

10.0 COMPARISONS WITH OTHER AREAS

10.1 Introduction

In order to explore potential comparisons between the degree and value of arts activity in the Highlands and Islands and other areas, a number of reports that have been produced over the past five years were reviewed - some national, some regional; some on the arts as a whole and some on specific sectors. None, however, are directly comparable, and there are two key reasons for this:

- Other analyses are generally more broad-based in the activities that they cover.
- No other impact studies of which we are aware are based on as high a degree of “bottom up” data gathering.

A report in 1999 commissioned by the Scottish Cultural Agencies from Michael Quine (City University, London) emphasised the inadequate nature of statistical information on the sector, both for Scotland and the UK, and included a range of recommendations for improving this in the future.

More recently, a major report produced by the Policy Studies Institute in July 2001, “The UK Cultural Sector : Profile and Policy Issues”, was very critical of the quality of public statistics available to assess the impact and value of cultural activity in the UK. Official data are described as “broad brush, and of little use in building up a picture of specific areas of cultural activity”.

As discussed in Section 2 above, the categories of activity for this Highlands and Islands study were tightly drawn. In particular, crafts and cultural facilities (such as museums) were excluded, and these tend to provide a relatively large number of jobs within the broad cultural sector in rural and urban areas respectively. Other studies on arts and culture tend to include activities such as these that support relatively large numbers of jobs, and, if based on Census of Population or Employment data, may also include (for example) sports facilities, where the employment data cannot be disaggregated at the spatial level being analysed. Indeed, official sources often cannot provide figures for even the broad arts or cultural sectors for areas with small total populations such as the Highlands and Islands. Also, retailing (e.g. of music) is often included in arts impact studies. Significantly higher employment impacts would have been found in this Highlands and Islands study had all retailing of books and records been covered (including the major stores).

As noted elsewhere in this report, much arts-related employment in the Highlands and Islands is part-time or casual, and a visual artist, musician, writer, etc, who earns money from their arts activity will often have a full-time job in another field, a pension, or working spouse to support their artistic interest. These people will not tend to be picked up through analyses of Census returns, income tax or VAT returns, etc, not least because their income is often undeclared for tax purposes. This also applies to a proportion of the tourism businesses (eg. B&B's) that gain economic benefit from the overnight stay and other spending of tourist visitors to events and exhibitions. In aggregate, these part-time workers represent a substantial proportion of the full-time equivalent jobs estimated as arts-related in the Highlands and Islands.

The part-time nature of much artistic work is not unique to the Highlands and Islands, although our research suggests that it is relatively prevalent. A Socio-Economic Study of Artists in Scotland for the SAC by the University of Glasgow found that 40% of the artists surveyed earned less than 10% of their income from their principal artistic activity in 1994/95, and 65% earned less than 50%.

10.2 Attendance at Arts Events and Exhibitions

A report by System 3 for the SAC (July 1998) provides useful benchmark figures for Scotland. From the figures on attendance at different types of events provided in the report, it is possible to compute approximately how many times per year people attend the categories of event and exhibition that broadly match those covered by our Highlands and Islands study. Excluding cinema from the analysis (as this was only covered partially in our Highlands and Islands study), Scottish adults (aged 18 plus) attended an average of 4.5 events and exhibitions per person per year.

Our Highlands and Islands study gives an average of approximately 2.6 attendances per year by the population as a whole within the Highlands and Islands. If attendances at arts events and exhibitions by Highlands and Islands residents outwith the area are taken into account (eg. concerts in Glasgow or Edinburgh) and if the Scottish average is adjusted downwards to include young children in the per head base, it would appear that the results of our study mirror fairly closely the national pattern.

Particular events in small communities in the Highlands and Islands can attract very high proportions of the local population, but the opportunity to attend are far more limited than in a city where a range of alternatives is available daily. Ticket prices are generally cheaper in the Highlands and Islands, but it is rare for star names to perform in the Highlands and Islands (other than occasionally at Eden Court).

The System 3 survey included 150 interviewees from the Highlands and Islands, and the following characteristics of their attendances were found:

	Highlands and Islands	Scottish Average
	(%)	(%)
<u>Cinema</u>		
Never attend	49	32
Attend 2+ times per year	39	57
<u>Musicals</u>		
Attend 2+ times per year	16	23
<u>Rock/Pop Music</u>		
Attend 2+ times per year	20	23
<u>Folk/Traditional Scottish Music</u>		
Never attend	47	75
Attend 2+ times per year	35	12
<u>Contemporary Painting</u>		
Never attend	66	75
Attend 2+ times per year	23	12
<u>Country and Western Music</u>		
Never attend	74	85

These statistics illustrate the interest in the Highlands and Islands in traditional and country and western music, the opportunities to see contemporary painting in galleries, and the limited opportunities to attend cinema (in most parts of the area), rock/pop music concerts, and musicals.

10.3 Local Authority Expenditure on the Arts

Levels of expenditure by Highlands and Islands Local Authorities on the arts are relevant to a number of aspects of this report, as well as being a determinant of arts-related employment in as far as such expenditure is incurred on direct employment.

An annual survey by the SAC and COSLA provides comparative details of spending on the arts by Local Authorities in Scotland. Revenue expenditures per capita for the most recent year for which figures are available are summarised below.

	Per Capita Revenue Expenditure (£) (1998/99)
Argyll and Bute	6.74
Comhairle nan Eilean Siar	no return
Highland	5.03
Moray	3.90
Orkney	5.12
Shetland	24.27
Scottish Average	7.02

Expenditures by all of the Local Authorities bar Shetland are below the national average per head of population. Shetland Isles Council makes by far the highest level of expenditure per head of Scottish Local Authorities. Generally, relatively high expenditures are made by the cities with substantial arts facilities to support - Glasgow (£15.72), Edinburgh (£14.38), Aberdeen (£11.78), and Dundee (£9.79). Edinburgh and Glasgow City Councils jointly account for 68% of the grant expenditure to arts organisations made by Scottish Local Authorities (included in the above figures). Within the Highlands and Islands, Highland Council's spending of £726,477 in 1998/99 is significant - Eden Court Theatre receiving a high share of this.

As an illustration of the reductions in Local Authority arts support since re-organisation referred to elsewhere in this report, Highland Council's expenditure of £1.05 million on the arts in 1998/99 compares with total expenditure by the Highland District Councils, plus the Regional Council of £1.45 million* in 1994/95 (unadjusted for inflation). Direct provision expenditure (including arts officers) fell from approximately £500,000 to approximately £300,000.

* Caithness District did not submit figures for 1994/95, and its 1992/93 total was instead used.