

9.0 COMPARISONS WITH THE 1991 IMPACT STUDY

9.1 Events and Exhibitions

Table 9.1 below repeats the table from the 1991 Impact Study report that related to Events and Exhibitions (Table 5.7 of that report), with the box office/entry fees adjusted for inflation at 30% since the April 1990 to March 1991 period.

Table 9.1
Audience and Box Office Estimates by Art Form
April 1990-March 1991

Art Form	Total Audience/ Visitors	No. of Tourists	Total Box Office/ Entry Fees (£)
Classical Music	14,974	1,884	54,462
Traditional Music	30,617	6,782	160,167
Other Music	32,989	5,741	116,615
Dance	4,077	593	11,948
Drama - Professional	25,664	7,877	92,629
- Amateur	19,115	2,080	49,044
Childrens Events	10,114	507	6,664
Poetry/Readings	2,952	1,275	3,414
Mixed Events/Festivals	17,459	6,621	58,066
Exhibitions (days)	135,429	44,618	57,416
HIE area totals (incl. exhibitions) (excluding Eden Court)	293,390	77,978	610,190
(including Eden Court)	429,090	100,585	1,553,715
HIE area totals (excl exhibitions) (excluding Eden Court)	157,963	33,357	552,124
(including Eden Court)	278,663	51,463	1,490,943

Table 9.2 shows the percentage change between April 1990 - March 1991 and October 1999 - September 2000 for each category of activity in Table 9.1 as measured by the new study. The figures by art form in the body of Table 9.2 exclude Eden Court Theatre, but the overall changes are shown both exclusive and inclusive of this major facility.

As previously noted, the new study was much more comprehensive in its coverage, and much more information on artistic activity in the Highlands and Islands is now available than ten years ago. For this reason, some of the cells in Table 9.2 are shown as n/a (not applicable). The 1991 study did not include performances of traditional or other music in hotels, pubs, night clubs, etc except where given by musicians touring the Highlands and Islands or associated with festivals. Also, performances (including pantomimes) given by local amateur drama groups were generally not covered in the 1991 study. It was therefore not considered appropriate to make direct comparisons between the 1991 and 2001 studies for traditional music, other music or amateur drama. The overall increases in activity shown in Table 9.2 for the Highlands and Islands do, however, include the increases due to the wider scope of the new study in these three sectors.

Table 9.2
Changes in Events and Exhibitions Activity in the HIE Area
April 1990/March 1991 to October 1999/September 2000

Art Form	Total Audience/ Visitors	No. of Tourists	Total Box Office/ Entry Fees (£)
Classical Music	+ 72%	+ 248%	+ 144%
Traditional Music	n/a	n/a	n/a
Other Music	n/a	n/a	n/a
Dance	+ 41%	+ 42%	+ 78%
Drama - Professional	+ 48%	+ 32%	+ 107%
- Amateur	n/a	n/a	n/a
Childrens Events	- 39%	+ 18%	+ 107%
Poetry/Readings	+ 162%	+ 56%	+ 549%
Mixed Events/Festivals	- 56%	- 46%	- 41%
Exhibitions (days)	+ 376%	+ 802%	+ 107%
HIE area totals (incl. exhibitions) (excluding Eden Court)	+ 403%	+ 689%	+ 389%
(including Eden Court)	+ 281%	+ 543%	+ 161%
HIE area totals (excl exhibitions) (excluding Eden Court)	+ 426%	+ 538%	+ 419%
(including Eden Court)	+ 249%	+ 367%	+ 164%

Notes: (i) The Mixed Events / Festivals category is lower for 1999/2000 than for 1990/91 because more events were classified to an artform category in the 1999/2000 study.

(ii) Cinema is not shown in Table 9.2 as it was not covered in the 1991 study.

9.2 Direct Employment

The increase of more than 100% in the “bottom line” (box office income) between the two studies is consistent with the increase in the number of full-time equivalent jobs supported by the arts between the two studies - up from approximately 700-825 direct fte’s to approximately 1,620 direct fte’s. It is difficult to assess precisely how much of this increase in employment impact is due to the wider coverage of the new study and the greater visibility of arts activity, but we consider that the underlying increase will be around 33% (ie. 250 additional fte jobs supported since 1991).

The 1991 study did not estimate indirect and induced job creation through the multiplier, and a comparison on this basis is therefore not possible.