

7.0 OVERALL HIGHLANDS AND ISLANDS ECONOMIC IMPACTS

The economic impacts calculated for each LEC area in Section 6 above are aggregated below to the whole of the HIE area.

7.1 Events and Exhibitions

The Events and Exhibitions analysis, Tables 7.1(a) and 7.1(b), is given inclusive and exclusive of Eden Court respectively, and represents an aggregation of Tables 6.1.1 to 6.1.10 for the individual LEC areas. In terms of total audience/visitor numbers, Eden Court accounts for 10% of all identified activity in the Highlands and Islands, and in terms of total box office/entry fees it accounts for 26%.

Table 7.1(a)
Artistic Events and Exhibitions in the Highlands and Islands, Oct 1999-Sept 2000
(inclusive of Eden Court Theatre)

Art Form	No. of Events/ Performances	Total Audience/ Visitors	No. of Tourists	Total Box Office/ Entry Fees
Classical Music	221	35,280	8,413	232,483
Traditional Music	2,296	281,042	79,537	966,616
Other Music	1,972	298,201	72,155	1,138,745
Dance	141	15,919	2,877	111,824
Drama - Professional	435	87,364	20,297	636,985
- Amateur	981	146,638	39,529	523,709
Childrens Events	142	15,386	2,435	48,517
Poetry/Readings	148	8,614	2,164	28,542
Cinema	1,286	73,474	9,225	208,566
Mixed Events/Festivals	44	9,295	3,939	37,663
Exhibitions (days)	31,614	664,839	406,328	119,131
Total (Incl. Exhibitions)		1,636,052	646,899	4,051,781
Total (Excl. Exhibitions)	7,666	971,213	240,571	3,932,650

Table 7.1(b)
Artistic Events and Exhibitions in the Highlands and Islands, Oct 1999-Sept 2000
(exclusive of Eden Court Theatre)

Art Form	No. of Events/ Performances	Total Audience/ Visitors	No. of Tourists	Total Box Office/ Entry Fees
Classical Music	202	25,730	6,559	133,007
Traditional Music	2,272	270,992	77,527	896,292
Other Music	1,909	271,317	66,778	903,074
Dance	122	6,210	945	21,300
Drama - Professional	336	37,890	10,402	191,440
- Amateur	971	139,986	38,531	483,367
Childrens Events	105	6,220	600	13,770
Poetry/Readings	145	7,720	1,985	22,160
Cinema	683	57,567	6,044	164,762
Mixed Events/Festivals	42	7,600	3,600	34,500
Exhibitions (days)	31,254	644,839	402,328	119,131
Total (Incl. Exhibitions)		1,476,071	615,299	2,982,803
Total (Excl. Exhibitions)	6,787	831,971	212,971	2,863,672

7.2 Overall Economic Impacts

The employment impacts in Table 7.2 below are inclusive of Eden Court Theatre, and were calculated by aggregating Tables 6.2.1 to 6.2.10 for the individual LEC areas.

Table 7.2
Annual Employment Impact from Arts Activity in the Highlands and Islands

	Direct Employment (fte's)	Total Employment (incl. indirect and induced) fte's
Arts venues and galleries	297	445.5
Individual artists	460	690
Teachers and tutors	358	573
Recording; musical instruments, publishing, etc	70	105
Arts officers, etc	54.5	88
Arts holidays; misc.	46	69
Tourist-related (externalities)	161.5	243
Totals	1,447	2,214

The aggregate employment impacts in Table 7.3 below are again inclusive of Eden Court Theatre, and are calculated from Tables 6.3.1 to 6.3.10. These impacts relate broadly to the year October 1999 to September 2000.

Table 7.3
Aggregate Employment Impact in the Highlands and Islands

	Direct fte's	Fte's inclusive of the multiplier
(i) Artists, events, officials, etc	1,285.5	1,965.5
(ii) Voluntary venue impacts	1.5	2
(iii) Externalities from tourist visits	161.5	243
(iv) Externalities from visiting performers	12.5	19.5
(v) Creative content industry	161	282
Totals	1,622	2,512

As defined for the purposes of the study, the arts support more than 1,600 direct full-time equivalent jobs, equating to approximately 2,500 full-time equivalent (fte) jobs (direct, indirect and induced) including multiplier effects. 18% of this total is attributable to venues and galleries; 27% to work by individual artists; 23% to arts-related teachers and tutors; 10% to the spending of tourist visitors to events and exhibitions other than at the venue but attributable to the visit, 11% to the creative content industry, and 11% to other impacts.

10% of the overall direct employment impact represents “externalities” from visitors to the area, rising to approximately 26% (415 fte's) if the tourism component of visits to arts events and galleries (averaging 40% of all such visits) and arts holidays are added, and if an allowance of 25% is added for the tourism component of the work of individual performing and visual artists.

Comparisons with 1991 impacts, as far as these are possible, are provided in Section 9 below.

The 2,512 fte jobs attributed to the arts in the Highlands and Islands above represent 1.8% of the estimated 137,526 fte's in the area.*

This compares, for example, with 2,412 fte jobs generated by salmon farming in the Highlands and Islands in 1996, as calculated in a study by PACEC for HIE and The Scottish Office (inclusive of supplier and induced multiplier effects, but exclusive of downstream processing).

7.3 Unquantified Impacts

A further category of impact that we have not been able to quantify in our study is the role that a thriving artistic community, be it the city of Inverness or a small island, has in attracting people to move to the Highlands and Islands to start businesses, to augment the skilled labour supply, to help maintain population levels in fragile areas, or to retire. Indeed people in each of these categories, including the retired, often in turn strengthen the local arts community through part-time artistic work, providing voluntary input and, perhaps, starting new initiatives or providing business expertise that helps in devising fundable arts development projects.

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* calculated from 1999 data on full and part-time employment, and 1991 data on the self-employed.