music education.

Economic Impact of Music in Glasgow

In preparation for this bid, the Glasgow Edinburgh Partnership commissioned a study of the economic impact of music in Glasgow which is attached as an Appendix 1. It shows that:

- The music sector employs 2,922 people in Glasgow: equivalent to 0.7% of all employment in the City and 12% of the City's creative and cultural workforce. This is unsurprising when one reflects that five of the country's six largest music industry employers are located in Glasgow, and over half of Scotland's music sector workforce is based in Glasgow.
- The music sector accounts for a larger share of creative and cultural employment in Glasgow (12%) than in Scotland as a whole (4.9%)
- The music sector currently adds £74.6 million worth of output to the Glasgow economy, and £143.4 million to the Scotland economy. As with employment, the music sector accounts for a larger share of creative and cultural output in Glasgow than across Scotland as a whole
- Glasgow's music sector is growing. In particular, the operation of arts facilities, which includes live music venues, has grown rapidly in the City. Of 29 venues questioned, 25 experienced an increase in employment between 2003 and 2008, while only four experienced a contraction.

Public Awareness

The international impact of Glasgow City of Culture in 1990 illustrates how effectively Glasgow raises awareness of its cultural activities. Glasgow has a superb track record in promoting its cultural events, treasures, companies and assets both within the City and further afield. It has certain strengths which make it more effective than many comparable cities.

It is the centre of Scotland's media industry and most major Scottish media companies are based in the City. These companies may serve the whole of Scotland and an international market, but they naturally reflect the cultural riches on their doorstep.

There is a massive and ever-changing body of informal media – blogs, personal websites, short-run specialist magazines and newssheets serving niche musical interests. A formal audit of these would be no sooner completed than it would be out of date as new titles are launched, distributed, go bust, and are recycled at a phenomenal rate. However, an informal survey of 10 bars in Glasgow yielded an average of 13 different pieces of print publicity of this kind alone, catering to markets as diverse as clubbing, world music, jazz and rock.



Through Glasgow City Marketing Bureau the City council energetically promotes musical events of all kinds online and in print through regularly updated listings, on-street advertising and other branding campaigns.

As many of the companies presenting events regularly in Glasgow are of national and international status, most have excellent marketing operations of their own.

The City is served by two highly effective publicity distribution organisations who disseminate publicity throughout the City on poster sites and leaflet racks.

97% of all music organisations in the City have either their own website (many of them backed up with phone assistance), or they are featured on such central resources as the Scottish Music Centre website.

Information services at the libraries and at the Scottish Music Centre offer regularly updated listings and other music-related information.

Many of the City's venues occupy high profile sites within busy and highly populated parts of the City. For example, Glasgow Royal Concert Hall is located at the junction of two main shopping streets, Sauchiehall Street and Buchanan Street: the venue's extensive use of poster sites, as well as massive TV screen (visible from 500 metres away) ensures that all passers-by are aware of its events and presence.

Carling Academy and ABC both have imposing frontages further down Sauchiehall Street which cannot be ignored.

Broadcasting

Glasgow is the centre of Scotland's media industries. It is home to national companies such as BBC Scotland and Scottish Media Group; as well as numerous local radio stations, newspapers, magazines and websites that serve more local interests.

BBC Scotland

BBC Scotland has been an active and entrepreneurial patron of the arts in the City for decades. Its headquarters are located at Pacific Quay in Glasgow. It produces radio, TV and internet output both for Scottish audiences and more widely for the whole of the BBC. It has a commitment to reflect music making in Scotland. Its role in the Scottish music industry has traditionally been:

- to reflect the best of what is going on, through recordings and broadcasts, comment and coverage.
- to identify and nurture new talent – many major Scottish artists were given important chances and exposure through BBC recordings and broadcasts.
- to offer a varied diet of music programming, responding to changing needs

BBC Scotland has capitalised on the vibrancy and sheer volume of activity on its doorstep in Glasgow, and it has always been an excellent partner to musical institutions in the City. Whether offering Celtic Connections a national and international platform, broadcasting the RSNO, Scottish Opera and others on BBC Radio 3, commissioning new work for Paragon Ensemble, or offering studio sessions to the next generation of top rock bands it both invests in the music scene and promotes it.

Additionally, the BBC produces its own major events such as Glasgow Music Live in 1999 and the annual Proms in the Park. Its greatest single musical commitment is the BBC Scottish Symphony Orchestra (see above) which acts as a highly visible symbol of the BBC's contribution to the musical life of the City.

Commercial Radio

The following commercial and community radio stations are also based in Glasgow and cater for different sectors of the community. All broadcast music to cater to their specific target audiences. Some of these networks will be involved in sponsoring and supporting major music events in the City, but few have a policy of recording and championing new talent comparable to the BBC.

Awaz FM
Chill
Clyde 1
Clyde 2
Heat Radio
Jazz FM

Kiss
96.3 Rock Radio
Smooth Radio
Saga FM
Sunrise Radio

Of these the most prominent are the two Clyde stations; their airtime is dominated by rock and pop music programming. In addition to their mainstream work, they initiated their Clyde 1 Unsigned scheme which gives rising talents a chance to upload their music onto the website, be heard and promoted and – just as importantly - get honest feedback.

High profile events

Please see Part 1 of this bid for a full list of major events and titles conferred on Glasgow in the past 30 years. Time after time, Glasgow has demonstrated an ability to seize opportunities and to deliver results well beyond the original expectations.

Glasgow – the lung of Scotland's Music

Throughout this document we have noted the national role of Glasgow-based musicians, organizations and institutions. With so much of the music workforce based in the City Glasgow inevitably enjoys significant standing within the country as a whole, and wields a significantly larger influence than other Scottish cities.

It is also widely known as a good collaborator and partner, not least with Edinburgh, UNESCO City of Literature. The Glasgow-Edinburgh Collaboration Project was developed in 2006 in order to develop a joint proposition for the two cities, which will help to deliver mutually beneficial changes in connectivity, business growth and migration.

The project was jointly developed by Glasgow City Council, City of Edinburgh Council and Scottish Enterprise, and occurred as a response to the noted successes of such collaborations in other areas, including the Oresund Cross Border Region, connecting the Danish City of Copenhagen with the Swedish city of Malmö and the Randstad region of the Netherlands, connecting the cities of Amsterdam, Rotterdam, The Hague and Utrecht.

As will be seen in Part III of this bid, the presence of two UNESCO Creative Cities in Scotland will open the way for deeper and more extensive partnership between these utterly different cultural centres, with the potential to magnify their international impact and usefulness many times.

Part 3 Glasgow UNESCO City of Music

As will readily be seen in reading Part II of this bid, Glasgow is very much an international city of music already. Conferring the title of **Glasgow UNESCO City of Music (GUCM)** will recognise this; but the major reason for bidding for the title is that we believe that Glasgow's music could be yet more successful, impressive, creative, influential and international.

The first outcome of receiving the title will be the creation of an organization within the City, the kind of which has not been seen before in the UK. **Glasgow UNESCO City of Music (GUCM)**

GUCM will be constituted and registered as a charitable trust, and as a limited company to realize the aims and objectives of this bid. It will be a lean and versatile organisation with low costs and high impact.

It will win influence and respect by swiftly demonstrating its effectiveness both within the City itself and also internationally – especially through collaborations with other UNESCO Creative Cities.

Role

GUCM will function throughout the body of Glasgow's music world to improve its health, maximise its performance and ensure it seizes every opportunity to advance. It will belong to no one kind of music, but guard its independence and neutrality well to ensure that it can be a good partner to all. From this privileged position it will be a constant source of proposals, ideas and possibilities, for whose development it will find partners.

Creative partnerships and initiatives

GUCM's will work entirely through partnerships and collaborations not as an independent production, funding or delivery mechanism. Its core activity will be to catalyze, influence, broker, negotiate, promote and facilitate initiatives and projects that benefit music in Glasgow both at home and internationally.

Structure

GUCM will succeed in its aims most effectively by ensuring that it has the widest array of knowledge, brains, skills, ideas, contacts and talents from Glasgow's music world at its disposal. There already exists a formidable assembly of top people committed and sympathetic to its objectives: the Steering Group for this bid. This includes senior figures from every part of Glasgow's music world as well as representatives of the City Council, educational establishments, funding bodies, and other interested parties. We will invite them to continue their association and form a core Steering Group of GUCM, augmented by additional members as opportunity arises.

Two bodies will be drawn from the Steering Group membership:

- 1) Trustees: a non-executive group primarily responsible for the long term health of the organization
- 2) Management Group whose 6 members serve on a rotating basis for 2 years. While still essentially non-executive, this group will have an active role and work closely with GUCM's director to realize the organisation's objectives. It will meet regularly as a group (6 times a year) and its members will be called on by the Director as often as required

Director

GUCM will engage as Director a significant and senior individual, effective at the highest levels internationally and within Scotland. A detailed job specification will be developed in due course. The Director's role will include:

- Responsibility to the Management Group for the day to day management of the company, financial and administrative management and engaging other staff.
- Represent GUCM both locally and internationally and act as a champion of its goals and projects
- Work to realise the objectives of the company and implement GUCM's five year strategic plan
- Fundraise for GUCM.



- Report to the Trustees as required on legal and financial matters relating to the Trust.
- To act as first point of contact with UNESCO.

Project Managers

The Director will engage project managers to achieve GUCM's specific goals. These will generally be short term, goal-specific posts; individuals will be engaged for their specialist knowledge, or specific skills appropriate on a project by project basis .

A secretary will be engaged to work with the Director.

Office

In order to minimize overheads GUCM will share office space with other music organizations within the City: an offer of office space has already been made by the management of the City Halls which would offer an ideal base at the heart of Glasgow's music scene.

Funding

We believe that many City organisations will be ready to extend their support to cover the estimated annual expenditure of GUCM.

In the first instance, a 3 – 5 year commitment will be sought. Potential funders include:

City of Glasgow (International committee & Culture budget)
Scottish Executive
Scottish Enterprise
Glasgow's Universities and the RSAMD
Glasgow Edinburgh Collaboration
BBC Scotland
Scottish Arts Council

Additional project funding might be sourced from:

SAC / Creative Scotland
Event Scotland
Commercial sponsors
Charitable Trusts and Foundations

Partnerships

There is such a high level of enthusiasm and positive feeling about the potential of the UNESCO City of Music title in Glasgow, that even in the process of preparing this bid many different partnership possibilities have been suggested. Partnership with Culture and Sport Glasgow (the trust responsible to the City for the provision of cultural resources) offers many exciting opportunities. There is also a clear understanding of the potential of the organization described in these pages to enhance the musical life of the City and to bring additional advantages, through membership of the Creative Cities network.

In practical terms, GUCM will manage its partnerships strategically to ensure that its efforts are expended to maximum effect for maximum benefit to Glasgow's music. The Director, in dialogue with the management group, will be responsible for setting priorities and managing partnerships

Potential Partnerships exist at all levels:

Local:

In the course of researching this bid, organisations and individuals were asked what functions GUCM could undertake to make the maximum difference in Glasgow. Almost all stated that the City would benefit from a body which took an overview of the City's music world in order to spot opportunities and possibilities, facilitate collaborations and information sharing.

National:

Glasgow is a national city – it is the engine of Scotland's music, so GUCM will embrace partnership and collaborations rooted in the City which benefit the whole nation. GUCM will engage with such national organisations as the Scottish Arts Council, Scottish Government, BBC Scotland, Musicians Union, Scottish Enterprise and the National Companies (most of whom are resident in Glasgow) to foster projects of national benefit to Scotland.



In particular GUCM will nurture its partnership with Edinburgh City of Literature in order to maximise impact and benefit to both cities.

In order to deliver mutually beneficial improvements to the two cities, the Glasgow-Edinburgh Collaboration has developed a Prospectus for Action, and Glasgow's application for UNESCO World City of Music status will support the deliver of three of the actions identified in this plan, namely:

- Promoting and discussing collaborative opportunities with each City's tourism action group;
- Identifying target events; and
- Investigating how to extend benefits of major festivals and designations.

In addition to this, the status will also present the two cities with the opportunity to stage joint musical and literary events, which could lead to further benefits of this nature. The two cities already have a strong track record in hosting joint events of this nature, for example:

- In 2006, Glasgow's Oran Mor staged 18 productions as part of the Edinburgh Festival Fringe programme;
- The Tryptych Music Festival takes place annually over three days in April, across Glasgow, Edinburgh and Aberdeen; and
- Edinburgh's Commonwealth Pool is to host the diving competition as part of Glasgow's 2014 Commonwealth Games programme.

There is a robust belief that through a twin designation the development and delivery of events of international significance will lead to significant new economic benefits in Scotland. An important element of these benefits will be manifested in maximising supply chain links between the Cities to support the existing asset base and grow new businesses.

International:

Glasgow is an international music city – it welcomes musicians of many nations, and Glaswegians take their

own music far and wide. To a degree there is so much international exchange already that much goes unremarked. One aspect of GUCM's work must be to raise its profile - to remind the City itself of its musical riches.

Working with the UNESCO Creative Cities network, Scottish Government and such bodies as the British Council Scotland, Scottish Arts Council, VisitScotland, GUCM will champion all opportunities for international music collaborations, as well as making the most of all opportunities to promote Glasgow's music internationally.

Special Project Plans

UNESCO Creative City Collaborations

An immediate goal for GUCM will be to encourage collaborations between Glasgow's performers, music organisations, festivals, promoters, schools and colleges and the their colleagues in the other UNESCO Creative Cities. Plans for Travel Scholarships to allow young musicians from Glasgow to travel to Seville and Bologna have been discussed.

UNESCO Music Champions

GUCM will invite distinguished and prominent figures in the music world to become **UNESCO Music Champions**. Once created, these Champions will enjoy the title in perpetuity so that a body of distinguished advocates for music in the City is created. How these figure operate to benefit music in Glasgow will differ according to their personality, strengths, genre of music etc., but their commitment will be to work in line with GUCM's objectives and lend their status and profile to raise the profile of music in the City. Specifically they might lend their support to

- the creation of special music projects
- promotional campaigns relating to relevant initiatives and projects
- fundraising
- acting as spokesperson for GUCM as appropriate

Free The Music - UNESCO Celebration

Within the first year of receiving the title, GUCM aims to present a major event in Glasgow to celebrate the title and Glasgow's music. It will draw together many different partners on this occasion with the objective of making the event free and open to as wide a public as possible.

This event will be taken as an opportunity for GUCM to present its achievements to date and to announce future plans to the press.

Appendix 1 & 2

Appendix 1

Glasgow's Government

Following the Local Government election in May 2007, Glasgow City Council comprises 79 elected Members, representing 21 multi-member wards of 3 or 4 members. The current political make-up of the Council is:

Scottish Labour Party: 46
 Scottish National Party: 22
 Scottish Liberal Democrats: 5
 Scottish Green Party: 5
 Scottish Conservatives: 1

The Leader of the Council, Steven Purcell, is the political head of the Council, while the Lord Provost, Robert Winter is the civic head.

The City is represented in the UK Parliament by 7 MPs.

Central	Mohammad Sarwar – Scottish Labour Party
East	David Marshall – Scottish Labour Party
North	Ann McKechin – Scottish Labour Party
North East	Rt Hon Michael Martin – Speaker of the House of Commons
North West	John Robertson – Scottish Labour Party
South	Tom Harris – Scottish Labour Party
South West	Ian Davidson – Scottish Labour Party

The City is represented in the Scottish Parliament by 17 MSPs

Anniesland	Bill Butler – Scottish Labour Party
Baillieston	Margaret Curran – Scottish Labour Party
Cathcart	Charles Gordon – Scottish Labour Party
Govan	Nicola Sturgeon - Scottish National Party
Kelvin	Pauline McNeill – Scottish Labour Party
Maryhill	Patricia Ferguson – Scottish Labour Party
Pollok	Johann Lamont – Scottish Labour Party
Rutherglen	James Kelly – Scottish Labour Party
Shettleston	Frank McAveety – Scottish Labour Party
Springburn	Paul Martin – Scottish Labour Party

Glasgow Region:

Bashir Ahmad – Scottish National Party
 William Aitken – Scottish Conservative and Unionist Party
 Robert Brown – Scottish Liberal Democrats
 Bob Doris - Scottish National Party
 Patrick Harvie – Scottish Green Party
 Bill Kidd - Scottish National Party
 Sandra White – Scottish National Party

Appendix 2

Music in Glasgow

Performing Companies and Venues

Companies of national significance based in Glasgow:

Royal Scottish National Orchestra
 Scottish Opera
 Scottish Ballet
 National Theatre
 BBC Scottish Symphony Orchestra.
 BBC Scotland
 Capella Nova
 Concerto Caledonia
 Scottish Ensemble
 National Youth Orchestra of Scotland
 National Youth Choir of Scotland
 National Youth Jazz Orchestra of Scotland
 NYOS Futures

Glasgow's Performers and Creators

123 Bands most of whom create their own material and arrangements.
 27 Singer/songwriters working primarily in the rock/pop and folk sectors
 79 Composers and composer/arrangers working primarily in the classical sector

Orchestras

38 Orchestras are currently active in Glasgow:

Academy String Orchestra
 Academy Chamber Orchestra
 Academy Symphony Orchestra
 BA Applied Music Orchestra
 BBC Scottish Symphony Orchestra
 City of Glasgow Symphony Orchestra
 Glasgow Caledonian Strathspey & Reel Society
 Glasgow Chamber Orchestra
 Glasgow Festival Strings
 Glasgow Improvisers Orchestra
 Glasgow Schools String Orchestra
 Glasgow Schools Symphony Orchestra
 Glasgow Senior Citizens' Orchestra
 Glasgow Sinfonia
 Glasgow Symphony Orchestra
 Helensburgh Orchestral Society (delete)
 National Children's Orchestra of Scotland
 National Youth Orchestra of Scotland
 NYOS Futures
 Royal Scottish National Orchestra
 RSNO Big Band
 Scottish Ballet Orchestra
 Scottish Concert Orchestra
 Scottish Festival Orchestra

Scottish Fiddle Orchestra
 Scottish Opera Orchestra
 St. James Orchestra, Paisley (delete)
 The City of Glasgow Philharmonic Orchestra
 The National Youth Jazz Orchestra of Scotland
 The RSAMD/GU Athanaeum Orchestra
 The Songs for Lovers of Swing Orchestra
 University of Glasgow Symphony Orchestral
 University of Strathclyde Symphony Orchestra
 West of Scotland Schools Symphony Orchestra
 YouthWorks Chamber Orchestra
 YouthWorks Orchestra
 YouthWorks Symphonia
 YouthWorks Wind Orchestra

Choirs

49 Choirs are currently active in Glasgow:

Academy Chamber Choir
 Aria Choir
 BA Applied Music Choir
 Call That Singing!
 Cappella Nova
 Cathures - formerly Glasgow Renaissance Singers
 City of Glasgow Chorus
 Clydebank Male Voice Choir my statement
 Cumbernauld Choir my statement
 NYCoS Dumfries Area Choir my statement
 Eastwood Choral Society
 Eurydice Choir
 Glasgow Cathedral Choral Society
 Glasgow Chamber Choir
 Govan Gaelic Choir
 Glasgow Gospel Choir
 Glasgow Hebridean Choir
 Glasgow Islay Gaelic Choir
 Glasgow Islay Junior Gaelic Choir
 Glasgow Jazz Choir
 Glasgow Jewish Choral Society
 Glasgow Lyric Choir
 Glasgow Orchestral Society
 Glasgow Philharmonic Male Voice Choir
 Glasgow Phoenix Choir
 Glasgow Youth Choir
 GU Madrigals
 Hutcheson's Senior School Choir
 Jordanhill Community Choir
 Kedron Choir
 Kentigern Ensemble
 Linn Choir
 Milngavie Choir
 NYCoS chamber choir

NYCoS National Boys Choir
 Paisley Philharmonic Choir ((My statement))
 Queer Notes (The)
 Royal Scottish National Orchestra Chorus
 Royal Scottish National Orchestra Junior Chorus
 Russian Choir (The)
 Scottish Concert Singers
 St Mary's Cathedral Choir
 University of Glasgow Chapel Choir
 University of Glasgow Choral Society
 University of Glasgow Girl Choir
 University of Glasgow Music Club Choir
 University of Strathclyde Chamber Choir
 Vocal Fusion
 YouthWorks Chamber Choir

Bands

123 Rock and pop bands
 21 Jazz Bands
 44 Traditional and folk bands
 7 Dance Acts
 31 Groups belonging to smaller or cross-over categories

Ensembles

73 instrumental ensembles feature on the database, but this includes some umbrella categories so the actual total is likely to be closer to 90.

Ailsa Ensemble
 Athenaeum Brass
 Ay' Flutin'
 BA Applied Music Guitar Ensemble
 Caledonia Brass
 Chord 'n' Blew
 Dunbartonshire Concert Band
 Duo Stewart
 Ecoute
 Enigma Brass
 Ensemble Elúcian
 Four Hands On One Piano
 The Herriet Ensemble
 Martin Hughes & John Thwaites
 Intermezzo
 Invention Ensemble
 Jack Keaney and Jean Hutchison
 Kedasuru Saxophone Quartet (Glasgow High School)
 Kelvin Ensemble
 King's Park Brass
 Lion
 The Lydian Ensemble
 Morley Duo
 The Morley String Quartet
 NCOS String Ensemble

Nevis String Quartet
 The Nielsen Wind Consort
 Paragon Ensemble
 The Pirasti Piano Trio
 The Rachmaninov Trio
 Royal Scottish National Orchestra Brass Quintet
 Royal Scottish Academy Brass Sextet
 Royal Scottish Academy Brass
 RSAMD Student Chamber Ensembles
 The Salon Orchestra
 Scottish Chamber Music Players
 Scottish Clarinet Quartet
 Scottish Ensemble
 Scottish Ensemble Quartet
 Scottish Reed Trio
 The Silver Duo
 Stanzeleit-Fenyo Duo
 BA Applied Music Brass Ensemble
 BA Applied Music Guitar Ensemble
 University of Strathclyde Concert Band
 University of Strathclyde Small Ensembles
 University of Strathclyde Small Ensembles
 University of Strathclyde Small Ensembles
 Symposia
 Syrinx
 Bambi Tavares-Chen and Julien Nathan
 Terpsichore Duo
 Thistle Brass Quintet
 University of Glasgow Brass Quartet
 University of Glasgow Contemporary Music Ensemble
 University of Glasgow Wind Band
 University of Strathclyde Concert Band
 University of Strathclyde Improvisation Ensemble
 The Wallace Collection
 West Lothian Celebrity Winds Surely not Glasgow
 YouthWorks Saxophone Quartet
 The Blind Date
 Cadell Quartet
 Cauty
 Eden Quartet
 Flauti Animati Scotica
 Glasgow String Quartet
 Glasgow Viennese Strings
 Glasgow Wind Band
 University of Strathclyde Artists Early Music Baroque Group
 University of Strathclyde Artitst Early Music Recorder Consort
 University of Glasgow Early Music Ensemble
 Concerto Caledonia

Amateur Theatricals

13 Amateur societies providing variety, music theatre and similar entertainments of different kinds.

Apollo Players
 Cecilian Society
 Celebrated Gaslight Gaieties
 Glasgow Academy Musical Theatre Arts
 Glasgow Light Opera Club
 Lyric Club
 Minerva Club
 Minerva Youth Theatre
 Pantheon Club
 Pied Piper Productions
 The Savoy Club Glasgow
 Theatre Guild Glasgow
 Theatre South Productions

Solo Performers

281 soloists are listed in GCMD
 174 are classical musicians
 34 specialised in traditional music
 28 are DJs
 20 specialised in rock and pop
 17 specialised in jazz
 8 offer miscellaneous genres including Country and Ghanaian drumming

Music Venues

GCMD lists 200 separate venues which present music regularly in Glasgow.

13th Note
 500 Club
 ABC
 Adelaides
 The Admiral
 Alliance Francaise
 The Annexe
 Arches Theatre
 Ardrossan Civic Centre
 The Glasgow Art Club
 Arta
 The Attic Bar
 Baby Grand
 Baby Grand West
 Bacchus Bar
 Bar 10
 Bar 185
 Bar Bliss
 Bar Bloc
 Barfly Glasgow
 Barony Hall
 Beanscene

Beer Cafe
 Ben Nevis Bar
 Bennets nightclub
 Blackfriars
 Blanket (formerly Bed/The Velvet Rooms)
 Blue Dog
 Bon Accord
 Borders bookshop
 Botanic Gardens
 Bourbon Street
 Box
 Braehead Arena
 Brel Bar Restaurant
 Britannia Music Hall
 Brunswick Hotel
 Buchanan Hotel
 The Buff Club
 The Burrell Collection
 The Butterfly and Pig
 Cafe Cossachok
 Capitol
 Carlibar Community Centre
 Carling Academy Glasgow
 The Cathouse
 CCA (Centre of Contemporary Arts)
 Charles Rennie Mackintosh Society Headquarters
 City Halls
 The Classic Grand
 Clutha Vaults & The Scotch Corner
 Corby Hall
 Couper Institute
 Crawford Theatre
 Cumbernauld New Town Hall
 Dixon Hall
 Downtown Bar Bistro
 Drumchapel Shopping Centre
 Eastwood Park Theatre
 Eastwood Parish Church
 The Edge Bar
 Lebowski's
 Elliots Bar
 Est Est Est
 Fernan St Centre
 Firewater
 Fury Murry's
 Gallery of Modern Art
 The Garage
 GilmorehillG12
 Glasgow Barrowland Ballroom
 Glasgow Caledonian University
 Glasgow Caledonian University Students Union

Glasgow Cathedral
 Glasgow Green
 Glasgow Hotel
 Glasgow Independent Studio
 Glasgow Royal Concert Hall
 Glasgow School of Art Students Association
 Glasgow Science Centre
 Glasgow University Union
 University of Glasgow
 Glasgow Vennel Museum
 The Goat
 Govan Old Parish Church
 Govan Town Hall: TV and film studio/ rehearsal
 Haggs Castle
 The Halt Bar
 Hardgate Hall
 Henry Wood Hall
 Hetherington Research Club
 Hillhead Baptist Church
 Hillhead Library and Learning Centre
 Houston Inn
 Hutcheson's Hall
 Hyndland Parish Church
 Ivory Blacks
 Jordanhill Parish Church
 Kelvingrove Art Gallery and Museum
 Kelvinside Hillhead Parish Church
 Kibble Palace
 King Tut's Wah Wah Hut
 The King's Theatre
 The Lane
 Langside Hall
 Lansdowne Parish Church
 Lauries
 Liquid Ship
 The Lismore
 The Loft
 McChuihl's Straight no Chaser
 McLellan Galleries
 McSorley's
 Madness
 Mas
 Merchants' House
 Metropolitan
 Michael Caines Restaurant
 Millennium Hotel
 Mitchell Library, Theatre and James Moir Hall Complex
 Molendinar Community Education Centre
 Mono
 Mugdock Country Park
 Museum Of Transport

The NACDU Arts Centre
 New Kilpatrick Parish Church
 Newton Mearns Baptist Church
 Nice N Sleazy
 O Henrys
 O'Neills
 Oko restaurant
 Old Athenaeum Theatre
 The Old Fruitmarket
 Oranmor Cultural Centre
 Orchardhill Parish Church
 Panjeas
 Partick Burgh Hall
 Partick Library
 Pavilion Theatre
 Pearce Institute
 National Piping Centre
 Pizza Express
 Pollockshaws Burgh Hall
 Pollok Community Education Centre
 Pollok Estate Library
 Pollok House
 The Polo Lounge
 Port Glasgow Town Hall
 Princes Square
 Provands Lordship
 The Quality Central Hotel
 Queen Margaret Union
 The Queens Club
 Ramshorn Theatre
 Renfield St Stephens Church Centre
 The Ferry
 Ivy
 Rockers
 Rowantree Inn
 Royal Scottish Academy of Music and Drama
 St Aloysius Church
 St Andrews in the Square - Glasgow Centre for Scottish Culture
 St Columba's Church
 St Francis Centre
 St Helen's Church
 St Luke's and St Andrew's Church
 St Margaret's Episcopal Church
 St Mary's Cathedral
 St Mungo's RC Church
 St Peter's RC Church
 Sammy Dows
 The Scotch Corner - see Clutha Vaults above
 The Scotia Bar
 Scottish Exhibition and Conference Centre
 Sherbrooke St Gilbert's Parish Church

Shettleston Hall
 Sighthill Community Education Centre
 Soundhaus Music & Dance Collective
 The State Bar
 The 78
 University of Strathclyde
 Strathclyde Students Union
 Streetlevel
 Sub Club
 The Tall Ship
 Tchai Ovna
 Theatre Royal
 The Three Judges
 Tiger Tiger
 The Brick
 Tramway
 Tron Theatre
 Tunnel
 Underworld
 Universal
 The Vale
 Wellington Church
 Platform
 Winter Gardens People's Palace
 Woodside Hall
 Woodside Social Club

Music Promoters

Chapelton Acoustic Music Club
 Glasgow Folk Club
 Glasgow Gaelic Musical Association
 Glasgow Orchestral Society
 Grand Ole Opry
 Music for Granted
 New Dawn Folk Club
 Rowantree Folk Club
 Star Folk Club
 University of Glasgow Music Society
 University of Strathclyde Music Society
 Westbourne Music
 Acoustic Affair
 Acoustic Lightbulb
 Babbity Bowster
 Big Bud Promotions
 Big Groove Promotions
 Bunkdada
 Cathouse Promotions Limited (CPL)
 Death and Taxes
 DF Concerts
 Dicelines
 Downtown Music

Drop Zone Records
 Glasgow Jazz Services
 Glasgow Music Collective
 Impel Music Group
 Jazz Glasgow
 Joy Promotions
 Kingsonic Promotions
 Peter MacCalman
 Keren McKean
 Robin Morton
 Music Makers
 PCL
 R&A Music
 The Shameful Phallic Hymn
 Slam Events
 Sound Affects Music Ltd
 Soundsfine Ltd
 Synergy Concerts
 Twisted Ape Promotions
 UZ Events
 Westbourne Music
 Ziggy's Jazz Club

Music Festivals

Glasgow supports 24 well-established festivals which have music either as their sole focus, or as a core aspect of their programming.

Castlemilk Music and Arts Festival
 Celtic Connections
 Emergenza Live Festival
 Feis Oigridh Glaschu
 Free RadiCCAls
 Glasgay Festival
 Glasgow Blues and Roots Festival
 Glasgow Fringe Festival
 Glasgow International Jazz Festival
 Glasgow Mela
 Glasgow Music Festival
 Glasgow River Festival
 Illuminate Festival
 In The City
 Inspirations Festival
 Instal
 Merchant City Festival
 MusicWorks
 New Territories
 Piping Live!
 Scottish Proms
 Sufi Festival
 Triptych
 West End Festival

Record Companies

12ft Wide Records
 Alola Ltd.
 Amoebic Productions
 Andmoresound
 Arcana Records
 Art Threat
 Babi-Yaga Records
 Beatcave Records
 Big Bang Records
 Bosque
 Buff Records
 The Buzz Group
 Catacol Records
 Celtic Voices
 Chemical Underground Records
 Consume
 Contribution Records
 Corban Records
 Cosmos Original Productions
 Creeping Bent
 Cryptic Audio
 Debunk Music Ltd.
 Dicelines
 Downtown Music
 Drop Zone Records
 Electric Honey Records
 Emoticon/Headspace
 Fenetik Records
 Five20East Records UK
 Flamingo West Records
 Flotsam and Jetsam Records
 Friendly Sounds
 GDANSK
 Geographic
 Glasgow Underground
 Green Pepper Junction
 Green Room Records Ltd.
 Iona Records
 Iridite
 JazzABelle
 Keywork Records
 Kingfisher Records
 KRL Records
 Linn Records
 Lismor Recordings Ltd
 Lost Dog Recordings
 Luna Records
 Mayker Records Ltd
 Measured Records
 Merula Productions

Micro Recordings
 Mint Blue Records
 Moon Music
 My Dark Star Records
 Neon
 Neon Tetra Records
 NGM Records
 No Half Measures Ltd.
 One Inch Punch
 One Records
 Oscarr
 Pict Records Ltd
 Play Records
 The Precious Organisation
 Products of Society
 Psychiatric Records
 Randan
 Red Monkey Records
 Rictus Records
 Rock Action Records
 Rub-A-Dub
 Sano Music
 Savalas Underground Developments
 Scotch Bonnet
 Self Destruct Recordings
 Shoeshine Records
 Solemusic Industries Ltd.
 Solipsism
 Soma Records
 The Soul Rooms/Sound Control
 Spiral Records
 Spit & Polish
 Start A Riot Records
 Sticky Music
 Trepanner Headmusic Company
 Tula Records
 UDiscs
 Under The Counter
 Underdogg Entertainment
 Vertical Records
 Wallace Brass CD Label
 West Nile Records

Music Stores

23rd Precinct
 A-One Music
 Academy of Sound
 Alba Second Hand Music
 Avalanche Records
 The Band Room
 Biggars Music

Borders Books & Music
 Carbon Music
 Classics in the City
 Drum Shop Glasgow
 Folk Revolution
 W & D Forrest
 Guitar Guitar
 The Guitar Store
 Impulse Music Travel
 Lost in Music
 McCormacks Musical Instruments & sheet music
 Merchant City Music
 Monorail Music
 Music for Granted - sheet music
 Music Zone
 Musical Swap Shop
 Southside Music
 Victor Morris
 Wesley Owen
 Zavvi

Artist Management Companies

There are 20 music management companies resident in Glasgow:

1554 Management/ Dee Bahl
 Banchory Management
 Better Days
 Bows Art Classical Music Management
 The Buzz Group
 Citybeat Management
 G R Management
 Gerry McManus Management
 Green Pepper Junction
 Mark Hughes
 Hyperactive Music Management
 Interact Management International
 Logan Arts Management
 Megalomania Management
 Pitch Perfect
 Secret Music
 Slam Events
 Symphonic Music
 Urchin Artist Management
 Westbourne Music

Economic Contribution of the Glasgow Music Sector



A study for the
Glasgow-Edinburgh Collaboration Project

March 2008

Economic Contribution of the Glasgow Music Sector

Glasgow-Edinburgh Collaboration Project

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Appendix A: SIC definitions of the creative and cultural sector

Appendix B: Definitions of the music sector

Appendix C: Productivity assumptions



Approved by: Richard Sweetnam
Position: Associate Director
Date: 25th March 2008

This output is based on and comprises both your input and information sourced from third parties (which may include public data sources). Whilst we will use all reasonable care and skill in the collection and collation of this output we cannot warrant or guarantee the accuracy of the output. You acknowledge that outputs which use empirical data and/or statistical data and/or data modelling techniques cannot be taken as a guarantee of any particular outcome and are not intended to be the sole basis of your business decisions. Our standard terms of business apply.

Introduction

In March 2008 the Glasgow-Edinburgh Collaboration Project appointed Experian to provide evidence to support the City of Glasgow's application for UNESCO City of Music status. Specifically, this included assessing the current contribution made by the city's music industry to employment, output and the wider economic development of the City of Glasgow, the Glasgow City Region and Scotland as a whole, and an examination of the opportunities that the City of Music designation presents for greater collaboration between Glasgow and Edinburgh.

The remainder of the report is structured as follows:

- Section one defines what is meant by the creative and cultural sector and highlights the contribution of the sector to Glasgow's economy and labour market;
- Section two provides a definition for the Glasgow music sector, and examines the contribution it makes to employment and output in the Glasgow economy;
- Section three considers the strategic contribution made by the Glasgow music sector to economic development, tourism, and inclusion in the city and to the goals of city collaboration;
- Section four considers the specific contribution of music events to the city, including an examination of attendance levels and visitor expenditure patterns;
- Section five provides a summary of the key research findings, and identifies areas where further analysis may be required.

1 The Creative and Cultural Sector

1.1 Definition and supply chain

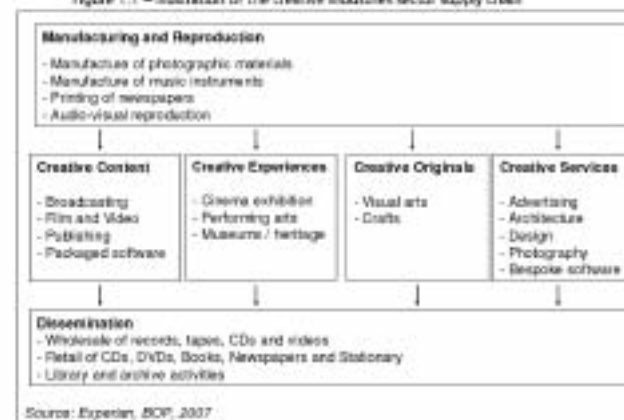
Glasgow's music industry forms part of the city's creative and cultural sector. This sector was identified as one of the eight 'spikes of high-value economic activity' in Glasgow's ten-year economic development strategy and is thus one of the strategic development priorities of the Glasgow Economic Forum.¹

This section of the report will provide an illustration of current economic trends in this sector in the City of Glasgow, in the Glasgow City Region and across Scotland as a whole.²

For the purposes of this analysis, we will define the sector based on the SIC code definition for the sector that was jointly developed by Experian and the Burns Owens Partnership as part of their 2007 study into UK-wide trends in the sector.³

As the figure below illustrates, the creative sector consists of the four distinct sub-sectors of 'creative content', 'creative experiences', 'creative originals' and 'creative services'. All of which receive support from the manufacturing and reproduction sub-sector, and from the dissemination sub-sector (a full definition of these sub-sectors, based on the 2003 Standard Industrial Classification is provided in Appendix A).

Figure 1.1 – illustration of the creative industries sector supply chain



¹ Glasgow Economic Forum (2006), *A Step Change for Glasgow – Glasgow's Ten-Year Economic Development Strategy*.

² Unless otherwise stated, the Glasgow City Region is defined as the City of Glasgow, East Dunbartonshire, West Dunbartonshire, North Lanarkshire, South Lanarkshire, East Renfrewshire and Renfrewshire Unitary Authority areas.

³ Experian and the Burns Owens Partnership (2007), *A Creative Countryside*.

1.2 Employment by industry

The table below shows the number of people employed in the creative and cultural sector in Glasgow, the Glasgow City Region and Scotland in 2006. It shows that 24,412 people were employed in the sector in Glasgow, equivalent to 6.2 per cent of the city's workforce. This is a higher share than that recorded across the wider Glasgow City Region and across Scotland as a whole.

The figures also show that the creative services sub-sector accounts for the largest number of creative industry jobs in all three areas.

Table 1.1 – Breakdown of employment in the creative and cultural sector in 2006

	City of Glasgow	City Region	Scotland
Creative Services	11,295	16,997	49,613
Creative Content	4,767	7,142	22,484
Creative Experiences	1,450	2,124	10,532
Creative Originals	4,167	6,526	18,417
Manufacturing and Reproduction	391	1,767	3,144
Dissemination	2,403	5,024	14,694
Total	24,412	39,579	118,862
Proportion of workforce	6.2%	5.6%	5.0%

Source: Annual Business Inquiry, 2006

1.3 Output by Industry

The table below provides estimates of total creative and cultural output in Glasgow, the City Region and Scotland, broken down by sub-sector. It has been calculated by applying industry productivity estimates from Experian's Winter 2007/2008 Regional Planning Service⁴ to the above employment figures.

It shows that in 2006, the sector contributed £707 million to the Glasgow economy, and £3,385 million to the Scottish economy. It also shows that the industry accounts for a higher proportion of total output in Glasgow than across Scotland as a whole.

Table 1.2 – Breakdown of output in the creative and cultural sector in 2006
(£ million, 2003 prices)⁵

	City of Glasgow	City Region	Scotland
Creative Services	359	507	1,539
Creative Content	158	238	707
Creative Experiences	34	49	238
Creative Originals	84	127	353
Manufacturing and Reproduction	15	119	205
Dissemination	58	121	343
Total	707	1,162	3,385
Proportion of total output	4.8%	4.2%	4.0%

Source: Experian, 2008 based on Annual Business Inquiry, 2006

⁴ These productivity estimates are reproduced in Appendix C

⁵ 2003 is used as a base year in order to ensure consistency with ONS National Accounts (http://www.statistics.gov.uk/downloads/theme_economy/Blue_Book_2007_web.pdf)

1.4 Employment Growth

The table below shows average annual employment growth in the creative and cultural sector between 1999 and 2006. It shows that over this seven year period, creative and cultural employment in Glasgow rose at an average rate of 3.2 per cent per annum, significantly above the growth rates recorded across the Glasgow City Region and across Scotland as a whole, and above the 1.8 per cent annual increase recorded across Glasgow's total workforce.

Within the sector, the 'creative experiences' sub-sector has experienced the most significant rate of employment growth, with providers of such experiences, including music venues, theatres, museums and cinemas taking on an increased importance in the City's labour market.

In contrast, employment in the dissemination sub-sector has fallen. This fall may be partly attributable to the emergence of competing internet based music retailers, a trend that has been cited as one of the factors that contributed to Glasgow based music retailer Fopp's 2007 move into administration.⁶

In line with the manufacturing industry as a whole, the creative and cultural manufacturing and reproduction sub-sector has experienced a decline in employment across Scotland as a whole. However, in spite of this Scotland wide decline, employment in the sub-sector increased in Glasgow over the period.

Table 1.3 – Average annual employment growth in creative and cultural, 1999-2006⁷

	City of Glasgow	City Region	Scotland
Creative Services	2.5%	2.2%	2.9%
Creative Content	4.4%	4.4%	1.1%
Creative Experiences	8.0%	7.5%	6.8%
Creative Originals	4.9%	3.4%	2.2%
Manufacturing and Reproduction	2.7%	2.1%	-7.1%
Dissemination	-1.4%	-1.5%	-0.8%
Total	3.2%	2.4%	1.6%

Source: Annual Business Inquiry, 2006

1.5 Output Growth

The table overleaf shows average annual trends in output growth in the creative and cultural sector, broken down by sub-sector. It shows that output in the sector in Glasgow grew at an average annual rate of 2.7 per cent per annum, representing a faster rate of growth than that recorded across the City Region and Scotland as a whole, and a faster rate of annual growth than the 2.5 per cent recorded across the Glasgow economy as a whole over the same period.

As with employment, the creative experiences sub-sector experienced the fastest rate of growth, while the dissemination sub-sector experienced a decline.

⁶ BBC (2007), Fopp Closes Down its 106 stores, <http://news.bbc.co.uk/1/hi/business/5022200.stm>. It should be noted that seven Fopp stores have now reopened under ownership of HMV, including the two Glasgow stores.

⁷ Figures exclude SIC-7481 : Photographic activities; SIC-7222 : Other software consultancy and supply and SIC-7221 : Publishing of software, as these codes were not added to the standard industrial classification until 2003.

Table 1.4 – Average annual output growth in creative and cultural sub-sectors, 1999-2006 (constant prices)

	City of Glasgow	City Region	Scotland
Creative Services	2.4%	2.3%	2.8%
Creative Content	3.6%	3.8%	0.4%
Creative Experiences	6.8%	5.3%	4.4%
Creative Originals	4.6%	3.5%	2.2%
Manufacturing and Reproduction	3.1%	4.7%	-5.0%
Dissemination	-1.7%	-1.8%	-0.8%
Total	2.7%	2.5%	1.3%

Source: Experian 2008, based on Annual Business Inquiry, 2008

2 The Music Sector

2.1 Definition and supply chain

For the purposes of this study, we have defined the music sector based on the definition provided by the Scottish Arts Council as part of their 2005 Feasibility Study of a proposed Scottish Music Industry Association⁵.

This definition divides the sector into five sub-sectors, each covering a different stage in the music supply chain. These are: 'creation/ music making'; 'facilitation/ business support'; 'commercialisation/ recording industry'; 'consumption/ live music' and 'education'.

Figure 2.1 – Illustration of the music sector supply chain



2.2 Total Employment

In order to quantify the size of the music industry, we have used Experian's National Business Database to identify all of the companies in Scotland that describe their business type as belonging to one of the 21 types listed in Appendix B. These types were chosen as they match most closely to the types of businesses shown in Figure 2.1. We then aggregated the numbers of employees in each of these companies to produce estimates of total sector employment.

Using this analysis, we have concluded that the music sector employs 2,022 people in Glasgow (equivalent to 0.7 per cent of all employment in Glasgow), and that just over half of Scotland's music sector workforce is based in Glasgow⁶.

⁵ Scottish Arts Council (2005), *Scottish Music Industry Association: Feasibility Study Report*, <http://www.scotlandscouncil.org.uk/resources/publications/researchandpolicy/2005/ScottishMusicIndustryAssociation/2005FeasibilityStudyReport%20.pdf>

⁶ Based on an analysis of the business base carried out on 11th March 2008

We also concluded that the music sector accounts for a larger share of creative and cultural employment in Glasgow than in Scotland as a whole.

Table 2.1 – Total employment in the music sector, 2008¹³

Employment	City of Glasgow	City Region	Scotland
Creation and Music Making	528	798	1,818
Facilitation / Business Support	114	214	466
Commercialisation/recording	92	98	188
Consumption / live music	1,848	1,805	2,184
Education	474	643	1,142
Total	2,922	3,557	5,776
Proportion of creative workforce *	12.0%	9.0%	4.9%

Source: Experian's National Business Database, Svend Brown Music Projects, 2008

* Estimates, based on 2008 creative and cultural sector employment

2.3 Total Output

Using the same approach as that described in Section 1.3, we found that the music sector currently adds £74.6 million worth of output to the Glasgow economy, and £143.4 million to the Scotland economy.

As with employment, the music sector accounts for a larger share of creative and cultural output in Glasgow than across Scotland as a whole.

Table 2.2 – Total output in the music sector, 2008 (2003 prices)

Employment	City of Glasgow	City Region	Scotland
Creation and Music Making	14.3	20.7	45.4
Facilitation / Business Support	2.9	4.9	11.3
Commercialisation/recording	2.8	3.0	6.0
Consumption / live music	42.2	44.3	52.1
Education	12.4	16.9	28.6
Total	74.6	89.8	143.4
Proportion of creative output*	18.6%	7.7%	4.2%

Source: Experian's National Business Database, Svend Brown Music Projects, 2008

* Estimates, based on 2008 creative and cultural sector output

2.4 Largest Employers

The table below provides details of the fifteen largest music businesses in Scotland in employment terms, based on our analysis of the National Business Database, supplemented with additional information provided by Svend Brown Music Projects. The table illustrates Glasgow's dominance of the Scottish music industry, showing that five of the country's six largest music industry employers are located in Glasgow.

¹³ Where the National Business Database is used for analysis, the Glasgow City Region is defined as the G, ML, PA and KA postal areas.

Table 2.3 – Key employers in the Scottish music industry

Name of Business	Location	Description	Employees
Edinburgh Playhouse	Edinburgh	Concert Halls	200
The Royal Scottish Academy	Glasgow	Music Schools	200
OT Music & Drama	Glasgow	Radio & Television Stations	125
BBC Scotland	Glasgow	Radio & Television Stations	125
Royal Scottish National	Glasgow	Musicians & Composers	120
Orchestra	Glasgow	Concert Halls	113
Glasgow Royal Concert Hall	Glasgow	Music Schools	90
The Piping Centre Ltd	Glasgow	Radio & Television Stations	75
Radio Clyde Ltd	Clydebank	Radio & Television Stations	60
Northsound Radio	Aberdeen	Radio & Television Stations	60
Radio Forth Ltd	Edinburgh	Radio & Television Stations	60
Real Radio	Glasgow	Radio & Television Stations	60
Radio North Angus Fm	Arbroath	Radio & Television Stations	60
A B C	Glasgow	Concert Halls	60
Scottish Opera Technical Centre	Glasgow	Concert Organisers	60
Motherwell Concert Hall	Motherwell	Concert Halls	60
Sound Publicity Ltd	Paisley	Music Management & Promotion	60

Source: Experian's National Business Database, Svend Brown Music Projects, 2008

2.5 Employment Growth

As the National Business Database is built around 'a snapshot in time', it is not possible to use this source to examine changes in the size of the music sector over time. However, an illustration of overall trends in the sector can be obtained by using data from the Annual Business Inquiry (ABI) to examine employment trends in the standard industrial classification categories most closely aligned to the music sector.

The table below shows that SIC9222 - Operation of arts facilities, which includes live music venues, has grown rapidly in both the City of Glasgow and the Glasgow City Region, while expanding at a more modest rate across Scotland as a whole. The reproduction of sound recordings sub-sector also grew, although there was a marked deterioration of employment in the wholesale and retail sectors.

Table 2.4 – Average change in employment numbers across the music sector, 1999 - 2006

	City of Glasgow	City Region	Scotland
9232: Operation of arts facilities	41.3%	18.1%	1.9%
2231: Reproduction of sound recording	10.1%	6.8%	5.9%
9220: Radio and television activities	- 0.6%	0.2%	1.8%
3230: Manufacture of television and radio	- 7.1%	- 1.0%	- 12.7%
3630: Manufacture of musical instruments	- 7.2%	- 5.9%	2.2%
5245: Retail sale of electrical household appliances and radio and television goods (including CDs, DVDs and videos)	- 7.0%	- 9.2%	- 5.3%
5143: Wholesale of electrical household appliances and radio and television goods and lighting	- 9.9%	- 0.3%	2.4%

Source: Annual Business Inquiry, 2006

A recent survey of 58 Glasgow music venues by Svend Brown Music Projects provides further evidence to substantiate the view that the performance element of the music sector is currently undergoing a strong expansion, reporting that 25 venues experienced an increase in employment between 2003 and 2008, while only four experienced a contraction.

Table 2.5 – Change in employment numbers at a sample of Glasgow concert venues, 2003 - 2008

Change	Number of Respondents
Growth	25
No Change	29
Contraction	4
Sample Size	58

Source: Svend Brown Music Projects, 2008

2.6 Output Growth

The table below shows average annual output growth in 4-digit SIC sub-sectors closely associated with the music industry, calculated using the same approach as that described in section 1.3.

The figures show that, in spite of strong employment growth, SIC9232 (Operation of Arts Facilities) has only shown modest growth. This may be a reflection of poor productivity growth in the industry, or may simply reflect issues around the reliability of ABI data at this fine level of granularity.

The manufacturing sub-sector has seen significant output growth in spite of a poorer employment performance. This may be a consequence of productivity improvements in these sub-sectors.

Table 2.6 – Average change in output levels across the music sector, 2003 - 2008

	City of Glasgow	City Region	Scotland
9232: Operation of arts facilities	0.2%	1.5%	4.2%
2231: Reproduction of sound recording	2.3%	- 2.7%	- 8.3%
9220: Radio and television activities	2.2%	1.3%	- 4.1%
3230: Manufacture of television and radio	2.1%	4.4%	- 2.1%
3630: Manufacture of musical instruments	7.0%	9.5%	- 0.9%
5245: Retail sale of electrical household appliances and radio and television goods (including CDs, DVDs and videos)	- 2.6%	- 7.3%	- 3.6%
5143: Wholesale of electrical household appliances and radio and television goods and lighting	- 10.5%	- 3.2%	- 0.2%

Source: Experian 2008, based on Annual Business Inquiry, 2006

3 Strategic contribution

3.1 Economic Development

The creative and cultural sector fulfils an important role as a source of employment in the Glasgow labour market, accounting for 6.2 per cent of all jobs in the city, and thus employing one in every 16 of the city's workers. Within this sector the music industry is also a key employer, employing 12 per cent of the city's creative and cultural workforce.

In addition to this role, a strong creative and cultural sector can offer a number of further benefits to city competitiveness. For example, Zukin's 1995 study on the cultures of cities¹¹ identifies three such benefits.

First, she suggests that the construction of internationally competitive cultural centres, such as concert halls, can act as a signal to the business community of a city's capability to be internationally competitive in other economic spheres, arguing that:

"who could build the biggest modern art museum suggested the vitality of the financial sector. Who could turn the waterfront from docklands rubble to parks and marinas suggested the possibilities for expansion of the professional and managerial corps"

Secondly, she argues that having a city with a strong creative tradition can allow its workers to explore and enhance their own creativity, thus 'feeding both products and innovative ideas throughout an economy'.

Finally, the development of new cultural infrastructure can help to 'create a social space for the exchange of ideas on which businesses thrive'.

In recognition of these benefits, Glasgow's ten-year economic development strategy, *A Step Change for Glasgow*, identifies the creative industries sector as one of eight 'spikes of concentrated, high value economic activity' that should be further developed in the decade ahead.

3.2 Tourism

Tourism is a significant growth sector internationally, and is identified as a priority industry by both *The Government Economic Strategy* of the Scottish Government and the *A Step Change for Glasgow* strategy.

Glasgow's *Tourism Strategy to 2016* argues that Glasgow can be classed as 'a world-renowned capital of contemporary music', citing evidence from *The New York Times* to support this argument¹².

¹¹ Zukin, S. (1995). *The Cultures of Cities*, Blackwell, Oxford.

¹² *New York Times* (16th October 2006), *The Follow-Your-Bias List*, http://nymag.com/dv/music/travel/features/index.html?_r=1&_t=0&_i=1

The strategy proposes to further develop this reputation by developing a diverse events and festivals programme and by working to enhance the city's reputation as a cultural and leisure destination.

3.3 Inclusion

In addition to the above economic development and tourism benefits, research by the Cultural Commission identifies a number of social benefits associated with a strong cultural sector¹³. These include:

- increasing confidence, creativity, human growth and transferable skills, by providing personal insight and inspiration;
- stimulating regeneration by improving communities and community pride;
- improving collaboration and teamwork, thus contributing to well-being, quality of life and health;
- improving educational attainment;
- encouraging diversionary activity and supporting crime prevention;
- increasing employability; and
- encouraging volunteering.

These benefits are as relevant to the music industry as in any other form of creative activity, and research by the Scottish Executive¹⁴ has found that students who study music at standard grade level are likely to be more confident and more employable than their peers who do not. Activities associated with UNESCO City of Music Status can, if properly designed, help to generate further improvements in each of the above areas.

In recognition of these benefits, and in acknowledgement of the Scottish Government's policy of facilitating the 'Cultural Entitlement' of all of Scotland's citizens¹⁵, Glasgow City Council have recently launched the *Glasgow Cultural Pathfinder Project* in 2007, with the objective of widening participation in music and other forms of cultural activity among disadvantaged older people and other under-represented groups.

3.4 Glasgow-Edinburgh Collaboration

The *Glasgow-Edinburgh Collaboration Project* was developed in 2006 in order to develop a joint proposition for the two cities, which will help to deliver mutually beneficial changes in connectivity, business growth and migration.

The project was jointly developed by Glasgow City Council, City of Edinburgh Council and Scottish Enterprise, and occurred as a response to the noted successes of such collaborations in other areas, including the Great Cross Border Region, connecting the Danish City of

¹³ Cultural Commission (2006), *Our New Major Enterprise – Final Report of the Cultural Commission*, <http://www.scotland.gov.uk/Publications/2006/06/161726/17302>

¹⁴ Scottish Executive (2005), *Arts and Employability – Research Findings*, <http://www.scotland.gov.uk/Publications/2005/10/111022244/1>

¹⁵ Scottish Executive (2006), *Scotland's Culture – The Scottish Executive's Response to the Cultural Review*, <http://www.scotland.gov.uk/Publications/2006/01/180911252/0>

Copenhagen with the Swedish city of Malmö and the Randstad region of the Netherlands, connecting the cities of Amsterdam, Rotterdam, The Hague and Utrecht¹⁶.

In order to deliver mutually beneficial improvements to the two cities, the Glasgow-Edinburgh Collaboration has developed a Prospectus for Action, and Glasgow's application for UNESCO World City of Music status will support the deliver of three of the actions identified in this plan, namely:

- Promoting and discussing collaborative opportunities with each city's tourism action group;
- Identifying target events; and
- Investigating how to extend benefits of major festivals and designations.

In 2004 Edinburgh was awarded UNESCO City of Literature status, and if Glasgow's application is successful, Scotland will become the only European country with two UNESCO Creative Cities in complementary disciplines.

Edinburgh's position as UNESCO City of Literature has already benefited Glasgow by providing a new platform through which to market its own Aye Wyle'book festival¹⁷, and through bring additional visitors to the City (research undertaken by Edinburgh City Council indicated that between August 2004 and July 2005, Edinburgh's festival events attracted 1.2 million visitors, 39,000 of whom spent at least one night in Glasgow¹⁸). It is likely that the award of UNESCO City of Music status to Glasgow would present similar benefits to Edinburgh.

In addition to this, the status will also present the two cities with the opportunity to stage joint musical and literary events, which could lead to further benefits of this nature. The two cities already have a strong track record in hosting joint events of this nature, for example:

- In 2006, Glasgow's Oran Mor staged 18 productions as part of the Edinburgh Festival Fringe programme;
- The Tryptych Music Festival takes place annually over three days in April, across Glasgow, Edinburgh and Aberdeen; and
- Edinburgh's Commonwealth Pool is to host the diving competition as part of Glasgow's 2014 Commonwealth Games programme.

The two cities already have an emerging collaborative relationship relating to the UNESCO designations. Board members in Edinburgh and Glasgow have a close working relationship and our consultations highlighted that while specific actions have not been agreed there are a number of potential interventions which have already been mooted.

There is a robust belief that through a twin designation the development and delivery of events of international significance will lead to significant new economic benefits in Scotland. An important element of these benefits will be manifested in maximising supply chain links between the Cities to support the existing asset base and grow new businesses.

¹⁶ Details of the collaboration benefits experienced by these two regions can be found in Gulliver, S (2008), *City Collaboration: The Future for European Urban Cooperativeness*, <http://www.locust-jackson.com/2011/01/13/09170TheCollaboration.pdf>

¹⁷ Edinburgh City of Literature (2008), *What's On – Glasgow and the West*, <http://www.cityofliterature.com/whatson/whatson-f88.pdf>

¹⁸ City of Edinburgh Council, (2006), *Edinburgh's Year Round Festivals 2004-2005 Economic Impact Study*

As time moves forward the two Cities have agreed to continue to discuss ideas and plan to develop an action plan formalising joint activities in an effort to maximise economic benefits and make best use of resources.

4 Event attendance and expenditure

4.1 Music Events in Glasgow

Musical performances form a significant part of Glasgow's economic and cultural life, and research by Svend Brown Music Projects identifies 201 music venues across the city.

Together, these venues offer an eclectic mix of musical performances, with a broad range of performances taking place in the city each day. For example, in a typical week¹⁹, the entertainment publication *The List* provided details of 127 music events taking place in the city, including 76 rock and pop events, 11 jazz events, 8 folk events, and 34 classical events. In comparison, 96 events were held in Edinburgh over this same period.

In addition to this regular flow of concerts, a number of significant festivals and one-off events take place in the city each year, including:

- **Celtic Connections** – International festival of traditional and contemporary Celtic music, held across 14 venues over two weeks every January;
- **Tryptych** – Three day festival of alternative music held every April, involving seven Glasgow music venues, plus other venues in Edinburgh and Aberdeen;
- **West End Festival** – Music and arts festival held over two weeks across a number of venues in the West End of Glasgow every June;
- **From In the Park** – Free televised concert in Glasgow Green taking place on the 2nd weekend in September as part of the UK-wide 'Last Night of the Proms' Event;
- **Glasgow International Jazz Festival** – 10 day jazz festival, taking place in June;
- **Piping Live!** – Week long festival of piping held in Glasgow Green, culminating in the World Pipe Band Championship; and
- **Glasgow's Hogmanay** – New Year celebration, including an open air concert in George Square.

4.2 Measuring Attendance

In order to estimate the total number of people who attend musical events in Glasgow during a typical year, we have categorised each of Glasgow's 201 music venues into one of nine venue types, namely:

1. Large, dedicated music venues hosting predominantly contemporary performances;
2. Large, dedicated music venues hosting predominantly classical performances;
3. Large, multi-purpose venues hosting music events;
4. Smaller, dedicated music venues;
5. Pubs, bars, clubs, restaurants and university unions staging music performances;
6. Other businesses staging music performances;
7. Churches hosting ticketed choral performances;
8. Theatres and cultural centres hosting music performances; and
9. Community centres, libraries and public halls hosting music events.

¹⁹ Thu 10th to Wed 15th March 2008

For categories 1, 2 and 3, we looked at each venue individually, and gathered data on the number of events held per year. Based on the assumptions that each of these performances would sell out, we then derived an estimate for the number of people attending performances at each venue per year.

For each of the remaining five categories, we used similar evidence to derive an estimate of typical attendance at music events, and for the typical number of events held at each venue. These were then multiplied together to produce an estimate of the number of individuals attending concerts at each type of venue per year.

A full list of assumptions is provided on the table overleaf.

Based on this analysis, we found that Glasgow's music venues attract a total of 3.43 million concert attendees per year. This is shown in the table below.

Table 4.1 – Total visits generated through music events in Glasgow

Venue	Attendance per event	Number of events	Attendance per year
Barrowlands	1,890	120	226,800
The Coring Academy	2,500	200	500,000
ABC	1,350	180	243,000
All Type 1 Venues	-	500	969,800
Royal Concert Hall	2,475	272	673,300
RSMD	231	300	69,300
City Halls	593	173	102,589
Old Fruitmarket	1,400	53	74,200
All Type 2 Venues	-	798	919,288
SECC	6,500	130	780,000
Hampden	52,000	3	156,000
Braehead Arena	5,200	2	10,400
All Type 3 Venues	-	125	946,400
Typical Type 4 Venue	100	300	30,000
All Type 4 Venues	-	1500	150,000
Typical Type 5 Venue	75	50	3,750
All Type 5 Venues	-	4150	311,250
Typical Type 6 Venue	50	12	600
All Type 6 Venues	-	552	27,600
Typical Type 7 Venue	50	15	750
All Type 7 Venues	-	330	16,500
Typical Type 8 Venue	150	30	4,500
All Type 8 Venues	-	480	72,000
Typical Type 9 Venue	50	15	750
All Type 9 Venues	-	285	14,250
Total (all venues)	-	6720	3,427,088

Source: Experian 2008, based on Svend Brown Music Projects 2008

Table 4.2 – Summary of Glasgow's performance venues

Type number	Description	Examples	Number of such venues	Attendance	Events per year
1	Large dedicated music venues hosting predominantly contemporary performances	The Barrowlands Ballroom The Cieling Academy The AGO	3	1,890 (a) 2,800 (a) 1,350 (a)	120 200 180
2	Large dedicated music venues hosting predominantly classical performances	Glasgow Royal Concert Hall RSAMD City Halls Old Fruitmarket	4	2,475 (a) 291 (a) 585 (a) 1,400 (a)	272 260 173 53
3	Large multi-purpose venues hosting music events	The SEC Hampden Park Breehead Arena	3	5,000 (b) 60,000 (a) 5,200 (a)	120 0 2
4	Smaller dedicated music venues	King Tut's Wah Wah Hut, The 13 th Note Cafe, Bar Fly, Box, Nice n' Sleazy	5	180 per venue (a)	300 per venue
5	Pubs, bars, clubs, restaurants and student unions staging music performances	The Garage, McSorley's	60	75 per venue (a)	50 per venue
6	Other businesses staging music performances	The Gilded Collection, Borders Bookshop	48	50 per venue (a)	12 per venue
7	Churches hosting isolated choral performances	Jordanhill Parish Church, Newton Meams Baptist Church	22	55 per venue (a)	15 per venue
8	Theatres and cultural centres	Oran Mor, 80 Andrews in the Square	18	180 per venue (a)	30 per venue
9	Community centres, libraries and public halls	Macbeth Library, Patrick Bligh Hall	15	58 per venue (a)	15 per venue

Source: Experian, Sound Brown Music, 2006; plus websites of RSAMD, SEC, Hampden Park and Breehead Arena

(a) – Assumes that all performances are sell-outs

(b) – Assumes all performances are sell-outs, and based on 50% of concerts in 355 capacity Academy Concert Hall, and 50% in 108 capacity Gilded Palace

(c) – Assumes all performances are sell-outs, and based on 50% of concerts in 1,208 capacity Grand Hall and 50% in 150 capacity smaller hall

(d) – Assumes all performances are sell-outs, and based on 50% of concerts in 3,000 capacity Clyde Auditorium, and 50% in 10,000 capacity Hall Four

(e) – Assumes that all performances sell to 50% capacity

4.3 Visitor Profile

The table below provides a breakdown of the home locations of people who purchased tickets for events at the Celtic Connections Festival and for events held at the Citizens Theatre.

Celtic Connections is a major, internationally marketed event, and our analysis has therefore assumed that the profile of attendees at this festival will be broadly similar to the profile of attendees at other internationally marketed events, such as those held in Type 1 to Type 3 venues.

Productions held at the Citizens Theatre tend to be marketed more towards a Glasgow and Scotland market, and we have therefore assumed that attendees at these events will have a similar profile to attendees at other Glasgow and Scotland marketed events, such as those held in Type 4 to Type 9 venues.

Table 4.3 – Geographic distribution of concert attendees, evidence from other studies

Visitor Type	% of visitors (Celtic Connections)	% of visitors (Citizens Theatre) ²²
GCC day trippers	40	48
Greater Glasgow day trippers	19	30
Scotland day trippers	24	16
Scotland overnight visitors	7	3
UK day trippers	2	1.5
UK overnight visitors	5	1.5
Overseas overnight visitors	3	0

Source: Glasgow Grows Audiences, 2007

4.4 Expenditure Attracted

The table below provides estimates for off-site expenditure in the City of Glasgow and Scotland by visitors to the Celtic Connections Festival, based on a recent impact study undertaken by Glasgow Grows Audiences.

The figures are based around the assumption that all expenditure made by Scotland based visitors and UK day trippers is captured within Glasgow itself, but that UK and overseas overnight visitors are likely to visit the concert as part of a wider trip to Scotland, and would therefore also purchase goods and services elsewhere in the country.

The figures for the City Region were calculated by Experian, based on the assumption that fifty per cent of all visitor expenditure made outside of Glasgow is absorbed by the rest of the city region.

²² Based on information provided by Glasgow Grows Audiences. Visitors travelling 0 to 9 miles used as a proxy for GCC day trippers. Visitors travelling 10 to 29 miles used as proxy for Greater Glasgow Day Trippers. Visitors travelling 30 to 99 miles used as proxy for Scotland day trippers. Visitors travelling 100 to 149 miles used as proxy for Scotland overnight visitors. Visitors travelling 150 miles or more split evenly between UK day visitors and UK overseas visitors.

Table 4.4 – Off site visitor expenditure at music events – Evidence from the Celtic Connections festival

Visitor Type	City of Glasgow	City Region	Scotland
GCC day trippers	£26.22	£26.22	£26.22
Greater Glasgow day trippers	£28.89	£28.89	£28.89
Scotland day trippers	£37.56	£37.56	£37.56
Scotland overnight visitors	£193.86	£193.86	£193.86
UK day trippers	£123.00	£123.00	£123.00
UK overnight visitors	£240.11	£271.89	£303.67
Overseas overnight visitors	£796.17	£812.49	£828.80

Source: Glasgow Grows Audiences 2007, Experian 2008

The table below shows the total expenditure impacts of the Glasgow music industry, calculated by multiplying the above expenditure figures by total attendance numbers in Table 4.1, based on the visitor profile assumptions in section 4.3.

These show that individuals attending music events spend a total of £241 million per year in the Glasgow economy, and £253 million per year in the Scottish economy.

Table 4.5 – Total off site visitor expenditure per year by attendees at Glasgow music events (£ million)

Visitor Type	City of Glasgow	City Region	Scotland
GCC day trippers	37.2	37.2	37.2
Greater Glasgow day trippers	20.7	20.7	20.7
Scotland day trippers	29.1	29.1	29.1
Scotland overnight visitors	41.9	41.9	41.9
UK day trippers	8.1	8.1	8.1
UK overnight visitors	36.2	41.2	45.7
Overseas overnight visitors	67.7	69.1	70.5
Total	240.9	247.3	253.2

Source: Experian 2008 based on Glasgow Grows Audiences 2007

5 Summary and Issues for Consideration

5.1 Summary of Key Findings

The table below provides a summary of the key research findings, showing the contribution made by the music and creative and cultural sectors to employment and output in Glasgow, the City Region and Scotland; and showing the attendance and expenditure impacts of music events held in the city.

Table 5.1 – Summary of key findings

	City of Glasgow	City Region	Scotland
Creative sector employment			
Employment in creative sector, 2006	24,412	39,579	116,882
Employment in creative sector as % of total employment, 2006	6.2%	5.0%	5.2%
Average annual employment growth in creative sector, 1999 - 2006	3.2%	2.4%	1.8%
Creative sector output			
Output in creative sector, 2006 (£ million, 2003 prices)	707	1,162	3,365
Output in creative sector as % of total output, 2006	4.9%	4.2%	4.0%
Average annual output growth in creative sector, 1999 - 2006 (constant prices)	2.7%	2.5%	1.3%
Music Sector employment			
Employment in music sector, 2006	2,922	3,557	5,776
Employment in music sector as % of creative employment, 2006 *	12.0%	9.0%	4.9%
Music Sector output			
Output in music sector, 2006 (£ million, 2003 prices)	24.6	88.6	143.4
Output in music sector as % of creative output, 2006 *	10.6%	7.7%	4.2%
Event attendance and spend			
Total number of music events held in Glasgow per annum	8,726	-	-
Total attendance at music events in Glasgow per annum (thousands)	3,427	-	-
Total expenditure at music events in Glasgow per annum (£ million)	241	247	253

Source: Experian 2008 based on Glasgow Grows Audiences 2007 and Spend on Music Projects 2008

* Estimates, based on 2006 creative and cultural sector employment

In addition to these quantitative benefits, the sector also helps to support the wider economic development commitments of the Glasgow Economic Forum, adds value to the tourism brand of the Glasgow-Edinburgh area, and serves as an effective medium for social inclusion activity.

5.2 Issues for further consideration

5.2.1 Understanding the sector's contribution

While a detailed assessment of the net economic impacts of the sector is not within the remit of this study, it will be important to ensure that the issues of leakage, displacement and multipliers are taken cognisance of when discussing the impact of the sector, in particular:

- **Deadweight** – While this analysis accounts for expenditure made by visitors to Glasgow who attend music events, it is unable to distinguish between those individuals for whom the event was the sole reason for visiting Glasgow or Scotland, and those for whom attending the event was only part of the reason for visiting, and who would have visited regardless of whether or not the music event took place.
- **Leakage** – It should be noted that some of the people employed in Glasgow's music industry may commute to the city from other parts of the City region. Also, some of the output produced within the city's boundaries may be produced by non-Glasgow based businesses. Therefore, some of the benefits described above may 'leak out' to areas outside of the city. Conversely, the creative output of Glasgow-based recording artists will not be captured by this analysis if it is produced outside of the city boundaries.
- **Displacement** – It may be the case that individuals who attend music events in Glasgow choose to do so instead of undertaking some other form of leisure activity such as eating out or going to the cinema. Expenditure in the Glasgow music sector may therefore 'displace' activity in the city's catering and leisure sectors. Similarly, it may be the case that, by choosing to work for Glasgow music businesses, some of the sector's employees may forego an opportunity to work for other Glasgow based businesses outside of the sector, therefore reducing the productive potential of these non-music businesses.
- **Multipliers** – The benefits described in this analysis could be thought of as the 'first iteration' benefits. The analysis does not account for further 'knock-on' benefits created due to:
 - Expenditure by Glasgow music sector employees and employees of other businesses serving concert audiences, within the local economy; and
 - Purchases of supplies made by Glasgow music sector businesses and by other businesses serving concert audiences within the local economy.

5.2.2 Maximising the benefits of UNESCO Status

Should Glasgow succeed in acquiring UNESCO World City of Music designation, it will be important to develop a detailed action plan to identify and pursue opportunities to use the designation as a tool for greater Glasgow-Edinburgh collaboration, social inclusion activity and tourism promotion.

Appendix A

SIC definition of the creative and cultural sector

CREATIVE SERVICES	4-digit	Share
Advertising	7440 Advertising	100%
	7412 Market research	
Architecture	7420 Architectural and engineering activities	50%
Design	7437 Other business activities NEC	50%
Photography	7491 Photographic activities	100%
Interactive media & software services	7322 Other software consultancy and supply (inc. web page design)	100%

CREATIVE CONTENT	4-digit	Share
Broadcasting	6020 Radio & TV activities	100%
Film & video	6011 Motion picture production	100%
	6012 Motion picture & video distribution	100%
	6022 Other recreational activities NEC	50%
Publishing	2211 Publishing of books	100%
	2212 Publishing of newspapers	100%
	2213 Publishing of journals and periodicals	100%
	2214 Publishing of sound recordings	100%
	2215 Other publishing	100%
	7240 Database activities inc. online publishing	100%
	6240 News agency activities	100%
Packaged software (inc. leisure software)	7221 Publishing and development of non customised software	100%

CREATIVE EXPERIENCES	4-digit	Share
Cinema exhibition	9213 Motion picture projection	100%
Performing arts	9292 Operation of arts facilities	100%
	9294 Other entertainment activities NEC (e.g. dance halls, dance instructors)	100%
Museums & heritage	9252 Museum activities and preservation of historical sites & buildings	100%
	9293 Botanical and zoological gardens and nature reserves	100%

CREATIVE ORIGINALS	4-digit	Share
Visual arts and crafts	9251 Other artistic and literary creation and interpretation	100%
	5248 Other retail sale in specialised stores	50%

MANUFACTURING INPUTS	4-digit	Share
Manufacturing	3404 Manufacture of photographic chemical material	100%
	3030 Manufacture of musical instruments	100%
	3298 Manufacture of TV & radio receivers, sound or video recording or reproducing apparatus & associated goods	100%
	3229 Manufacture of television and radio transmitters and apparatus for line telephony and line telegraphy	50%
Reproduction	2221 Printing of newspapers	100%
	2231 Reproduction of sound recording	100%
	2232 Reproduction of video recording	100%
	2233 Reproduction of computer media	100%

DISSEMINATION INPUTS	4-digit	Share
Wholesale	5143 Wholesale of records, tapes, CDs and videos, and of the playback equipment, and lighting	50%
	5147 Wholesale of photographic goods, musical instruments and other household goods	50%
Retail	5245 Retail sale of electrical household appliances and radio and television goods (inc. CDs, DVDs, videos)	50%
	5247 Retail sale of books, newspapers and stationery	50%
Rental	9251 Library and archive activities	100%
	7140 Renting of personal and household goods NEC	50%

Source: Experian, BCP, 2007

Appendix B

Definitions of the music sector

Thomson Business Type Label Definition (used in size of industry analysis)

Creation Musical Instruments Manufacturing Musical Instruments and Sheet Music Musicians and Composers Recording Studios Recording Equipment Rehearsal Studios and Facilities
Facilitation Music Management and Promotion Musical Instrument Repairs and Servicing Acoustic Engineers Acoustic Consultants
Commercialisation Music Publishers Record Companies Record, Tape and CD Wholesale and Manufacturing Record, Tape and CD Manufacturing
Consumption Music Shops Concert Organisers Record, Tape and CD Wholesale Radio and TV Stations Concert Halls and Performance Venues (supplied by Glasgow Growe Audience)
Education Music Schools Music Teachers
Source: Experian 2008 based on Scottish Arts Council, 2005

SIC code definition (used in sector growth analysis)

SIC Code	SIC description
2214	Publishing of sound recordings
2231	Reproduction of sound recordings
3290	Manufacture of TV and radio receivers, sound or video recording or reproducing apparatus and associated goods
3690	Manufacture of musical instruments
5143	Wholesale of records, tapes, CDs and videos, and of playback equipment and lighting
5147	Wholesale of photographic goods, musical instruments and other household goods
5245	Retail sale of electrical household appliances and radio and television goods (inc. CDs, DVDs, videos)
9220	Radio and TV activities
9232	Operation of arts facilities
9234	Other entertainment activities not elsewhere classified

Source: Espenari, 2008

Appendix C

Productivity assumptions (2003 prices)

SIC codes	Industry description	1999			2000			2009		
		Glasgow	GGR	Scotland	Glasgow	GGR	Scotland	Glasgow	GGR	Scotland
1, 2 and 3	Agriculture, Forestry & Fishing	£21,892	£19,040	£18,629	£18,888	£22,582	£28,904	£23,258	£25,750	£27,982
11	Oil & Gas Extraction	£21,256	£22,086	£24,607	£17,241	£21,890	£21,102	£16,518	£14,280	£10,290
16, 12, 13 and 14	Other Mining	£42,817	£40,590	£43,809	£71,429	£59,589	£55,541	N/A	£52,129	£40,977
15 and 16	Food, Drink & Tobacco	£35,903	£33,637	£32,765	£35,215	£42,633	£43,897	£44,991	£43,919	£42,589
17, 18 and 19	Textiles & Clothing	£42,124	£44,073	£45,171	£64,786	£85,381	£58,268	£69,307	£68,170	£60,431
20	Wood & Wood Products	£18,408	£16,524	£17,805	£29,786	£29,979	£28,711	£26,621	£29,984	£28,177
21 and 22	Paper, Printing & Publishing	£42,108	£42,390	£43,443	£42,326	£42,479	£43,131	£45,908	£44,139	£44,945
23	Food Processing	£71,429	£54,595	£54,993	N/A	£111,111	£79,808	N/A	£69,999	£93,095
24	Chemicals	£52,136	£54,077	£52,764	£99,317	£91,925	£97,494	£92,692	£95,432	£93,073
25	Rubber & Plastics	£29,742	£29,576	£29,729	£42,794	£43,082	£42,169	£42,219	£42,040	£42,147
26	Metals	£28,544	£27,987	£28,703	£44,194	£42,633	£42,503	£45,101	£42,762	£42,629
27 and 28	Metals	£37,801	£36,482	£37,339	£36,339	£36,223	£38,705	£37,801	£37,599	£36,029
29	Machinery & Equipment	£34,820	£34,175	£35,273	£35,088	£34,940	£36,345	£35,442	£35,779	£37,040
30, 31, 32 and 33	Electrical & Optical Equipment	£58,473	£56,719	£59,540	£68,679	£60,657	£71,338	£71,802	£73,675	£70,015
34 and 35	Transport Equipment	£37,374	£37,596	£36,827	£44,807	£45,474	£44,734	£45,671	£46,255	£45,440
36 and 37	Other Other Manufacturing	£16,224	£16,291	£17,308	£24,645	£25,071	£24,201	£23,898	£23,961	£22,916
40 and 41	Gas, Electricity & Water	£133,060	£124,868	£135,970	£200,954	£208,192	£200,094	£183,070	£192,327	£191,782
42	Construction	£28,418	£29,620	£28,909	£32,536	£33,427	£32,358	£33,438	£33,389	£33,086
43 and 44	Wholesaling	£32,657	£32,580	£32,590	£35,640	£35,411	£34,840	£37,758	£37,470	£36,982
45	Retailing	£17,542	£17,170	£17,237	£18,237	£19,080	£18,192	£18,918	£18,764	£18,889
46	Hotels & Catering	£17,818	£17,487	£17,898	£14,848	£16,989	£16,238	£14,892	£14,989	£15,389
47, 48, 49 and 50	Transport	£32,875	£32,584	£32,148	£41,262	£40,585	£48,215	£44,192	£43,990	£43,217
51	Communications	£28,881	£29,142	£28,267	£92,802	£91,372	£91,218	£71,967	£69,987	£69,989
52, 53 and 54	Banking & Insurance	£48,829	£48,783	£47,163	£97,839	£99,935	£98,798	£76,988	£75,470	£76,732
55, 56 and 57	Business Services	£24,529	£23,917	£24,715	£27,991	£27,337	£28,707	£28,748	£28,947	£30,699
72 and 74	Other F&E	£47,301	£47,147	£48,225	£47,202	£47,271	£47,844	£58,591	£59,633	£51,489
75	Public Admin. & Defence	£36,957	£35,349	£34,354	£36,607	£35,944	£34,528	£36,303	£37,384	£36,081
80	Education	£36,817	£30,789	£38,103	£26,159	£25,239	£25,208	£26,738	£26,815	£25,677
85	Health	£32,503	£32,075	£21,892	£22,730	£22,359	£22,308	£23,725	£23,285	£23,182
90, 91, 92 and 93	Other Other Services	£37,458	£27,086	£27,029	£23,381	£22,911	£22,598	£25,311	£24,010	£24,454

Source: Experian's Regional Planning Service, Winter 07/08



