

# GROWING THE VALUE FOR MUSIC TOURISM IN GLASGOW



## RESEARCH REPORT AND PROMOTIONAL PLAN

*By Dougal Perman, Tim Wright and Fay Young with contributions and support from the collaborative research team and Glasgow's music industry*

***“Glasgow is the European capital of music!”***  
**Swedish delegate to the Music Tourism  
Convention, Liverpool February 2017**

Glasgow is a world-class, world-renowned, world city of music.  
Now we just need to tell the world.

This document presents a research report and promotional plan for developing Glasgow’s music tourism potential. Our proposals are based on new findings of original research, fresh assessment of existing research, consultation and analysis.

This work on behalf of Scottish Enterprise and Glasgow Life is by a collaborative team lead by creative consultancy Inner Ear.

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# Contents

<b>Chapter 1: Executive Summary</b>	<b>4</b>
<b>Chapter 2: Introduction</b>	<b>7</b>
<b>Chapter 3: The Current State of Music Tourism in Glasgow</b>	<b>10</b>
Economic Value	10
Tourist Perceptions	15
Survey Overview and Analysis of Survey Data	16
Music Mystery Shopper Comes To Glasgow	18
Key Infrastructure	21
Constraints	24
<b>Chapter 4: Opportunities For Growth</b>	<b>29</b>
<b>Chapter 5: Potential Interventions</b>	<b>31</b>
<b>Chapter 6: Recommendations</b>	<b>36</b>
Brand Optimisation	36
Advocacy	38
Twinning	39
Maps and Routes	41
Storytelling	42
Signposting	43
Branded Areas	44
Discoverability	45
<b>Chapter 7: Conclusions &amp; Next Steps</b>	<b>46</b>
<b>Chapter 8: Appendices</b>	<b>48</b>
Music Mystery Shopper Exit Interview	48
Case Studies	53
Grassroots Venue Value Research Methodology and Data	65
Catalogue of Glasgow Music Assets	68
Music Tourist Survey Questions and Responses	70

# Chapter 1: Executive Summary

Glasgow's music scene is rich in opportunities for growth. Round table discussions reveal great enthusiasm for collaborative enterprise to develop potential to benefit the city economy. But there are obstacles to overcome. Here is a brief summary of findings, constraints, opportunities and recommendations.

## Economy

- Music tourism in Glasgow accounted for an estimated **£105M in 2015** sustaining **1,141 full time jobs** from **449,000 music tourists**, according to a recent UK report.<sup>1</sup>
- Our new research suggests this **underestimates** the contribution of smaller venues (under 1,500 capacity). Our findings indicate a possible **further £54.7M spending in Glasgow grassroots venues**.
- Total value contributed by **live music attendance in Glasgow is £159.7M**.

## Perceptions

- Glasgow's **musical culture is highly regarded** in the UK and abroad.
- The **UNESCO City of Music badge is poorly used** and largely unrecognised.
- There is scope to encourage visitors to **stay longer and spend more by capturing their interest** in the wider musical culture: developing clusters, maps and digital resources.

## Assets

- Extraordinarily rich and **varied music 'ecosystem'** of venues (concert halls, clubs, pubs, cafes), record shops, recording studios, visitor attractions record labels, instrument shops and makers.
- World renowned venues including the Barrowland Ballroom, King Tut's Wah Wah Hut and the Sub Club.
- Sites of historical interest and **heritage** (eg Britannia Panopticon).
- **Strong brands** such as UNESCO City of Music and Celtic Connections which could be further exploited.

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<sup>1</sup> [http://www.ukmusic.org/assets/general/Wish\\_You\\_Were\\_Here\\_2016\\_Final.pdf](http://www.ukmusic.org/assets/general/Wish_You_Were_Here_2016_Final.pdf)

## Constraints

- Lack of accommodation, although more capacity is under construction.
- Licensing laws which are restrictive by international comparison.
- Limited promotion outside Scotland.
- Obstacles to collaborative working in Glasgow.

## Opportunities for Growth

- **Increase visitor numbers** and prolong their stay, **increasing the average spend**. The relatively low proportion of visitors to Glasgow from elsewhere in the UK or from abroad offers opportunity for growth.
- There is **spare capacity** in most venues, providing room for growth without incurring additional costs.
- Our consultations reveal enthusiasm for collaborative working to maximise potential: hotels are hungry for content to use when serving their customers.
- Targeted marketing: hospitality has a potential customer base, but we **need to know more** about where visitors come from, their needs, wants and interests.

## Potential Interventions

- City festivals, music trails and branding – case studies from the US, Iceland, France and the UK show how large and small economies can use music tourism to **greatly increase visitor numbers and spending**.

## Recommendations

Innovative marketing and creative collaboration can enhance Glasgow's reputation, increase visitors and encourage them to stay longer and spend more. Possibilities include:

- Promoting “existing brands” – music venues and events – to a wider audience
  - To increase the amount people spend on these existing brands.
- Creating new brands, such as “**music districts**” to highlight diversity
  - To create another visitor attraction with minimal outlay and without building new infrastructure.
- Inviting Glasgow's music stars to become **advocates** for the city
  - To showcase what is on offer to followers of those stars.

- **Twinning** Glasgow with other global music cities for mutual benefits
  - To create reciprocal promotional opportunities.
- Enhancing information exchange through a collaborative system of data capture and dissemination
  - To grow the audience for music activities and add value for hospitality customers.
- **Mapping routes** – expand on popularity of walking, riding and virtual tours to lead visitors through the city’s music heritage
  - To introduce visitors to new places and experiences and provide more opportunities to spend.
- **Storytelling** – use powerful narratives of city’s musicians and music professionals to bring stories to life
  - To create promotional hooks that can be used in social media engagement and media relations.
- **Signposting** – make it easier for visitors to find their way around the city, go further and stay longer
  - To deepen engagement with the city and encourage people to make new discoveries and spend more time and money.



## Chapter 2: Introduction

***“We are a live music city. That can be the RSNO doing Mahler or it can be someone jamming in a pub. Or buskers. We need a narrative that’s inclusive and can comfortably encompass all of that. Glasgow can be proud of all of that.”***

**Janette Harkess, Royal Conservatoire of Scotland**

The tender for this piece of work from Scottish Enterprise asked for a plan:

***“to help us move from a strategic overview of music’s importance to the city to providing insights and deliverable actions to maximise the opportunities and address the key challenges in the city.”***

The insights in this report are based on original qualitative and quantitative research, a review of existing evidence, and consultations with professionals in the music and wider tourism industry.

Our quantitative research included:

- Relevant parts of the Wish You Were Here 2016 report, undertaken by Oxford Economics on behalf of UK Music;
- New analysis of the value of grassroots music venues (those with less than 1,500 capacity) to Glasgow’s music tourism
- A survey of attitudes and opinions about Glasgow and its music scene.

Qualitative research included:

- Two round table discussion workshops with industry professionals
- Case studies of key people and organisations in Glasgow’s music offering
- A music “mystery-shopping” critique of the city’s music scene by a music industry professional from Berlin

By gaining a clear picture of the current state of Glasgow music tourism we can identify options for growth which are deliverable and quantifiable, and within the capacity of the sector.

## Wish You Were Here, UK Music 2016

In 2015 Glasgow's live music scene contributed £105M to the city's economy with 1.4M attendance, of which 449,000 (32%) were music tourists.<sup>2</sup> According to Oxford Economics (who conducted the research on behalf of UK Music), this activity sustains 1,141 full time jobs.

This excellent report by one of the UK's most respected economic consultancies offers sound methodology for assessing the value of music tourism. However, it has limited applicability in a city like Glasgow because it only considers venues with capacities greater than 1,500. This undervalues the economic impact of music tourism in Glasgow, which is so rich in musical diversity and range. In particular, it overlooks what the Music Venue Trust calls "grassroots music venues." Glasgow has many cafes, bars, smaller venues and clubs with capacities from the tens up to 1,500, but their economic contribution is not captured by the methodology utilised by Oxford Economics in the Wish You Were Here 2016 report. (In this study we use the term "grassroots venue" to describe any venue with less than 1,500 capacity. These are explored in the next chapter).

By gathering data from grassroots venues we draw attention to Glasgow's extraordinarily rich musical ecosystem. It is a hidden asset, but this diversity has measurable impact on the city's ability to build on the value more visibly created by the larger venues.

**Our new research** uses an adaptation of the Oxford Economics methodology in the Wish You Were Here report. We now estimate the value of grassroots venues. This offers important additional benefits:

- A. A more complete assessment of the value of Music Tourism to the Glasgow economy providing a benchmark for measuring future growth;
- B. A sense of the existing industry's ability to grow based on current capacity;
- C. Recommendations that can be properly integrated with the widest aspects of the Glasgow music industry;
- D. A way of calculating the potential value which might be created from it;
- E. A benchmark model which can calculate potential economic impact flowing from the changes brought about by various interventions.

Our findings are outlined in the next chapter. Data tables and methodology are detailed in the appendices.

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<sup>2</sup> [ukmusic.org/assets/general/Wish\\_You\\_Were\\_Here\\_2016\\_Final.pdf](http://ukmusic.org/assets/general/Wish_You_Were_Here_2016_Final.pdf)

## Opinion Survey

What do people think of Glasgow as a music city and as a place to visit? How does it compare with other music cities? To find out we designed a survey and commissioned market research specialists IBP to conduct interviews with prospective visitors in Inverness, Aberdeen, Newcastle and Manchester. Results and analysis are presented below.

Context and colour are added in case study interviews with key personnel in:

- The Hydro
- Glasgow Music City Tours
- Glasgow Taxis
- Crowne Plaza
- Royal Conservatoire of Scotland
- Bar Bloc
- Glasgow Audiences

In each case study we explore what music means to Glasgow as a city, the role it plays in people's life and work and how that might influence tourism.

## Industry Consultation

It is crucially important to involve industry in Glasgow in this report's proposed interventions and recommendations. To gain their insight and ensure that their voice is heard and acknowledged, we invited people from different aspects of music, tourism and culture to two discussion workshops. We have used key points from the workshop in this document. (Minutes from the meetings are included as an appendix.)

To see ourselves as others see us, we invited a "mystery music shopper" to Glasgow. Pieter Stoaling is a music industry professional who lives and works in Berlin. He joined us for a long weekend to experience a selection of what Glasgow has to offer musically and compare the experience with Berlin. An exit interview is included in the appendices and recommendations appear in the relevant chapter below.

***"There are no people on the streets handing out flyers, which you do get in Berlin..."***

**Pieter Stoaling**

## Chapter 3: The Current State of Music Tourism in Glasgow

*“Music is a big part of the city now. It’s good for hotels, restaurants and it’s certainly good for taxis.” Stephen Flynn, Glasgow Taxis*

We are not starting from nothing. And there are ambitious plans for growth. Between now and 2023, Glasgow’s Tourism and Visitor Plan aims to attract: “One million additional overnight visits to Glasgow, contributing to 6,600 new jobs and delivering an associated spend of £771M”.

Music is one of four key strategies being employed to achieve this goal, along with Charles Rennie MacIntosh, Contemporary Art and Heritage.

Glasgow music’s vitality and integrity is part of the city’s DNA. In our discussions with public sector and music industry professionals we found a consensus:

*“Little to nothing needs done to further stimulate musical activity in Glasgow, but more could be done to promote it and encourage people to visit the city and enjoy its music scene.”<sup>3</sup>*

### Economic Value

Each year UK Music survey the economic impact of music tourism. In the Wish You Were Here 2016<sup>4</sup> report they found that music tourism generated a spend of £3.8Bn by 10.4M music tourists to the UK in 2015. Scottish-specific data shows a total spend (comprising both direct and indirect spending on music tourism) of £295M. They estimate 3,230 full time jobs are sustained by music tourism in Scotland.

In Glasgow total spend was £105M with music tourism sustaining 1,141 full time jobs. Total live music audience attendance in 2015 in Glasgow was 1.4M, of which 32% (449,000) were music tourists. **Glasgow contributes 3% of UK live music spending.** Greater Glasgow has a population of 1.2M<sup>5</sup>, 2% of the UK population of 65.6M<sup>6</sup>.

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<sup>3</sup> Paraphrased from comments made during both of our round table workshop industry consultations.

<sup>4</sup> [ukmusic.org/assets/general/Wish\\_You\\_Were\\_Here\\_2016\\_Final.pdf](http://ukmusic.org/assets/general/Wish_You_Were_Here_2016_Final.pdf)

<sup>5</sup> [understandingglasgow.com/indicators/population/trends/trends\\_within\\_glasgow\\_clyde\\_valley](http://understandingglasgow.com/indicators/population/trends/trends_within_glasgow_clyde_valley)

But the value of music tourism comes from multiple sources and goes beyond Box Office receipts. Whilst ticket sales and on site spending at venues is significant (and the mainstay of the venues) travel, accommodation and off site spending all make a significant contribution to the economy. This helps sustain a wider ecosystem of services – both giving to and gaining from music tourism in the city.

Two important points:

1. To grow the value of music tourism we must either **increase gross numbers of music tourists** or **increase what they spend** – or a **combination of both**.
2. We must consider the **capacity** and **opportunity** for the music sector (venues and supporting services) to respond to and **support this potential for growth**.

These two points influence the recommendations we make.

Of the music tourists who visit Glasgow, we can only estimate the proportion who stay overnight. The city has good rail and road links to other parts of Scotland – it is easy to get into the centre, but equally easy to leave. A key aim of any strategy must be to increase the proportion of overnight stays.

Although Wish You Were Here 2016 focuses only on venues of 1,500 capacity or more, it does include some topline data from the Music Venue Trust about the contribution of grassroots venues to UK music tourism. In 2016 there were 5.6M total audience visits to UK small music venues, generating £231M. Music tourist visits to small venues numbered 1.4M, of which 135,000 (9.64%) were from overseas.

Music Venue Trust defines<sup>7</sup> grassroots venues as:

- Being thought of as such by musicians and audiences
- Having a focus on cultural activity
- Being a music business, run by music experts
- Taking risks with its cultural programme
- Serving as a beacon of music and key generator of the night-time economy
- Existing harmoniously within its local community

To get a more complete picture of the economic situation in Glasgow, we conducted our own survey of grassroots venues. Our methodology is contained in the appendices. But, in brief, to make the data suitable for inclusion with the wider Wish You Were Here data we based our core approach, where possible, on the methodology and definition models used by Oxford Economics in the wider UK report.

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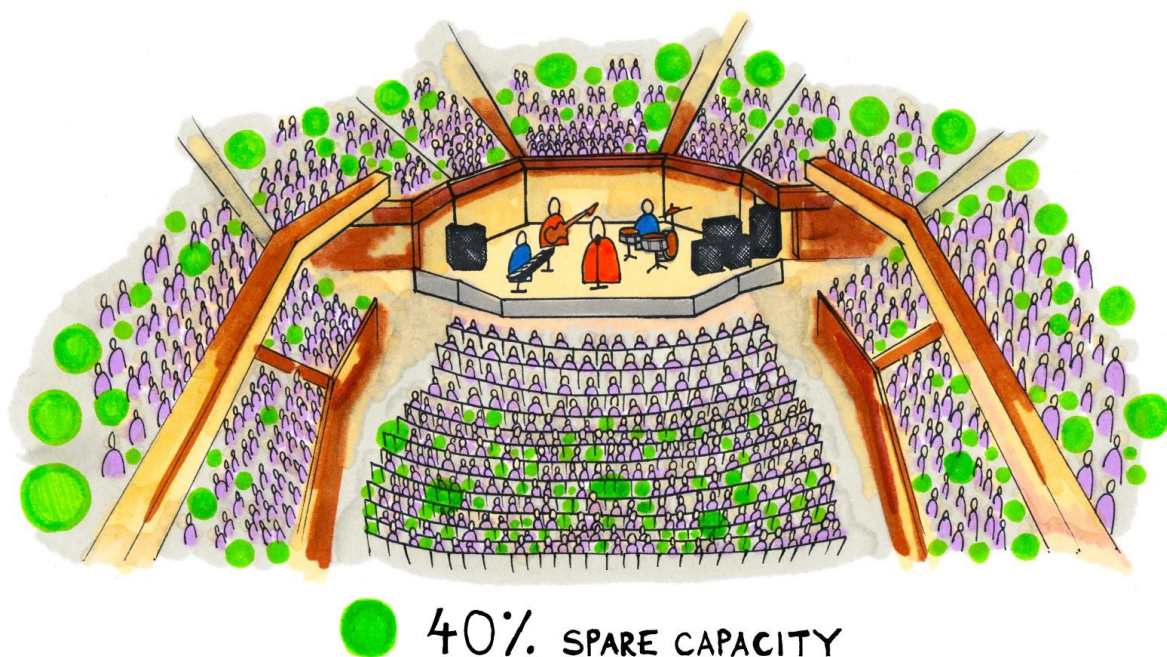
<sup>6</sup> [ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/](https://ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/)

<sup>7</sup> [musicvenuetrust.com/wp-content/uploads/2016/09/Defining-Grassroots-Music-Venues.pdf](https://musicvenuetrust.com/wp-content/uploads/2016/09/Defining-Grassroots-Music-Venues.pdf)

We drew up a list of 43 dedicated music venues in Glasgow, comprising both large scale and smaller – grassroots – venues (sometimes multiple venues are contained within one larger establishment). Many are privately owned and run, some are municipal. We counted 32 venues with capacities of less than 1,500 (therefore not included in Wish You Were Here). We asked these venues for data, on the understanding that we would aggregate it and treat individual submissions confidentially.

### *Findings indicate room for growth without extra cost*

The average capacity of grassroots venues in Glasgow is c.442. Utilisation (i.e. percentage attendance of capacity) is just under 60% (about 57%). Number of events per annum is c.175. Domestic tourist attendees number c. 20% with c. 10% of attendees using accommodation.

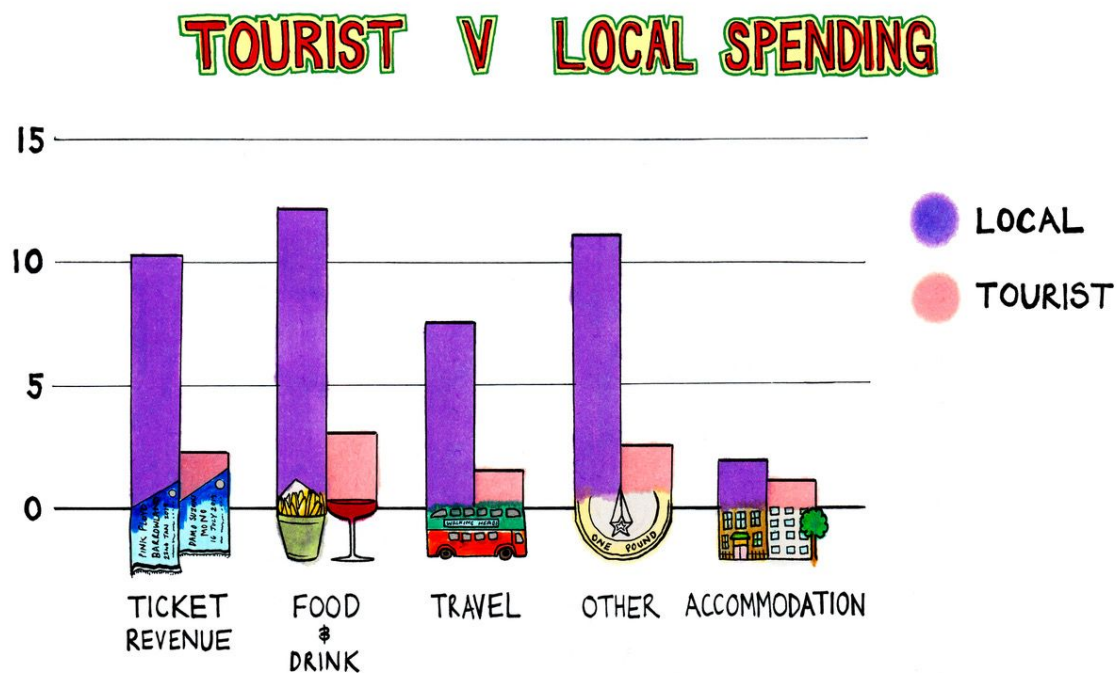


These figures suggest 1.4M people per annum attend music events in grassroots venues in Glasgow, 282K of whom were tourists (thus 1.1M were local attendees). We estimate that 28K tourists stay one night and 141K locals stay overnight (people who live far enough away from the venue to warrant the occasionally overnight stay in town).

We calculate that gross value of attendance at grassroots music venues is £54.7M. Of that, £11.4M is contributed by domestic, UK-based (predominantly residing in Scotland or the north of England) music tourists.



Our research indicates that total ticket revenue is £12.7M, £2.5M by tourists and £10.2M by locals. On site spending on food and drink is £15.5M in total, £3.1M by tourists and £12.4M by locals. Travel spending is £9.5M in total, £1.9M by tourists and £7.6M by locals. Accommodation spending is £2.8M in total, £1M by tourists and £1.8M by locals. And off site ancillary spending is £14.1M in total, £2.8M by tourists and £11.3M by locals.



If Wish You Were Here data from 2015 (presented in the 2016 report) is still accurate today, the total value contributed by live music attendance in Glasgow is £159.7M (£105M mainstream plus £54.7M grassroots).

Understanding the economic contributions of both large scale, mainstream (above 1,500 capacity) and small, grassroots, venues (below 1,500 capacity) enables us to calculate the anticipated results of the interventions that we propose later in this document.

***“Marketing has to be carefully balanced. It needs to let the music breathe, to keep it authentic and grassroots. That’s the scene.***

***That’s what brings music tourists to the city.”***

**Fiona Shepherd, Glasgow Music City Tours**

## Tourist Perceptions

What are we like? To gauge perceptions of Glasgow from prospective visitors, we commissioned market research specialists IBP to conduct a survey. They set out to interview 200 people, 50 each in Aberdeen, Inverness, Manchester and Newcastle. We only received 30 interviews from Manchester because of the terrorist attack at Manchester Arena.

Responses offer some surprising and unexpected insight. But one thing is clear. Glasgow is second only to London in the overall UK league table of music cities.



<sup>8</sup> Word cloud based on opinions of Glasgow from our survey (see question information), generated with wordclouds.com

## Survey Overview and Analysis of Survey Data

We encourage you to read out detailed analysis, survey questions and complete data sets, which are included in the appendices of this report. But first, an overview. The survey finds that Glasgow is a well-recognised music city, well thought-of throughout the UK, particularly so in Scotland. As a tourist destination it offers visitors a range of perceived attractions including its vibrant music scene, pubs and as a retail centre.

Existing key anchor venues with major acts are already a significant attractor for music tourists and play an important role in bringing groups of visitors to stay in the city. Glasgow is blessed with a great diversity of established smaller venues which have scope for significant expansion using only their existing facilities. This diversity of the music scene in terms of venue type and genres is an important strength. It creates opportunities to identify and signpost “clusters” or musical areas within the city. This would, the survey suggests, make powerful and attractive incentives to encourage tourists to explore these areas more deeply extending both their stay and spend.

Survey data indicates that, maps, social media and personal recommendations from locals and ambassadors could all signpost, guide and enhance the uptake of music clusters if established in the city. The currently poorly recognised UNESCO World City of Music badge might represent an underused opportunity to develop this idea.

### Key Findings

- When asked to describe Glasgow, the most commonly used word is “Good”.
- 87% of respondents were positive about Glasgow’s music scene.
- Pubs are associated with live music, indicating grassroots importance.
- Glasgow’s music scene is recognised as being “Scottish” and “Diverse”.
- People are willing to travel, and stay away, to see live music.
- The following attractions would entice visitors (in order of preference):
  - Gig in a well-known venue; Specific visitor attraction; Designated music area; Guided city tour; Distinctive record/music shops; App based tour
- When it comes to music in UK cities, Glasgow is second only to London.
- 89% of respondents do not know about Glasgow’s UNESCO status.

## Conclusions

- Glasgow has a **well recognised and strongly regarded musical culture**. It is seen as a “good” place to visit and known for its shops. The music scene is known for key venues and the pub and club scene and is viewed as diverse.
- The **UNESCO badge is poorly used** and largely unrecognised as part of the music culture or scene.
- Majority of respondents are attracted to travel to a city in large part to see **a major act at a recognised venue**.
- There is an opportunity to encourage these visitors to **stay longer and spend more by capturing their interest** in the wider music culture.
- Developing **areas or clusters with a particular reputation for music** could be an attractive way to realise potential of the rich musical culture. The idea seems attractive to music tourists – particularly in the AB and C1 categories.
- Music tourists could make good use of a multi-functional **music map**. This could be integrated with social media, providing recommendations and enabling group activity given that this is the most popular mode of visiting – ostensibly this might be presented as an app or online guide, (easy to use, despite the relatively unpopular response to that question).
- There may be **cross-selling opportunities** when integrated with shopping.
- Glasgow is an attractive place to visit, and to explore the music culture has strong appeal, particularly with AB and C1 Categories.
- Empowering “local” representatives to act as **ambassadors for the local music sector** could be an effective way of guiding tourists to explore further.

***“How about a walkway of Glasgow’s music history starting from The Hydro, perhaps? You could link the venues – Barrowland at one end of the Clyde, O2 [Academy] at the other.”***

**Debbie McWilliams, SEC Head of Live Entertainment, Ticketing and Sales**

Music Mystery Shopper Comes To Glasgow

*“You don’t get that in Berlin. In Glasgow you go to the bar and the bartender starts talking to you and having an interested conversation with you. That’s nice, you know, really friendly. It’s more conducive to an atmosphere that you want to be in rather than ‘here, have your drink, pay your money, go back to your seat.’”*

Pieter Stoaling, Berlin mystery shopper

Pieter Stoaling, who has worked for record labels and run clubs and gigs as a party promoter, works for Native Instruments in Berlin. With his partner Maria and their son Pau, he came to Glasgow for a long weekend to explore Glasgow music. He found a friendly welcoming city and plenty for the whole family to do, but also some interesting differences with Berlin.

Over a four day stay (Friday 21—Tuesday 25 April), which included Record Store Day, Pieter visited Mono, Barras Art and Design Centre, CCA, Nice ‘N’ Sleazy, King Tut’s Wah Wah Hut, Berkeley Suite and Bar Bloc.

Listed below are differences Pieter found between two great music cities. For a full account of Pieter’s visit see the interview recorded by Dougal Perman in the appendix.

BERLIN	GLASGOW
Good public transport throughout the city	Quick (15 mins) and easy to get from airport to city
Taxis more expensive	Taxis cheap around city – just £5 from Merchant City to Anderston
Eating and drinking much cheaper	Food and drink much more expensive.
In a bar a pint of beer costs €3 But you can buy a pint for 90¢ in the	A round of drinks for four people is £20. “That would do four people all night in

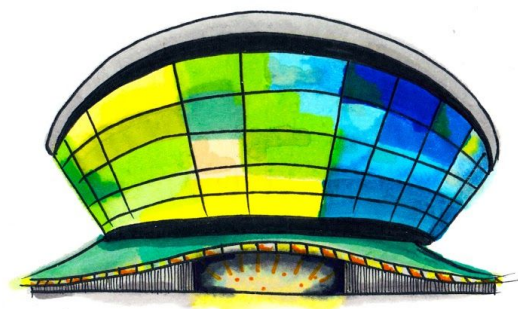
<p>street. Socialising outside is easier in general and that is good for the music scene, with free gigs in the park for example.</p>	<p>Berlin!” You can’t drink outside in Glasgow [unless it is within a licensed area] so outdoor socialising is more constrained.</p>
<p>A bigger city, has more venues, seasonal pop-ups especially during summer.</p> <p>A more dominant subculture of electronic music. Sometimes it feels like techno is everywhere.</p>	<p>Much more variety. Famous venues – like King Tut’s, Sub Club, Barrowland – known to German music tourists like Pieter. But many discoveries – like Nice ‘N’ Sleazy – to be made in exploring the indie band scene.</p>
<p>Very different culture, much more relaxed. Venues open longer – operating on 72 hour cycle – so there’s no need to rush. People drink and do ‘get smashed’ but don’t go out ‘to get smashed’. “Alcohol is an accompaniment rather than a priority.”</p>	<p>Because of different licensing laws things happen a lot earlier.</p> <p>“A lot of interesting things are happening at the same time so you have to pick A or B instead of going to A first and then B.” So the market is split. Alcohol is more of an issue in Glasgow.</p>
<p>Venues, bars and restaurant may seem less friendly.</p> <p>The ‘Berliner Schnauze’ (aloofness) can be perceived as unfriendly. “You don’t have conversation at the bar unless the bartender knows you.”</p>	<p>[on welcoming staff in Mono, CCA and Nice ‘N’ Sleazy] “The people here are really nice, relaxed, friendly. You don’t get that in Berlin...</p> <p>It’s not just younger, single people going out in the evenings [in Glasgow], it’s families, young people, older people, huge variety of people for a big variety of programming. It’s good.”</p>
<p>More posters and flyers than Glasgow. Buying tickets is easier.</p> <p>Good listings though visitors might have difficulty finding underground events.</p> <p>Online guides.</p>	<p>Buying tickets is often frustrating. No user-friendly app. No online guides. No one-stop shop. Listings are erratic. Fewer posters since the city clamped down on flyposting – but also fewer displays in bars and cafes. “There are no people on the streets handing out flyers either. Which you do get in Berlin. And even in the venues, the flyers weren’t prominently positioned.”</p>

***“That’s a real shame because if you’re a visitor to the city, that’s what you see. And if you’re a foreign visitor to the city, maybe you don’t have the internet on your phone so posters [and flyers] might be the first point of information you have.***

**Pieter Stoaling**

### **Conclusions**

- Glasgow is **easy to get to** and access.
- Getting around is **straightforward** and **cost-effective**.
- Eating and drinking is **more expensive than Berlin**.
- The **music scene** in Glasgow is **strong, vibrant** and **diverse**.
- Glasgow’s **people are an asset**. They are **welcoming and friendly** and also make **energetic, enthusiastic audience** members.
- Grassroots “below the line” **publicity materials**, especially posters and flyers, **are scant compared to Berlin**.
- Clear **need for an online guide** for listings and ticketing.



## Key Infrastructure

What does Glasgow have to offer music tourists? A lot, it seems. Or it certainly has a lot of potential in its key infrastructure. Here we have compiled a list of valuable assets that can be plotted on a map, promoted and served to music tourists. See the appendices for a full list.

### *Venues*

There are 43 venues in Glasgow that we consider to have music at the heart of their programming, or where music makes a significant contribution to their programming.

### *Music bars, pubs and cafes*

In addition to the dedicated venues, music plays an important role in many of Glasgow's pubs, bars and cafes, either as live music or with named DJs. This is not an exhaustive list, but we did identify 35 notable establishments around the city.

### *City Festivals*

Glasgow is host to a diverse selection of city music festivals. The biggest is Celtic Connections (more of which in the recommendations chapter). Then there is the World Pipe Band Championships and Piping Live! And the TRNSMT rock festival was a new addition in 2017. Niche and underground festivals include Glasgow Jazz Festival, the West End Festival, the Southside Festival, Electric Frog, The Riverside Festival, Counterflows, Sonica and the Tenement Trail.

### *Record shops*

Changing retail trends have hurt record shops considerably, but Glasgow does still have a number of specialist and high street music outlets. There are 12 record shops in and around Glasgow, each with something to offer locals and visitors alike.

### *Instrument Shops and Instrument Makers*

People come to Glasgow to buy and repair original and new musical instruments too. There are 16 notable shops and instrument makers with shop fronts.

### ***Recording and rehearsal studios***

## ***Places to make a noise are an important part of any music scene.***

Music tourism provides the potential for service providers to become visitor attractions. We counted 13 significant recording and rehearsal studios in and around Glasgow. Visiting artists may require somewhere to rehearse or record. Or they may be interested to visit because of the history or heritage of the studios (learning about the bands who have rehearsed in Berkeley or recorded in Chem 19, for example).

### ***Record Labels***

While music tourists may not normally be able to visit record labels in Glasgow, they are part of the cultural mix of the city's music scene. Established labels like Soma, Chemikal Underground, Numbers, Lismor and Linn are complemented by new ventures such as Last Night From Glasgow and DIY/self-releasing projects.

Local labels do get together at independent record fairs which take place from time to time in venues like the Barras Art and Design Centre and SWG3. They are often part of the club and gig scene and feature in stories told on walking tours by the likes of Glasgow Music City Tours and Walking Heads.

### ***Sites of musical historical interest***

Some of the greatest venues in Glasgow exist now only as museums – like the infamous Britannia Panopticon, one of the world's first music halls, which played host to debut appearances by Harry Lauder, Stan Laurel and Carrie Grant – or have been completely replaced by new buildings, like the legendary Apollo, which took up the whole block where Cineworld now resides. These sites, and many more, are assets to Glasgow's music scene and play an important role in the city's rich music heritage. They feature in guided tours conducted by Glasgow Music City Tours (see the case studies appendix) in music history blogs and on virtual tours by Walking Heads.

### ***Education***

Educational establishments are part of the story too. The Royal Conservatoire of Scotland has produced many famous musicians over the years. It is now rated in the top three performing arts schools in the world (see the case studies) and is a draw for

longer-term visitors in the form of foreign students who then attract visits from family and friends. In addition to distinctive classical music, RCS has specialisms in jazz and traditional music, which are complemented by the National Piping Centre – a global centre for excellence in the music of the bagpipes – and the College of Piping. And many musicians and music industry practitioners have passed through the universities, Glasgow School of Art and Stow College – now part of City of Glasgow College. The work of these institutions is augmented by hundreds of music teachers and community music groups around the city which, while they may not be a draw for visitors per se, do form part of the fabric of the music scene, and industry, in Glasgow.

## People

People Make Glasgow, and our survey data bears this out. Perhaps the city's strongest asset when promoting any part of its culture, in respect to music, people include musicians, industry professionals and, of course, the fans.

***“What I loved about it was that people just wanted to sing – that’s a great Glaswegian trait...”<sup>9</sup>***

**Leo Moran, Saw Doctors**

Glaswegian audiences are legendary the world over. In the interviews one recurring theme is the vibrancy, energy and enthusiasm of the Glasgow crowd. When The Who played The Hydro in April 2017, Pete Townshend and Roger Daltrey were visibly moved by the response of the audience. Referring to politics Daltrey said, “we don’t care what you do, Glasgow, we love you!” Townshend added, “we don’t have to come here, you know. We come here because we f— love it!”<sup>10</sup>

## Status

Glasgow has the accolade of being a UNESCO World City of Music. But this award, and the status it bestows, has not been utilised effectively. Our survey found that very few know about it. During our first workshop the music industry professionals around the table agreed we should all be proud of the award and celebrate it. The Royal Conservatoire of Scotland has made a big deal of the fact it is rated the third best performing arts school in the world. Glasgow could do a lot more to celebrate and even revel in its status as a world city of music.

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<sup>9</sup> <http://www.walkingheads.net/leo-anto/>

<sup>10</sup> Experienced by Dougal Perman at The Hydro, 07/04/17

***“What is it? What does it mean? There’s the importance of that conversation visitors have in a taxi from the airport. You’ve got ten, 15 minutes and very chatty taxi drivers. What do they sell in terms of the things that make Glasgow special? I would very much like if RCS and the UNESCO City of Music, were part of that conversation. Along with ‘you get the best curry in the world and you can do this and you can do that... because they are, and we are, unique selling points of the city’***  
**Janette Harkess, Royal Conservatoire of Music**

## Constraints

What obstacles do we need to overcome? We identify four main constraints: accommodation capacity; licensing laws; how the mainstream relates to the underground; and obstacles to joined up working.

### ***Accommodation Capacity***

Anecdotally we have heard that Glasgow has a shortage of hotel rooms. New hotel property construction projects around the city support that claim. Visit Scotland’s Scottish Accommodation Occupancy Survey Annual Report 2015 puts hotel room occupancy in Glasgow at 79%<sup>11</sup>, meaning there is some capacity. In our workshop and roundtable discussions we learned that Glasgow hotel room occupancy is currently 85%. However, those figures are an average across the year. From the 2015 report data, Glasgow has the second highest occupancy rate in Scotland, with only Edinburgh beating it at 82%. Edinburgh has twelve festivals throughout the year, and is especially busy during August and around Christmas and Hogmanay. In terms of music events Glasgow is most likely busiest during Celtic Connections (January) and the World Pipe Band Championships (August).

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<sup>11</sup> [visitscotland.org/pdf/Visit%20Scotland%20Ann%20Report%202015.pdf](https://visitscotland.org/pdf/Visit%20Scotland%20Ann%20Report%202015.pdf) (page 14)

***“We can’t be complacent. When you are doing well, that’s the time you challenge your city”.***

**Round Table Workshop 1 (April 2017)**

If hotel rooms are scarce during times of year when we have the opportunity to attract more visitors, then we do need to increase the number of available beds. Building additional hotels will help to complement the existing hospitality trade offering, self-catering (including Airbnb) and hostels.

***“Don’t forget, if it’s an act with a large cast then you might have a crew of 150 and they have to stay somewhere and they’ll come the day before and leave the day after.”***

**Dominic McVey, General Manager Crowne Plaza**

In preparation for our second round table discussion workshop (held in October 2017) we learned that Glasgow will have 1,000 new hotel beds from 2018. This presents a challenge for hoteliers who will face more competition to sell beds in their hotels. The music tourism strategy in Glasgow tells us people can be attracted to the city, and to individual hotels, by the music scene. And it presents an opportunity for venues, promoters and music practitioners in terms of an extended captive audience to which they can market their events and activities.

***“The hospitality trade sometimes don’t know what is going on in the city in terms of venues and events that could attract tourists. When people come to Glasgow, they don’t come to see the inside of a hotel bedroom, they want to explore what the city has to offer.”***

**Round Table Workshop 2 (October 2017)**

## **Licensing**

Visiting Glasgow from abroad may be a culture shock. Off licences cannot sell alcohol after 10pm, bars close at midnight and clubs shut at 3am. Visitors from other music cities may be disappointed by Glasgow's rigid licensing laws. We are not suggesting changing municipal or national policy, but perhaps more could be done to manage expectations.

***“The nighttime industry in Glasgow isn't as strong as it could be, it isn't as strong as other cities. We only have a 2am licence because we're outside the city boundaries. These are challenges we face, a venue at the forefront of dance music.”***

**Round Table Workshop 1 (April 2017)**

Restricting times when it is possible to buy alcohol does not stop people from drinking, it just pushes them into different situations. One result of Glasgow's licensing laws is the vibrancy of the after-party scene. Gig goers and clubbers do not go home when the venues close. They continue in people's homes and at unofficial party locations, such as warehouses. While this culture brings other issues – unwanted noise and health and safety concerns – it has inspired scenes. One could argue that some of the city's greatest musical exports, like Slam, Optimo, Jackmaster and Franz Ferdinand, would not enjoy their status and recognition without the after-party scene. “Going back to people's houses and bonding over music is a big part of Glasgow's club culture and how electronic music has developed here,” said Richard Chater, co-founder of the Numbers record label, in an article in The Guardian<sup>12</sup>.

However, visitors to the city may feel excluded if the crowd at a club or venue goes on somewhere else to which they are not invited.

***“When people come to Glasgow, they do not come to see the inside of a hotel bedroom but want to explore what the city has to offer.”***

**Round Table Workshop 2**

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<sup>12</sup> [theguardian.com/travel/2017/jun/15/alt-city-guide-to-glasgow-bars-clubs-restaurants-galleries](https://www.theguardian.com/travel/2017/jun/15/alt-city-guide-to-glasgow-bars-clubs-restaurants-galleries)

### ***How the mainstream relates to the underground***

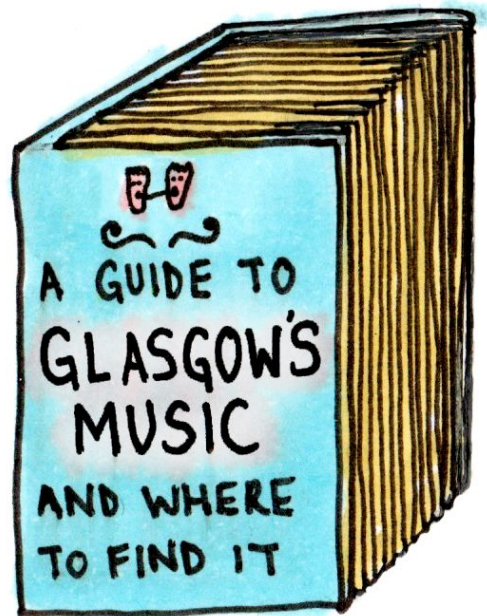
After parties are the epitome of the underground culture that contributes to Glasgow's world-renowned alternative music scene. But promoting it is tricky. Like the observer effect in physics, even the act of examining the underground could change its nature.



The mainstream is easier to understand and promote. Shows at The Hydro, concerts at Glasgow Royal Concert Hall and city festivals are straightforward to market. By contrast, gigs at Nice N Sleazy, clubs at La Cheetah and the after party scene are part of the city's musical DNA but their kudos is fragile. Not that the underground cannot be promoted, however. The internationally renowned club night, record label and DJ duo Optimo tour the world but are still loved at home. In the same Guardian piece about the Glasgow scene, Keith McIver (aka JD Twitch from Optimo), remarks: "There is something in the Glasgow mentality. People aren't good at promoting themselves, but it'd be nice if they were a tiny bit more ambitious. There's nothing wrong with doing something amazing that reaches a lot of people. It's not selling out."

***"SWG3 and the Sub Club do a great job at this. We need to be mindful that underground needs to be underground and that is how that scene want it to remain. They have no desire to be attached to the mainstream. Underground promotes itself and I guess the best part that we can play in that respect is making sure they have the support needed to continue to be creative."***

**Round Table Workshop 1**



### *Obstacles to Joined-up Working*

***“Is there scope to have artists performing in hotels as a pre-gig promotion, opening up smaller gigs and venues to tourists?”***

#### **Round Table Workshop 2**

Our round table discussions showed enthusiasm for collaborative working to optimise the potential of Glasgow’s music economy. There is an appetite for working together for mutual benefit – on both the industry side and on the supporting and ancillary service side. But there was also general recognition that better information exchange and collaboration would be beneficial – its absence is a challenge.

***“We tend to rely on social media communication but there’s nothing to beat face to face meeting. We’ve achieved more in two hours of real life talking than we could two months of tweeting.”***

#### **Round Table Workshop 2**

## Chapter 4: Opportunities For Growth

Glasgow enjoys a strong position as a music tourism destination yielding considerable economic returns to the city and the wider Scottish economy. How can we identify opportunities to preserve and grow this aspect of the city's economic activity and what interventions could have a role to play?

Growth will come from increasing the number of tourists; encouraging them to spend more during their visit; or ideally both. Any recommended intervention should seek to deliver an uplift on either one or both of those variables.

Our work with the music industry for this report provides evidence that the sector has the capacity to develop on the basis of existing resources. It also highlights opportunities to create greater capacity. This needs to be done by addressing issues within the sector itself. Some factors are beyond the control of the music industry – transport, accommodation, licensing etc – but addressing them may produce new opportunities to develop the sector.

Our survey offers excellent insight into current perceptions of the city as a music tourist destination. It also reveals opportunities to enhance that by: building additional awareness; challenging perceptions or factors which might discourage music tourists or creating a more integrated offer.

***“It probably needs a more joined up approach. Perhaps there's some kind of fund where everyone contributes for the benefit of all, not just Glasgow but people who are responsible for the output of music across Scotland.”***

**Debbie McWilliams, SEC Head of Live Entertainment, Ticketing and Sales**

**Increasing numbers of music tourists:** further work needs to be done to identify where existing visitors come from, to identify where locally-targeted marketing campaigns might be undertaken to increase flows from existing locations – either by attracting new tourists from that location or encouraging repeat visits. This work would also identify gaps where we might seek to attract new visitors from places not yet making the trip to Glasgow.

**Increasing visitor spend:** the models we have employed split the spend into several categories – box office, travel, accommodation, onsite spend and offsite spend. Increased average spend might be achieved by driving up the transaction costs – i.e. by offering higher quality acts and/or higher quality food and drink – but probably more easily by extending stays or providing more opportunities for tourists to spend locally.

Further work needs to be done to identify the origins of visitors: those coming from areas within easy travelling distance of Glasgow will typically spend less than those coming from further afield in the UK – and they will spend less than those traveling from overseas.

**Stimulating grassroots growth:** there is considerable scope for growth based on existing capacity, most notably at the grassroots level. Factors external to the sector may affect the capacity of the wider economy and the city to take full advantage of the opportunity. But we assume the wider ambitions for Glasgow to grow tourism in a range of sectors implies that macro issues will be considered and addressed elsewhere. This report will contribute to those discussion.

With relatively low average occupancy, the grassroot element of the sector has potential to absorb more tourists and create considerable additional value without any further expansion of existing assets. This is not to suggest it should not expand, but to point out that at present increasing the number of music tourists is not constrained by existing capacity.

We should be careful not to confuse capacity with utilisation. Utilisation may possibly be increased via intervention and this will be one of the aims of the suggested interventions later in this report.

***“The smaller venues are hugely important. That’s where artists learn how to develop rapport, build confidence, create a performance. That’s the training ground of the artists that play the Hydro, there has to be a place for them to learn their craft.”***

**Debbie McWilliams, SEC Head of Live Entertainment, Ticketing and Sales**

## Chapter 5: Potential Interventions

*If the Celtic Connections audience could be increased by 60% to 175,000 the amount generated for Glasgow would rise from £10.7M to £17.12M.*

*[See more in City Festivals below and Chapter 6 Recommendations]*

Our aims and objectives in developing music tourism are to:

- Increase attendance at venues
- Increase spending onsite
- Increase overnight stays
- Use music to stimulate increased spending offsite

In the next chapter we recommend a set of strategies for promoting Glasgow's music tourism offering and encouraging more people to visit the city, stay longer and spend more money. Here we consider inspiring examples of what works well elsewhere.

### City Festivals

City Festivals already bring local, national and international audiences to Glasgow. But we can do much more. See below how the small French town, Lorient, attracts 700,000 visitors to their annual celtic festival – that's **over six times the size of Glasgow's world class Celtic Connections festival.**

Music tourism can be stimulated by promoting City Festivals to bring more visitors into the city, and country, boosting not just the local but also national economy.

**Festival Interceltique de Lorient**, held in Brittany, an area with fewer international air and rail connections than Glasgow, attracts **700,000 visitors** every August<sup>13</sup>. It was conceived as an international festival, makes a feature of the family of "Celtic Nations" and is promoted heavily outside France. The festival has made a relatively obscure provincial French **town of 57,000** people an international destination.

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<sup>13</sup> <http://www.festival-interceltique.bzh>

In 2017 there was a Scottish focus, negotiated by Showcase Scotland Expo, where 40 Scottish artists performed in a special pavilion attracting an anticipated audience of at least 150,000. Initiatives to promote Scotland included an intervention – conceived by this report’s project leader Dougal Perman with his Scottish Music Industry Association colleague Lisa Whytock (who heads up Showcase Scotland Expo) – whereby the World Pipe Band Championships (“The Worlds”) was streamed live by the Festival to thousands of audience members. The streamed content showcased Glasgow to promote The Worlds, Piping Live! and Celtic Connections.

Lorient has an audience that is **over six times the size of Celtic Connections**. We can learn from its success and use our relationship with them to increase Glasgow City Festival audiences.

**Iceland Airwaves** has been running in Reykjavík since 1999. In 2013 the Reykjavík Grapevine reported that credit card receipts for November 2012 **increased by 43%** from 3Bn to 4.3Bn ISK (£22.6M to £32.4M), which has been attributed to Iceland Airwaves audiences<sup>14</sup>. According to a report published in 2015 by Iceland Music Export (in Icelandic), festival goers at Iceland Airwaves **spent €9.5M (£8.4M)** during their stay at the festival.<sup>15</sup>

Festival manager Grímur Atlason says in the same Iceland Magazine article that music is an important element of the Icelandic economy.

“I think it is obvious when you look back to 1986, when nobody was visiting Iceland and compare that to today. We can disagree whether this is a good development, but it is obvious, in my mind, that the world discovers Iceland when the Sugarcubes become famous and Björk becomes a global superstar. And the name of Björk was always associated with Iceland.”

Successful musicians are powerful advocates and can be attractive to visitors.

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<sup>14</sup> [grapevine.is/news/2013/10/24/new-figures-reveal-iceland-airwaves-economic-impact/](http://grapevine.is/news/2013/10/24/new-figures-reveal-iceland-airwaves-economic-impact/)

<sup>15</sup> [icelandmag.visir.is/article/economic-significance-rock-n-roll-reykjavik-confirmed-and-it-sounds-way-better](http://icelandmag.visir.is/article/economic-significance-rock-n-roll-reykjavik-confirmed-and-it-sounds-way-better)

## Mapping

Mapping trails that people already follow, and fostering a collaborative community rather than competing for visitor numbers has been beneficial for everyone involved in the **Americana Music Triangle**<sup>16</sup> which links Memphis, Nashville and New Orleans via driving trails. Aubrey Preston founded the Americana Music Triangle in 2013 to increase tourist trade in the Deep South.

As reported in Decatur Daily:

“About five years ago, Leiper’s Fork, Tennessee, businessman and investor Aubrey Preston began contacting people in communities where music is an important part of history, culture and tourism.

“His mission was to create a network of like-minded people who wanted to spread the word about their treasures without spending a fortune.

“The result of those meetings is the Americana Music Triangle, a web-based organization that provides visitors a wealth of information about the music, people and places within [it]. Instead of simply competing for tourist dollars, members are working with each other to guide visitors to the next stop.”<sup>17</sup>

The 1,500 mile route connecting the three cities showcases many stops along the way. Preston did not create the triangle from scratch, rather the team behind it made explicit trails and routes that were already popular with tourists. By recognising and codifying this visitor attraction, people, businesses and organisations in the area have seen a material benefit in terms of visitor numbers and economic impact.

An article in The Advertiser cites figures provided by Jay Dardenne, Lieutenant Governor of Louisiana (2010—2016), who:

“told the assembled crowd of tourism and local government officials that Louisiana had 28.7 million visitors in 2014, up 1.5 million from 2013. Those visitors spent \$11.2 billion, which translate into \$836 million in state taxes that hometown residents didn’t have to pay.

“‘It’s the one area of government that makes money for the people,’ said Dardenne. ‘If you take the entire tourism budget against that \$836 million number and that return on investment is 38 to 1.

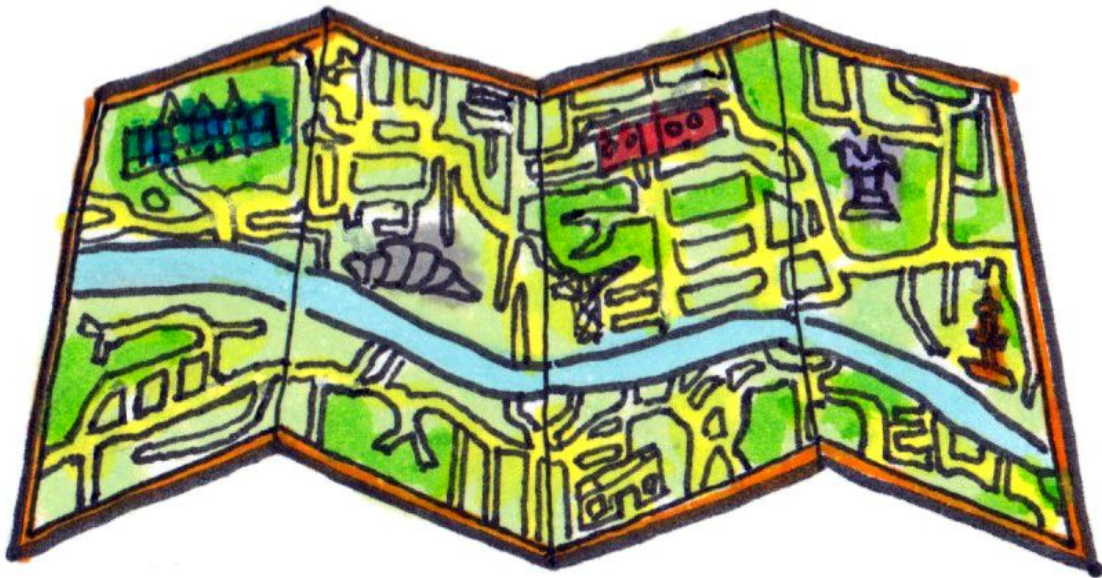
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<sup>16</sup> [americanamusictriangle.com](http://americanamusictriangle.com)

<sup>17</sup> [decaturdaily.com/opinion/editorials/americana-music-triangle-a-hit-because-of-cooperation/](http://decaturdaily.com/opinion/editorials/americana-music-triangle-a-hit-because-of-cooperation/)

*“When you spend money like that, you’re getting results. We’ve been doing that. We’re going to keep doing that.”<sup>18</sup>*

Louisiana saw a 5% increase in visitor numbers in 2014 (up 1.5M from 2013). Based on our calculations of grassroots venue spending, if we could increase visitor attendees to venues of less than 1,500 capacity in Glasgow from 20% to 25%, the gross value would rise from £54.7M to £57.5M with the contribution from music tourists increasing from £11.4M to £14.2M.



## Visitor Attractions

*“Once a year host a [music] doors open day. Music exhibitions attract a lot of visitors and given that the music industry has lost some of its most iconic figures in the past year, exhibitions are even more attractive.”*

## Round Table Workshop 2

<sup>18</sup> [theadvertiser.com/story/entertainment/music/2015/05/06/music-triangle-makes-room-lafayette/70916182](http://theadvertiser.com/story/entertainment/music/2015/05/06/music-triangle-makes-room-lafayette/70916182)

**The Beatles Story** visitor attraction in Liverpool was established in 2008 by Merseytravel and is situated in the stylishly redeveloped Albert Dock. According to a report published in 2015, it has attracted over 4M visitors, 70% of which are from overseas. It has generated £4.3M turnover and spends £0.9M per annum on local suppliers.<sup>19</sup>

**Graceland in Memphis** opened to the public as a visitor attraction in 1982. Since then it has attracted 20M visitors. It welcomes 500,000 visitors per year from all over the US and the world<sup>20</sup>. According to the Graceland website:

“The total economic impact on the city of Memphis from Graceland visitors is estimated to be \$150 million per year or possibly much more. A major part of that impact is that most Graceland visitors come from outside the city, bringing new dollars into the community, not only touring Graceland, but also patronizing other attractions in the area as well as area hotels, restaurants, shops and other businesses while they are in town. Further benefiting the city is the intense worldwide publicity that Graceland and the Elvis Presley phenomenon continually bring to Memphis. Contributing to the local impact is the fact that EPE employs approximately 350 people part-time and full-time year 'round, a number that swells to as many as 450 in the busy summer season.”

The Beatles and Elvis Presley were, of course, worldwide phenomena and their popularity clearly endures today. Glasgow does not have one big music act to utilise in the same way. However, lessons can be learned from these music-specific visitor attractions. The Britannia Panopticon and the Museum of Piping are arguably the only permanent ‘musical museum’ attractions in Glasgow apart from the memorabilia in the Hard Rock Cafe Glasgow.

According to our contacts at Glasgow Museums, the AC/DC exhibition attracted almost 41K visitors in 2011/2012. The Kylie exhibition in 2008/2009 attracted 165K visitors. More temporary exhibitions and permanent attractions could bring many more visitors to the city and stimulate additional spending.

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<sup>19</sup> [liverpool.ac.uk/wp-content/uploads/2016/02/Beatles-Heritage-in-Liverpool-48pp-210x210mm-aw.pdf](http://liverpool.ac.uk/wp-content/uploads/2016/02/Beatles-Heritage-in-Liverpool-48pp-210x210mm-aw.pdf)

<sup>20</sup> [graceland.com/about](http://graceland.com/about)

## Chapter 6: Recommendations

*“The sense of community needs to be there. Co-owning the brand of UNESCO rather than working against in competition. How does everyone work together to promote Glasgow but still keep their own business thriving? How do we tell Glasgow’s music story?”*

Round Table Workshop 2

Based on our research and analysis, we identify six strategies for developing music tourism in Glasgow: **brand optimisation, advocacy, storytelling, mapping, twinning, signposting**. Two of them – twinning and mapping – require initial setup then relatively low maintenance. Storytelling and brand optimisation are ongoing, advocacy should be embedded in our culture. And signposting is crucial.

### Brand Optimisation

We should develop existing brands and build new ones.

*‘The music history of this city is not evident on the ground. We need to pay tribute to the success stories of our homegrown talent and venues. An example of this could be placing plaques or statues throughout the city in locations where famous acts lived, played, wrote the music or rehearsed.’*

Round Table Workshop 2

The quote above is a nice idea, and worth considering in the longer term, but there is a lot we can do right now with what we already have.

**Welcome to Glasgow City of Music!** Glasgow already has music brands – for example UNESCO World City of Music and Celtic Connections – but does not exploit them to full potential. Very little is made of Glasgow’s UNESCO World City of Music Status, part of global UNESCO Creative Cities network. The city, and everyone living, working and playing in it, can own this brand.

We have heard that Glasgow Life are going to refresh the brand’s visual identity. Once this is done we recommend encouraging music establishments and websites to carry the badge, which we think they will do with pride. This will contribute to signposting (see below). Somehow the website URL asset [glasgowcityofmusic.com](http://glasgowcityofmusic.com) has been allowed to slip – it is now owned by a Glasgow music fan blogging in French. We recommend buying it back and making good use of it as a portal for the city’s music assets and an opportunity for residents and visitors to engage with Glasgow’s music (see the case for an online guide below).

Celtic Connections successfully attracts an enthusiastic local audience. But it brings relatively few visitors from outside the city, or from abroad. In 25 years it has built an audience of 110,000<sup>21</sup>. With more international marketing and effective use of content, it could become much larger. (See previous chapter.)

According to Jade Hewat (see Why Glasgow presentation by the Glasgow Business Embassy and Invest Glasgow<sup>22</sup>), Celtic Connections attracts 110,176 attendees with 43.3% overnight stays and an overseas audience of 18.4%. Celtic Connections generated £10.7M for Glasgow (which we know from combining our research with the Wish You Were Here figures is nearly 7% of the city’s gross music spending). **If the Celtic Connections audience could be increased by 60% to 175,000 – a quarter of the Lorient audience – the amount generated for Glasgow would rise from £10.7M to £17.12M.**

Creative Scotland promotes Scottish bands and performers abroad and facilitates their appearance at Festival Interceltique de Lorient, as it does at other international festivals and showcases, such as South by Southwest in Austin, Texas. This can be counted as export promotion for Scotland. Yet there is little public effort behind inward promotion to attract overseas visitors to Celtic Connections. Already world-class, with an outstanding programme of international performers, Celtic Connections could become the global winter celtic music festival to complement Festival Interceltique’s summer festival.

We recommend working with Showcase Scotland Expo, the Scottish Music Centre and members of the Scottish Music Industry Association (especially those involved in

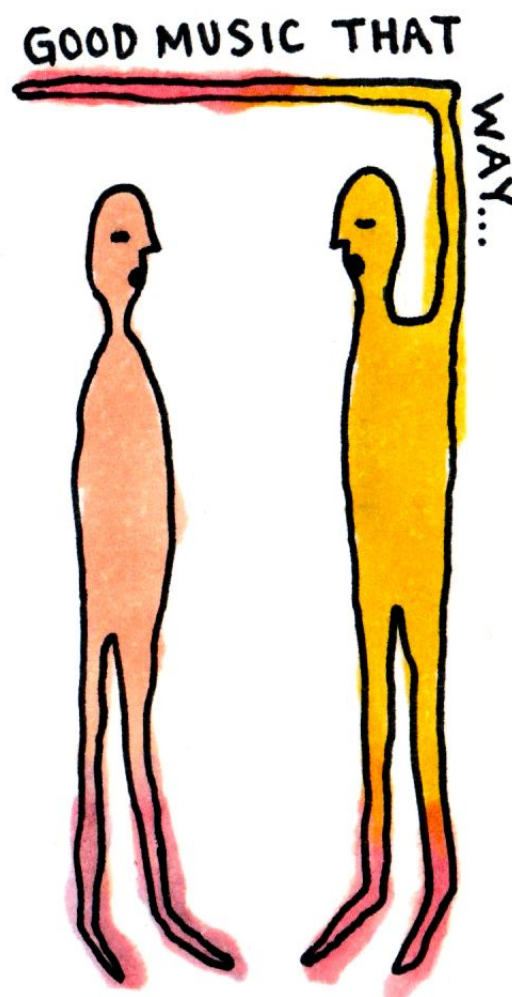
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<sup>21</sup> [celticconnections.com/blog/Pages/And-so-farewell-.aspx](http://celticconnections.com/blog/Pages/And-so-farewell-.aspx)

<sup>22</sup> [glasgowlife.org.uk/about-us/welcome/Documents/Why%20Glasgow%20Presentation.pdf](http://glasgowlife.org.uk/about-us/welcome/Documents/Why%20Glasgow%20Presentation.pdf)

networking at SxSW, The Great Escape, ADE, WOMEX, Jazz Ahead and Classical Next) to utilise existing relationships with international partner events to highlight Glasgow brands especially the UNESCO status, city festivals, significant venues and visitor attractions. Brand building is achieved through all of the recommendations in this chapter.

## Advocacy



Champions for Glasgow's music scene exist already. Every proud Glaswegian musician and music fan who travels around the world cannot help telling stories about their home city. But we can do more. We take inspiration from The Arches, now part of Glasgow's music history, which nominated Liz Lochhead and Carl Cox as its patrons. We could select four prominent touring artists – such as Nicola Benedetti, Jackmaster,

Eddi Reader and Alex Kapranos – and agree with them that we could declare them Glasgow music ambassadors. To launch the PR exercise we could hold a Music Ambassador's Reception (serving Tunnock's Tea Cakes rather than Ferrero Rocher), invite tourism media, bloggers and key influencers on social media and ask the ambassadors to tell a story about what Glasgow has done for them, why they love the city and why they think people should visit it.

Everyone can take part. We can encourage Glasgow residents to share what they love about their city's music with the world on social media and through guest blog posts for the City of Music website.

In partnership with the Scottish Music Industry Association, we can ask venues, record shops, studios, media, record labels and other music bodies to become part of a City of Music network and advocate Glasgow as a music city to their audiences.

***“We make special efforts to poster places where new arrivals in Glasgow congregate, as we understand it can be difficult to get your bearings and a foothold in the nightlife of a new city. We work with DJs from abroad who are part of these communities to spread word of mouth.”***

**Chris Cusack, Bloc**

## **Twinning**

Let's think global. To attract people to Glasgow, we can twin Glasgow with other great music cities of the world – Detroit, Berlin, Dublin, Rio, Paris, New York, Shanghai...

More specifically, we can twin venues, like the Sub Club and Bergain, Nice n Sleazy and CBGBs, etc. – and even twin scenes with other places (electronic; folk, traditional and world; classical; pop, rock and indie; jazz and blues).

We recommend starting with one twin partner, such as techno in Berlin and working together to swap stories, celebrate each other's culture and encourage dialogue, interest, travel and trade between the two places.



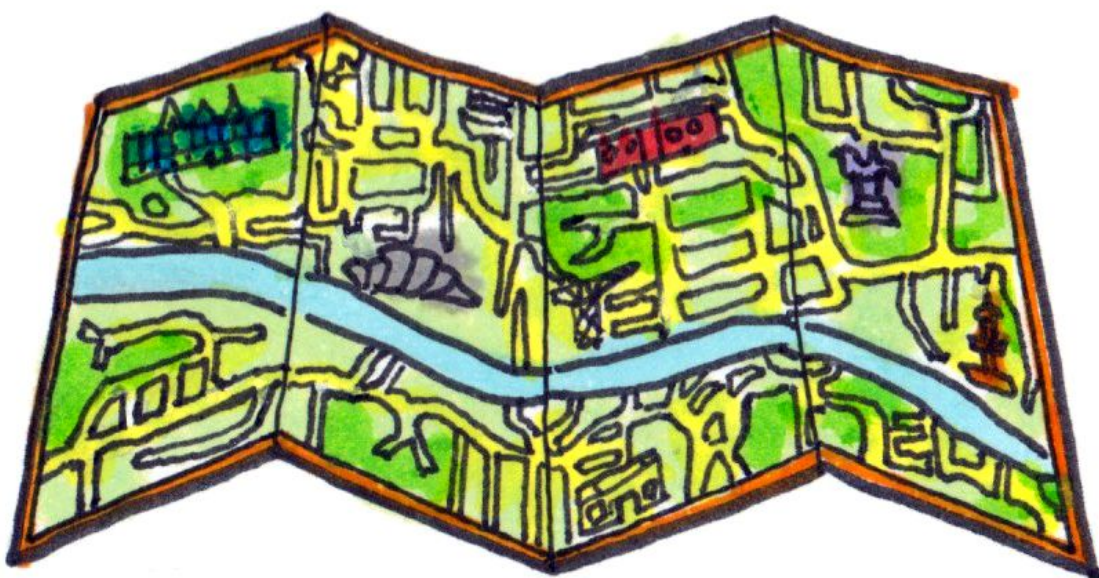
## Maps and Routes

By leading people into Glasgow and then guiding them around, we can inspire, inform, entertain and educate them about the city's music scene. There are already tours around the city. Music tours are provided by Glasgow Music City Tours, who lead guided tours, (see the case study in the appendix) and Walking Heads, who have created an interactive Glasgow Music Tour which is online and in app form.

Musical pathways into Glasgow can be highly visible. Following the Americana Music Triangle example, codified routes could lead to Glasgow from major UK points of entry and popular tourist destinations:

- Starting in London, travelling up through Manchester to Glasgow.
- From Edinburgh to Glasgow.
- Linking Liverpool with Glasgow.
- And following a folk trail from Inverness to Glasgow,
  - Down the A9 (taking in many stops on the way)
  - Along the A82 and over to the West Coast, diverting to the islands and winding up in Glasgow.

**Glasgow becomes a gateway to the rest of Scotland.** Using these maps and routes, we can help tourists plan their onward journey. If Glasgow is a pivotal point, it will help them think well of the city as a positive part of their trip.



## Storytelling

Musician's experiences, fan's experiences and musical heritage are all sources of storytelling about Glasgow's music offering that can be captured, curated and communicated to reach new visitors and encourage them to come to the city. Glasgow Life is best placed to find these stories and utilise them in PR, but everybody can help as part of the citywide advocacy of Glasgow's music scene. Stories can be published on the city of music website and shared on social media. An archive can be compiled and offered to journalists, bloggers and documentary filmmakers.



***“The majority of visiting bands ask us for advice and since we host so many visitors overnight we regularly advise them to see the city. At least half (the acts) choose to spend a substantial amount of time both before and after their show at places like Kelvingrove Art Gallery, GOMA, Kelvingrove Park, The Barras Market, Celtic Park, the Clydeside and more...”***

**Chris Cusack, Bloc**

## Signposting

Glasgow is a highly regarded conference centre. Both leisure and business visitors can be encouraged to stay longer, spend more and visit again by engaging them in the city's music scene. But we need to do more to tell them about it.

### Points of Entry

#### ***“Welcome to Glasgow: A World City of Music”***

Each point of entry – Glasgow Airport, Prestwick Airport, Glasgow Central Station, Queen Street Station, Buchanan Street Station, the M74, M73, M80, M8, A81 and A82 roads – has the potential to display signage that promotes Glasgow as a music city. Where appropriate photography, design and illustration can be used. Airports and stations can engage visitors through interactive displays, which also provides opportunity to gather data. That data can be aggregated and used to inform an Interactive Glasgow City Guide (see below).

***“Travellers arriving at Edinburgh’s Waverley Station are met with poetry and displays proudly welcoming them to the UNESCO City of Literature. Dundee will do the same as a UNESCO City of Design. Glasgow should be welcoming visitors to the UNESCO City of Music.”***

**Round Table Workshops 1 and 2**

## Branded Areas

Our survey research shows that visitors like the notion of a designated music area of a city. We recommend branding an area of the city as a “music district” – just as the International Financial Services District was created to attract inward investment and Creative Clyde was established to attract digital media companies to work in Pacific Quay. Venues within the music district could collaborate in joint marketing campaigns – celebrating a cluster of musical excellence. Bringing more visitors, staying longer, spending more will benefit the whole industry.



## Discoverability: The Case For An Online Guide

There is no comprehensive guide to Glasgow's music scene. Music events and activities happen every day and night of the year yet nothing exists to tell residents or visitors about all of them. There are event guides like The List, The Skinny, Ents 24, Resident Advisor, etc. but they do not/cannot cover everything and none of them provide a compelling user experience, far less encourage purchase of tickets, restaurant reservations or accommodation bookings. An interactive city guide could do all of this and much more, earning revenue from affiliate sales, sponsorship and advertising.

We can scope out such a guide, as a website and app. It could also include maps of all of the assets we have catalogued – listings data scraped from websites and social media event pages, recommendations from social network posts, music, fashion, food and drink and souvenir shopping guides. Entertaining and informative content. All curated from the masses of publically available material existing online.



In the course of our research, we have not found evidence of any online guide like this for any city anywhere. We see potential to establish a creative consortium of public and private partners to work collaboratively to create the essential 'Glasgow Guide'. Initial funding may be sought from the public sector but development capital could be crowdfunded. The potential for this guide is huge. Once established, it can be rolled out around the world. First Glasgow. Then Manchester, London, Paris, Berlin, New York and so on.

Following our second round table workshop in October 2017, we are going to trial a simplified version of the online guide by collating and aggregating information about Glasgow's music activities and supply it to hotels participating in our pilot scheme. We will track usage and evaluate efficacy over a six month period.

## Chapter 7: Conclusions & Next Steps

This report demonstrates that music tourism already makes a significant contribution to the Glasgow economy. However, there is spare capacity – most of the money spent on music events in the city comes from locals. The city's high reputation at home and abroad is undervalued and under-exploited.

There is great potential, but more work needs to be done: to understand the city's strengths and weaknesses better; to learn from the experience of others and to design practical, affordable and cost-effective interventions which would command the support of the sector.

Our suggested next steps are based on the work we have done here and our industry consultations. We welcome the opportunity to explore further initiatives and research, which might include:

### ***Meetups and Community Building***

Our workshops have proven so successful that we know a regular programme would be welcome and productive, especially where music and tourism professionals are introduced and meaningful connections are made.

### ***Familiarisation Trips Between Music and Hospitality***

Selected businesses could be invited to visit each other to explore opportunities for trade and collaboration. We could help facilitate the trips, but the business would be done by the people involved. We could profile success stories through case studies shared with the community.

### ***Music Activities Information Service***

As described above, as a precursor to any kind of online guide, we would like to devise and implement a system for collating, aggregating, disseminating and tracking usage of a music events and activities service for hotels.

### ***Extending the Survey***

To augment our existing survey data we have commissioned IBP to set up an online version which we will promote to UK-wide and international audiences with the help of a network of partners from music, media and tourism industries. The data will provide further insight into market trends and visitor motivations. Once we have collated and analysed the data we will present it in an updated version of this report.

### ***Learning from Elsewhere***

What works well, and why? We could undertake an in-depth study of successful festivals and visitor attractions in other countries and parts of the UK to properly understand their business models and applicability to Glasgow.

### ***Scoping out an online guide***

- Creating a prototype
- Convening a focus group to test the proposed design
- Revising the online guide in light of response
- Presenting a proposal for online guide and further work (research and marketing)

### ***Collaborative Marketing***

Exploring the potential for collective marketing campaigns by industry participants, particularly among grassroots venues.

### ***Measuring and Monitoring***

Now that we have done a benchmark economic analysis, there is potential for further work to build a repeatable monitoring mechanism to assess the ongoing value of the sector and to monitor impact from interventions.

***“We are doing a lot. But we need to make sure we don’t just talk, we have to go and do something about it.”***

**Stephen Flynn, Chair, Glasgow Taxis**

## Chapter 8: Appendices

### Music Mystery Shopper Exit Interview

Exit interview, conducted by Dougal Perman (who invited Pieter and his family to come to Glasgow).

Pieter Stoaling works for Native Instruments in Berlin. With his partner Maria and their son Pau, he came to Glasgow for a long weekend (Friday 21—Tuesday 25 April) over Record Store Day. Pieter and his family hung out with my family and together we explored some of Glasgow's music offering.

His experience of travelling to Glasgow from Berlin was “really easy”. They flew with easyJet and then it was a 15 minute journey into the centre of Glasgow. “In terms of time it's like going to Brandenburg,” Pieter suggests, “It's very cheap to fly as well.”

Getting around the city presented no problems either. Pieter and his family used the subway, buses and taxis. “Getting around Glasgow is easy. We got a taxi from Merchant City to Anderston [where they were staying] and it cost five quid. Taxis in Berlin are quite a lot more expensive.”

Eating and drinking, however, is “much, much more expensive in Glasgow than in Berlin. A round of drinks for four people is £20. That would do four people all night in Berlin. In a bar a pint of beer would be €3. But you can drink on the street in Berlin and buy a beer for 90 cents. Socialising can happen outside for a lot cheaper.” People hang out on the street. “And that's also quite conducive to the music scene. You can do free gigs in the park. Being able to drink outside isn't the catalyst for free gigs, but they kind of go hand in hand.”

Berlin, much bigger than Glasgow, has many more venues, including seasonal pop-ups, especially in the summer. But while Berlin's venues cater for the dominant subculture, electronic music, “Glasgow has much more variety.”

“In Glasgow there are a few venues that are very prominently known”, like the Sub Club, Barrowland and King Tut's, “whereas there are quite a few that people like me haven't heard of.” Pieter also thinks that “Nice N Sleazy is instrumental – no pun intended – in the indie band scene in Glasgow.”

## A cultural contrast

“Compared to Berlin, it’s quite a big cultural shift because things happen a lot earlier in Glasgow due to the difference in licensing laws. That means a lot of interesting things can be happening at the same time so it limits what you can do. You have to pick A or B instead of going to A first then B.” Berlin’s event times are more staggered which is probably just a natural evolution due to venues being open for 72 hours straight. In the UK, as we know, there’s a culture of, the pubs are only open till this time so people go out to get smashed. “In Berlin it tends to be more relaxed.”

Is Berlin defined by drinking as Glasgow, or indeed Scotland, or the UK? “No, definitely not. Of course people go out and get smashed. But they don’t go out to *get smashed*. It’s an accompaniment rather than a priority. Alcohol isn’t so deeply ingrained in the culture as it is in the UK.”

## Family fun in Glasgow

First up was Mono for Record Store Day, packed full of families of music fans. Pieter and Maria enjoyed being able to take their son to a lively gig environment for some food and drink. “Really nice family fun atmosphere, sitting outside on the pavement, really great, you know? Some good music. I know it has a really good record store [Monorail] anyway. Really relaxed people. The people here [in Glasgow] are just nice anyway. You don’t get that in Berlin.” Pieter talked about the “Berliner Schnauze”, which encapsulates a certain aloofness which can be perceived as unfriendly. In Glasgow, however, “you go to the bar and the bartender starts talking to you and having an interested conversation with you. In Berlin that doesn’t happen unless you know the person behind the bar. [In Glasgow] That’s nice, you know, really friendly. It’s more conducive to an atmosphere that you want to be in rather than ‘here, have your drink, pay your money, go back to your seat.’ But Glasgow’s always been like this.”

During our time at Mono we detoured to the Barras Art and Design Centre (BAaD) to explore. We then returned in time to see a bit of Teen Canteen’s set at Mono. After Mono we popped into the CCA where there was a gig on upstairs. Having a drink in the entrance lobby of the CCA (because everywhere else was too busy), Pieter noted how the staff at the box office were talking to people as they came in which made for a friendly atmosphere. “And not just ‘hi’, but ‘hello, how are you doing, come in!’ It’s really cool. Having something like that open in the evening is really nice. It’s not just younger, single people going out in the evenings [in Glasgow], it’s families, young people, older people, huge variety of people for a big variety of programming. It’s good.”

## Music everywhere

Then we went to Nice N Sleazy which had a very different atmosphere. Again Pieter found it very friendly, from door staff to people on the ticket desk in the gig space downstairs. “We didn’t have tickets but they found space and sold us tickets and let us in anyway. Sleazy’s doesn’t change. It’s an institution. The vibe is really good. I like a small place anyway. It feels comfortable, not hot and horrible. And again there, there was an interesting mix of ages too. The stage is a good size too and the sound is excellent.” We saw Teen Canteen play their Sirens EP launch party. “We saw them play at Mono, chatted briefly outside then saw one of them in the CCA and then spoke to them again outside Sleazy’s. It felt like they are part of Glasgow rather than just ‘the band’, you know? That’s really cool to see.”

As we will look at shortly (in Key Infrastructure), it is not just the venues that make the music scene or are attractive to tourists. Glasgow does have a high density of musicians per capita and many streets are rich in music history. At the GFT screening of a comedy drama short film she made in Glasgow, comedian Josie Long called the city “an indie music playground.” She was, in part, referring to the homeplace of her favourite bands like Belle And Sebastian, Mogwai, The Delgados and Arab Strap, but the prevalence of musicians (and DJs for that matter) all over the city validates her description.

On the way home Pieter wanted to drop into the Bon Accord for a whisky. And while we sipped a dram, a pub band played in the corner. It felt like music was everywhere in the city that night.

The next day we went to King Tut’s Wah Wah Hut to see Joe Goddard. Pieter had never been to King Tut’s so he was intrigued. “It’s kind of a bit of a legendary place isn’t it? Apart from Sleazy’s it is *the* live music venue in Glasgow. The crowd were *really* into it, which I would expect anyway with a name like Joe Goddard. People were there to see him, rather than music lovers going out to see music, whatever it is.” Goddard did perform to a very enthusiastic, adoring crowd. He was noticeably touched, even overwhelmed. “I love coming to Glasgow”, he said, “well, it’s probably the best city in the world, isn’t it!” Pieter thought it would be interesting to go to a bill of lesser-known bands to see what the crowd reaction would be like. “Again the sound is really good in there. My ears didn’t hurt afterwards, which is quite unusual.”

On the way home we went to a club at the Berkley Suite. It was quiet (on a Sunday night) but Pieter liked the club and enjoyed the music and ambience. “Interesting place. I think it’s cool. It’s nice to see something that’s unassuming on the outside but when you get in, it’s really special. Like the Sub Club, just a tiny little door. The doormen at Berkeley were really friendly too.”

## On ticketing and listings

Our experience of buying tickets was interesting. Although we were told that the Sleazy's gig had sold out, the promoter let us in anyway and we paid on the door. We thought the Joe Goddard gig might sell out so we bought tickets in advance via the Ticketmaster app, which offered a convoluted, clumsy user experience. It took a frustrating half an hour to buy the tickets. Then when we got to King Tut's the tickets were not there, because they had been 'recently purchased'. The venue staff sorted it out, but it took quite a while. On Saturday afternoon we had tried to buy tickets to the Hacienda Classics show at the Hydro but the tickets had been taken off sale prior to the gig, following ticketing protocol, but there was no easy way to link from the app to the venue to enquire as to whether there were still tickets available. Pieter thought this was a drawback: "I could imagine that if people were out in Glasgow in the evening and try to get tickets for something but have a bad user experience, they could get put off really easily."

Pieter remarked on the absence of a convenient online guide to Glasgow's music scene. There is nothing comprehensive at the moment. "There's no one stop shop. There needs to be. Even The Skinny, which is a pretty 'on it' magazine, even their listings of what's on was pretty slim." We were surprised that The List did not have much more to offer in terms of listings.

On Monday evening we went to Bar Bloc because we had heard about the Blas Collective folk sessions on Monday nights. Pieter enjoyed listening to the Blas Collective's take on traditional folk music (and playing pop covers in a trad style) and we noted that some of the crowd were there to see the band, others were just out for a drink, but everyone seemed to enjoy the music. The List did not list the event, though and the only information we could find was on Bloc's website. "Things can only be listed," Pieter observes, "if somebody knows about them. Of course King Tut's is listed because everyone knows there will be something on in King Tut's but for the lesser known, even more grassroots stuff, they have to go to these people and say 'my thing is on', or else The List, or whatever it may be, has to somehow hear about it through the grapevine. Maybe there's a way to incentivise the people behind these lesser-known gigs to really informing [listings] people about their events."

## Fly thinking?

And what about Berlin? Are there online guides there? "Yes there are. There are publications like The List but there are also a few underground websites that have listings of alternative and really secret events. But you have to know about these websites and you have to be a member, and you have to be invited to join. It's not

easy to find them. So a visitor won't get a look-in, unless they have a friend who knows about it. It's clearly not for music tourists. It's really to brew local culture for locals, by locals. And they are very good listings. But in terms of what you might find if you went to Berlin, it's pretty much the same [as Glasgow]."

"I see a lot more postering in Berlin than in Glasgow," says Pieter. We discussed how Glasgow used to have a lot more postering for clubs and gigs but there has been a clampdown on flyposting, and there is less opportunity to display gig and club posters on the walls of bars, cafes and shops around the city. "That's a real shame because if you're a visitor to the city, that's what you see. And if you're a foreign visitor to the city, maybe you don't have the internet on your phone so posters might be the first point of information you have." We ruminated on the fact that while we understand the reason for banning posters on railings ("because it rains so much that you end up with a pile of papier mache"), but perhaps there could be a way of providing space for DIY postering for grassroots gigs and clubs that appeal to music tourists in an underground way. We only noticed flyers in music venues. "No people on the streets handing out flyers either. Which you do get in Berlin. And even in the venues, the flyers weren't prominently positioned."

## Case Studies

### The Hydro

- Opened 2013
- 13,000 capacity
- Ranked No 2 for attendance in UK
- Total annual attendance 1million
- Music attendance 0.5 million
- Tickets from £45 to £175
- Staff employed: around 150 (to be checked)
- Interview: Debbie McWilliams, SEC head of live entertainment, ticketing and sales

*“Glasgow is always somewhere that acts love playing. They love the crowd here and people turn out to hear live music in very high numbers... that’s why we sit at Number Two because the people of Glasgow love their music. That’s important not just for Glasgow but for the whole of Scotland because there isn’t another big venue in Scotland.”* **Debbie McWilliams**

Debbie McWilliams, SEC head of live entertainment, ticketing and sales, describes The Hydro as the pinnacle of Glasgow’s live music scene. The Hydro dominates the newly named Scottish Event Campus which it shares with the Armadillo and SECC. Yet the remarkable success of the 13,000 capacity arena also depends on a dynamic relationship with key players in the city’s music industry.

Small venues are a vital part of the landscape: “That’s the training ground of the artists that play the Hydro, there has to be a place for them to learn their craft.”

Large capacity arenas like The Hydro can make a big impact on the economy of their neighbours (see the ‘Finnieston effect’). They are also part of a live music network, both locally (in the city) and nationally (across the whole of Scotland and the rest of the UK). Acts, venues, promoters, recording studios – and audience – are all part of an essential, interdependent, city culture.

As Debbie explains, if an act chooses to play London, Manchester, Birmingham and Glasgow their fans have choices to make:

‘Where do they want to travel? Where’s the best venue? So if you’re in Newcastle you may consider Manchester, you may consider Glasgow and then you’ll say, “Well, you know what, the Hydro’s fantastic, I’m going to go to Glasgow.” The city needs to

contribute to that as well. It's not just the venue. There needs to be a certain vibrancy to a city to attract people. The Glasgow audience is legendary.'

### ***The Finnieston Effect***

A similar symbiotic relationship has developed in the surrounding neighbourhood. 'The Hydro has helped put Finnieston on the map as an absolutely phenomenal destination for people – and the quality, the quality is incredible, you struggle to find somewhere up there that isn't great.

'Think of the people that come to the Hydro, maybe a million people throughout the year, Finnieston definitely benefits from that, definitely, but does the whole city benefit from it and is there a way the city can benefit from it?'

### ***Big is not always best***

There is no real 'competition' with rival venues such as O2 Academy, and The Hydro enjoys good relationships with other venues. Big is not always best, some acts prefer closer contact with the audience (Bob Dylan chose the 3,000-seater Armadillo in 2017) and The Hydro helps promote events at venues such as Royal Concert Hall and Hampden.

### ***Could Glasgow do more to promote music tourism?***

A more 'joined up approach' could combine the skills and resources of key players in the music scene. 'We need a city app, digital assets drive sales'. The Hydro wants to encourage people to stay longer (two new hotels are planned for the SEC in 2018) and explore further.

'How about a walkway of Glasgow's music history starting from The Hydro, perhaps? You could link the venues – Barrowland at one end of the Clyde, O2 at the other.'

## Glasgow Music City Tours

- Launched 2015
- Guided walking tours: Merchant City and City Centre ‘Music Mile’
- Tours on Friday and Saturday for up to 15 people
- Tickets £15
- Interview: Fiona Shepherd, co-founder and tour guide

*“Glasgow is the obvious place to do a guided walking tour of music, because of the scene here, because it’s so healthy. When we became a UNESCO City of Music we felt it wasn’t being shouted about enough. It still amazes me that so many music lovers in Glasgow don’t know that we have that accolade, a lot of people on our tours are not aware of that. So we’re still not shouting about it loud enough in my opinion.”*

### **Fiona Shepherd**

Fiona Shepherd, a music journalist with more than 30 years experience of Glasgow’s live music scene, is co-founder of Glasgow Music City Tours (GMCT) which launched in the summer of 2015.

The popularity of Glasgow Music City Tours – guided tours quickly sell out during Celtic Connections – demonstrates the value of storytelling in reaching a wide audience of locals, visitors and tourists, aged from teens to pensioners. But it is more difficult to identify exactly who the music tourists are.

Music tourists might account for up to 30% of people taking the tours, ‘But is someone coming from Fife for a day in Glasgow a tourist or a local visitor?’ Not everyone knows about music – or events like 6Music Festival. Many just like walking tours. Routes are determined by venues rather than bands or artists though GMCT recently produced a Belle and Sebastian Tour for private parties.

## **Venues**

Venues like Barrowland and King Tut’s are known to most people taking the tours. Panopticon is a ‘hidden treasure’ on the Merchant City route; Nice ‘N’ Sleazy a treat for people interested in basement bars. The site of the long-gone Apollo is popular for older customers with memories to share. ‘Interestingly the Hydro is different – it attracts big numbers to see a big name, but they would come for Beyoncé rather than the Glasgow scene. Not many come on our tours.’

### ***Culture and Commerce***

City culture and commerce weave through the tours. Venue stories combine social history with music and other aspects of Glasgow culture. At the end of the tour people often ask for good places to eat and drink, where to hear a local band, find a good gig. Discount deals (on drinks or events) offer extra incentives for tour customers, especially at stopping points like Tut's and the Clutha.

### ***Future Potential?***

The Belle and Sebastian tour offers a possible model for tours based on individual 'gatekeeper' bands along 'song lines' which romanticise city locations. 'But it can be difficult to design a walking route round that and it's hard to think of bands associated with Glasgow as you could with, say, Manchester or Liverpool'.

### ***Marketing is a Challenge***

It is for a small company growing 'through trial and error' anyway. Glasgow City Marketing Bureau provides valuable support. ('We've had great publicity, including National Geographic'). Bookings come through the GMCT website, TripAdvisor, Twitter, Facebook, word of mouth. 'And a couple came from Edinburgh after seeing someone carrying our tote bag'.

### ***Could Glasgow do more to promote music tourism?***

It needs to strike the right balance. 'For bands and promoters it's easy to make music happen in Glasgow but there's a certain shyness about pushing it too hard. Marketing has to be carefully balanced. It needs to let the music breathe, to keep it authentic and grassroots. That's the scene. That's what brings music tourists to the city.'

## Glasgow Taxis

- Established 1997
- 800 taxis
- 1600 drivers
- 80 call centre staff
- Covers Glasgow city and Central Belt
- Interview: Stephen Flynn, chair Glasgow Taxis

*“Since the Hydro took off, that’s been the best thing ever. It’s really made a massive difference to the city as a whole. Music is a big part of the city now. It’s good for hotels, restaurants and it’s certainly good for taxis.”* **Stephen Flynn**

Glasgow Taxis does not keep statistics on how many of its customers are tourists – or music tourists – but Stephen Flynn, can track the rise and fall in demand for taxis through the year according to the number of conferences and music events in the city.

‘In 2016 we took a hit, we were 14% down on the year before. We work closely with Glasgow City Marketing Bureau so we knew there would be a lack of conferences last year. But there was a lack of events at the Hydro too – not much happened in the music scene until September. That made a big difference to us.’

Stephen Flynn’s perspective gives a glimpse of a dynamic but fluctuating music economy. Different artists bring different age groups to different venues – and that dictates whether people stay overnight and how much they will spend on hotels and restaurants, and transport. ‘Will they need taxis to the station next morning? You’ll see lots of cars at the Hydro for young audiences.’

### **Venues are spread across the city**

The Hydro accounts for perhaps 80-85% of Glasgow Taxis music related trade. ‘It’s good for trade, good for the city.’ But other venues, old and new, also stand out on the music map: O2, Oran Mor, and the Barrowland (‘it continues to amaze, there are events on every week’) are joined by newer names such as Saint Lukes and SWG3. And the Kelvingrove Bandstand is beginning to attract more interest.

## **Festivals**

Festivals help to keep trade going throughout the year. Celtic Connections provides

a vital boost in January/February, with film and comedy festivals following close behind. But music is increasingly important in stimulating new traffic – highlights of this summer include the Stone Roses concert at Hampden Park in June and T in the Park at Glasgow Green in July, ‘when the city is a wee bit quieter’. In August the World Pipe Band Championships brings around 40,000 people to Glasgow. ‘That’s good for hotels, restaurants and taxis.’

### **Ambassadors**

Taxi drivers are ambassadors for the city – tourists often ask for advice on museums and restaurants. Stephen Flynn places particular emphasis on the importance of a good working relationship with the Hydro. ‘We’re trying to work with the Hydro to make sure the end experience is good. You don’t want to come and have a good experience in a music venue and then struggle to get transport up the road.’

### **Could Glasgow do more to promote music tourism?**

There’s a need for joined up thinking: ‘It’s all about talking to each other. The people who deal with music and events – the city marketing bureau and tourist board – are doing that but maybe we are needing to do a wee bit more so that we all connect into each other’s websites. The same with transport, so that when people get here they know who to phone. It’s about getting people to work together, that’s the most important thing. We are doing a lot. But we need to make sure we don’t just talk, we have to go and do something about it.’

### **Crowne Plaza**

- Opened 1989
- 283 rooms
- Around 227 staff
- Occupancy ‘healthy’: mid 80%
- Room rates vary, anything from £79 - £300
- Interview Dominic McVey, General Manager

*“If Rod Stewart is playing next door we expect to be full. We don’t know exactly what percentage of our 283 rooms we sell because of that... but I would suspect that on a night like that at least fifty per cent of my residents would be because of Rod Stewart.”* **Dominic McVey**

The Crowne Plaza Hotel, ‘next door’ to The Hydro, enjoys a commanding view of

Glasgow's changing waterfront. Much of the view from the foyer was not there when Dominic McVey arrived fourteen years ago. 'It's good to see the city moving out and it's good to see the river corridor getting regenerated.'

Regeneration began with the development of the SECC now renamed SEC (Scottish Events Campus) and much of Dominic McVey's focus is on the conference programme which brings increasing numbers of international delegates to the city. He provides valuable insight into the close collaboration essential to delivering a good experience for visitors. And he welcomes the competition of new hotels planned for the city.

'A hotel manager might grumble about competition but sometimes competition is a very good thing. To attract large events you have to have well known brands so it's great to have Crowne Plazas, Hiltons, Radissons, Premier Inns...brands that people recognise.'

### **Music Attraction**

Music is one of the attractions – along with big sporting events – which bring tourists to the Crowne Plaza. 'To attract big acts you need a good venue and we couldn't have a better one than The Hydro, though Glasgow's known for other venues like Barras and King Tut's so the range of smaller venues is important too.'

It's impossible to estimate exactly how many guests come for live music events. 'Most people now book through OTAs (online travel agents) like booking.com and they don't say why they are coming.'

### **Overnights**

Most guests stay for one night only, though that might vary according to what's on at The Hydro and when. 'If it's a Friday night they might make a weekend of it. And if it's an act with a large cast then you might have a crew of 150 and they have to stay somewhere and they'll come the day before and leave the day after.' Other tourist attractions and events are promoted on the hotel website and by the concierge.

Close collaboration is crucial to planning any successful large event – concerts or conferences – and Glasgow Life (formerly GCMB) has a key role in bringing all the 'major players' together, up to five or six years before the event. 'All the various sectors work together ... the airport works with the taxi company and the coach companies and the hotels and the SEC and the restaurants. Everyone gets on board and then when the business comes, it's good for all of us, not just the hotels.'

### **Could Glasgow do more to promote music tourism?**

Dominic McVey makes no difference between music events and conferences. ‘It’s what we do as a city that works. And I think it’s close collaboration between all the major players. And when I say major players I mean all the hotels. To ensure that there are rooms available, that the standards of service are good. But it’s also to ensure that the transport links are good so there’s plenty of taxis and that there’s room in the restaurants but also that the restaurants aren’t falsely inflating their prices on the night of the concert so you are not gouging the market. So it embodies everyone and that’s what Glasgow is good at.’

### **Royal Conservatoire of Scotland**

- Formerly Royal School of Art, Music and Drama
- Established 1847
- 1100 students – 50% Scottish, 25% rUK, 25% international
- around 750 staff (full and part time)
- 2017 Ranked Number Three for performing arts
- Interview: Janette Harkess director external relations

*“There’s the importance of that conversation visitors have in a taxi from the airport. You’ve got ten, fifteen minutes and very chatty taxi drivers. What do they sell in terms of the things that make Glasgow special? I would very much like if RCS and UNESCO City of Music were part of that conversation...we are unique selling points of the city”.*

**Janette Harkess**

### **Storytelling celebrates success**

For Janette Harkess the Royal Conservatoire Scotland is a distinctive part of a unique live music story which both RCS and Glasgow are only just beginning to celebrate.

Ranked Number Three in the world for performing arts, RCS shares third place with the Royal Academy of Music; The Juilliard School and The Royal College of Music are first and second. It has taken a year to adjust to the idea that they have something to shout about, says Janette Harkess. Perhaps that lends insight to Glasgow’s attitude to being a UNESCO City of Music?

When RCS was ranked Number Six in 2016 – the first year that QS included performing arts in their ranking – there was a delayed reaction inside the institution. ‘It

was a very Scottish thing, you know: what's the evidence, who else is on the list?

'But when we got the Number Three ranking it was almost the world outside going, "Fantastic. That's brilliant for Glasgow, that's brilliant for Scotland". Suddenly it felt like it wasn't us as an institution bragging but actually celebrating that we are part of an amazing city and a country where the arts flourish.'

### ***A sense of place with a sense of urgency***

Now the Number Three ranking is displayed on the pavement outside the RCS in Renfrew Street. The 2017 prospectus title is Life is Not a Rehearsal and the diverse culture of Glasgow – festivals, nightlife, live music – is an essential selling point to an international audience of students and academics. Applications to study, teach and visit have increased significantly in the last year.

A sense of place is communicated with a 'sense of creative urgency'. In a student city, with alumni including David Tennant, James McEvoy and Nicola Benedetti, the RCS contributes an aura of fame and vitality. Life is lived 'right here, right now'.

### ***Collaborative, entrepreneurial, egalitarian***

RCS is a live performance venue in its own right, encouraging creative collaboration and entrepreneurial energy in students, connecting music, theatre, dance and film-making. The curriculum aims to prepare students for the real world, to find creative ways of earning money. ( 'Around 97% go on to further study or employment which is counter-intuitive for the arts'.) For the RCS itself collaboration is an essential part of creative partnerships with other national companies. And with other universities. 'We're not in competition with each other. Glasgow is a team city, it's easy to work in collaboration here.'

### ***Can Glasgow do more to promote UNESCO City of Music?***

'The important thing is how the city describes what being a UNESCO City of Music is. That can be about music and communities, it can be about music and schools, it can be about pubs.

'We are a live music city. That can be the RSNO doing Mahler or it can be someone jamming in a pub. Or buskers. We need a narrative that's inclusive and can comfortably encompass all of that. Glasgow can be proud of all of that.'

## Bloc

- Restaurant, bar, venue.
- Established 2001, live music since 2007
- 160 capacity
- 30 staff
- [www.bloc.ru](http://www.bloc.ru)
- Interview: Chris Cusack, venue manager

*“We make special efforts to poster places where new arrivals in Glasgow congregate, as we understand it can be difficult to get your bearings and a foothold in the nightlife of a new city. We work with DJs from abroad who are part of these communities to spread word of mouth.”* **Chris Cusack**

Bloc is located in central Glasgow and operates as a bar and restaurant during the day. At night it hosts live music and DJs. It is licensed until 3am and in 2015 also launched the Bloc+ Music record label to releases local acts. Venue manager Chris Cusack estimates that around 10% of evening/night time clientele are visitors to Glasgow and actively targets this segment, as well as foreign students.

### **Targeting tourists and attracting visitors to Glasgow**

Bloc has “definitely noticed a rise in visitors from outwith Glasgow” as a result of a strategically planned promotion.

Their strategy includes:

- Advertising in travel guides and the EasyJet inflight magazine
- Hosting dedicated events to make visitors feel welcome. This includes the monthly night Sugo, catering for foreign students and encouraging them to mix with the local scene. .
- Targeting youth hostels with publicity (eg flyers, posters).
- Attracting touring acts to play their only Scottish date in Bloc, bring people from other areas of Scotland, in particular Stirling, Perth, Dundee and Fife. “The audience is forced to go where the music is.”
- Acts from other parts of Scotland booked to play Bloc are often accompanied by their fans.

### ***Engaging with touring bands to promote the venue and Glasgow's attractions***

Bloc has developed strong ties with the touring band scenes in Spain, Italy and France, which in turn has boosted awareness of the venue. Publicity generated by touring acts who have had a positive experience at the venue, is the key to boosting its reputation internationally.

This includes providing bespoke advice on Glasgow based on the acts' schedules and interests. "The majority of visiting bands ask us for advice and since we host so many visitors overnight we regularly advise them to see the city. At least half (the acts) choose to spend a substantial amount of time both before and after their show at places like Kelvingrove Art Gallery, GOMA, Kelvingrove Park, The Barras Market, Celtic Park, the Clydeside and more."

### ***How can public bodies help augment the venue's offering to visitors?***

Marketing and advertising can be prohibitively expensive for small venues. Assistance with costs would help, says Chris Cusack, but promotion has to be handled with care.

"Shifting their focus from the beige, MOR-indie/folk musical-impression of Scotland towards the vibrant, innovative underground scene that originally made Glasgow so prominent in the 80s, would really help."

And there's scope for sending promotional material about Glasgow to bands in advance, giving them ideas of ways to explore the city culture. "But, It would need to be relevant and in-keeping with the community we are discussing. The idea of pamphlets [mentioning] Buchanan Galleries and the City Chambers isn't appealing.

What impact, if any, has the UNESCO City of Music status had on Bloc?

"As far as we can tell, none."

## Glasgow Audience: what the bands say...

### CCA

“What I loved about it was that people just wanted to sing – that’s a great Glaswegian trait...” **Leo Moran, Saw Doctors** on why he loves playing Glasgow.

[walkingheads.net/leo-anto/](http://walkingheads.net/leo-anto/)

### Barrowland

“It’s always proper to end a tour on a high. And Glasgow delivers perennially. The Glaswegians seem to have a special energy and it's a real 'When you're out, you're out' attitude you encounter every time. Boisterous, good-natured, witty and charged. The Barras generates a particularly high energy, some other venues get close to it, sometimes, but with the Barras it’s always.” **Leo Moran, Saw Doctors**

"Not for the fainthearted (no seats, no lifts, no arty fartys) it is a basic room but it is imbued with the spirit of 10,000 gigs." **Christy Moore**

### Old Fruitmarket: Celtic Connections

“Celtic Connections is a *great* festival. It’s funny how venues have got their own atmosphere, regardless of who comes along. We’ve also played the Concert Hall, which is more polite, and great in its own way, but when playing in a city so full of music fans, the slightly more raucous, spirited atmosphere of the Old Fruitmarket or the Barrowlands would be my preference! It’s a kind of energy, and it impacts on the way you play – I might strum the guitar that little bit harder at the Fruitmarket!”

Fiachna O’Braonain, [Hothouse Flowers](#).

## Grassroots Venue Value Research Methodology and Data

We wanted to calculate the value of music tourism not included in the UK wide report produced by Oxford Economics, we do this to give us:

- an indication of its value as a valuable statistic in and of itself
- to be able to calculate the economic impact of any proposed intervention by attaching a value figure to each predicted additional music tourist created as a result the intervention

To do this we need to use the Oxford Economics methodology for value creation but apply it to venues excluded from their report – i.e. those with a capacity of less than 1,500.

### Method

#### Step 1

Identify a music venue with less than 1500 seats ( ideally more than one venue) and establish the following:

- What is the venue's capacity?
- What is an average ticket price?
- How full is the venue on average?
- How many events per year do they do?
- What is the average ancillary spend at the venue per visitor (Food drink etc.)?
- Percentage of visitors they think come from more than 30 miles away – including overseas (Average commute in Scotland is 10.7 km so we work on three times the average commute distance in Scotland to define a "tourist". Scottish transport statistics. No 33. 2014 edition )

From this we can establish two things :

- the average value of each fan in a venue of less than 1500  

$$b + e = g$$
- the average value of music tourists venue per 100 seats  

$$((a * c\%) * f\%) * g / 100 = h$$

Using the standard Oxford Economic multipliers we can use this to create an economic impact measure for, say, each 100 extra music tourists.

## Step 2

We then collate the number of venues in Glasgow with a range of capacities from perhaps 100 to 1500 and arrive at a total capacity for Glasgow in these venues (i).

We then apply the average of c to the total capacity to get usage across the sector (j) and then an average of f to get the total number of music tourists (k).

We can checksum this against i/h which should be equivalent to  $k \cdot g$ .

Again using the standard Oxford Economic multipliers to k we can arrive at the current total value of music tourism in the less than 1500 seat capacity venues (l).

## Data

Gross Value of Music Industry at venues less than 1.5K			
<b>£54,699,197</b>			
Gross value of Music Tourists at venues less than 1.5k			
<b>£11,385,672</b>			
Totals		Variables	
Ticket Totals		Venues	
£2,539,555	Tourists	Number of Venues	32
£10,158,221	Local	Average Capacity	442
£12,697,776	All	Average Utilization	57.00%
		Average Number of Events PA	175
On site Spends		Average Domestic Tourist Attendees	20.00%
£3,103,901	Tourists	Average Attendees using Accommodation	10.00%
£12,415,603	Local		

£15,519,504	All	<b>Attendees</b>	20.00%
		Gross Number of Attendees	1,410,864
<b>Travel Spends</b>		Gross Number of Tourist Attendees	282,173
£1,904,666	Tourists	Gross Number of Local Attendees	1,128,691
£7,618,666	Local	Tourist staying 1 night	28,217
£9,523,332	All	Locals staying 1 night	141,086
<b>Accommodation Spend</b>		<b>Spend</b>	
£1,015,822	Tourist	Average Ticket Price	£9.00
£1,834,123	Local	Average Off-site Spend	£10.00
£2,849,945	All	Average On-site Spend	£11.00
		Average Travel Spend (50% £1.50 50% £12)	£6.75
<b>Off Site Spend</b>		Average Accommodation Spend Tourist	£36.00
£2,821,728	Tourist	Average Accommodation Spend Local	£13.00
£11,286,912	Local		
£14,108,640	All		
<b>Off-site and On-site spend calculations for GVA</b>			
Retail			
£1,410,864	Tourist		
£7,054,320	All		
<b>Food and Beverage</b>			
£4,514,765	Tourist		
£22,573,824	All		

## Catalogue of Glasgow Music Assets

### Venues

Venues marked with \* are larger than 1500 capacity.

1. Barrowland Ballroom\*
2. Berkeley Suite
3. Box
4. Broadcast
5. CCA
6. City Halls: Grand Hall
7. City Halls: Recital Room
8. Drygate
9. Glad Cafe
10. GRCH: City of Music Studio
11. GRCH: Concert Hall\*
12. GRCH: New Auditorium
13. GRCH: Strathclyde Suite
14. Kelvingrove Bandstand\*
15. King Tut's Wah Wah Hut
16. La Cheetah
17. Mitchell Theatre
18. Mono
19. National Piping Centre
20. Nice n Sleazy
21. O2 ABC
22. O2 Academy
23. Oran Mor
24. Queen Margaret Union  
(University of Glasgow)\*
25. Royal Conservatoire of Scotland
26. Saint Andrews In The Square
27. Saint Luke's
28. SECC\*
29. SSE Hydro\*
30. Stereo
31. Sub Club
32. SWG3: Galvaniser's Yard\*
33. SWG3: TV Studio

34. SWG3: Warehouse
35. SWG3: The Poetry Club
36. The Admiral
37. The Art School
38. The Cathouse
39. The Garage
40. The Old Fruitmarket
41. The 13th Note
42. Theatre Royal\*
43. Tramway: Hall 1

### Music bars, pubs and cafes

1. Babbity Bowster
2. Ben Nevis
3. Blackfriars
4. Bloc+
5. Blue Dog
6. Bon Accord
7. Broadcast
8. Buck's Bar
9. Clutha Vaults
10. Distill
11. Dukes
12. Firebird
13. Jinty McGuinty's
14. Lebowskis
15. Lios Mor
16. Macsorley's
17. Maggie Mays
18. McChuills
19. Molly Malones
20. Sloans
21. Slouch
22. The Brass Monkey
23. The Butterfly and Pig
24. The Griffin Bar
25. The Howlin' Wolf

26. The Hug And Pint
27. The Islay Inn
28. The Old Hairdressers
29. The Park Bar
30. The Pot Still
31. The Rum Shack
32. The Scotia Bar
33. The State Bar
34. Variety Bar
35. Waxy O'Connor

### ***Record shops***

1. Fopp
2. HMV
3. Lost Chord
4. Love Music
5. LP Records
6. Missing Records
7. Mixed Up Records
8. Monorail
9. New Hellfire Club
10. Oxfam Music
11. Rub A Dub
12. The Braw Wee Emporium

### ***Instrument Shops and Instrument Makers***

1. Band Supplies
2. Biggar's Music

3. CC Music
4. Drummer's Only
5. Guitar Guitar
6. Jimmy Egypt's Guitar Repair Shop
7. Kenny's Music
8. Moon Guitars
9. Southside Music
10. Strung Out Guitars
11. The College of Piping Shop
12. The Guitar Store
13. The Guitar Workshop
14. The National Piping Centre Shop
15. The Violin Shop
16. Victor Morris

### ***Recording and rehearsal studios***

1. 45/R
2. Berkeley
3. Carlton Recording Studios
4. Chem 19
5. Empire Studios
6. Glasgow Music Studios
7. Gorbals Sound
8. Green Door
9. Headhunter Studios
10. La Chunky
11. Lofi
12. Riverside Music Complex
13. The Greenroom Rehearsal and Recording Studios

# Music Tourist Survey Analysis, Questions and Responses

## Introduction

To analyse the survey results we looked for significant deviations or data spikes in the quantitative data. Where the data took the form of open ended responses, we looked at the sentiment of statements and assigned a positive, negative or open value to each and looked for word use frequency. In this way we created some quantitative data from essentially qualitative content.

Where a set of responses provide differing levels of positivity or negativity, we made this a binary analysis as well. Summing the total of the positives gives a gross value of positivity, whilst giving regard to individual categories. For example where categories of “Not at all”, “To some extent” and “To a significant extent” are available, we totalled the two positive groups to give a gross figure whilst still looking at distinctions between the three categories.

The data itself seems to be reasonably balanced in terms of the spread of respondents. There is some deviation from national Social Grades, and with a slight bias towards female responses. The Manchester set is a slightly smaller set than the other three but seems to be sufficiently broad to be representative.

## Open Ended Response Questions

Several questions use open answers, notably questions 10 and 11. These are significant questions so are dealt with first. Open ended responses were also available where the “Other” response option was offered.

### ***Q. 10 If a friend said to you they were thinking of visiting Glasgow, what would you say?***

This question is aimed at gathering perceptions of Glasgow as a city, without particular reference to its music scene.

The general perception of the city is a positive one with 81% of comments deemed to have a positive tone and only 7% deemed negative. Looking at it city by city, there is a notably more positive perception of Glasgow in Scotland than to England. Scottish cities combined gave a 91% positive comment (3% negative) ranking whereas as the English cities returned a 65% return of positive comments (11% negative).

Looking at terms that came up regularly, the most common word was “Good” occurring in around 25% of the comments and an expression of wanting to “come on the trip” cropping up in 22 comments (12%).

***“It’s what we do as a city that works. And I think it’s close collaboration between all the major players. And when I say major players I mean all the hotels. To ensure that there are rooms available, that the standards of service are good. But it’s also to ensure that the transport links are good so there’s plenty of taxis and that there’s room in the restaurants, but also that the restaurants aren’t falsely inflating their prices on the night of the concert so you are not gouging the market. So it embodies everyone and that’s what Glasgow is good at.”***

**Dominic McVey, General Manager, Crowne Plaza**

The most specific non-music attractive characteristic of the city mentioned was its **shopping**, but, noticeably, this comment is largely confined to Scottish respondents. This suggests an opportunity for encouraging music tourists to spend more during their time in the city – either reinforcing the notion of ‘shopping’ to Scottish music tourists or introducing it to tourists from England and further afield.

Scottish respondents also mentioned “Pub” in 17% of their responses whereas no English city respondent mentioned it at all.

The word Music was only used in seven comments (4%) of responses.

**Q. 11 *Thinking about the city of Glasgow specifically, what words or phrases would you associate with its music scene / heritage?***

These comments were generally encouraging with 87% deemed as positive. Note: As the Inverness comments were significantly at odds with the other cities we were concerned at the manner of the framing of the question to respondents and could not

readily integrate them with other responses and so these were excluded from this analysis. A Scottish-English distinction was apparent with Aberdeen returning a 96% positive response and the combined English cities returning a 78% positive response. The key term used in the responses was “Pub” – coming up in 12% of responses from Aberdeen. Clearly there is some association with pubs and live music which in itself perhaps reinforces the importance of the grassroots section of the Glasgow music scene. It is also noticeable that in England Glasgow’s music scene has some perception of being “Scottish”. The “Diversity” of the music scene also warranted mention with 9% of responses referencing this.

### **Other Questions**

**Q. 1 *Have you ever taken a visit that involved at least one night away from home for any of the following?***

- **To go to see a music show or gig that had a specific named headline act**

Highest “Yes” came from Inverness (62%) – lowest from Manchester (37%) with Newcastle (42%).

This could imply that respondents are able to see big name acts in Manchester and Newcastle without the need to travel but not in Inverness. But, it is worth noting that less than 50% on average said “yes” when all groups are considered.

Females (54%) and those living with friends (63%) were the highest rating sectors to say yes. It is noticeable, in terms of demographics, that those living alone are much less inclined to do this with 70% saying “No”.

- **To attend a music festival**

Less common than to see a headline act. Only 38% saying “Yes” and particularly unpopular with women with 70% saying “No”.

- **To attend a club**

The least popular choice. Only 15% saying “Yes” and a very low approval in Inverness and Newcastle with 98% saying “No” in each case.

**Q. 3 *Thinking about the most recent time you did any of these things, what was the nature of your visit for your group?***

The activity is predominantly undertaken with a group of friends with 63% saying this was how they did it. There was also a strong correlation between those in a relationship traveling with their partner to undertake this sort of trip.

**Q. 4 *What type of accommodation did you stay in?***

Hotel or B&B rated the most popular option (50%) followed by staying with friends (23%) There may be evidence of some “glamping” perhaps with higher percentage of AB socioeconomic group (24%) saying they camped. This could also possibly be a “Glastonbury effect” (and also be attributed to boutique festivals all over the UK with a similar ethos and vibe to Glastonbury).

Note: staying a night away to attend a festival seems a less popular choice with 62% saying “No” and a noticeable gender split with 70% of females saying “No”. This seems to be a more male oriented activity.

Staying over with the intention of visiting a specific club or similar did not seem a commonly attractive activity. But it seemed that the idea of attending an event at a specific well known or interesting venue – without the added proviso of staying overnight – had some attractions with 46% and 49% saying it would be “to some extent” or “to a significant extent” attractive respectively. Inverness, again, was the most positive at 62% saying “to a significant extent” it would attract them.

***“A hotel manager might grumble about competition but sometimes competition is a very good thing. To attract large events you have to have well known brands so it’s great to have Crowne Plazas, Hiltons, Radissons, Premier Inns... brands that people recognise.”***

**Dominic McVey, General Manager, Crowne Plaza**

**Q. 5 *To what extent would each of the following attract you to a city to explore its music scene?***

- **Chance to attend a gig or show at a specific well known or interesting venue.**

This is clearly the most attractive option with a 95% gross approval rating. Inverness stands out with a 62% rating in the “Significant Influence” category against an overall average of 49%. The responses here tally quite closely with the findings of Q1 where respondents reflected on what they have actually done.

It is also notable that there is strong support for this in the E socioeconomic group with 75% rating this significantly influential against a category average of 52%.

- **Guided City Tour**

The Gross Approval rating of a guided tour as an attractor is 80%. Despite this, on closer examination the attractions of guided tours of a city's music scene / heritage seem more middling and quite varied across the groups with 46% of respondents saying it would influence them to “some extent” and 34% to a “significant extent”. Notably, it mainly appeals to a younger demographic with 65% of 16—24 year olds regarding this as a feature which would attract them to “some extent”. There is also an interesting split between Manchester and Newcastle with 60% of Newcastle respondents saying it would be a significant draw and 0% of Manchester respondents.

- **App Based Tour**

App based tours did not have the same appeal. The largest response to this question being 35% saying it would not influence them at all: a gross approval of 64% only. Again there is a significant split between Manchester and Newcastle responses at the “Significant Influence” category.

- **Specific Visitor Attraction**

On the subject of a Specific Visitors Attraction the gross acceptance is 87%. The most distinctive category is in Manchester where some 83% said it would have influence “To some extent.” But it is a noticeably lukewarm response when compared to the other cities in the “Significant extent” category: only 3% of Manchester responses selected this against a category average of 33%. Looking across this question it is noticeable that Manchester is not strongly positive about any of the options. This raises a question. Where a city has a well established musical scene, do residents feel less need to travel elsewhere for music related attraction? It is also worth noting that

the E social grouping tends to be pretty positive about most of the options comparatively speaking but we have to question if this group is necessarily the most valuable to the city as tourists if we are being fiercely rigorous on the economics of where value is derived

- **An area of the city that is a particular centre of live music in pubs and clubs**

This rated second only to the live act at a significant venue, in terms of gross appeal. But it is noticeable that it rates very strongly in the “Significant extent” category with a 55% rating which is by some margin the highest selection for any of the options. It is also worth noting that it is particularly popular in the AB and C1 socioeconomic categories with 70% and 64% respectively selecting it as a “Significant” draw. It is probably fair to say that these more “affluent” categories are likely to be those with a greater capacity to stay longer and spend more. By extension, they are more likely to make a greater impact on the growth of the sector. This suggests an opportunity for targeted marketing.

- **A range of distinctive record/music shops**

A gross appeal of 76% with a high approval in Inverness. This may speak to the relative availability of such an offer in their city.

Over all, the general impression from the question is that big name shows at significant venues will act as anchor events, providing opportunity to entice visitors to explore further into the city’s music scene. Evidence from elsewhere in the survey suggests this is already happening – certainly to a Scottish audience. But there is scope for development. And there is great potential for creating unique attractions – like a defined musical district – to convert one night stays into two when tourists book in for a big act. Or simply offer another reason for coming to Glasgow.

### ***Q. 7 Relative Strength of Music Scene in UK cities***

**Belfast** – No respondents from Aberdeen felt it had a strong music scene, and its perception of a strong music scene is only noticeable in the E social category.

**Birmingham** – Again strong approval from the E category. Ranked poorly by Manchester, but relatively positively by Newcastle. Overall an average gross approval rating.

**Brighton** – Lowest gross approval of any city surveyed.

**Cardiff** – A low rating overall but an oddly contradictory one in the “strong music

scene” category. Newcastle gave it a 63% ranking whereas neither Manchester nor Inverness respondents gave it any “strong” responses and only 2% of Aberdeen respondents rated it as “strong”.

**Edinburgh** – Edinburgh has quite a strong positive perception of its music scene with an 82% gross figure, with Newcastle scoring it particularly highly. This may reflect good rail connection between the cities.

**Glasgow** – The city has a very strong rating. Comparison with Edinburgh looks, on first glance, very close: with Glasgow rating 85% and Edinburgh 82%. Closer examination reveals a different story. Glasgow has a markedly higher score than Edinburgh in the “Very Strong” category with some 59% of the responses falling in this category by comparison to Edinburgh’s 40%. This figure also compares well with Liverpool which achieves only 52% in the “Very Strong” category. In fact across all segmentations – by age and/or social economic category – there is a consistently high score in the “Very Strong” category for Glasgow. The only exception is Manchester. However this city had an equally poor view of Edinburgh. The even spread of positive votes suggests a broad perception of Glasgow as having a strong music scene.

**Leeds** – A gross positive total of 79% and a very strong rating from Newcastle of 84% seeing the city as having a “Very strong” music scene. The city also has a significant recognition as a “Very Strong” music scene in the D and E social categories.

**Liverpool** – Liverpool has a strong gross rating of 84% but, as mentioned above cannot match Glasgow in the “Very strong” category and the rating of “Very Strong” is more unevenly spread. There is a bias towards older responders choosing the “Very Strong”, which we might class as a Beatles effect, and also amongst the E social category which returned a 92% rating for “Very Strong”

**London** – It should be no surprise that the perception of London as a city with strong musical culture is very apparent. With a gross approval rate of 97% of which 83% rated it as a “Very Strong” and consistent scoring throughout it is the dominant city in the survey.

**Manchester** – The city has an excellent rating and whilst the responses from Manchester itself are strong it is noticeable that Newcastle rates Manchester as having a “Very Strong” music scene more highly than its own residents! One of the most notable distinctions in this area is that three of the four cities rated Manchester at 80% or higher as a “Very Strong” music scene but Aberdeen rated it as only 34% in this category.

**Newcastle** – With an 83% gross approval rating this is a good review, although it is noticeable that much of that approval comes at the “Quite Strong” level with the exception of the respondents from Newcastle itself. Again like Edinburgh and Liverpool, this performance whilst strong cannot match Glasgow.

**Q. 8 *Please indicate your level of agreement with the following Statements:***

- **You would consider visiting a city for a specific music show or gig?**

This question puts emphasis on the attraction of the act as a draw and not the city but with an 83% gross approval of which 48% in the “strongly agree” category it is clear that a good act will be a draw for visitors and corresponds with the findings in Q5. Glasgow’s ability to attract top line acts is clearly a significant strength.

- **Visit a city specifically for its music scene**

Less of a draw in and of itself with a gross approval of 61%, but with only 21% of these respondent “strongly” agreeing – and notably none from Inverness agreeing with this.

- **Explore a city’s music scenes as part of a wider trip**

Evidently a stronger attraction with a gross approval of 75%. It suggests an opportunity to extend the spend and duration of stay for music tourists, or indeed attract other visitors to explore this aspect of the city. Given Glasgow’s reputation as a music city – with well known venues attracting big name acts – convincing visitors to stay longer and explore further seems a viable aim.

**Q. 9 *To what extent do you think each of the following would help you explore a city’s music scene?***

- **A Music trail map identify places of interest**

The Map concept has a gross approval rating of 86% and has particular attraction to the AB group, the most affluent socio economic group

- **Information in guide books**

A varied response to this with an inconsistent rating from the four surveyed cities where 50% of Newcastle respondents said it would have a “significant” impact but only 14% of Aberdeen respondents agreed.

- **An app or online guide**

The least popular option with 22% of respondents saying it would have no impact, but was markedly more popular with female respondents than males. Again we see this has some correlation with Q5 where an App was not considered a significant attractor.

- **Information on social media**

The most popular option on gross counts and perhaps unsurprisingly this offer was much more popular amongst the 16–24 year old groups than other age groups.

- **Personal recommendations from local people**

The strongest offer in terms of those saying that it would have a “significant impact”. Given its emphasis on local people recommending, it is worth exploring whether a musical version of “People Make Glasgow” might have some resonance here. It also emphasises the value of personal intervention: hotel staff, transport and other “local” representatives have an important part to play. Ensuring they are ready and able to perform this role for the music sector could be a useful intervention.

**Q. 12 *How interested or otherwise do you think you would be in going to Glasgow for a visit that included some element of the City’s music scene***

This question received a Gross approval rate of 85% with nearly half of the respondent saying that they would be at least “Quite interested”. Aberdeen is particularly positive with 64% of respondents being “Very interested” but it is also worth noting that the approval rates are particularly high amongst the AB and C1 categories with 91% and 88% gross approval ratings respectively.

**Q. 13 *Are you aware that Glasgow is a UNESCO World City Of Music***

Clearly under-used, with 89% of people unaware. Examining the social categories there is no indication that the UNESCO association has any “class” related effect – AB and C1 categories are as unaware as anyone else.

***“When we became a UNESCO City of Music we felt it wasn’t being shouted about enough. It still amazes me that so many music lovers in Glasgow don’t know that we have that accolade, a lot of people on our tours are not aware of that. So we’re still not shouting about it loud enough in my opinion.”***

**Fiona Shepherd, Glasgow Music City Tours**

*Questionnaire and response data tables available upon request.*