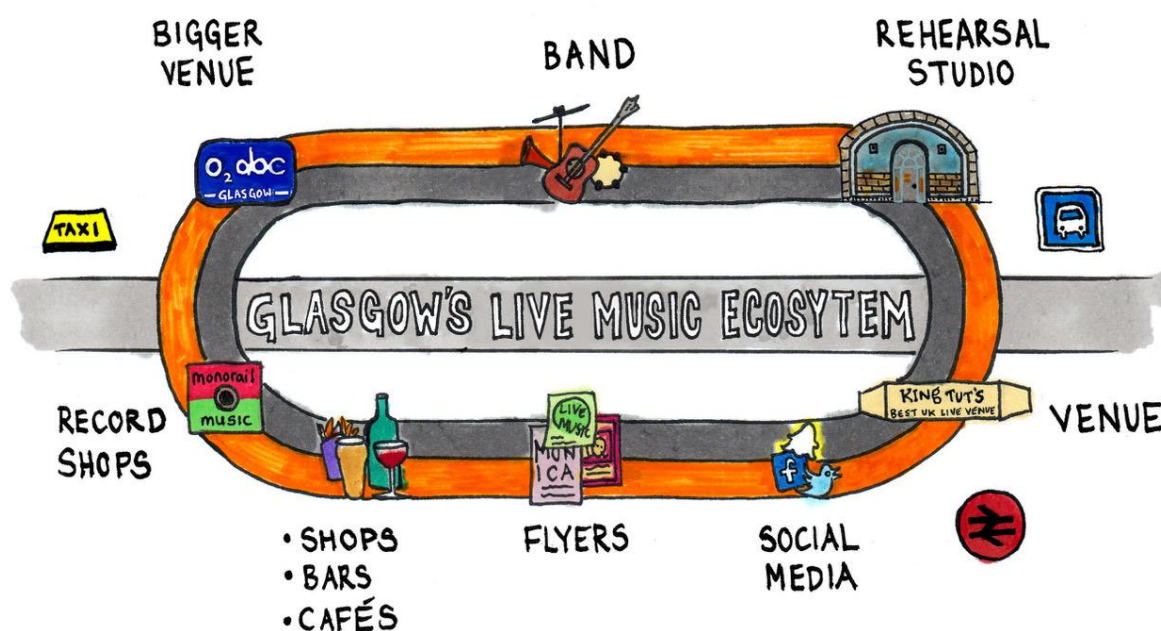


GROWING THE VALUE FOR MUSIC TOURISM IN GLASGOW



ABRIDGED VERSION OF THE 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.

Dougal Perman runs Inner Ear and chairs the Scottish Music Industry Association. Tim Wright drives twintangibles and Fay Young leads Walking Heads. Illustrations by Rae-Yen Song. Layout and additional graphics by Dougal Perman. Additional research, ideas and contributions from Olaf Furniss, Robert Kilpatrick, Laurie Duffy and Brian Baglow.

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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.¹
- 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.

¹ 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

“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 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 110,000². 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 Glasgow³), 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.

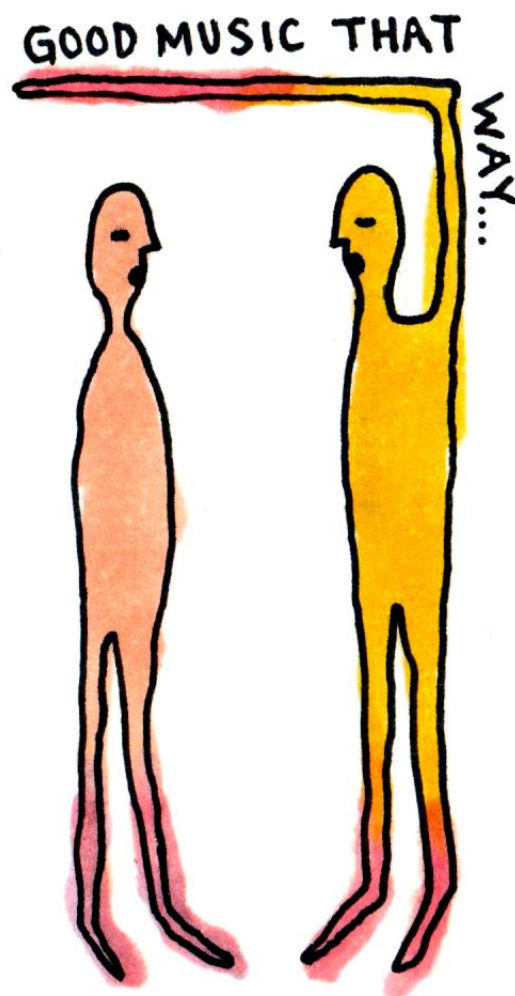
We recommend working with Showcase Scotland Expo, the Scottish Music Centre and members of the Scottish Music Industry Association (especially those involved in

² celticconnections.com/blog/Pages/And-so-farewell--.aspx

³ 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

Twining

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.



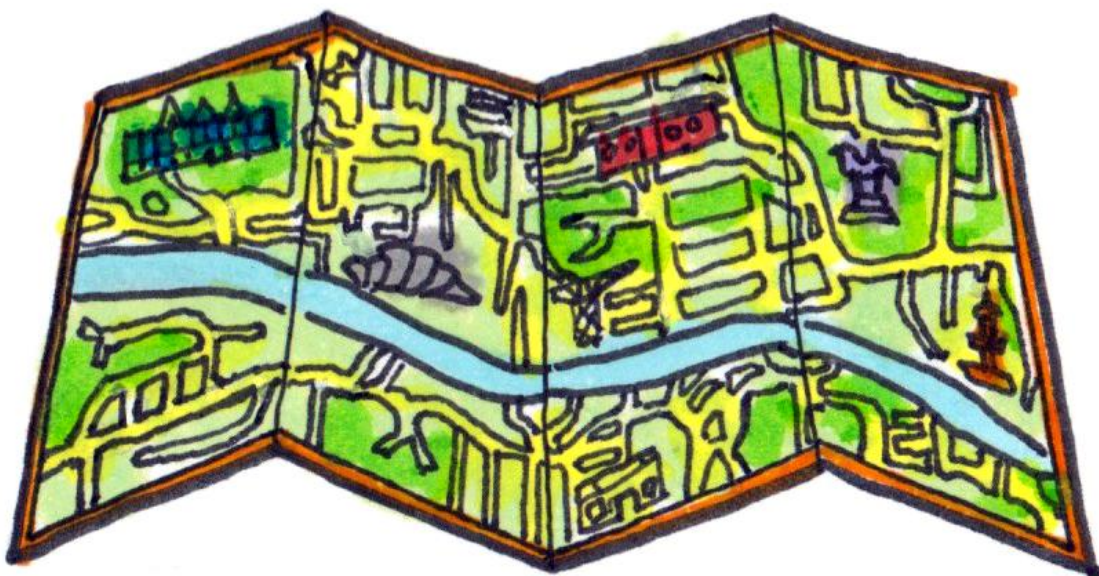
Maps and Routes

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.

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