

Glasgow, UK

About the area

With a population in excess of 1.8 million, Glasgow City Region (GCR) is the fourth largest city region in the UK and Scotland's economic powerhouse. There are two international airports and an extensive rail and road infrastructure, and the region has almost one-third of Scotland's jobs, business base and economic output.

The Region benefits from numerous assets:

- access to a highly skilled workforce of 1.2 million across a wide range of industries;
- existing strengths in a number of sectors including financial services, life sciences, engineering, manufacturing and creative and media industries; and
- home to a number of internationally acclaimed successful universities and research institutes that provide the space for innovation and the people who drive the Region's development.

The GCR comprises eight of Scotland's 32 local authority areas. Local authorities have direct responsibilities for the delivery of business advice and support services and for local economic development, including employability services and local area regeneration. They are also responsible for a wider range of services and functions which impact directly on the growth of the economy, including, planning, roads and transport, environmental health, education and childcare, events and tourism, community development and culture and leisure services. Councils are also the drivers of the recent City Region and Growth Deals, agreements between the Scottish Government, the UK Government and local authorities designed to bring about long-term strategic approaches to improving regional economies.

History of CCS policy in the region

Like many industrial cities, Glasgow suffered from the demise of heavy industry and by the mid-1980s was largely regarded as a city in decline. The civic response was to look to culture as an engine of regeneration and renewal beginning with the opening in 1986 of the Burrell Collection, a large collection gifted to the city and now housed in a museum within Pollok Country Park in the city's south side. This was followed by the Glasgow Garden Festival in 1988, the widely praised year as European City of Culture in 1990, the Glasgow Design Festival in 1996 and the Year of Architecture and Design in 1999.

This investment in culture also extended beyond high profile events. Since 1983, the city has invested almost GBP 800 million (in current prices) in cultural infrastructure. In addition to high profile developments such as the opening of the Burrell Collection, Glasgow Royal Concert Hall, Gallery of Modern Art, Tramway, Riverside Museum, the SECC/Clyde Auditorium and the SSE Hydro, this also includes the redevelopment of the Kelvingrove Art Gallery and Museum, City Hall and the Old Fruit Market as well as improvements to smaller venues and a host of local libraries and community facilities.

The initial focus on high profile events and buildings helped to raise the profile of culture in the region and move Glasgow's image and reputation away from declining heavy industry towards that of a modern, vibrant city. Towards the turn of the century, there was growing interest in the economic potential of culture and the creative industries, and Glasgow was again an early leader. Civic support for the screen sector was strong, and Glasgow quickly developed a reputation for film and TV production, and for design, building on the international profile of the Glasgow School of Art. The city spawned bespoke support providers for the sector, and invested in facilities and infrastructure for artists, film and TV producers and small creative businesses, often using European Structural Funds.

Throughout this time, Glasgow's visitor economy also grew, not least as a result of its strong cultural profile, and cultural policy started to shift towards engaging the people of the city in culture, in particular those in greatest need. Despite steady growth in the city economy, Glasgow continued to struggle with persistently high levels of deprivation and health inequalities. These challenges continue to this day and in many respects have gotten worse rather than better.

Policy interest in the CCS from an economic development perspective declined in Glasgow during this time, and many felt that its early leadership position (relative to other parts of the UK) had been lost. However, the tide appears to be turning on this once again as the city region looks again to the creative industries to support future growth. Importantly, the focus of this renewed policy interest is based more on creative economy thinking than it is on CCS as a key sector. This new approach is interested in the growth of CCS itself, but also in the application of creativity across the wider economy. It is a broader and more open approach that is not restricted to more traditional notions of business growth. Instead, it sees the application of creativity across areas like manufacturing, technology and tourism as an enabler of innovation far beyond the sector's own boundaries.

However, for many partner councils outside the main city area, policy interest is more around culture and its role in community wellbeing. All have some cultural assets although for some these may be limited. Others, such as North and South Lanarkshire have larger cultural services which are mainly focused on delivering against social outcomes relating to poverty and health.

Cultural participation

The GCR has generally high cultural participation rates, with nine in ten adults in the region participating in cultural activities. Prior to the pandemic, cinema was the most common form of attendance at a cultural event or place of culture, with 60% of adults in the Glasgow City Region having visited in the last 12 months, and live music and heritage site attendance had been steadily rising in the years leading up to 2019. While data is not available at a subnational level, Scotland had the third-highest household spending on recreation and cultural services of all regions in the UK.

Attending museums is the second most popular form of cultural participation in the GCR (after cinema) and data from Glasgow Museums demonstrates strong performance in engaging those from more deprived areas. Museums and other cultural venues have been a central element of Glasgow's cultural regeneration effort and Glasgow City now has the largest civic museums service in Scotland. For example, in the city of Paisley, a GBP 100 million culture-led investment programme began in 2016 with investment of GBP 3.7 million in The Secret Collection. This facility replaced a vacant department store and is the first publicly accessible museum store on a UK high street. The large basement unit of the facility houses tens of thousands of items from Renfrewshire's museum collections, not on display in the main museum – many unseen by the general public for decades. Paisley Museum Reimagined (PMR) is the flagship project in the investment programme, which aims to deliver a free to enter cultural campus of national and international significance, whilst ensuring accessibility for all. The Museum's High Street location will be used to transform Paisley's perception of itself, develop a visitor economy, lead the regeneration of the town centre, and give Paisley an outward-facing profile.

Alongside culture led-regeneration strategies, cultural participation has been incorporated into health and wellbeing agendas with some success. Health and wellbeing are major policy drivers in Scotland and in the GCR, and there has been growing interest in the role that arts and culture can play in promoting wellbeing. This has led many of the authorities and culture trusts within the GCR to develop pilot programmes tackling specific health and wellbeing issues through cultural participation.

Jobs and skills

In 2019, around 40% of employment in CCS in Scotland (excluding cultural and creative jobs outside the sector) came from The Glasgow City Region. There has been 5% growth in employment in CCS in the region since 2010, outperforming Scotland as a whole which has experienced an overall decline in CCS employment in this period, with growth of -1%. In the GCR, employment in CCS is highly concentrated in the urban core (Glasgow city) and the main areas of growth are in screen and in design and architecture. Performing arts is also strong, particularly in Glasgow City but has not shown much employment growth.

The sector has some notable skills gaps. For example, in the screen sector, the skills base is under pressure with continued growth over recent years that shows little sign of abating. It has been highlighted that these skills gaps risk threatening the longer-term competitiveness of Scotland's screen sector if not addressed (Skills Development Scotland/EKOS, 2019^[3]). Concerns have also been raised around the impacts of Brexit on the ability of CCS to access international talent, not least in areas such as computer games and animation (Carey, Florisson and Giles, 2019^[4]).

Much like other regions, cultural and creative employment in GCR is often precarious. In 2020, following a broad consultation, the Scottish Government launched a *Culture Strategy for Scotland* (Scottish Government, 2020^[5]), which placed strong emphasis on fair work and on inclusiveness and diversity in the cultural and creative workforce. The strategy recognises the often-difficult working conditions for many in the sector (low paid and insecure work) and pledges action to promote and apply fair work principles across the arts and cultural industries.

Entrepreneurship and business support

In 2020, GCR accounted for 35% of the total CCS business base in Scotland. Just under half of CCS businesses in the region came from the following three sub-sectors: “motion picture, video and television programme activities” (19%), “architectural activities” (15%) and “specialised design activities” (15%). Between 2010 and 2020, the business base of the creative industries in GCR has grown by almost one-fifth (17%) – more than double the growth at a national level (8%). With the exception of businesses within Books and Press sub-sector, all sub-sectors have grown significantly since 2010 and have outperformed growth at a national level. Growth has been particularly pronounced in the three sub-sectors mentioned above.

Entrepreneurship and business support in the region is diverse, with a mix of mainstream and sector-specific provisions. The screen sector benefits from specific support from Screen Scotland and from local film offices (including the Glasgow Film Office and others within the GCR) and some sector organisations and programmes (e.g. TRC Media, Film City Futures). There is also a range of bodies supporting arts organisations and CCS businesses, mainly at a national rather than regional level such as the Federation of Scottish Theatre, Arts and Business Scotland and Publishing Scotland. Further support may be provided by Creative Scotland and local authorities but this is less likely to focus on business development. Specific business start-up and development support is generally provided by mainstream services, such as Scottish Enterprise (one of Scotland's three economic development agencies) or the Business Gateway (a national service delivered by local authorities across Scotland).

Accesses to finance

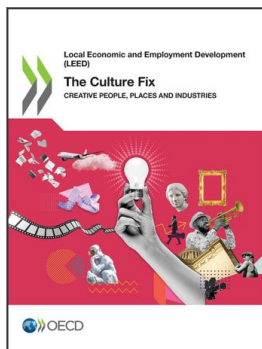
Following the global financial crisis of 2008, the UK Government policy of austerity led to reduction in UK government spending on culture and put pressure on local council budgets. At a national level, Creative Scotland (funded by the Scottish Government and the National Lottery) continues to provide essential

funding to the CCS both through ongoing revenue funding support and specific project funding. At a sub-sector level, Screen Scotland has a key role in offering support to the screen sector as does Museums Galleries Scotland.

In GCR, the majority of local government expenditure on culture is on direct provision – the cultural buildings and services that councils either run themselves or deliver through arms-length external organisations (ALEOs). The ALEO model has grown significantly over the last ten years. Essentially a facilities-based model, most ALEOs were established with a view to achieving savings on non-domestic rates by virtue of the charitable status of these organisations. The ALEO model also opens up other avenues for income generation, wider fundraising and operational efficiencies, but has been seen by some as politically problematic.

Trusts and Foundations have long played a critical role in helping to fund arts activities and arts organisations in the region, for both revenue and capital. However, arts organisations reported that both business sponsorship and trusts and foundations income are increasingly competitive and require investment (time, people and money) to secure. Larger organisations tend to do better in these areas as they are better able to hire specialist skills in business development.

Wider review also suggests that access to finance for creative businesses remains an issue, but there is a marked lack of data to assess the extent or impacts of private sector investment in the sector. Some CCS business may be accessing mainstream business grants via councils or enterprise agencies, but no data are available to assess the extent of this, nor its impacts. Similarly, it is not known how many CCS businesses may have accessed commercial investment or even bank finance. It has been noted that this lack of data is a constraint on effective policymaking to support access to finance for CCS businesses and entrepreneurs.



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