

5.0 ASPECTS OF ECONOMIC IMPACT

Two categories of economic impact that feed into the LEC area analysis in Section 6 below were first analysed at the wider Highlands and Islands level: (i) Educational arts-related employment, and (ii) Impacts from visiting performers.

5.1 Educational Arts-Related Employment

In order to assess the number of teachers of arts-related subjects in the educational sector, we contacted all of the educational authorities in the Highlands and Islands for data on primary and secondary education, and all of the relevant UHI partner colleges for data on further and higher education. All provided information, although in some cases it was difficult to deduce full-time equivalence from numbers of people employed and to exclude the teaching of crafts, design, etc from wider courses (in order to retain consistency with other aspects of the study).

Primary and secondary education were covered in the 1991 study, and the figures from that study are given below for comparison with those for early 2001.

Teachers of Arts-Related Subjects
in Primary and Secondary Schools
(full-time equivalent jobs)

	Music		Art		Drama		Dance		Total	
	1991	2001	1991	2001	1991	2001	1991	2001	1991	2001
Shetland	26	30	14	14	-	-	-	-	40	44
Orkney	6	8	5	10	-	1	-	2	11	21
Western Isles	22	16	21	15	-	-	1	-	44	31
Highland/West Moray	108	105	92	63	3	3	-	-	203	171
Argyll and Islands	31	19	29	30	2	2	-	2	62	53
Totals	193	178	161	132	5	6	1	4	360	320

The data for the two years, 1991 and 2001, are not precisely comparable as different methods may have been used by those providing the information in calculating full-time equivalence. The following points are, however, clear:

- There has been a significant reduction in art teachers in Highland. In Highland primary schools, visiting specialists who have retired or otherwise left have not been replaced (for economy), the responsibility for teaching art and music falling increasingly on general class teachers. In Highland secondary schools, there has been a change in balance between the teaching of arts and music in the early years, which has led to an increase in music (and instrument) tuition and a reduction in art tuition.
- In comparison with Orkney and the Western Isles, there are a relatively high number of specialist arts-related teachers in Shetland which perhaps reflects the ability of the Local Authority through oil revenues to incur discretionary expenditure in its priority areas. Shetland continues to specialise in music, and this is linked to the relatively high number of professional and amateur musicians in Shetland that we found in our wider analysis for this study.
- Drama and dance teaching, as in 1991, lag behind music and visual art tuition, although drama as part of the curriculum will be taught to an extent by English teachers, and dance by

PE and other teachers. The dance teaching in Orkney shown above represents expressive dancing taught in blocks by PE teachers.

- Young people's interest in drama is illustrated by an 83% increase in applications for university drama courses in the UK in the past seven years (influenced by potential careers in television). This strength of demand has not stimulated increased provision in Highlands and Islands schools, and its pupils are thus disadvantaged in progressing into higher education in this field.

From the information received, we estimate that 15-20 fte jobs are provided in arts-related teaching within the Highlands and Islands by the UHI partners. This range is given because of the difficulty of excluding crafts, design, etc where this is part of a wider arts course. In addition, course tutoring for the Open University and the Open College for the Arts will provide employment in the Highlands and Islands, but this work will tend to be undertaken for supplementary income by people already included in our economic impact analysis as artists or teachers.

As noted elsewhere in this report, arts teachers are often important in their local areas through also being active within their discipline (eg. as a musician) and/or through helping to lead or participate in local arts initiatives, community arts events, etc. Since arts teachers are specialists who would otherwise (in general) be employed as such outwith the Highlands and Islands were the jobs shown in the table above not available in the region, the benefits from the scale of provision of such jobs in local areas extends beyond equipping school pupils with artistic skills and (thereby) encouraging them to participate actively in the arts later in life. The reduction in specialist art teachers, and the virtual absence of specialist drama and dance teachers, thus means that communities have become increasingly deprived of this skills base.

5.2 Impacts from Visiting Performers

Performers at the events covered in the analysis in Section 6 of this report and assistants travelling with them generate significant economic benefit to areas in which they stay overnight when such expenditures are aggregated over the year. These impacts, in terms of expenditure by visiting performers, are analysed below separately for (a) performances at Eden Court Theatre, and (b) all other events (including festivals, where some performers will visit the local area for several days).

(a) Eden Court Theatre Performances

The director of Eden Court, Colin Marr, provided us with estimates event-by-event for all performances at the theatre between 1st October 1999 and 30th September 2000 of the number of people in the visiting company and the number of nights (if any) that these people will have spent in the local area (normally Inverness). The size of visiting groups spending the night varied from 2 to approximately 100 (Scottish Ballet). At least 100 people performing at the Inverness 2000 Festival Fling (September 2nd) will also have spent the night locally. In total, visiting companies will have spent a total of **4,458** nights over the year; while a further **1,456** visitor days will have been generated (ie. these people will have travelled home after the performance).

Professional musicians, dancers, etc generally stay in relatively expensive hotels; whereas small groups tend to stay in budget accommodation. Given the opportunities to spend money in Inverness the day after a performance and this accommodation profile, we have assumed

that these 4,458 visitor nights will generate an average spend of £65 : giving total spend of £289,770. The 1,456 visitor days, we have assumed, will generate an average spend of £10 per day : giving additional total spend of £14,560. Together, these expenditures total approximately **£300,000**.

(b) Other Visiting Performers

Groups or individuals giving performances at other events and festivals and staying overnight will vary from one (eg. a jazz pianist) to double figures for a group of dancers, to much larger numbers at special events such as the National Mod and the Northern Meeting Piping Competition. Companies touring a range of Highlands and Islands venues that are in receipt of grant or deficit funding will average approximately five, whereas unsubsidised groups will tend to be smaller in size. For the purposes of this study we have assumed an average group size of 3.5 where a group spends the night in the locality of their performance (or en route to their next venue where they are touring the Highlands and Islands).

Touring groups will tend to stay in budget accommodation, while many receive hospitality from local promoters (in the form of meals/drinks, and, in some cases, overnight accommodation). We have, therefore, assumed that their average overnight spend in the Highlands and Islands will be approximately two thirds that of the average tourist : ie. £30 per night. Allowing for inflation, this is comparable to the average of £25 assumed for the 1991 Impact Study. Our estimate of overnight stays over the year October 1999 to September 2000 in the Highlands and Islands as a whole, based on our events analysis in Section 6, below is **2,000** person nights. At an average spend of £25 per night, this would give total expenditure of **£50,000**. A breakdown of this employment benefit by LEC area is given in Tables 6.3.1-6.3.10.

Some of the above touring groups will be Highlands and Islands residents. Their expenditure away from home is still regarded as “non-displaced”, however, as it is assumed that they would otherwise be touring outwith the Highlands and Islands. In 1999/2000*, HIE funded 11 incoming companies who toured 79 venues, and 11 Highlands and Islands-based companies, who toured 103 venues.

Overall Impact from Visiting Performers

Adding the expenditure impacts while in the Highlands and Islands of visiting performers at Eden Court and other venues gives an annual total of **£350,000**. Following the methodology given in Section 6 for converting visitor spending into full-time equivalent jobs supported in the Highlands and Islands, this level of expenditure by visiting performers will generate a total of approximately **21 fte’s**.

* May to April