Facilitating Music Tourism for Scotland's Creative Economy

AHRC Creative Economy Engagement Fellowship Report

Dr Matthew Ord   Dr Adam Behr

Contents

Table of Contents

Acknowledgements

Dr Matthew Ord

AHRC Creative Economy Engagement Fund
Postdoctoral Research Fellow
Newcastle University

Dr Adam Behr

Lecturer in Contemporary and Popular Music –
Project Academic Lead
Newcastle University

For more information please contact:

adam.behr@newcastle.ac.uk

matthew.ord@newcastle.ac.uk

List of Abbreviations

AHRC   Arts and Humanities Research Council

MT   Music Tourist

MU   Musicians' Union

MVT   Music Venue Trust

PRS   Performing Rights Society

STGA   Scottish Tour Guides Association

SMIA   Scottish Music Industry Association

UNESCO   United Nations Educational, Scientific and Cultural Organization

UNWTO   United Nations World Tourism Organisation

Executive Summary

This report presents the findings of qualitative research carried out between February and September 2018 as part of an AHRC Creative Economy Engagement Fellowship at Newcastle University. The project was supported by the Scottish Music Industry Association and Music Tourist who shared their contacts and expertise, offered advice on selecting potential interviewees and assisted with the design and distribution of an online questionnaire. The principal aims of the research were:

- To identify potential beneficiaries of music tourism in Scotland
- To identify barriers to and opportunities for collaboration between the music, retail, hospitality and other tourism sectors
- To better understand the role played by the various actors involved in music tourism and the challenges facing them
- To produce a set of recommendations aimed at helping representatives of these sectors and policymakers to facilitate the development of music tourism in Scotland

The resulting report is based on interviews and presents a snapshot of opinions from individuals working in the field of music tourism including promoters, hoteliers, musicians, tour guides and retailers, as well as representatives of the public sector. We hope that the following key findings and recommendations will be of value to representatives of the sectors who are engaged in developing music tourism initiatives across Scotland, and to policymakers who are interested in growing the potential of music as a generator of economic, cultural and social value for Scotland.

Summary of Key findings

In the course of the interviews and literature review, several stakeholders in the music, retail, hospitality and tourism sectors were identified as potential beneficiaries of music tourism:

- *Venues and promoters* could benefit from enhanced links with tourism and accommodation sectors.
- *Musicians* stand to benefit from the tourist demand for local music experiences through closer links with tour operators and guides, language schools and conference organisers.
- *Record and instrument shops* could potentially benefit from and participate more fully in local music tourism initiatives, such as music city brands, music trails and districts (for example Culturally Significant Zones). At the same time, music retail businesses have a potential role to play as sites of important subcultural and local knowledge, and consequently as advocates for local music and music scenes.
- *Hotels* are already a key beneficiary of music tourism but could be supported to develop better knowledge partnerships with local musicians, promoters and venues, who in turn would

benefit from tourist demand for local music experiences through better links with hotels, tour operators and guides.

Significant barriers to collaborative activity identified through this research include:

- **Knowledge**: Lack of access to or awareness of relevant sources of knowledge and inadequate opportunities for knowledge *sharing* across the various sectors that make up the music tourism ecology.
- **Strategy**: Lack of sufficiently cohesive national music tourism strategies at Scottish Government and (in Glasgow and elsewhere) at city and regional levels.
- **Funds**: A lack of money for marketing and promotion, particularly among small businesses.
- **Branding**: Relative lack of visibility of Glasgow's UNESCO creative city status; lack of specific collaboration across UNESCO creative cities of Dundee, Glasgow and Edinburgh
- **Culture**: There was anecdotal evidence of 'insularity' and 'lack of connectedness' in cities such as Glasgow and interviewees mentioned a sense of competition between smaller and larger creative music-related businesses.

Policy barriers include:

- **Funding**: Current funding policy hinders funding bodies such as Creative Scotland from targeted investment in the career-building potential of music tourism.

- **Noise** Vulnerability of music-related businesses to noise complaints and development
- **Licensing** laws restrict the number of music events that can be staged. Also, the difficulty of obtaining short-term licenses and a lack of clarity about application processes prevents music-related businesses from capitalising on events like Record Store Day and the Fringe with one-off music events.

Opportunities for collaboration include:

- Hotels and other businesses are potential hubs for music tourism.
- Collaboration between funding and development agencies Creative Scotland, Visit Scotland, Scottish Enterprise and Highlands and Islands Enterprise could be used to further career development and promote innovation in music tourism.
- Shared UNESCO status of Edinburgh, Glasgow and Dundee offers the potential for shared promotional activities.

Key recommendations

This report recommends that the Scottish Government consider the setting up of a National Music Office, with regional music advisory boards, in order to:

- Provide a space for regular and structured dialogue between representatives of the music, leisure, tourism and hospitality industries, policymakers and local communities.
- Consider how to facilitate access to knowledge and resources for musicians and music-related businesses. This might include, for example, information on funding and visa applications, and aspects of local and national policy (including licensing and planning and development) insofar as they impact on music.
- Align concerns about *inward* aspects of music tourism with key contextual aspects of support for Scotland's music industries and national reputation, such as music exports.
- Facilitate music tourism by acting as a point of contact with, and source of information for, overseas tour operators.
- Commission research on music and music tourism activity with a focus on the Scottish economy and experience.

At the local level, music advisory boards could:

- Commission regional maps/directories of music venues and shops to be distributed online, via apps and at tourist information offices, hotels and airports.
- Facilitate networking opportunities to establish stronger links across relevant sectors (horizontally) and within them (vertically); support musicians and music venues in developing closer relationships with local accommodation providers and other businesses.
- Strengthen music city branding efforts; work to identify and protect existing assets such as historic venues and the Glasgow Album Pathway; protect key 'spaces and places' for musicians to rehearse, record and perform.

The following additional recommendations relate to public and funding bodies:

- Visit Scotland and Scottish Government could collaborate with relevant cultural organisations and trade associations in developing a music tourism strategy for the whole of Scotland.
- Visit Scotland could create a revamped music tourism hub on their website and work to allocate resources for its upkeep.
- Visit Scotland and Creative Scotland could produce a joint report on their recent successful collaborations with a view to informing and developing further collaborative projects.

- Creative Scotland, Visit Scotland, Highlands and Islands Enterprise and Scottish Enterprise could jointly consider ways to support musicians' career development beyond traditional models, including music tourism: for example, Creative Scotland and Visit Scotland could create a joint funding call specifically for music tourism projects, encouraging closer collaboration between the two organisations and helping to create sustainable careers for musicians in music tourism.

Further research

Universities and other research organisations have a role to play in developing music tourism through collaborative research. Suggestions for further research include:

- Visit Scotland in association with universities, Music Tourist, the SMIA and other relevant bodies should conduct further research to assess the value of music tourism throughout the whole of Scotland separate from the rest of the UK, preparatory to creating a national music tourism strategy. Initial work done by the SMIA at city level could provide a launch platform for this wider research exercise.

- Research is required in order to map the extent of knowledge-sharing across music, tourism, and hospitality in Scotland to identify room for growth, 'knowledge brokers' and gaps in the flow of necessary knowledge.

- Research partnerships between the music tourism sector and scholars in music, sociology, digital humanities, and oral history (among others) as well as practitioners' organisations (such as the SMIA, MT, MVT, MU, PRS) could be an important driver of innovation for the sector. The government should unlock funding for collaborative research projects in these areas. Outputs could include both written and digital formats, and feed into the development of Scottish, regional or city-level music portals and apps.

Introduction: music tourism in Scotland

Scotland is currently experiencing growth in music tourism that suggests it has a solid basis to build on. UK Music estimates that 928,000 music tourists came to Scotland in 2015 spending a total of £295 million.[1] In 2016, the figure increased by 31%, with 1.2 million visitors spending a total of £334 million.[2] Scotland enjoys an international reputation for musical excellence with particular strengths in traditional and popular music. The nation's musical assets include large arenas such as the Hydro in Glasgow, international festivals such as Celtic Connections and institutions including the Royal Conservatoire of Scotland, recently ranked amongst the Top 5 in the world.[3] Glasgow, Scotland's largest city, has a long-established reputation as a world centre for music and retained the distinction of being the UK's only UNESCO City of Music from 2008 until 2018 when Liverpool was also awarded that status. There are additional signs that Scotland's potential as a global music destination is beginning to be appreciated by a range of actors across its public and private sectors, from MSPs to record shop owners to hoteliers. A recent report focussing on Glasgow highlighted the current and potential economic value of music tourism for the city while calling for greater advocacy and increased investment in infrastructure to support future growth.[4] Scotland has also hosted early moves towards international dialogue in this area, including the world's first 'music tourism summit' in Glasgow's 2016[5], and a workshop at Edinburgh's Usher Hall in 2017 which saw Music Tourist partner with Tourism South Australia, the City of Adelaide and Arts South Australia.

Developing music tourism as a driver of socio-economic growth can be an appealing strategy for a number of reasons, not least the fact that overseas music tourists spend 'a quarter more than the "average" overseas visitor'.[6] Other benefits include the 'cool factor' experienced by 'music cities' and regions, which can translate into enhanced 'soft power' at the national level.[7] This is also aligned with the Scottish Government's National Performance framework, notably the existing indicator of 'Scotland's Reputation' and the indicator in development of 'A Positive Experience for People

---

[1] UK Music (2016) *Wish You Were Here 2016: The Contribution of Live Music to the UK Economy,* 44.
[2] UK Music (2017) *Wish You Were Here 2017: The Contribution of Live Music to the UK Economy,* 32.
[3] Anon (2019) 'QS world university rankings 2018: performing arts', *The Guardian* [online] Available at: https://www.theguardian.com/higher-education-network/2018/feb/28/qs-world-university-rankings-2018-performing-arts. Accessed 25 March 2019.
[4] Dougal Perman, Tim Wright and Fay Young (2018) *Growing the Value for Music Tourism in Glasgow: Research Report and Promotional Plan.* Glasgow: Scottish Enterprise and Glasgow Life.
[5] Brian Ferguson (2016) 'World's first 'music tourism' summit to be staged in Glasgow', *The Scotsman*, 13 October 2016. Available at: https://www.scotsman.com/business/companies/media-leisure/world-s-first-music-tourism-summit-to-be-staged-in-glasgow-1-4257682. Accessed 25 March 2019
[6] Adam Blake (2012) *Destination Music: The Contribution of Festivals and Major Concerts to Tourism in the UK.* UK Music, 9.
[7] Music Canada (2015) *The Mastering of a Music City: Key elements, effective strategies and why it's worth pursuing* [research report] Toronto: IFPI/Music Canada, 25.

Coming To Scotland'.[8] An elevation in cultural status, likewise, has perceived psychological, as well as political, benefits for residents for whom a more positive self-image and increased investment in local culture and supporting infrastructure may contribute to an increased quality of life. The perception of particular cities and regions as music hubs is also thought to be a key factor in encouraging investment and attracting and keeping a high-quality workforce to a city or region.[9] Additionally, music tourism is 'a job incubator […] When someone attends a concert, whether it is a global artist or their friend's garage band […] There will be ushers, bartenders, a sound technician (or an entire crew of technicians for large tours), a cleaning crew, etc'.[10] Finally, culture-led regeneration strategies are believed to be more sustainable in the event of economic downturns than traditional industries, as well as being less likely to be negatively disrupted by the emergence of new technologies.

Music tourism success stories include the city of Austin, Texas, which brands itself as 'the Live Music Capital of the World'. As a result of a committed music strategy, Austin, with a population of 800,000, generates $1.6 billion a year from a music scene which supports 18,000 jobs and creates $38 million in tax revenue.[11] The city's status as a cultural centre and as one of America's 'Best [Cities] for Staying Young' has been thought to contribute to its young and rapidly growing population, and large-scale investment from leading technology firms including Dell, Apple and Samsung.[12] A recent study reported that income from music tourism was the largest growth sector within the local music industry.[13] Following this and other high-profile examples, it is perhaps unsurprising that cities across the world including Toronto, Adelaide, and more recently Glasgow, have sought to translate thriving music scenes into a basis for sustainable economic growth. This trend also operates at the national level: Colombia's tourist board has recently made music the focus of a major international tourism campaign, and Brand USA have also decided to make music a 'primary tourism driver' in 2019.[14] The UNTWO reports that music tourism is growing at twice the rate of the global economy,[15] with Latin and North America as the leading beneficiaries, while in Europe, 'Portugal and Spain have seen a 500% rise in music tourists since 2014' and Norway 400%.[16]

---

[8] Scottish Government (2017) 'National indicator performance: Children and Young People' *Scottish Government/Riaghaltas na h-Alba* [website] Accessible at: https://nationalperformance.gov.scot/measuring-progress/national-indicator-performance. Accessed 25 March 2019.

[9] UK Music (2016) *Measuring Music 2016*. London: UK Music.

[10] Julián Guerrero Orozco, Shain Shapiro and Julia Jones (2018) *Music is the New Gastronomy: Your Guide to Connecting Music and Tourism and Making the Most Out of it*, White paper on Music and Tourism, UNWTO, ProColombia and Sound Diplomacy, 27.

[11] Titan Music Group (2012) *Accelerating Toronto's Music Industry Growth: Leveraging Best Practices from Austin, Texas*, Music Canada, n.p.

[12] Ibid.

[13] Ibid.

[14] Guerrero Orozco, Shapiro and Jones (2018) *Music is the New Gastronomy*, 13.

[15] Ibid., 5.

[16] Orozco, Shapiro and Jones (2018) *Music is the New Gastronomy*, 14.

What is music tourism? What is a music tourist?

Despite the recognition of music tourism as an emerging global trend, there is no general agreement on what constitutes a 'music tourist'. The UNWTO define tourism as 'as the activity performed by people traveling to and staying in places outside their usual environment for not more than one consecutive year for leisure and not less than 24 hours, business and other purposes', and music tourism as 'any activity undertaken by a tourist where the primary motivation to travel is music related'.[17] Definitions and methodologies vary, however, and how the term is applied depends on who is conducting the study and what they are trying to find out. For Titan Music Group, authors of a report on music tourism in Toronto, Canada, '"music tourists" are people who travel – often with their families – to a city beyond their home region for the sole purpose of attending a large music event, often an international music festival'.[18] An early study by Blake for UK Music distinguished between overseas and domestic music tourists:

> We define an overseas music tourist as someone who booked a ticket to a live music event in the UK from their own country, prior to travelling as a means of differentiating them from those overseas visitors who happen to attend a music event once in the UK […] We define a domestic music tourist as someone who booked a ticket to a live music event in advance, and who travelled outside their home region to attend the event (or outside their home nation in the case of Scotland, Wales and N. Ireland).[19]

The last part of this definition posed a problem for Scotland (which is both a culturally distinct nation and a political region of the United Kingdom) because 'someone travelling from the Orkney Islands to Glasgow would not count as a music tourist despite the travel time involved'.[20] In a subsequent report published the following year, UK Music redefined a domestic tourist as anyone travelling 'at least three times the average commuting distance in the Government Office Region (GOR) in which the event took place in order to attend the event.'[21] As a result of this redefinition, the total estimated number of music tourists to Scotland increased from 187,000 to 537,000.[22]

UK Music's annual reports on music tourism focus on separating out the economic contribution of larger events and festivals to UK tourism in general. As such, the distinction between those visitors whose primary purpose is music, and those who take in a concert as part of a larger trip is important. The focus of this study, however, is not on measuring music tourism, but on how to

---

[17] Ibid., 12.
[18] Titan Music Group (2012) *Accelerating Toronto's Music Industry Growth: Leveraging Best Practices from Austin, Texas* [research report] Toronto: Music Canada, n.p.
[19] Adam Blake (2012) *Destination Music: The Contribution of Festivals and Major Concerts to Tourism in the UK* [research report] London: UK Music.
[20] Ibid., 12.
[21] UK Music (2013) *Wish You Were Here 2013: Music Tourism's Contribution to the UK Economy* [research report] London: UK Music, 67.
[22] Ibid., 82.

grow its value for a wider range of stakeholders, and this may not be so much a question of creating *more* 'music tourists' (however defined for the purpose of measurement) as of encouraging tourists to become consumers of music experiences by more fully integrating music with tourism and other relevant sectors. As such, the question of whether a given individual fits a given definition of music tourism is less important, and this report applies a somewhat looser set of criteria, defining as a music tourist anyone travelling away from their home who spends money on a music event or experience, even if this is not the primary purpose of their trip.

Methodology

This report draws upon qualitative data, including 20 recorded interviews supplemented by a review of relevant academic and governmental literature, alongside reviews of academic and other grey literature, including industry reports, newspaper articles and online sources such as corporate and governmental websites. The interviewees were selected from a range of key sectors including retail, hospitality, music and tourism.[23] Interviews were semi-structured and transcribed verbatim. In addition to these recorded interviews, a number of respondents assisted by filling out an online questionnaire or by giving informal interviews. While the number of survey responses to quantitative questions did not support generalizable statistical conclusions applicable across the country, the information supplied by survey participants – and their qualitative answers – were of use in informing further interview questions and for informing the analysis of the interview material. Additional quantitative material was provided by publicly available information from sources such as Visit Scotland, The Scottish Tour Guides Association and Airbnb.

This data was collated and coded using the qualitative data analysis software NVivo, identifying a number of key themes. These have supplied the basic structure of the report which is divided into three sections: 'Knowledge and knowledge networks' considers the importance of access to knowledge for developing effective collaboration between music and tourism businesses, identifying key information channels, effective practice and knowledge gaps; 'Music tourism, place and identity' considers the place-specific challenges to developing music tourism; and 'Music tourism, government and policy' looks at the impact on the field of key policy areas such as cultural funding, licensing, and planning and development.

---

[23] For a full list of participants see appendix.

Chapter 1. Connecting music and tourism: knowledge and networks

Introduction

The tourism industry 'requires knowledge as a source of innovation'.[1] The interviews conducted during this study indicate that lack of access to relevant knowledge is perceived as a significant barrier to building effective connections between the music, tourism and hospitality sectors. This chapter explores the key theme of *knowledge* which emerged out of the interview data, making a number of recommendations aimed at addressing current barriers to effective knowledge-sharing between the various sectors of the music tourism ecology in Scotland.

McLeod et al. define knowledge as 'a fluid mix of framed experience, values, contextual information, and expert insight that provides a framework for evaluating and incorporating new experiences and information'.[2] In the context of music tourism, relevant knowledge could include the subcultural expertise of local musicians and fans;[3] the social contacts of hoteliers; the kinds of knowledge produced by universities and other research organisations; and information about the behaviour and experiences of overseas visitors. Knowledge is something valuable, a 'social capital resource that may be provided from one person to another as a gift'.[4]

As McLeod et al. note, 'people in the tourism sector businesses are the agents of information and knowledge and thus 'inter-relationships' between people in these businesses can be examined to understand what, how, why, or why not, information is shared'.[5] A knowledge-network is 'a mechanism for explicating tacit knowledge among people' for the benefit of members of a network.[6] Networks may exist as formal 'strategic alliances' between groups or sectors: tourism is 'one of the most widely integrated [industries] in the world [with] highly intense levels of cooperation [between] airlines, hotels, travel agents, and tour operators',[7] but informal networks can be just as important; in fact, 'embedded knowledge […] seems to be more readily shared through an informal structure as opposed to a formal structure'.[8] The structure of networks may result in certain members (organisations or individuals) being in key 'brokerage' positions, 'acting as a go-between [connecting]

---

[1] Michelle Theresa McLeod, David Roger Vaughan and Jonathan Edwards (2010) 'Knowledge networks in the tourism sector of the Bournemouth, Poole, and Christchurch conurbation: preliminary analysis', *The Service Industries Journal*, Vol. 30, No. 10, August 2010, 1654.

[2] Ibid., 1652.

[3] 'Subcultural' here refers to the shared knowledge and values of 'a group of people who consciously define themselves as different to or apart from the culture to which they belong'. Ian Buchanan, (2010) *Oxford Dictionary of Critical Theory*. Oxford: Oxford University Press, 456. Contemporary subcultures might include indie music fans or participants in dance music culture (as studied by Sara Thornton (1995) in *Club cultures: music, media and subcultural capital*. Cambridge, UK: Polity Press.)

[4] McLeod et al, 'Knowledge networks', 1653.

[5] Ibid., 1655.

[6] Ibid., 1654.

[7] Cristóbal Casanueva, Ángeles Gallego, Ignacio Castro, and María Sancho (2014) 'Airline alliances: Mobilizing network resources', *Tourism Management* 44, 88.

[8] McLeod et al, 'Knowledge networks', 1664.

two otherwise unconnected alters'.[9] A 'broker' could be a hotel, a government department, or an individual, and identifying these brokers is one of the challenges and main benefits of effective networking. The next section considers the various forms of knowledge at work in the context of music tourism, looking at the roles played by musicians, accommodation providers, tour guides and others, suggesting ways to increase the opportunities for effectively sharing this knowledge.

Tourist experiences and local knowledge

Recent innovations in the tourism industry have been increasingly driven by customer demand for 'local' knowledge and experiences. As *The Guardian* recently noted, tourism 'has connotations of uncritical consumption, of high prices and low quality, of being mindlessly funnelled amid a mass of humanity towards the sorts of joints that real New Yorkers or Londoners or Parisians wouldn't be caught dead in'. [10] The value of a tourism experience, therefore, 'is measured by how much it overlaps with a local's'.[11] This is true even as mobile technology increasingly drives the delivery of information. Russian data scientists developed an app which used publicly available Instagram data to provide visitors to St Petersburg with insider information from local residents' in real time.[12] While this and similar advances in mobile technology tend to increase tourists' day-to-day engagement with mobile technology, they do so with the aim of facilitating authentic local experiences. While 3% of visitors to Scotland said they would prefer to use smartphone apps to find out more about local attractions during their trip, 46% expressed a preference for talking directly with locals.[13] This reflects positive perceptions of Scottish people as 'friendly' (51%), 'helpful' (21%) and 'welcoming' (11%), with 31% of visitors noting that interactions with locals 'added to my holiday experience'.[14]

Music tourism, then, means not only travelling in order to attend large events but satisfying the desire to experience a different part of the world as locals see (or hear) it, which can include both tourism more generally, and travel related to events at smaller venues such as Summerhall or King Tut's. Many tourism and hospitality businesses appreciate the demand for authentic local perspectives, and the need to provide accurate and *authentic* local knowledge to their guests: 'Knowing the best things that your area has to offer […] not necessarily the most popular, shows your guests that you're not just pedalling the same tourist attractions to them as to everyone else but you have considered their needs and you are able to show them the gems that only the locals know'.[15] In

---

[9] Ibid., 1658.

[10] Elle Hunt (2017) 'Want a more 'authentic' tourist experience? There's an app for that', *The Guardian*, [online] 15 September 2017.

[11] Ibid,.

[12] Ksenia D. Mukhina, Stepan V. Rakitin, Alexander A. Visheratin (2017) 'Detection of tourists attraction points using Instagram profiles', *Procedia Computer Science* 108C (2017) 2378–2382.

[13] Visit Scotland (2017) *Scotland Visitor Survey 2015 & 2016*. Edinburgh: Visit Scotland.

[14] Visit Scotland (2017) *Scotland Visitor Survey 2015 & 2016*. Edinburgh: Visit Scotland.

[15] Visit Scotland (2017) *Insight Department: Trends 2018*. Edinburgh: Visit Scotland, 7.

Glasgow, where many tourist trips are very short,[16] local businesses of all kinds need to supply visitors with local knowledge quickly and efficiently if they are to benefit fully from inbound tourist traffic.

Our research suggested, however, that visitors' access to local knowledge is currently insufficient. Lynn Fairley of Eurohostel:

> I sometimes stop in the street because I feel so sorry for them and you know that they're just aimlessly walking around – you'll see them […] you know that they're wandering around […] going to every wrong place they could be going to and you just think 'what a shame'.[17]

In Glasgow, the knowledge available to visitors about musical events can be scattered and confusing; a recent study argued that local listings magazines such as *The List* are limited in the extent to which they can 'provide a compelling user experience, far less encourage purchase of tickets, restaurant reservations or accommodation bookings'.[18] This sense of a lack of integration making it difficult for tourists to navigate between points on the value chain was supported by interviews: digital marketing consultant Daniel Macintyre told us, 'there's a lot more to do on the ground in terms of the destination development in terms of districts, in terms of maps and apps and ticketing, where do people get the tickets. The visitor doesn't necessarily know where all the box offices are.'[19] Other respondents suggest that this is also true in other parts of the country; in Edinburgh, for example, knowledge about local music scenes can be elusive even for local residents. Darren Yeats, of VoxBox Records, notes:

> a lot of it is very word of mouth you need to have friends that are into the indie music scene to even know it exists […] you can be a student in Edinburgh – and for years and years – and not know that there's anything happening locally, unless maybe you pick up *the Skinny*[20] magazine and have a read through that. But if it doesn't seem like your thing it's hard to find an entry point.[21]

This issue of ensuring widespread access to information, across the potential gig-going demographics, applies more broadly too. Yeats continues:

> [T]he students aren't going to the gigs, the local gigs in the local pubs. Engaging students is one thing but engaging the local youngsters is another battle as well… we've a huge population in Edinburgh, so how can you get them to go?

---

[16] Most hotel guests stay for only a single night. Perman et al. (2018) *Growing the Value for Music Tourism in Glasgow*, 59.
[17] Lynn Fairley, fieldwork interview, 2018.
[18] Perman et al. (2018) *Growing the Value for Music Tourism in Glasgow*, 45.
[19] Daniel Macintyre, fieldwork interview, 2018.
[20] Local listings magazine.
[21] Darren Yeats, fieldwork interview, 2018.

Ensuring access to accurate, timely and authentic knowledge about local music events and activities through more integrated knowledge networks would seem to be a fundamental step towards growing Scotland's music tourism economy. To create a more connected and navigable environment for tourists it is therefore necessary to identify gaps in current knowledge, sources of knowledge, channels for delivery, and barriers to knowledge sharing within and between the various sectors that support the music tourism economy.

Tour guides and operators

Respondents told us that the often-ephemeral nature of local music events made it difficult to make reliable recommendations to tourists, particularly those interested in Scotland's traditional music. In a recent study, tour operators in Argyll reported that 'visitors often ask for local tips and suggestions for live traditional music [and] the most frequent demand for traditional music is in the form of pub sessions'.[22] Our interviewees echoed this, while also suggesting that demand outstripped supply. 'When tourists come to Scotland,' one Danish tour guide told us, 'the first thing they want to hear is music, live music, Scottish music':

> In Edinburgh, of course a big city, if you hunt long enough, you'll find it […] perhaps not every day but you could find something, but for the rest of the country – they have the Highland Games on a Saturday and if you are at a place at the right time you might find something.[23]

Iain Stewart of Serenity Scotland, one of relatively few tour guides to include traditional music sessions in his itineraries, remarked that:

> The number of sessions sometimes in the winter and the information on sessions in the winter can sometimes be difficult to ascertain unless you're moving around and you're aware of what's actually current because as you'll know, sessions come and go, so being up to date with that is probably one of the biggest challenges.[24]

While translating the tourist demand for authentic Scottish music into real-world musical experiences can be a challenge for those organising small-scale bespoke tours, for larger tour operators, the difficulties are enhanced by a lack of local contacts and long lead-in times. Tour guide Pia Walker, who has worked for Danish travel firm Risskov Rejser remarked that:

> every agency from abroad, they need information – they could arrange tours to meet – something like that but they need two years to arrange things – so you'd need to know that

---

[22] Jasmine Hornabruck and Simon McKerrell (2018) *Traditional Music and the Rural Creative Economy in Argyll & Bute, Mapping Report 2018* [research report] Newcastle: Newcastle University, 48.
[23] Pia Walker, fieldwork interview, 2018.
[24] Iain Stewart, fieldwork interview, 2018.

there's something there 2 years in advance and everybody goes falling over from one year to another.[25]

Over 30% of visitors to Scotland begin planning their trip between 3 and 6 months in advance with 28% planning more than 6 months ahead.[26] It is therefore important, as Visit Scotland acknowledge, to 'make sure information is hitting visitors at the right time'.[27] In the case of local traditional music events, this can pose significant challenges. As well as the lack of relevant knowledge amongst tour operators, Walker also noted an absence of clear incentives for some accommodation providers to acquire and share knowledge about local music:

if you go into a hotel you're staying in and you say is there any traditional music going on, they'll go 'don't know'. […] and it's only if you meet someone who's interested they can send you in the right direction, so yeah, the network isn't particularly strong.[28]

Risskov Rejser make music the headline of their introduction to Scotland tours:

Scotland and music belong together. Scottish folk music has a faithful audience all over the world and the famous names like McCalman, Eddi Reader and of course Runrig have kept the traditions alive. Many pubs and 'folk clubs' have music several evenings a week, often with young talents. The bagpipe is still used in popular music and it can actually sound good. Also many of pop's big names come from Scotland.[29]

Despite the prominent place afforded to music by Risskov Rejser in their promotional copy, none of their itineraries includes any specific musical experiences.

UK-based operators

In keeping with the emphasis on 'scenery, landscape, history and culture as core elements' of Visit Scotland's marketing message, the tour itineraries offered by UK-based tour operators are heavily focused on landscape and heritage, with music occupying a relatively marginal position.[30] A text-search of 121 tour itineraries from leading providers illustrates this point with the capital city Edinburgh featuring prominently and 'castle' and 'loch' also occurring very frequently (Figure 1).

---

[25] Pia Walker, fieldwork interview, 2018.
[26] Visit Scotland (2017) *Scotland Visitor Survey 2015 & 2016* [research presentation] Available at: https://www.visitscotland.org/binaries/content/assets/dot-org/pdf/research-papers/scotland-visitor-survey-2015-16-full.pdf. Accessed 27 March 2019.
[27] Ibid.
[28] Pia Walker, fieldwork interview, 2018.
[29] Risskov Rejser (2018) 'Skotland', *Risskov Rejser* [website] Available at: https://www.risskovrejser.dk/rejser/rejser-til-skotland/. Accessed: 18 October 2018.
[30] Visit Scotland (2017) *Scotland Visitor Survey 2015 & 2016*, n.p.

[figure 1: tour itineraries top 50 words]

Of the 78 Cultural and Historical tours featured on the Go Scotland Tours website, only 2 explicitly mention music, and only one of these features a musical experience (of Shetland fiddle music at the Up Helly Aa festival) as part of an itinerary. Many tour operators, however, include images of music, musicians and musical instruments in their promotional material. Experience Scotland do not give detailed itineraries (they organise bespoke tours) but have featured images of the bagpipes, traditional music sessions and dancing in their promotional materials. Scottish Routes include a picture of the bagpipes on their page 'About Scotland' but do not mention music anywhere else on the site or include musical experiences on their itineraries.[31] This suggests that music, while important to Scotland's tourist brand, is underserved in terms of the opportunities to experience music on offer to tourists.

This is also reflected in the stated interests of professional guides. The Scottish Tour Guides Association website allows tourists to search for and contact a professionally accredited guide whose interests, chosen from a list of 59 separate interest categories, match their own. Searching the list of 484 guides for 'Music' yields 137 results, making music the 24th most popular interest, some way behind the top 3 categories of 'History and prehistory' (266 search results), 'Edinburgh' (262) and 'Food and Drink' (217) (Figure 2).

---

[31] They do, however, have a bespoke service whereby clients can plan tours in collaboration with guides.

SGTA Guides: Top 30 interests

A horizontal bar chart titled "SGTA Guides: Top 30 interests". The categories from top to bottom, with approximate values on a horizontal axis marked 0, 50, 100, 150, 200, 250, 300:

Interest	Approx. value
William Wallace	~118
Film Location work	~125
Vikings	~127
Birds and animals	~130
Music	~133
Study Tours	~137
Loch Lomond	~140
Literature	~150
Geography and Geology	~155
Stirling	~165
Castles and palaces	~172
Country houses and stately homes	~185
Whisky	~207
Churches and Cathedrals	~212
Food and drink	~217
History and Prehistory	~265

[Figure 2: Tour guides top 30 interests]

This indicates that there may be significant opportunities for musicians and other cultural producers, promoters, and tour guides with the relevant cultural knowledge to supply this unsatisfied demand by forging better connections with UK and European tour operators. Iain Stewart, himself a musician and trained ethnologist, notes that:

> it's absolutely perfect for musicians to get involved in and I think it's a way – as an income stream for a musician to be involved […] there's fantastic opportunities for someone who likes to tell stories and to explain things and at the same time can offer some music. I think that's a winning combination.[32]

As a recent report notes, 'many travel agents offer tours of the world's music scenes, from Liberty Travel's "Music Cities: Nashville and Memphis Escorted Tour" and STA travel's "Beats" series, which takes group travel packages to festivals and underground scenes around the world'.[33] Scotland undoubtedly has the musical assets, infrastructure and expertise to draw on to develop high-quality guided musical experiences; what is perhaps lacking at present are opportunities to connect tourism networks with the subcultural, academic and local knowledge necessary to realise this potential.

---

[32] Iain Stewart, fieldwork interview, 2018.
[33] Guerrero Orozco, Shapiro and Jones (2018) *Music is the New Gastronomy*, 15.

Case study: the hospitality sector in Glasgow

Like tour guides and operators, hotels and the newer accommodation providers, such as Airbnb, constitute a key channel for knowledge exchange between visitors and local music businesses. Hotels are the most popular source of accommodation for visitors to Scotland (41%) with European and long-haul travellers more likely to stay in a hotel (48% and 57% respectively).[34] As a source of information about the cultural life of a locality, accommodation providers occupy a brokerage role which begins long before guests actually arrive and may continue throughout their visit. 40% of visitors in 2015-16 booked their trip through an accommodation provider's website, and 33% of tourists surveyed named direct recommendations from their accommodation provider as a preferred source of information.[35] However, the type and extent of information about local music offered by accommodation providers through their company website varies greatly and is, for the most part, general and limited. In Glasgow, 60% of tourists stay in a hotel. Out of 106 providers[36] listed on Visit Scotland's accommodation pages for the Glasgow area, only 32 mentioned the city's music scene on their website while 53 did not and 20 did not have a website at all. Of those that did mention music, only 15 made reference to a specific event (e.g., a gig or festival), and only 5 mentioned the city's UNESCO status. Of those sites which did mention music, the focus was on large corporate venues (the Hydro) and what might be called 'heritage' venues such as the Barrowlands and King Tut's. The Hydro featured on 29 sites, only 9 of which provided a link to the venue's page. The Barrowlands and Oran Mor receive 5 mentions each and King Tut's 7. 14 sites contained links to music businesses, venues or festivals. Only one site (Hotel Indigo's) mentioned record shops as part of a blog post on the Glasgow and Edinburgh music scenes.

Given the plethora of musical activity in Glasgow – and elsewhere – this suggests some notable gaps. Prior research [37]suggests that a healthy live music ecology in a given area involves the presence of venues of different types and sizes, and a route through them for practicing musicians. Data provided by PRS for Music to an investigation as part of the AHRC's Cultural Value project,

---

[34] Visit Scotland (2017) *Visitor Survey 2015-2016*, n.p.
[35] Ibid.
[36] The sample included 11 guesthouses/B&Bs, 47 hotels, 5 hostels, 18 serviced apartments, 2 student halls, and 18 self-catering apartments.
[37] Simon Frith, Matt Brennan, Martin Cloonan and Emma Webster, *The History of Live Music in Britain: Volume I, 1950-1967 – From Dance Hall to 100 Club.* Aldershot: Ashgate
Adam Behr, Matt Brennan and Martin Cloonan (2016) 'Cultural Value and Cultural Policy: Some evidence from the world of live music', *International Journal of Cultural Policy*, 22:3, 403-418
The same research also identifies different, though overlapping, promotional models – 'state funded', 'commercial' and 'enthusiasts' (who operate commercially, but put on shows because they want to, potentially holding down another job either as their main source of income, or to support themselves before moving to full-time concert promotion).

with Glasgow as one of three case-studies, illustrates the potential size of this gap[38]. As shown below (figure 3), over one year (2012) ticketed concerts returning to PRS for Music across different venue types were[39]:

Venue Type	Number of Concerts
Arenas & Stadiums	103
Mid-level Venues (Capacity 2,500+)	93
Theatres (Capacity 1,000 - 2,499)	790
Clubs (Capacity Under 1,000)	762
No Capacity Information	282
Parks	0
Overall	**2,030**

(Figure 3, 2012 PRS Returns, Glasgow – from Behr et al 2014)

While some degree of variation might be expected from year to year (including turnover in venues, and following the opening of the Hydro), the unsurprising fact that a great many more events take place in smaller spaces – including those for which there is not capacity information – highlights the amount of musical activity of potential interest to visitors that may be missed by an excessive focus on 'landmark' venues. Notable too, is that these figures do not include the large amount of *non-ticketed* events.

Visit Scotland found in their survey that tourists were fairly satisfied with the overall knowledgeability of accommodation staff (52%); in the interviews, however, hoteliers indicated that they experienced problems keeping guests informed about local music once on site. Duncan Johnston, General Manager of Hotel Indigo in Glasgow, mentioned the difficulty of staying up-to-date with local events:

---

[38] Adam Behr, Matt Brennan and Martin Cloonan (2014) *The Cultural Value of Live Music from the Pub to the Stadium: Getting beyond the numbers*. University of Edinburgh and University of Glasgow [AHRC research report]

[39] All venue type designations as per PRS for Music.

what we struggle with is knowing what's happening in the city day to day [...] the stuff, it changes so much, and we use magazines like *The List* to get info but there's so much, there's hundreds of events every day that we're probably not aware of so we can't tell our guests about them. I mean we try and find stuff online or whatever but it's hard.[40]

Such difficulties are not unique to Glasgow. Research on listings sites commissioned by the Greater London Authority and presented to the London Music Board [41]noted that half of listings sites did not contain external purchasing links, while half of social media pages had not been updated in over a year. It also noted that major listings like *Time Out* did not include grassroots venues, and a tendency for sites to be genre specific. Nevertheless, the interviews conducted for this project revealed the *consequences* of these gaps for front-line workers in the hospitality sector, and the relative size and population of Glasgow (and certainly other Scottish cities) compared to London may make the problem easier to address – if still not entirely straightforward.

Another gap in the flow of information goes in the other direction, from guest to hotel staff. Johnston also mentioned the difficulty of knowing what *kinds* of musical activities or events his guests were attending:

obviously we've got the huge events that are happening in the city. Concerts at Hampden [Park, stadium], we know that the majority of guests are here for that but there's a lot of things that we don't know why people are here.[42]

Finding solutions

Solutions to this problem range from the adoption of smartphone apps to changes in recruitment policy. Some of the hotels featured in this study reported using a combination of organisational and technological solutions to keep staff and guests informed of local music events while others have tried opening their public spaces up to music events. Elsewhere, 'brands like Hard Rock, Aloft and Selina' have experimented with providing 'regular concerts to their customers'.[43] In Glasgow, CitizenM hosts regular evening events in collaboration with local promoters. Other hotels, however, have found their lack of knowledge about the local music scene a barrier to pursuing similar strategies:

It's difficult knowing who to target. You know we've had bits and pieces, we had the open mic thing we tried to get, I was going along to various other ones in the city to try and encourage the guys that are on that scene to come down [...] but I haven't done much with

---

[40] Duncan Johnston, fieldwork interview, 2018.
[41] London Music Board (2016) 'Minutes: London Music Board Thursday 3 November 2016'. *Greater London Authority* [website] Available at: https://www.london.gov.uk/sites/default/files/minutes_-_london_music_board_-_3_nov_2016.pdf. Accessed 25 March 2019.
[42] Duncan Johnston, fieldwork interview, 2018.
[43] Orozco, Shapiro and Jones (2018) *Music is the New Gastronomy*, 23.

promoters or anything to get info. It's really knowing who to speak to that's been the difficulty.[44]

Frontline staff were clearly felt to have an important advocatory role. Johnston mentioned the difficulty of keeping staff supplied with relevant cultural knowledge to advise guests, suggesting a generational dimension: 'there's a couple of record shops I would send people to if they asked me, but I don't know if the guys on the desk would, because they probably don't even know what records are!'[45]

CitizenM in Glasgow use visits to local attractions to enable staff 'ambassadors' to make up-to-date recommendations to guests:

our 'ambassadors' who are the core workers of the hotel […] work everywhere, they work in the bar, the front of house the meeting rooms, and they are the face of it […] we want them to talk about their own experiences and their own interests to the guests, so generally, it's music-based as well and they like to recommend the clubs and the venues that they go to as well. And it's not like we just have people who are just core hospitality based. It's more people who are interesting and would make the guests experience better.[46]

Similarly, the newly opened Radisson RED, whose 'brand story' focuses on 'art, music and fashion' to attract millennial consumers, encourage their staff to deploy local knowledge and direct guests to recommended venues across the city:

people come to the city and we want our staff to be able to advise them on what things to go and see and do and, you know, be as enthusiastic as the people visiting the city are keen to explore and see. And we want the team to encourage them to do that.[47]

Both the Radisson RED and CitizenM use digital and mobile technology alongside printed listings information to keep guests informed of local events. Both hotels use an in-house smartphone app for check-in and keyless entry, while the Radisson's lobby has a large screen with an interactive city guide. The RED mobile app also has a guest chat feature which encourages guests to share information online.

CitizenM has in-room information on iPads with a printed guide in public areas. Its Sales Manager Derek Macmillan describes the facility:

we're trying to have local info based on phones we're also doing a new guide, which is going to be like the Citizen M guide but a printed version near all the check in desks which are

---

[44] Duncan Johnston, fieldwork interview, 2018.
[45] Duncan Johnston, fieldwork interview, 2018.
[46] Derek Macmillan, fieldwork interview, 2018.
[47] Emma Jackson, fieldwork interview, 2018.

completely free to people, and recommending places as well… it's just being able to get it to people they way they want to receive information; they want people to talk about things at check in and the ambassadors to be knowledgeable about the city. Every shift they talk about what's going on in the city and what people should be made aware of – we share every major event that's coming in because the city marketing bureau make a major event guide.[48]

These kinds of solutions are not open to all hospitality businesses due to the centralisation of online content. The websites of major hotels, as one respondent pointed out, are 'not all owned and managed from Glasgow, so a GM [General Manager] doesn't have autonomy to change what's on the website because it's run from London'.[49] And whereas Glasgow's 'music city' identity may resonate effectively with the brand narrative of companies like CitizenM and Radisson RED, other hotel chains may have less compatible branding strategies. Where newer 4-stars like CitizenM and Radisson RED are happy to position themselves as intermediaries between their customers and the city at large, 5-star hotels may be less likely to direct their customers, who have paid for a luxury accommodation experience, to musical experiences beyond the hotel, particularly if they are perceived to be 'off-brand'.[50] Identifying and seeking out potential investors from the accommodation sector whose brand identities resonate with the 'music city' brand may therefore be an important part of developing Glasgow as a music tourism destination.

Airbnb experiences

In Glasgow the potential of online platforms such as Airbnb to give a needed boost to capacity and better access to authentic local knowledge, has been officially acknowledged in the city's tourism plan:

> To meet our ambition, of an additional one million tourists per year, further supply in quality hotel accommodation is essential. We will also support the sharing economy, and the growth of short-term accommodation provision as it appeals to visitors seeking authentic experiences in our vibrant city neighbourhoods.[51]

Airbnb accommodation was rated highly as a source of local knowledge by participants in Visit Scotland's recent visitor survey (49% approval); however, it currently lags behind hotels as provider of choice with 5% of tourists overall and 13% of long-haul travellers opting to use the service.[52]

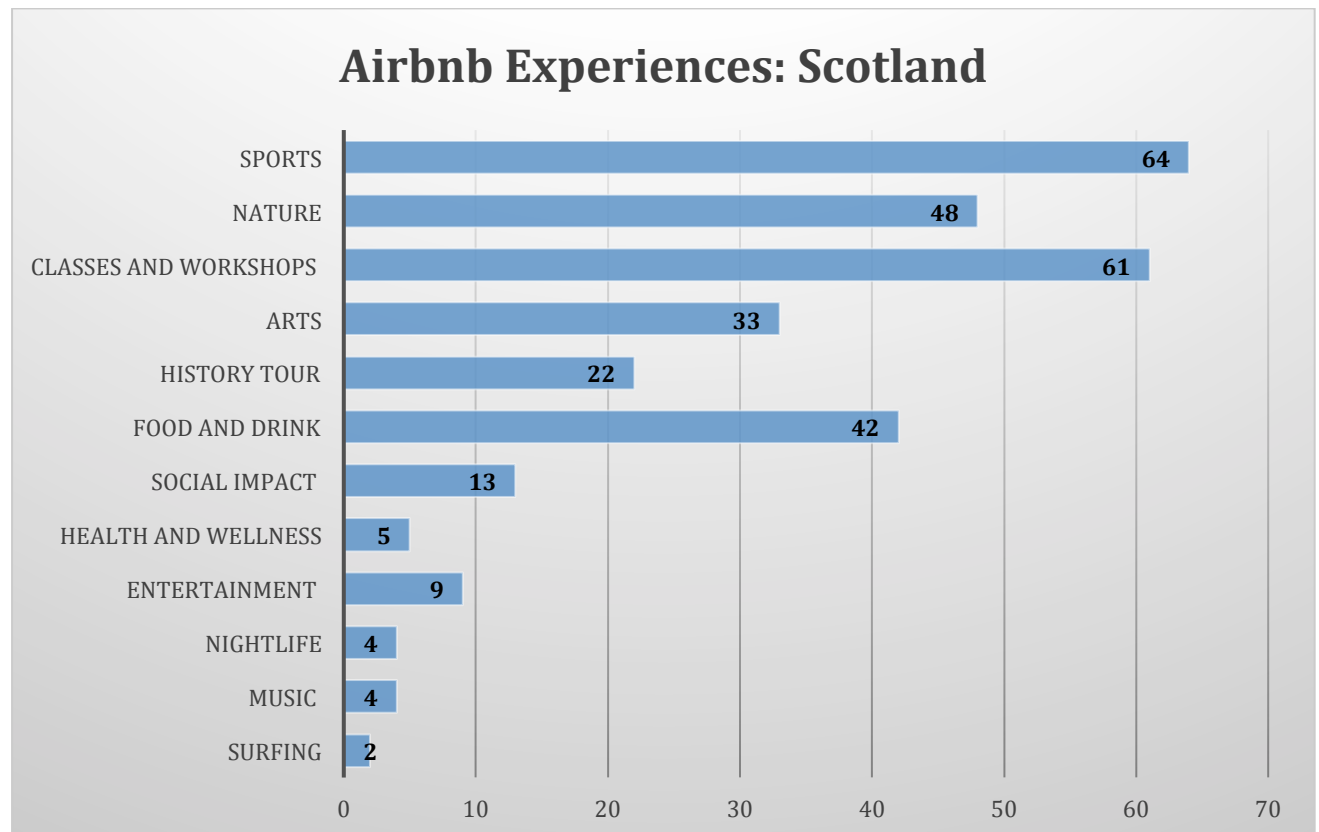[48] Derek Macmillan, fieldwork interview, 2018.
[49] Daniel Macintyre, fieldwork interview, 2018.
[50] Jonathan Trew suggested that his Glasgow City Music Tours were felt to be too 'scuzzy' by the 5-star hotels they approached (Fieldwork interview 2018). It's also worth noting that one of the few music experiences advertised by a 5-star hotel in Glasgow is an in-house 'jazz supper club' – effectively using music as an incentive *not* to leave the hotel.
[51] Glasgow Life (2017) *Glasgow's Tourism and Visitor Plan to 2023*. Glasgow: Glasgow Life, 8.
[52] Visit Scotland (2017) *Scotland Visitor Survey 2015-2016*, n.p.

Airbnb 'Experiences' are a relatively new development for the company, representing a crossover-point between accommodation and tour guiding, and reflect the urge to 'live like a local'.[53] They offer a possible revenue source for musicians looking to develop their practice beyond performing and teaching and an additional promotional channel for existing music tourism experiences. In Scotland there are currently 115 individual experiences listed which are tagged according to several themes or categories. The chart (Figure 4) shows the spread by category tags, indicating a clear bias towards sports and nature themed experiences.

Airbnb Experiences: Scotland

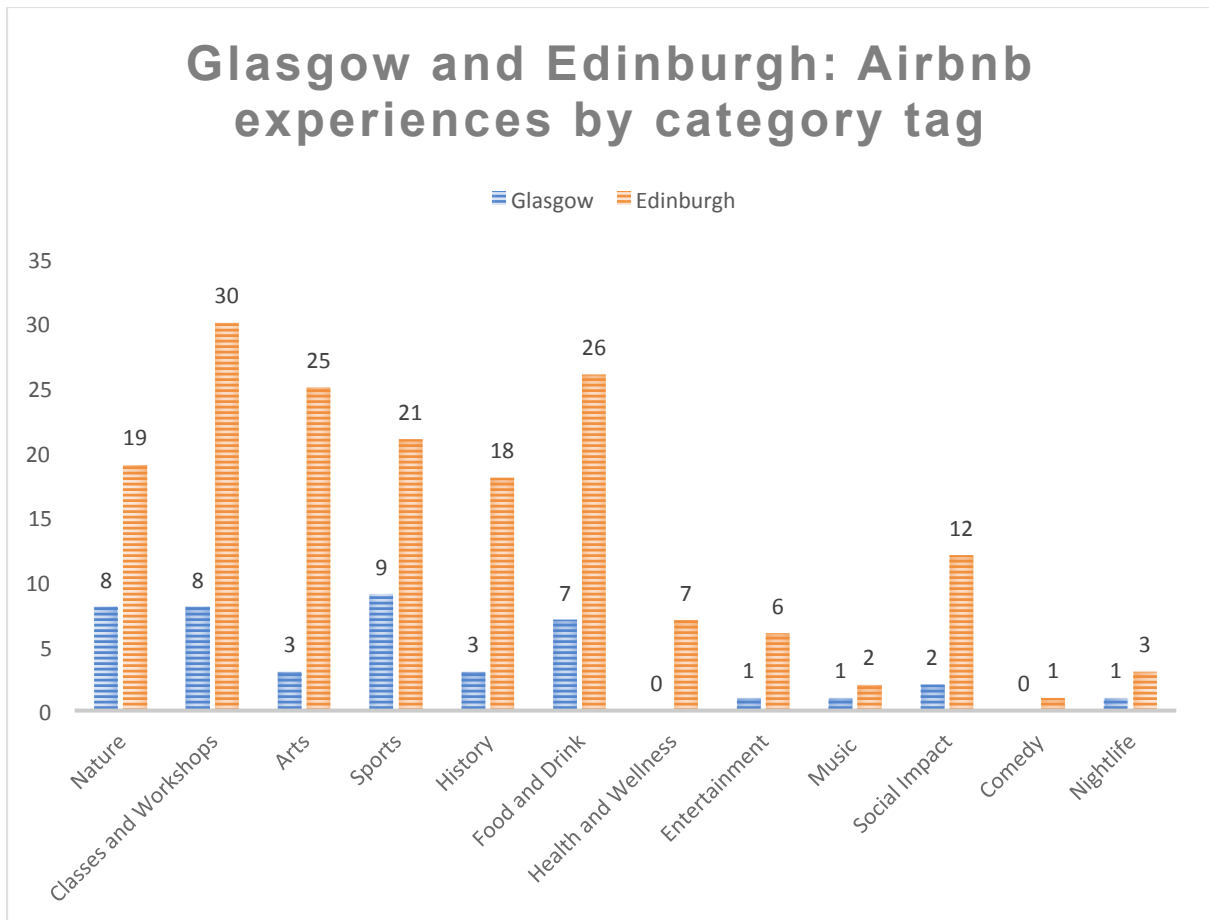| Category	Count
SPORTS	64
NATURE	48
CLASSES AND WORKSHOPS	61
ARTS	33
HISTORY TOUR	22
FOOD AND DRINK	42
SOCIAL IMPACT	13
HEALTH AND WELLNESS	5
ENTERTAINMENT	9
NIGHTLIFE	4
MUSIC	4
SURFING	2

[Figure 4: experiences by category tag]

Of the two largest cities, Edinburgh currently has a much higher profile on the platform with 115 individual experiences listed compared to 26 for Glasgow.[54] Again, sports and nature dominate the list. As of the beginning of April 2019, Edinburgh currently had two music themed experiences; a 'silent disco fitness tour' and a 'drink and walk through Edinburgh's music'. Glasgow's single experience offers the opportunity to work with a professional music producer (Figure 5.).

---

[53] The company launched their campaign 'Don't go there. Live there' in 2016. Airbnb (2016) 'Don't go there. Live there', *YouTube* [video clip] Available at: https://www.youtube.com/watch?v=bbdF8Muiwtk. Accessed: 18 October 2018.
[54] Figures correct as of 1st April 2019.

Glasgow and Edinburgh: Airbnb experiences by category tag

■ Glasgow ■ Edinburgh

Nature: Glasgow 8, Edinburgh 19
Classes and Workshops: Glasgow 8, Edinburgh 30
Arts: Glasgow 3, Edinburgh 25
Sports: Glasgow 9, Edinburgh 21
History: Glasgow 3, Edinburgh 18
Food and Drink: Glasgow 7, Edinburgh 26
Health and Wellness: Glasgow 0, Edinburgh 7
Entertainment: Glasgow 1, Edinburgh 6
Music: Glasgow 1, Edinburgh 2
Social Impact: Glasgow 2, Edinburgh 12
Comedy: Glasgow 0, Edinburgh 1
Nightlife: Glasgow 1, Edinburgh 3

[Figure 5: Edinburgh/Glasgow Airbnb experiences]

This spread perhaps reflects Edinburgh's larger tourist profile more generally. While this might suggest that Glasgow's music scene is underrepresented on the platform, a comparison with other UNESCO cities listed on the site shows that they are not faring much better (Figure 6.)
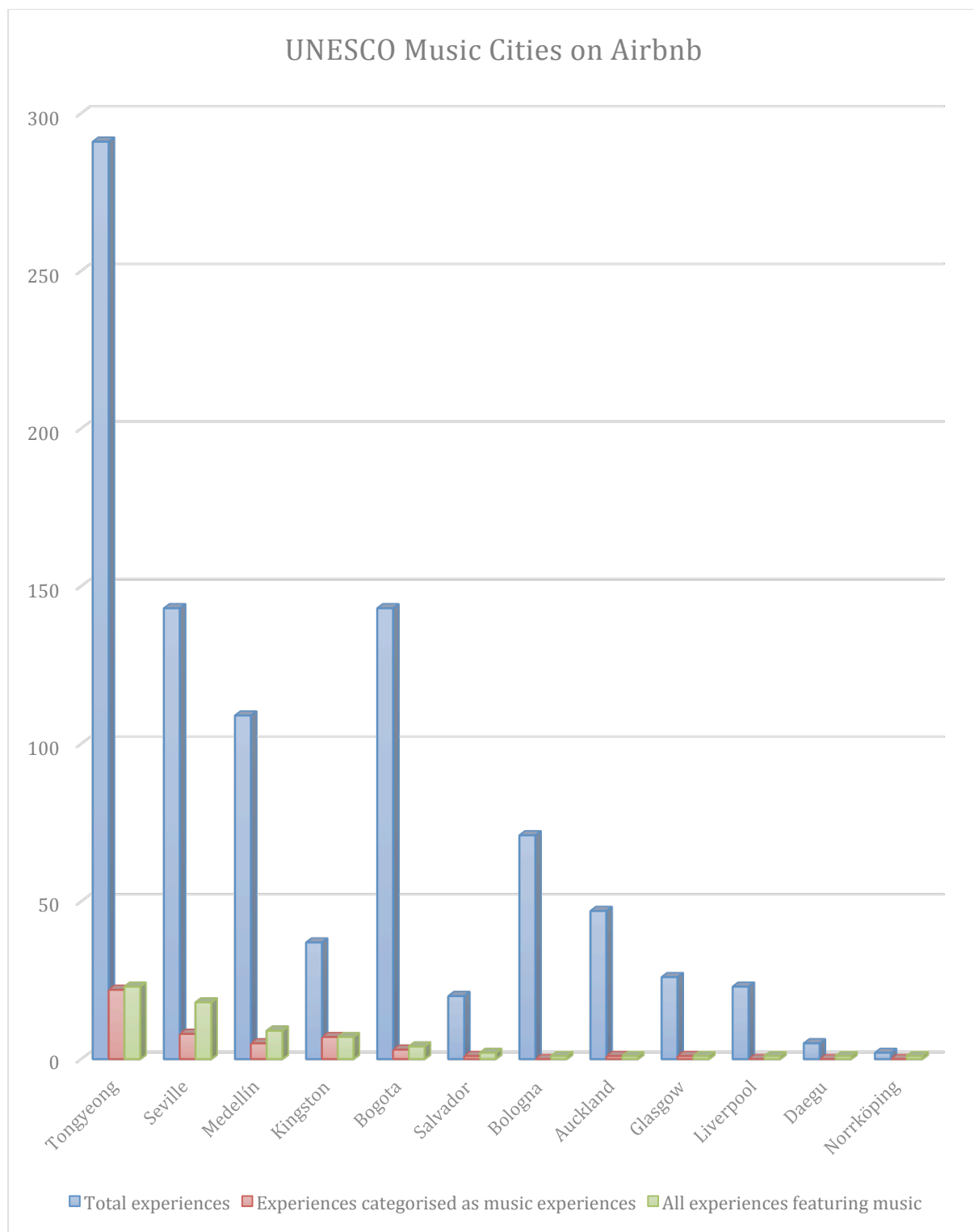
[Figure 6: UNESCO music cities on Airbnb]

Airbnb as a promotional resource: barriers and opportunities

Comparing the presence of music on the Airbnb profiles of UNESCO's music cities is complicated by the fact that not all experiences which feature music are listed under 'music' on the site (aside from the fact that, in some locations, where there are only a few experiences, categories are not supplied at all). While concerts, festivals and music lessons can clearly be counted as 'music experiences', whatever heading they are listed under, others are less easily categorised. A number of experiences in which music plays a significant role are described as a 'History Walk' or 'Dance Party' and so it is often necessary to look at the content of the experiences themselves in more detail. For our purposes, any experience where musical performance provided the main focus was included, regardless of category, alongside music heritage experiences such as music tours (often listed as 'History Walks').

To further complicate matters, many creators generate novel experiences by combining music with other elements (e.g., 'Silent Disco Yoga') making it difficult to identify which element should be seen as the main theme of the experience. In these cases, some judgement is required. As an example, a music festival experience which includes a kayak journey to and from the festival site was included as the festival was the main focus of the experience. 'Making pizza and singing La Traviata', on the other hand, an experience in which music only supplements the main focus (the experience is categorised as a 'Cookery Class'), was not included.

The difficulty in deciding how to categorise experiences illustrates how the concept of 'experience' functions on the site as an organisational principle which transcends specific content. This has implications for musicians and music businesses seeking to use the platform to connect with new audiences and customers. The interpolation of music into larger experiences reflects Airbnb's increasing tendency to move beyond its origins as a booking platform toward being a provider of branded lifestyle experiences. This is in turn illustrative of the much broader, long-term shift from the *service* to the *experience* economy.[55] Although this latter concept is usually associated with the retail, leisure and tourism industries, it has a number of significant implications for the arts, including music, as our interviews also suggested. Airbnb's strategy of reframing art and music within a portfolio of other lifestyle activities (e.g., 'food and drink'; 'nature', 'health and wellbeing') is echoed in the words of festival organisers we spoke to (see next chapter) who emphasised the importance of the overall experience for their customers and the need to combine music with other lifestyle activities. This suggests that in the experience economy, traditional intermediaries such as promoters, venues, and festival organisers can no longer be seen as simply facilitating access to a primary product or service – music – but constructing or curating complex experiences for their customers in which music forms part of the content. In the context of Airbnb, individual musicians are also required to re-cast their creative offering in terms of unique, consumable experiences. The logic of the experience

---

[55] B. Joseph Pine II and James H. Gilmore (1998) 'Welcome to the Experience Economy', *Harvard Business Review*, 1 July 1998, 97-108.

economy must therefore be taken into account by anyone hoping to benefit significantly from the promotional opportunities such platforms afford.

Glasgow case study: 'Work one-to-one with a music producer'

As Kenny Inglis – a record producer and the host of Glasgow's only Airbnb music experience – noted, for many working in music, 'things are so unstable that you have to be kind of willing to adapt all the time'.[56] Airbnb Experience hosting seems to offer an opportunity for musicians, promoters, and tour guides to utilise their existing cultural knowledge to develop new sources of revenue; Airbnb concerts, too, by providing access to diverse and hand-picked international audience may 'provide a fantastic marketing platform for local indie artists'.[57] Additionally, the process of setting up an Experience and getting it listed on the company's website can be short (a few weeks) and 'relatively straightforward'.[58] But experience hosts also cede control of certain aspects of their product to the company, with potential implications for both the perceived authenticity of their experience and access to useful data. Hosts currently have no access to user data which for Inglis is 'a kind of slight annoyance because, everything that you do is part of your business, gives you sort of statistics. You've got a kind of, you know SoundCloud or your website you can get stats on who's watching and where they're watching from':[59]

> you don't really know how many people are looking at it [the Airbnb experience] and you don't know how many people are put off, how many people click on the experience and read it all, how many people nearly booked, there's no sort of information on that which is a shame really because you could kind of tweak it to sort of make it a bit more attractive you know?[60]

Additionally, hosts may have to compromise on the look and feel of their listing with implications for the authenticity of the experience offered. In Inglis's case, a photo of his own studio was replaced with a stock photo in the final listing:

> my studio […] uses a lot of like vintage equipment and […] there's a look about it - it's quirky. If you were booking a studio and you saw mine you'd be kind of intrigued by it. Airbnb replaced it with this generic, you know, a guy's fingers on the mixing desk. I mean it just completely removes that sort of personalised kind of weird, quirky look that some people might gravitate towards, so I'm not sure what that's all about. Maybe it's just continuity about the way the experience page looks but it does seem to detract from the experience itself.[61]

---

[56] Kenny Inglis, fieldwork interview, 2018.
[57] Guerrero Orozco, Shapiro and Jones (2018) *Music is the New Gastronomy*, 41.
[58] Kenny Inglis, fieldwork interview, 2018.
[59] Ibid.
[60] Ibid.
[61] Ibid.

Experience hosting offers opportunities for musicians to develop an alternative revenue source which is relatively simple and cost-effective and for existing music tourism experiences to promote their product. At the same time, however, the platform is not a straightforward promotional space, with control over presentation and use of the data produced by users remaining subject to significant limitations. It is to be hoped that in future, the company will consider ways to give hosts better access to user data allowing them to refine their experiences based on customer data rather than through mere trial and error.

Retailers as knowledge sources: opportunities and barriers

The small size of many businesses in both music and tourism can act as a barrier to gathering and disseminating knowledge due to 'activity fragmentation'.[62] While record and instrument shops are potentially important reservoirs of knowledge about local scenes, they may not promote themselves specifically to tourists. This is despite the fact that many already benefit from music tourism; three of the Edinburgh record shops that we surveyed estimated that tourists made up around 30-40% of their total customers, while in Glasgow, two shops put the figure at 11-20%, and one at 41-50%. Low staff numbers mean that social media platforms Facebook, Twitter and Instagram are often the primary focus of shops' promotional strategies, and many of the shops we contacted for participation in this project had no official website, instead using a Facebook page as their main channel of communication with customers. The reliance on social media templates prevents shops from having full control over online content and, to an extent, from occupying an advocatory role, as a point of connection between their customers and other music-related businesses. Shops which do have a website use it primarily for online sales and enquiries, often through a form. Edinburgh record shop Underground Solu'shn are currently trying to build their online presence but are constrained by time and staff numbers:

> we don't have many people working here because we can't afford it so it's really sort of 'do what you can on a daily basis'. […] Currently we're on Instagram, Facebook and Twitter […] that's as much as we can manage at the moment. We're just trying to keep working on it, doing newsletters and stuff.[63]

One or two shops expand on this with embedded social media feeds, blogs, local information and listings. The VoxBox website, for example, features details of upcoming music-related events at the shop and elsewhere, information about travel and transport links, a shop blog, a discussion forum, links to musical content, other local services and/or businesses, as well as local visitor attractions.

---

[62] McLeod et al. (2010) 'Knowledge-networks', 1654.
[63] George Macdonald, fieldwork interview, 2018.

There are opportunities for record and instrument shops as valuable sources of local information to participate more fully in the music tourism knowledge network in ways which would benefit both retailers and local music scenes. It would therefore be beneficial to encourage a sense of this role and where necessary unlock support for the digital and marketing skills required by retailers to fulfil it.

Online music hubs

Several respondents in Glasgow spoke of the need for a centralised online music 'hub' or mobile app for information on music events that would allow venues and promoters to get information to the hospitality sector quickly and easily. Arguments in favour of this ranged from emphasising the status of Glasgow as a music centre comparable with others such as Berlin or Nashville, to questions of convenience (for business owners and customers) and consumer experience. Lynn Fairley of Eurohostel, noting the existence of similar listings apps in the US and Europe, remarked that 'it just seems bizarre that for a big city we have nothing that people can just click onto and see – an app would be wonderful, it'd be super!'[64] Duncan Johnston, of Hotel Indigo: 'It'd be easier if there was a one-stop shop I suppose. […] for my team it'd be really good even if it was a web portal or something or if there was an email thing that came out every week saying this is what's happening'.[65]

Others saw an app or other online solution as a way of overcoming the constraints imposed by low staff numbers. Helen Urquhart of the National Piping Centre remarked that 'something like that would help us get our messaging out even further just because there's only a very small team that are working on everything, that are trying to make sure we get the messages out'.[66] The majority of the music retailers we communicated with via the project's questionnaire also felt that their business would benefit from a music portal or app targeted at tourists.

Music portals exist in many other music cities around the world. They vary in terms of content and approach, but most provide local listings and travel information, with some, like the website of the Brighton Music Office offering, in addition to gig listings, a blog and a directory of local music-related businesses.[67] In Australia, the Live Music Office features a map of music-related businesses as well as resources for artists and venues giving advice on best practice, and information on relevant policy, including national and local music strategies, alcohol licensing, noise legislation, and planning and development.[68] Other websites and apps are more consumer focused, with the free

[64] Lynn Fairley, fieldwork interview, 2018.
[65] Duncan Johnston, fieldwork interview, 2018.
[66] Helen Urquhart, fieldwork interview, 2018.
[67] Brighton Music Office (2018) 'Home', *Brighton Music Office* [website] Available at: https://www.brightonmusicoffice.co.uk/. Accessed 28 October 2018.
[68] Live Music Office (2018) 'About Us', *Live Music Office: Live and Local* [website] Available at: http://livemusicoffice.com.au/about-us/about/. Accessed 28 October 2018.

Nashville Live Music Venue app allowing users to plan travel and book accommodation directly through the app while searching venues by date, location and genre.[69]

Potential problems with seeking online/digital solutions to the gaps in knowledge networks include the investment of time and money required to create and maintain online services, the issue of assigning responsibility for costs and upkeep, and the need to continually consult with various stakeholders with regard to design, structure and content. Some noted that there were already plenty of listings sites available but that many businesses either did not have time or money to engage with them or felt that the service should 'come to them' for information.[70] Others pointed to the issue of authenticity, and the importance of reflecting the values and concerns of local scenes and communities, rather than an inauthentic, commercialised version.[71]

There is also the issue of user experience; one respondent noted that while many users are comfortable with app-driven experiences – such as virtual music tours – for others, technology is only a means to connecting with real-world experiences; 'although technology is what everybody talks about and digital technology is taking over the world, actually people are still much more comfortable with old tech and real-life experiences'.[72] This is supported by Visit Scotland's survey data, with only 3% of respondents preferring apps as a source of knowledge about local attractions. While acknowledging the value of these technologies for delivering content and gathering data, research suggests that they are most effective as part of an integrated experience in which face-to-face human interactions still play a crucial and valued role.

Networking

Face-to-face relationships are not just important to tourists. While many respondents cited mobile technology as a crucial means of delivering and receiving information, the interview data also highlighted the importance of sustaining good interpersonal relationships. Hotels, venues and other music attractions clearly stand to benefit from good network connections for sharing knowledge. However, there are barriers to establishing and maintaining personal contacts. Helen Urquhart noted that creating and sustaining wider networks with other hospitality businesses was often difficult.

---

[69] Nashville Convention & Visitors Corp (2018) 'Nashville's Free Live Music Guide App', *Nashville Music City* [website] Available at: https://www.visitmusiccity.com/plan/tripplanning/nashvillemusicapp. Accessed: 28 October 2018.
[70] Adrian Gomes, fieldwork interview, 2018.
[71] George Macdonald, fieldwork interview 2018.
[72] Fay Young, fieldwork interview, 2018. This echoes the recent report from Perman et al. whose survey highlighted the value of direct, face-to-face recommendations from locals.

> Making sure that the folk that people ask – the hotel concierges and that sort of thing – that they know about us and it's not something that we've ever been particularly good at managing to do well. But I think that's a city-wide problem, not just us.[73]

She cited lack of time, and the problem of identifying relevant contacts within partner organisations as barriers; 'it's just really hard knowing who to talk to get the right person to come up here […] that sort of thing [is] hard for us because […] we run so much from this building with a very small team that if there was somewhere we could feed in, that would then help us get it out to everybody else'.[74]

Urquhart pointed to the importance cross-sectoral networking for developing interpersonal contacts: 'Networking is also really good because you get to meet the right people, you know the folk that go to these are usually the ones who are quite engaged, and you know "send us an email and we'll make it happen"'.[75] Derek Macmillan at the Piping Centre's partner organisation CitizenM also stressed the importance of face-to-face contact, suggesting that 'the best way for people to talk about concerts and stuff is to physically come in' and speak to the hotel's 'ambassadors', provided that they came at the right time ('three o'clock') and with enough notice.[76]

Many respondents, however, spoke of the difficulty of maintaining effective networking due to lack of time and personnel:

> if we had time and, you know, bodies on the ground, we could do a lot more of the marketing in terms of corporate bonding, working with a human relations team, because there's huge potential in the feelgood stuff in doing games together […] tapping into local knowledge or people's experience.[77]

McLeod et al point to motivation as key to successful networking, noting that 'networks may not be sustainable unless some kind of incentive is given, or tangible results are achieved'.[78] Incentivisation is therefore a necessary part of effective network building, and this can be problematic where the benefits of sharing resources are not readily quantifiable:

> most hierarchies start looking for something, if it's not in revenue, then it's more concrete and […] they know for every booking they're getting 50 pence you know for every referral. It's fine doing it on momentum and all that kind of stuff at the start when everybody's starting but just down the line people […] need to know that there's something in it for them. It's just the way business goes.[79]

---

[73] Helen Urquhart, fieldwork interview, 2018.
[74] Ibid.
[75] Ibid.
[76] Derek Macmillan, fieldwork interview, 2018.
[77] Fay Young, fieldwork interview, 2018.
[78] McLeod et al (2010) 'Knowledge-networks', 1655.
[79] Lynn Fairley, fieldwork interview 2018.

It is important, then, both for businesses to have opportunities to form and sustain interpersonal relationships with relevant contacts in other sectors, and for these partnerships to be demonstrably beneficial for both parties. In the final section, we suggest some ways in which policymakers might respond to this, and to the other challenges discussed in this chapter.

Conclusion

The interviews suggest that better knowledge-networks are needed to facilitate more effective links between the music, leisure and hospitality sectors. There is a potential role for policymakers, at both local and national levels, in helping to create and sustain effective knowledge-networks for music tourism initiatives. A recent study noted that policymakers had a role to play in 'supporting local business networks and bridging the gap between communities and groups with complementary resources and capabilities'.[80] Hotels, as we have suggested, are potentially important knowledge hubs within the music tourism ecology but there is much room for development, and the advocatory potential of other businesses, such as music retailers, is a potential source for growth which may require financial and skills support to unlock.

Policymakers could also consider ways to increase networking opportunities to establish stronger links both across sectors (horizontally) and within sectors (vertically), supporting organisations such as The Scottish Music Industry Association and Music Tourist to develop training and networking opportunities specifically targeted at musicians, venues and promoters seeking to connect with the tourism and hospitality sectors. Additionally, music venues could be supported in developing closer relationships with local accommodation providers, and hotels encouraged to open up their shared spaces to the city's music scene by collaborating with promoters and local venues, for example, hosting pre-gig promos.

A major component of the government's role in supporting music tourism is advocacy, and the interviews also suggest room for development here. Anecdotal evidence and recent research both reveal further scope for promoting awareness and for leveraging of Glasgow's UNESCO status. Glasgow Life could address the comparative lack of knowledge about UNESCO though a promotional campaign which could include the creation of visible markers of the city's status and its musical heritage. They might consider ways to make it easier for musicians and music businesses to promote the brand by providing official guidance on its use. They should also take steps to protect and promote existing assets such as the Glasgow Album Pathway. The UNESCO Creative Cities of Edinburgh, Glasgow and Dundee city councils could work together more closely to share marketing resources, helping connect creative enterprises in their respective areas of excellence connect with

---

[80] Juan Mateos-Garcia and Hasan Bakhshi (2016) *The Geography of Creativity in the UK: Creative clusters, creative people and creative networks*. London: Nesta and Creative England, 29.

larger audiences both across and outside Scotland. Finally, there is scope for more academic research on networking and knowledge-flows between the music, tourism and hospitality sectors which could help evaluate the potential for knowledge sharing. The Scottish Government should therefore seek to unlock funding for collaborative research projects assessing knowledge flows within and between sectors in the nascent music tourism sector.

Recommendations

- Facilitate networking opportunities to establish stronger links across music, tourism and accommodation sectors (horizontally) and within (vertically); support musicians and music venues in developing closer relationships with local accommodation providers.
- Work with the private sector in developing training and networking opportunities for musicians to help them build sustainable careers in music tourism.
- Visit Scotland in association with universities, Music Tourist and SMIA and other relevant bodies should conduct further research to measure the value of music tourism throughout the whole of Scotland separate from the rest of the UK, preparatory to creating a national music tourism strategy.
- Research is required in order to map the extent of cross-sectoral knowledge-sharing in Scotland to identify room for growth, knowledge 'brokers' and gaps in the flow of necessary knowledge, in order to maximise potential for knowledge sharing across sectors.
- Research partnerships between the music tourism sector and scholars in music, sociology, digital humanities, and oral history (among others) could be an important driver of innovation for the sector. The Scottish Government should seek to unlock funding for collaborative research projects in these areas. Outputs could include both written and digital formats, and feed into the development of Scottish, regional or city-level music portals and apps.

Chapter 2. Music tourism, place and identity

Introduction

The specific character of places informs how they market themselves in complex ways. The interviews conducted for this study indicated that there are a range of place-specific challenges to tourism development ranging from the concrete (e.g., limited hotel capacity in Orkney), to the relatively abstract (e.g. the psychological effect of the border between England and Scotland). The specifics of place create demand for certain types of local knowledge: traditional music, for example, is recognised as a draw for overseas tourists, but tour guides may need to develop local sensitivities in order to successfully connect tourists with local cultures. This also touches on the important theme of authenticity – the need to maintain a sense of a music culture embedded in place and not a staged event 'for the tourists'.

Concern with localness in another sense was also in evidence in the interviews: Aberdeen Festivals 'only work with locally run businesses […] the festivals are local, we work with local hotels that are owned locally, with local food and drink'.[1] Many hotels too, were keen to emphasise their positive impact on other local businesses: 'every Citizen M works with local suppliers […] so coffee's from Glasgow, beers are generally from Glasgow, food comes within Glasgow, so it's always supporting the local economy and that's one thing that, internally, we all strive for'.[2] At the new Radisson RED in Glasgow, this commitment to the local translates into the design of the hotel's rooms and public spaces: we've had a local artist who's designed all the wall paper for the bedrooms and he's worked on Marvel, he's very well known within the city'.[3] As well as highlighting the importance of individual businesses as connecting points between other types of business within their local area, this indicates a desire amongst many respondents to reflect the specific character of their locality while making a positive social and economic impact.

As these remarks also suggest, the space of music tourism continually connects the local with the global. The process of globalization, Robins observes, comprises 'intricate relations between global space and local space. Globalization is like putting together a jigsaw puzzle: it is a matter of inserting a multiplicity of localities into the overall picture of a new global system'.[4] In projecting an image that is simultaneously local and Scottish, tourist businesses may therefore have to balance the differing expectations of locals and visitors:

> the overseas visitor even at a festival wants the rounded experience that's not just going to the
> bar and going to see a band, and they want some form of Scottishness […] there are still that

---

[1] Angela Michael, fieldwork interview, 2018.
[2] Derek Macmillan, fieldwork interview, 2018.
[3] Emma Jackson, fieldwork interview, 2018.
[4] Robins (1991) in John Urry (1995) *Consuming Places*. London and New York: Routledge, 154.

huge swathe of people that want to feel Scottishness at these things and what we're trying to do is look out, you know and not be particularly Scottish about everything.[5]

Questions about 'Scottishness' and of Scotland's place within the UK, Europe and the world, which has been made more salient by recent events, form part of the larger context for this research: what is the relationship, for example, between Scotland's projected internationalist image, the decisions of cultural funding bodies and the national tourist brand; and how do these different versions of Scottish values and identities affect musicians and music businesses on the ground? This chapter looks at how place and identity impact on music tourism's developmental potential in Scotland and suggests ways of addressing some of the challenges they present.

Music and the Scottish brand

Scotland's brand image is organised primarily around history, heritage and above all images of natural beauty: as Visit Scotland observe, 'imagery of our landscape has been used extensively and historically to promote destinations across the nation, and with tremendous success'.[6]

50% of visitors to Scotland in 2015 and 2016 named 'the scenery and landscape' as their chief motivation for visiting, with history a close second at 33%.[7] As noted in the previous chapter, this historical focus on the natural environment is also reflected in the interests of professional guides and the itineraries of major tour operators, where musical experiences occupy a comparatively marginal position, despite the relative frequency of music-related imagery in promotional materials. As music occupies an increasingly prominent position in Scotland's tourism offer, the challenge for music tourism businesses is to ensure that this is reflected in effective relationships between the tourism and music industries, and high-quality music experiences for tourists which also inform national arts funding policy. For Creative Scotland's Alan Morrison, 'Scottish culture' is an 'advertisement of who we think we are as a nation and as a people, and as a welcoming place for people to either visit in short term or live long term'[8]. Morrison uses the pub folk session as a metaphor for Scottish internationalism:

what it is that makes Scottish music Scottish […] comes from […] what was in the folk world – a session. That you're just playing round the fireplace and anybody who comes up and joins you and you find tunes that you know from each other's cultures, so you can somehow play together, and that whole kind of session culture kind of filters through a lot of the thinking.[9]

---

[5] Angela Michael, fieldwork interview, 2018.
[6] Visit Scotland (2017) *Insight Department: Trends 2018*. Edinburgh: Visit Scotland, 6.
[7] Visit Scotland (2017) *Scotland Visitor Survey 2015 & 2016*, n.p.
[8] Alan Morrison, fieldwork interview, 2018.
[9] Alan Morrison. Fieldwork interview, 2018.

In Glasgow, similar narratives of internationalism and local place identity can inform the day-to-day operation of hotels: Hotel Indigo's Duncan Johnston noted the importance of 'making sure that we're all, whether everyone is giving that proper Glaswegian hospitality whether they're an Eastern-European Glaswegian or – I've got a Ghanaian in the front office whose been in Glasgow for 15 years. Glasgow is a very multicultural city now and we're all Glaswegians and giving people the information that they want, that friendliness which is why people come to Glasgow'.[10] Local place identities thus co-exist with ideas about the nation as a whole and filter down into interactions between businesses and tourists at street level.

The Scottish diaspora

As several respondents noted, the Scottish diaspora provides ready-made audiences for Scottish music, connecting music- with heritage-tourism. North America, Scotland's largest market for heritage tourism is also a potential music market 'because everyone there whose name is Mac- wants to check out what their heritage was and we can do that through that music'.[11] Helen Urquhart of the National Piping Centre in Glasgow acknowledged the 'huge diasporas of pipers across the world' noting that diaspora-oriented publications such as the *Scottish Banner* provide a channel for reaching out to these groups, seeming 'to hit the right people who are interested in all things Scottish […] if they're planning a trip to Scotland we will usually be on their itinerary and you know it's from *The Scottish Banner* that they've heard of us.[12]

Respondents noted that diaspora audiences may also be interested in some of the more niche aspects of Scotland's popular music past; Darren Yeats noted that:

> there's a lot of interest for Scottish music in North America and Australia – these are all kilt-wearing, highland game performing people in Canada – like those old records … all these old tartan tat records that sold well in Canada because of that whole connection. So we've got a very marketable thing. They could be sold to American tourists and Canadian tourists and Australians just because of history and that's something that's not really tapped into.[13]

Yeats highlights the importance of cultural knowledge and suggests that as notions of cultural identity evolve, new opportunities may emerge; mining the Scottish pop cultural past to tell the story of Scotland's musical identity in new ways may help to create demand from diaspora audiences.

---

[10] Duncan Johnston, fieldwork interview, 2018.
[11] Ibid.
[12] Helen Urquhart, fieldwork interview, 2018.
[13] Darren Yeats, fieldwork interview, 2018.

Urban and rural contexts

Urban and rural locations present their own specific challenges. Galashiels in the Scottish Borders region, for instance, has until recently suffered from comparatively poor transport links. Recent improvements have so far not resulted in an increase in destination tourism to Galashiels:

> We're off the beaten track a little bit. Even though the Waverley Line has been opened we're still a bit – you know, people don't come to Galashiels for something to do, or the numbers that come are tiny. They'll go on the end of the line to Tweed Bank to go Abbotsford House and mountain biking and stuff like that but, it's not really a tourist destination currently.[14]

Chris Wemyss of MacArts, an arts centre and music venue in Galashiels, noted that the siting of the Great Tapestry of Scotland in the town promises to connect local arts businesses with a significant increase in tourism and forms the backbone of the town's planned Cultural Quarter: 'when the tapestry's here we would *become* the beaten track we'll be 20, 30 metres from the front door of the tapestry so we should be able to access their visitors'.[15]

MacArts, like other venues in the region, can struggle to get onto bands' touring schedules:

> currently bands come up through Newcastle, jump over the Scottish Borders, go to the central belt, and then continue further north, Inverness, Aberdeen, and sometimes the Highlands, but there's never been a traditional stop, since the 1960s, in the Scottish Borders.[16]

However, the venue can draw audiences down from the central belt if they are able to book the right band at the right time:

> if the band are playing here, there'll tend to be a central Scotland option; however, if that sells out, we'll get a decent number of people travelling. If the central Scotland option sells out, we'll get people travelling. We'll also get the hard-core fans, who maybe go to both gigs [and] will travel as well.[17]

The venue would thus benefit from being able to target their marketing efforts at 'hard-core' fans likely to attend more than one gig, booking acts likely to sell out in Glasgow or Edinburgh, and persuading bands to choose them over (or as well as) more established venues. Barriers to these include a small to non-existent marketing budget, insufficient audience data, and the difficulty of securing exclusive gigs. One solution to the latter has been to improve the overall experience for musicians playing at the venue, e.g., providing free food and accommodation. Supporting venues such as MacArts with marketing costs and with networking opportunities to develop relationships with booking agents could also prove beneficial.

---

[14] Chris Wemyss, fieldwork interview, 2018.
[15] Ibid.
[16] Ibid.
[17] Ibid.

Festivals and location

The location of music festivals is increasingly important as festival-goers become more interested in off-site experiences and thus more likely to consider the portfolio of other activities available to them around an event. A recent report gives the example of Festival No. 6 in Wales which 'promoted itself as much on its location - and the tourist offer the town had - as the music'.[18] Nick Roberts of Electric Fields, a boutique festival based in Dumfries and Galloway covering a range of rock, indie and other popular genres, speculated that 'people spend five minutes looking at your line-up and then they'll spend months looking at how they're going to get there, what's the environment going to be like when they get there, what's the food like, what's the venue like'.[19] The global surge in festival tourism, combined with the relatively low cost of European air travel means that Scottish festivals are competing with cultural destinations throughout Europe and even further afield. Roberts notes:

> if you can jump on the plane to Barcelona, you want to know fine well, if you're spending your money elsewhere, what you're going to be getting for your money, and that's tourism, you know, that's not music. It's a very interesting area. We pitch to more lifestyle and tourism journalists than we do to music journalists at the moment.[20]

It is therefore in the interests of music festivals to promote their local area as much as their musical content, and in the interests of local businesses to develop good relationships with music festivals happening in their area. The Edinburgh-based music industry conference Wide Days is an example of an urban festival-type event that actively encourages attendees to engage with the city outside the confines of the conference venues, through tours and other experiences organised with partners, and perhaps provides a model of how more festivals might enhance both their tourist appeal and local cultural-economic impact by developing similar initiatives.

While rural music festivals such as Electric Fields undoubtedly have a positive impact on hotels and other local businesses, Roberts points to the risk involved in expressly recommending local businesses such as hotels, B&Bs and taxi firms due to the possibility of them over-reaching, with repercussions for the festival itself. He also noted that the mere fact of the border between the two countries can deter English audiences from attending festivals in Scotland:

> there's a tendency, especially with festival audiences, to *see* borders a lot more than if they weren't going to a festival […] someone who lives in the north of England might say, "look's great, but it's in Scotland", so there's an interesting thing because you're going, "but, we're actually *just* in Scotland", you know. It's something you like the look of and you'd like to go

---

[18] Guerrero Orozco, Shapiro and Jones (2018) *Music is the New Gastronomy*, 25.
[19] Nick Roberts, fieldwork interview, 2018.
[20] Nick Roberts, fieldwork interview, 2018.

to but it's 'Scotland', as opposed to "let me just check it out, maybe it's only a couple of hours from me", so there's an interesting element there.[21]

Roberts' point suggests that his festival would benefit from a concentrated marketing effort to dispel the sense of the border as an impenetrable barrier, something which would also undoubtedly also impact positively on other businesses in Scotland's border counties.

The urban context

As noted in the previous chapter, a significant challenge for urban music businesses is providing short-term visitors with reliable information about local music events and activities in time for them to become potential customers. The city centre of Edinburgh supports a bustling tourist economy which places some music retailers on the 'front line of the tourist map of Edinburgh purely because we're next to the airport bus and the train station so a lot of people just land in our laps basically, just purely because they're hanging around the area'.[22] However, wider socio-economic factors, including the post-financial crash recession and the flight of local residents from the city centre have negatively impacted on retailers. A 2016 survey found 'a distinct cooling of the resident's love affair with the city centre's shops, bars, restaurants and attractions […] at a time when the impact of the recession coupled with an increase in online shopping was crippling the city centre and footfall was significantly down'.[23] Manager of Hog's Head Records Tim Keppie told a journalist that 'around 20 years ago, the south side of the city was vibrant with different characters and there was a flow of people.' Now, however, 'the demographic has changed, and we have done as much as we can to adapt'. The shop, which opened in 1993, finally closed last year.[24]

George Macdonald of Edinburgh record shop Underground Solu'shn suggested that Edinburgh's comparatively compact size combined with a depressed economy made it harder to support a thriving music ecology, despite the large numbers of tourists and students coming into the city each year:

> Edinburgh's pretty much a village compared to other music hubs and the amount of people buying music or experiencing music playing music is significantly smaller than most other cities. It just makes it harder basically. So that's why you see less gigs here, you see less big

---

[21] Ibid.
[22] George Macdonald, fieldwork interview, 2018.
[23] This is Edinburgh (2016) *City Centre Marketing Campaign: This Is Edinburgh* [survey report] Edinburgh: This is Edinburgh.
[24] Kieran Murray (2017) 'Hog's Head music shop set to close after 25 years', *Edinburgh News* [online] 8 December 2017.

artists coming out of here, you see less stores, at the moment the number of record shops is

starting to go down again because people are struggling, so it's not an easy one.[25]

Macdonald notes that 'the price of rent and properties' means that, 'whole generations and types of

people that previously would live in the centre of town and be part of a musical scene, they can't live

in the centre of town […] and that's really hurt pretty much all retail in Edinburgh unless you're doing

booze or food or got a hotel'.[26] For those living in the suburbs or outside the immediate area, 'it's less

and less easy and cheap to come into the town and spend time or, you know, transport and all the rest

of it […] a lot of the people that are into stuff, unfortunately they don't have a great deal of cash so

the cost of staying in the centre of town or going on holiday isn't helping them have spare cash to

spend'.[27] This puts pressure on businesses to connect better with the 'transient' population and with

visitors to the city; to encourage tourists to behave, and spend, more like locals.

Location

Urban geography can affect the behaviour of tourists and shape the potential for music businesses to

thrive. Record shop VoxBox is located off the beaten tourist track in the 'village' of Stockbridge, an

affluent suburb of Edinburgh. Despite the shop's relative proximity to the centres of Edinburgh

tourism, manager Darren Yeats remarked that 'you can live in Edinburgh for a long time and just not

know there's a shopping area in Stockbridge'.[28] He cited various reasons for this, including reluctance

on the part of tourists to explore beyond the Royal Mile, and the physical (and possibly psychological)

barriers of Edinburgh's urban topography:

> most people are sheepish in their behaviour, they're frightened to go down side streets to see
>
> what's there. We're downhill from Princes Street and George Street so, if you take a punt and
>
> walk down that hill and there's nothing there, you have to walk back up the hill, so I think
>
> that might put tourists off from just taking the step.[29]

Research on tourist behaviour within urban space suggests that 'the physical space of the city is

engaged with socially and […] in some ways allows and in others inhibits specific social action'.[30]

Analysis of tourists' movements using GPS also suggests that 'if tourism is a spatially selective

activity, the spatial selectivity is largely driven by hotel location.'[31]Importantly, researchers found that

although 'visitation to icon attractions was not significantly influenced by hotel location, but other

---

[25] George Macdonald, fieldwork interview, 2018.

[26] George Macdonald, fieldwork interview, 2018.

[27] Ibid.

[28] Darren Yeats, fieldwork interview, 2018.

[29] Ibid.

[30] Thomas Thurnell-Read (2012) 'Tourism Place and Space: British Stag Tourism in Poland', *Annals of Tourism Research* 39(2), 810.

[31] Noam Shoval and Rein Ahas (2016) 'The use of tracking technologies in tourism research: the first decade', *Tourism Geographies*, 18(5), 597.

trips and activities were'.[32] The location, as well as the social capital, of hotels therefore makes them important tourist hubs, affecting their ability to connect guests with local cultural businesses; this is particularly significant in cities like Glasgow where 60% of visitors choose to stay in a hotel.[33] Moreover, less 'iconic' visitor attractions are the most affected, and therefore have the most to gain from good links with their local accommodation sector.

In their central Glasgow location, CitizenM are well-placed to connect with a number of local arts organisations: 'Location wise, we're obviously right beside the Theatre Royal, the Royal Conservatoire of Scotland and we're in like the Theatre District of Glasgow'.[34] This, combined with the chain's 'creative' brand, translates into good partnerships with local theatres. The hotel's sales manager, Derek Macmillan notes:

> because we're the nicest hotel for creative types in the city a lot of them like to have their guys staying with us and we set up special rates for them which are dynamic rates, so they get a set percentage off and a free welcome drink and a day of arrival cancellation policy that means for any last-minute changes we're really flexible for them.[35]

Its location in central Glasgow also chimes well with the brand's focus on food, culture and music and a millennial demographic. The Radisson RED brand, 'inspired by music, fashion and art' has a similarly good 'fit' with Glasgow, meaning there is potential for collaborative partnerships with the wider cultural sector, including musicians and venues. Director of Sales, Emma Jackson summarises:

> I don't think there is a better city for the brand than Glasgow […] music fashion and art is a lot of what Glasgow is and the brand and the city just work so well together we are constantly coming up with ideas for how we can work within those industries, it's just finding the time to do it all I guess.[36]

The Radisson's location, near the Hydro on the edge of Finnieston, an area that until relatively recently was emblematic of the city's post-industrial decline, demonstrates the power of culture-led development strategies to transform urban space. The location of the 12,000-seater arena has 'contributed considerably to the regeneration of the Finnieston area, helping inward investment and economic development'.[37] Emma Jackson of the Radisson told us that the transformation of Finnieston, now home to a range of fashionable restaurants, bars and cafes, reflected major changes in the cityscape over the last decade: 'I remember that 10 years ago when I was at Uni and it wasn't a

[32] Shoval and Ahas (2016) 'The use of tracking technologies in tourism research', 597.
[33] Visit Scotland (2016) *Scotland Visitor Survey 2015-2016*, n.p.
[34] Derek Macmillan, fieldwork interview, 2018.
[35] Ibid.
[36] Emma Jackson, fieldwork interview, 2018.
[37] Glasgow Life (2016) *Glasgow City of Music A UNESCO Creative City 2008-2016 REPORT*. Glasgow: Glasgow Life, 10.

place that really existed, there was nothing there, so the city has changed dramatically'.[38] Jackson sees the decision to site a Radisson RED in Glasgow as an indicator of the city's growing national and international status: 'We have Brussels, Minneapolis, […] Sao Paolo, and Glasgow will be the 5th one in the world so a really nice accolade for Glasgow and Scotland to have the first one in the UK'.[39]

There can, however, be a mismatch between brand and hotel location. In the case of Hotel Indigo, for example,

> the whole […] brand philosophy is about our local neighbourhood, it's about music, it's about culture and art and things we're trying to push that as the brand story really and we're stuck in the financial district of the city and there's not much of a buzz, so it can be quite a difficult one. There's no people here at the weekend because all that's down here is banks and insurance companies.[40]

Nevertheless, the hotel uses its website to promote and connect with the local music scene through a blog which features an article on King Tut's Wah Wah Hut ('the finest small music venue in the world'); the site also features a Glasgow Spotify playlist featuring Scottish acts such as Orange Juice alongside M-Ward and David Bowie.

Place and neighbourhood branding

Hotel Indigo's vocabulary of 'neighbourhoods' and 'curious travellers' resonates with the trend towards active 'neighbourhood branding' strategies in many post-industrial cities. Urry wrote in the 1990s that 'almost every town and city in Britain has now developed a "tourism strategy"'.[41] The 'rapid de-industrialisation' of urban Britain since the 1970s 'created a profound sense of loss, both of certain kinds of technology […] and of the patterns of social life that developed around such technologies'.[42] Urry also noted that perceptions that 'the costs of job creation in tourist and leisure-related services compared with manufacturing industry [were] very much lower', combined with the idea that 'leisure and tourism […] projects […] also benefit local residents' made place branding an attractive proposition for local authorities.[43]

Some Scottish cities currently have strong, relatively well-developed cultural brands; others do not. In Aberdeen, Dr Fiona-Jane Brown of Hidden Aberdeen Tours argues, 'the focus has gone too far towards attracting business rather than tourism up here', suggesting that the city's cultural offer is

---

[38] Ibid.
[39] Ibid.
[40] Duncan Johnston, fieldwork interview, 2018.
[41] John Urry (1995) *Consuming Places*. London and New York: Routledge, 154.
[42] Ibid.
[43] Urry (1995) *Consuming Places*, 154.

underdeveloped and lags behind the two largest cities.[44] She suggests, too, that the absence of regional histories from school curricula means that cities such as Aberdeen are less able to leverage their own histories in marketing themselves. Edinburgh by contrast has a strong cultural brand based on history, architecture and literature:

> Culture and creativity are one of Edinburgh's greatest assets. They are unarguable. Many aspects of our culture and creativity are tangible. They enable the city to place a distinctive proposition into our primary markets for foreign direct investment, talent attraction and retention, and the business and leisure visitor economies.[45]

A more recent development, *neighbourhood branding* 'refers to the symbolic and material practices of state and/or private cultural producers who aim to enhance the appeal of local areas within the city in order to attract investment, promote consumption, reduce criminality, or to achieve social and cultural aims such as invoking civic pride'.[46] The strategy 'has become increasingly influential in re-shaping former working class and often racialized districts into vibrant sites of urban consumption'.[47] Place-branding and 'neighbourhood' branding has been criticised as part of the 'neoliberalization' of city-spaces by scholars in critical geography who question the right of economic elites to impose their own conception of place for economic returns. Scholars also identify a familiar gentrification cycle whereby artists, attracted to an area by low rents, raise the property values and are then priced out by redevelopment with a subsequent loss of community and identity.[48] Even notwithstanding that terms like 'gentrification' and 'regeneration' are contested and overlapping, these are far from abstract matters. In the UK Live Music Census of 2017, just over a fifth (21%) of venues in Glasgow asked about 'barriers to success' identified 'planning and property' development issues' as challenge within the previous 12 months, with over a quarter (28%) identifying the noise related issues that are often

---

[44] (2018) 'Interview with Dr Fiona-Jane Brown of Hidden Aberdeen Tours', *History Scotland* [website]

[45] Ben Somerset How (2012) 'City Leader Brands – Edinburgh', *Creative Brief* [Blog] Available at: http://www.creativebrief.com/blog/2012/11/20/city-brand-leaders-%E2%80%93-edinburgh-2/. Accessed: 17 October 2018.

[46] Jeffrey R. Masuda (2018) 'Neighbourhood branding and the right to the city', *Progress in Human Geography* 2018, Vol. 42(2), 166.

[47] Ibid., 167.

[48] Howell (2008) notes that 'Critics of gentrification commonly assume that increased property values from revitalization eventually displace these inhabitants and drive their culturally diverse communities from the center of the city.' Ryan Howell (2008) 'Throw the Bums Out - A Discussion of the Effects of Historic Preservation Statutes on Low-Income Households through the Process of Urban Gentrification in Old Neighborhoods', *Journal of Gender Race & Justice*, 11, 542.

associated with them.[49] The Edinburgh Live Music Census of 2015, likewise, found the almost half of venues surveyed had been affected by noise, planning or development issues.[50]

Many music businesses, then, are located in areas facing development: 'one of the side effects of such regeneration can be a tougher environment for venues without the commercial or political wherewithal to adapt quickly to "gentrification"'.[51] The campaign to enshrine the 'agent of change' principle into planning law is one attempt to mitigate the effects of this developmental cycle. The 'agent of change' principle, essentially, dictates that the person or business (the agent) bringing about change due to a variance in land or property use is responsible for managing the impact of that change (not neighbouring businesses or people). Progress regarding the 'agent of change' principle will be discussed in the next chapter.

Music cities

Music city initiatives are a form of place-branding which seek to leverage musical heritage as a driver of cultural regeneration. While popular music has often been seen less as a local phenomenon than as the product of an international record industry, the growth of 'music cities', which in the UK began arguably with Liverpool, has encouraged the idea of popular music as heritage, a development which is supported both by local tourism strategies and, more recently, the museum and heritage sector. The National Museum of Scotland in Edinburgh recently staged *Rip it Up*, an exhibition of Scottish pop heritage. As part of this, the museum acquired 'the shop-fittings from Ripping Records in Edinburgh which is an absolutely iconic Edinburgh record shop'.[52] The exhibition's marketing team have to deal with the secondary status afforded to music, and popular music especially, in Edinburgh's cultural brand: marketing manager Alex Hinton noted that 'my colleagues who are Scottish and from Edinburgh would say that Glasgow is the place to go for the music and visual arts and Edinburgh's the place for the festivals and theatre and so I think there's definitely that kind of perceived difference'.[53]

Commonly accepted narratives like this have the potential to belie a broader musical heritage and the depth of current activity. In his address to a 'Live Music Matters' forum organised by City of Edinburgh Council at the Usher Hall, Neil Cooper (journalist and arts critic for *The Herald* and *The*

---

[49] Emma Webster, Matt Brennan, Adam Behr and Martin Cloonan with Jake Ansell (2018) *Valuing live music: The UK Live Music Census 2017 report.* Edinburgh: Live Music Census, 87. Available at: http://uklivemusiccensus.org/wp-content/uploads/2018/03/UK-Live-Music-Census-2017-full-report.pdf. Accessed 25 March 2019. The fact that over a quarter (29%) of Glasgow venue respondents also cited 'diminishing audiences' as a challenge heightens the extent to which it is important to develop new audiences, including visitors to the city.

[50] Adam Behr and Emma Webster with Matt Brennan (2015) *Edinburgh Live Music Census 2015 Pilot Study.* [Research report], Edinburgh: University of Edinburgh/Live Music Exchange, 52. Available at: http://livemusicexchange.org/wp-content/uploads/Edinburgh-Live-Music-Census-Report.pdf. Accessed 25 March 2019.

[51] Behr et al. (2014) *Cultural Value of Live Music*, 24.

[52] Alex Hinton, fieldwork interview, 2018.

[53] Ibid.

List amongst others) outlined the popular music history of the city, and the need to celebrate it alongside protecting present-day venues.

> Edinburgh has a long history of live music in bars and small venues […] In modern times this runs from the 1960s folk revival that ran parallel with the dance-hall scene, to bars such as the now demolished Tap O' Lauriston in West Port, which was a key venue for Edinburgh's punk scene.[54]

Here, and elsewhere, he has chastised 'a lack of civic knowledge concerning Edinburgh's rich musical history'[55] within and, echoing Darren Yeats's point above regarding students, beyond the City Council.

The goal, then, of aligning heritage and tourism with musical activity is tied up with a broader aim of promoting a city's cultural ecology at large. Greater depth of local knowledge, and history, is a means of simultaneously supporting local scenes, strengthening the city's brand and consequently, maximising opportunities for visitors to interact with them. Even aside from direct comparisons with other cities, lukewarm perceptions of a city can have an effect that extends beyond reputation. One way of countering such perceptions in this case was the setting up of an Edinburgh music tour to accompany the *Rip it Up* exhibition.

The entanglement of reputational and more concrete elements (alongside cultural and economic aspects) in city branding is evident internationally, across the various angles of approach. Music Canada defined a music city as simply 'a place with a vibrant music economy' noting a 'growing recognition among governments and other stakeholders that Music Cities can deliver significant economic, employment, cultural and social benefits'.[56] Their report argued that music city initiatives can drive 'job creation, economic growth, tourism development, city brand building and artistic growth'.[57] Additionally, a thriving music scene, by raising the quality of life can 'attract other industrial investment [and] talented young workers who put a high value on quality of life, no matter their profession'.[58]

Defining a 'music city', however, is not a straightforward exercise and any assessment of music's role in a given locality requires making choices about where to set the parameters, and what to count. This, like the increasing importance of music and the creative industries at large in local and national economies and strategies[59], is reflected in the growing number of censuses and assessment

---

[54] Neil Cooper (2015) 'The Only Fun in Town?' *Live Music Exchange* [blog] Available at: http://livemusicexchange.org/blog/the-only-fun-in-town-neil-cooper/. Accessed 25 March 2019.
[55] Ibid.
[56] Music Canada (2015) *The Mastering of a Music City: Key elements, effective strategies and why it's worth pursuing*. Toronto: IFPI/Music Canada, n.p.
[57] Ibid.
[58] Ibid., 13.
[59] Adam Behr (2015) 'Cultural Policy and Creative Industries', in John Shepherd and Kyle Devine (eds.)*The Routledge Reader on the Sociology of Music*, London: Routledge, 227-286

exercises. Some, like the Edinburgh and UK-wide projects mentioned above, have focused on live music. Live music censuses to varying degrees of depth have also been carried out in Melbourne/Victoria[60], Adelaide (2016/17),[61] Newcastle New South Wales[62] and Bristol. Other research and mapping exercises have spread the net more widely. The 'Nashville Music Industry: Impact, Contribution and Cluster Analysis'[63], for instance, covers the sector at large, including recording, publishing, instrument manufacture, retail and radio) while a report in Austin[64] included retail, audio equipment hire, record labels and artist management. Much depends on the motivations behind the research, its sponsors, and the resources available to the researchers. Dr Andrea Jean Baker made an assessment of the various algorithms feeding definitions of music cities and her case-studies' claims to be the 'music capital' of Australia. Her conclusions proposed a mix of quantitative and qualitative evidence that is inclusive of music genres and covers, amongst other things, both economic and heritage factors, noting that, 'culture is a multilayered activity, which is beyond a price tag'.[65]

The variety of factors in play is reflected on the ground. While some music cities (such as Nashville and Manchester) are associated with 'a distinct local sound or sounds', a thriving scene should comprise a 'diversity of music offerings, as well as support for local and indigenous cultural expression'.[66] Music Canada's report identified 'Artists and musicians; a thriving music scene; access to spaces and places; a receptive and engaged audience; and record labels and other music-related businesses' as the basic components of a successful music city.[67] However, it also found that music cities rely on a varied ecology and that 'business licensing, liquor licensing, transportation planning

[60] Music Victoria/City of Melbourne (2012) *Victorian live music census 2012*. Melbourne: Music Victoria/City of Melbourne. Available at:
www.musicvictoria.com.au/assets/Documents/Victorian_Live_Music_Census_2012.pdf
Dobe Newton and Rosa Coyle-Hayward (2018) *Melbourne Live Music Census 2017 Report*, Music Victoria/City of Melbourne/Collarts/RMIT/City of Yarra/City of Port Phillip. Available at:
https://www.musicvictoria.com.au/assets/2018/MLMC-2017-Report-compressed.pdf
[61] Live Music Office (2017) *Adelaide Live Music Census 2017*. Adelaide: MusicSA/Live Music Office. Available at: http://www.musicsa.com.au/wp-content/uploads/2017/12/LMO-Adelaide-Live-Music-Census-2017_v2.pdf. Accessed 25 March 2019; Live Music Office (2016) *Adelaide Live Music Census 2016*: Adelaide: MusicSA/Live Music Office. Available at: https://www.ahasa.com.au/__files/f/21042/LMO_-_Adelaide_Live_Music_Census_2016_Final.pdf. Accessed: 25 March 2019.
[62] Newcastle Live Music Taskforce/Live Music Office (2018) *Newcastle Live Music Census 2018*. Newcastle, NSW. Available at:
http://livemusicoffice.com.au/wp-content/uploads/2018/11/LMO-Newcastle-Live-Music-Census-2018_v5_web.pdf
[63] Garrett Harper, Chris Cotton and Zandra Benefield (2013) *Nashville Music Industry: Impact, Contribution and Cluster Analysis*. Nashville: Nashville Area Chamber of Commerce/Music City Music Council. Available at:
https://www.nashville.gov/Portals/0/SiteContent/MayorsOffice/EcDev/docs/NashvilleMusicIndustryStudy.pdf. Accessed 25 March 2019.
[64] Titan Music Group (2015) *The Austin Music Census: A Data-driven Assessment of Austin's Commercial Music Economy*. Austin: Titan Music Group. Available at:
http://www.austintexas.gov/sites/default/files/files/Austin_Music_Census_Interactive_PDF_53115.pdf. Accessed 25 March 2019.
[65] Andrea Jean Baker (2017). 'Algorithms to Assess Music Cities: Case Study—Melbourne as a Music Capital'. *SAGE Open*. https://doi.org/10.1177/2158244017691801, 10.
[66] Ibid., 17.
[67] Ibid., 13.

and parking, as well as land-use planning all have an impact on the health of the music economy'.[68] This is borne out by work on the Scottish context, which looked at case-study venues in Glasgow and Edinburgh and noted the importance of related 'legislative structures'[69] (licensing, health and safety, noise, cultural policies, etc.) to the live music ecology.

Just as de-coupling 'music tourism' from the broader music ecology is difficult, consideration of musical activity as a whole – and including tourism – involves being mindful of these wider relationships. Indeed, contributors to Music Canada's report expressed concern about the effect of branding initiatives on local communities. They conclude, however, that 'if the music community is directly involved in the development of the strategy, evidence would overwhelmingly indicate that the scene will be nurtured and strengthened, not weakened or compromised'.[70]

Prominent among the list of necessary components was 'spaces and places for live music performance and other activities such as rehearsing, recording and music education are integral to the success of a Music City'. The report on Glasgow music tourism by Perman *et al* noted the solid and relatively diverse base of venues and workspaces within the city.[71] Interviews, however, suggested there was room for improvement in visibility, provision, and in the attitude of local authorities towards potentially 'noisy' inner-city developments: 'We're the UNESCO city of music and there's no provision for bases for musicians, you know, you've got 500 artist studios for painters and sculptors, but you don't have one space that's funded [for music].'[72]

Holding onto musicians is a key challenge for sustaining a viable music city and Music Canada identify the cost of living as a key factor in musicians' decisions to relocate and reside long-term in cities. With average salaries around £10,000 per annum, the draft culture strategy for Scotland notes that ensuring that culture sector incomes remain above the poverty level poses 'a major challenge', one made more pressing by a culture of unpaid internships, short term contracts and the scarce and competitive nature of arts funding.[73] Additionally, as noted above, creative workers are as at risk (if not more) from the economic effects of gentrification as any other low-income group. Music Canada note that 'as the cost of living increases in many cities, musicians' incomes generally do not

[68] Ibid., 13.
[69] Adam Behr, Matt Brennan, Martin Cloonan, Simon Frith and Emma Webster (2016) 'Live Concert Performance: An Ecological Approach'. *Rock Music Studies* 3(1), 7.
Based on work covering both the history and current state of live music, the case-studies examined were King Tut's and the SECC in Glasgow, and the Queen's Hall in Edinburgh.
[70] Baker, A. (2017). 'Algorithms to Assess Music Cities: Case Study—Melbourne as a Music Capital'. *SAGE Open*. https://doi.org/10.1177/2158244017691801, 32.
[71] Perman et al., (2018) *Growing the Value for Music Tourism in Glasgow.*
[72] Kenny Inglis, fieldwork interview, 2018.
[73] Scottish Government (2018) *A Draft Culture Strategy for Scotland*, 37.

keep pace'[74] and urge that music cities must create 'a supportive environment for artists', including 'training and education programs, mentoring, access to hubs or incubators and affordable housing'.[75]

In addition to musician-friendly policies, cultural assets need to be identified and protected. Mapping and recognition of key music tourism sites should come with protected status; this has been done in Liverpool, where John Lennon's and Paul McCartney's childhood homes have been purchased by the National Trust and are open to the public, while Ringo Starr's house was saved from demolition and redevelopment.[76]

Considering local context

While much can be learned from comparisons with other successful branding initiatives, UK research suggests that there is no single template for success when developing a creative city, and that understanding local context is vital: 'UK creative clusters can take very different shapes. The message for the policymakers who want to support them is clear: there is not a one-size-fits-all for creative clusters, and local context matters'.[77] Music Canada (2015) similarly stress that 'it is normally impossible to simply transplant a comprehensive music strategy from one city to another'.[78] This is partly due to the local differences between music cities in terms of their heritage as well as the unique dynamics of contemporary scenes. In Glasgow, notes Jonathan Trew of Glasgow Music City Tours, 'many of the bands tend to be quite cult bands rather than huge megastars'.[79] It is also a musically diverse city, in which a number of scenes co-existing alongside one another: 'there's a huge kind of band scene the kind of indie, rock band thing, there's a lot of quite Avant Garde stuff going on, and there's a huge amount of techno, pop stuff, there's an awful lot of that and a real kind of momentum behind them'.[80] As Fay Young of Walking Heads noted, 'Unlike say Liverpool or Manchester', the city has few individual 'bands that sprang to mind that [tell] the story, in a coherent way'.[81] Narrating Glasgow as a music city thus requires a unique and carefully developed brand story which reflects the reality of the city's musical histories as well as the aspirations of those living and making music there. Here, again, the direction of travel in terms of thinking about *what* to support as well as how to support it is important. As Professor Simon Frith noted in his keynote address to the European Music

---

[74] Music Canada, *Mastering a Music City*, 45.
[75] Ibid., 14.
[76] Ibid., 38.
[77] Juan Mateos-Garcia and Hasan Bakhshi (2016) *The Geography of Creativity in the UK: Creative clusters, creative people and creative networks*. London: Nesta/Creative England, 15.
[78] Music Canada, *Mastering a Music City*, 32.
[79] Jonathan Trew, fieldwork interview, 2018.
[80] Kenny Inglis, fieldwork interview, 2018.
[81] Fay Young, fieldwork interview, 2018.

Council Annual Forum in 2013: '[A] music industry does not create a music culture; rather, a music culture leads to the development of a music industry.'[82]

Promoting an overall ecology, or city brand, requires infrastructural support, but also communication across musical worlds. Some of our respondents also mentioned additional aspects of the local creative culture that might present barriers to effective collaboration:

> for all of its rich diversity there seems to be a kind of slight backwardness about moving forward, about you know, thinking outside the box, about exposing your ideas to someone else, and all that sort of stuff […] I've never seen it get any better, it just seems to kind of sit in that zone all the time so… fantastic amount of music, just a kind of a slightly cold way of thinking about it between people.[83]

Others mentioned the need to overcome a certain 'ambivalence' in the relationship between 'grassroots' venues and independent cultural producers, and the more commercial end of the market. Fay Young, of Walking Heads tours stated:

> I think Glasgow has that in itself, it has a bit of an ambivalence about how much it wants to celebrate success and can it see bringing together the Hydro with the Grassroots? And actually the Hydro probably has a sharper sense of why that matters. As Debbie McWilliams of the Hydro says, […] 'we need a successful grassroots scene because those grassroots are the ones that eventually make it onto the stage, for the stars of tomorrow we need a healthy growth at the grassroots'.[84]

However, Young also noted signs of improvement; 'I think there has been a tension between those two, there are signs that is beginning to ease, and that people are beginning to see the importance of working together, but I think it will need some leadership – skilful leadership to bring people together'.[85]

Frith's address to the European Music Council ends with two, related, questions: 'What is good music for a country, region or city? What is a good country, region or city for music?' He posits, further, that, 'A flourishing local musical economy is certainly a sign of a healthy musical culture, but creating a healthy musical culture is not simply an economic matter.'[86] Evidence from our interviews bears this out, and suggests that work on creating city (or region) brands will result in more sustainable outcomes if 'top down' approaches are tempered by widespread communication and information-gathering across musical scenes and practices.

---

[82] Simon Frith (2013) 'The Social Value of Music (in the context of European regeneration policy)' *Live Music Exchange* [blog] Available at: http://livemusicexchange.org/blog/the-social-value-of-music-in-the-context-of-european-regeneration-policy-simon-frith/. Accessed 25 March 2019.
[83] Kenny Inglis, fieldwork interview, 2018.
[84] Fay Young, fieldwork interview, 2018.
[85] Fay Young, fieldwork interview, 2018.
[86] Frith (2013) 'The social value of music'.

Involving the whole city

While there is a case for arguing that culture-driven economic strategies can be 'more sustainable in economic downturns' with strong benefits for quality of life; 'the challenge is how to articulate that to civic leaders who are worried about picking up the trash.'[87] The need for effective and consistent leadership was highlighted by several interviewees:

> In Glasgow there's nobody. There's no leadership, there's a lack of leadership from the private sector's perspectives […] the music sector as a whole is quite competitive but they need to come together to […] address agent of change, they need to address working collaboratively with the public sector and the private sector. But ultimately, there needs to be public sector leadership because they're paid to do that and they've got the money and the resources and the people to do that but if they've identified music tourism as a strategic priority, they've got to resource it.[88]

In several cities, including Nashville, Austin and Adelaide, a local music office or advisory committee oversees the music city initiative, acting as a mediator between musicians, public and private sector and residents. The idea of national or regional music office will be discussed further in the next chapter.

Brexit

Several respondents voiced concerns about the effects of Brexit on their business. George Macdonald of Underground Solu'shn remarked simply that 'everything in the shop's gone up 15% since Brexit'.[89] Europe is an important market for Scottish music and a key touring destination for artists; Scottish jazz has established links with Nordic countries, while Scottish traditional music has had recent successes in France and Germany, most notably in the collaborative promotional efforts between Creative Scotland and Visit Scotland at the 2017 Lorient Interceltique Festival. Alan Morrison of Creative Scotland spoke about the highly negative consequences for musicians reliant on the European touring circuit of increased visa and carnet charges:

> Brexit is a big worry, if we end up getting difficulties with freedom of movement and having to go back to a system of filling in stuff about all your equipment you're taking border to border that's going to be worrying because Europe was viable when people could move around and learn how to tour by doing it that way. If you're going to America or you're going as far as Australia, the commitment is so much more that there's just bands at lower

---

[87] Music Canada (2015) *Mastering a Music City*, 30.
[88] Daniel Macintyre, fieldwork interview, 2018.
[89] George Macdonald, fieldwork interview 2018.

developmental levels of their career will just not be able to be doing international touring to the extent that they were before and that's very worrying.[90]

Morrison also suggested that Brexit may also impact negatively on the return visits by tourists that their European showcasing efforts have in part sought to stimulate. As no data on this is currently available, we suggest that any information held by Visit Scotland and/or Creative Scotland on the impact of overseas showcasing on inbound tourism should be made available in the form of a report. This could help build the case for further collaborative development in this area and form the basis for future research.

The EU is also a significant source of cultural funding for Scottish artists: recent research by Creative Scotland, Historic Environment Scotland and Museums and Galleries Scotland found that 650 projects received around £59 million between 2007 and 2016.[91] The UK as a whole has benefitted 'disproportionately' from Creative Europe funding, being involved in '44% of projects' and sharing in 11% of the total funding (€520M) disbursed between 2014 and 2016.[92]

One negative impact of the Brexit vote is the loss of eligibility for the European Capital of Culture programme. Concern about the loss of EU funding was mentioned by Chris Wemyss of MacArts, which currently benefits from Leader funding from the European Network for Rural Development, and by Angela Michael of Aberdeen Festivals whose overseas collaborations are supported by funds from Creative Europe:

> quite a few of our festivals over the years have done Nordic exchanges, some more than others. Jazz works very closely with Jazz Norway, Spectra does a lot of – so Iceland is a place that has opened up to us recently because we have a direct flight to Reykjavik. So our light festival this year was partly curated by Icelandic light artists and the Icelandic cultural minister came and spoke at our conference […] We very much do look North for partnerships and European collaborations. How that's going to be in the next year or two? We just don't know. Because a lot of that's European funded rather than locally funded.[93]

The impact of Brexit will be more than financial: as Michael suggests, the removal of opportunities for international collaboration facilitated by EU initiatives is likely to impact negatively on the sharing of technical and cultural expertise. Restrictions on freedom of movement will also affect recruitment. Research by the Department of Digital, Culture, Media and Sport concluded that 'the UK creative, tech and tourism industries need sufficient access to talent to continue as world leaders' and predicted that Brexit could create major barriers to recruiting talent for the creative industries and

[90] Alan Morrison, fieldwork interview, 2018.
[91] Scottish Government (2018) *A Draft Culture Strategy for Scotland*.
[92] Department for Digital, Culture, Media and Sport (2018) *The potential impact of Brexit on the creative industries, tourism and the digital single market*. HC 365, 20.
[93] Angela Michaels, fieldwork interview, 2018.

tourism.[94] Protecting 'the international span of the UK's creative networks – particularly with regard to the EU […] will be an important challenge going forward'.[95]

Loss of access to the EU talent pool is also a concern for hospitality and tourism businesses with the hotel chain Hilton noting that EU staff 'bring valuable language skills and international experience, helping us to welcome European guests who make up 63% of inbound holidaymakers'.[96] While EU nationals make up around 6% of the workforce of the UK's creative industries, and around 4.1% of its music industry, 'a conservative estimate' by the British Hospitality Association places the figure at around 15% or approximately 700,000 people.[97]

Also likely to impact on Scottish tourism is the potential loss of 'roam like at home' mobile services. With Google the second most popular source of information for visitors to Scotland (34%),[98] and the increasing popularity of smartphones and mobile apps as a means of communication between tourism and hospitality businesses and their customers, the reintroduction of high roaming charges is likely to place constraints on the digital marketing efforts of UK tourism businesses.

Given the uncertainty about the outcome of the Brexit process at the time of writing, its full effect is impossible to quantify. What is clear is that it is a source of considerable anxiety. Beyond its direct effect on music tourism, the potential ramifications of a disorderly exit from the European Union for the wider musical ecology are significant. Any loss of Freedom of Movement for Scottish musicians could have severe negative career impacts. Written evidence from Dr Patrycja Rozbicka (of Aston University) and Michael D. Conroy (a tour manager) to the DCMS inquiry into Live Music supports Morrison's concerns and identifies some of the potential problems for UK musicians seeking to play in Europe should they lose some of their current entitlements:

> The largest disadvantage for touring in Europe for US and Canadian bands and accompanying staff are the visa application procedures... The procedures are time consuming and costly and, in particular, affect smaller bands and self-employed individuals. For the new artists… it is a difference between being able to afford to tour or not. But also, the requirement of a promoter making them an offer to perform, and additional paper work needed, make the European promoters less inclined to bother with smaller acts.[99]

[94] Department for Digital, Culture, Media and Sport (2018) *The potential impact of Brexit on the creative industries, tourism and the digital single market.* HC 365.
[95] Juan Mateos-Garcia and Hasan Bakhshi (2016) *The Geography of Creativity in the UK: Creative clusters, creative people and creative networks*, Nesta/Creative England, 41.
[96] DCMS (2018) *The potential impact of Brexit on the creative industries, 10.*
[97] George Sell (2017) 'The Shadow of Brexit'*, Boutique Hotel News* [online], 25 January 2017, Available at: https://www.boutiquehotelnews.com/home/blog/2017/1/25/the-shadow-of-brexit/ Accessed: 31 October 2018.
[98] Visit Scotland (2017) *Scotland Visitor Survey 2015 & 2016*, n.p.
[99] Patrycja Rozbicka and Michael D. Conroy (2018) 'Brexit and the UK live music industry: Problems and solutions?' [written evidence submitted to DCMS committee] Available at:

This extends beyond live music and direct funding issues. As Strathclyde University's Professor Lillian Edwards has pointed out, the competitiveness of UK's businesses could be hindered by cracks in the degree to which its operations on data privacy are deemed 'adequate' regarding privacy rules.[100] Since this includes things like customer mailing lists and advertising, and since both the music and service industries – like others – are increasingly data driven, it is not a small matter in the long-term.

Visa difficulties have already started to affect festivals[101] and broader concerns impact on the attractiveness of the UK to international music companies. Given the interconnectedness of the music industries, local music ecologies and music tourism, it is difficult to imagine that negative consequences for the first two will not impact the latter.

Conclusion

There are a number of place-specific challenges to the future development of music tourism in Scotland including questions of location, urban space and tourist behaviour, as well as the uncertainties surrounding Scotland's position within the UK and Europe following the Brexit vote. The following recommendations are intended for music and tourism businesses and policy makers seeking to address some of these challenges.

Recommendations

- Music interests in Glasgow (and Scotland as a whole) should be supported in actively seeking out strong brand resonances with major accommodation providers such as Radisson and encourage them to invest in Scotland as a driver of employment and support for music tourism initiatives. This should include opportunities for 'grassroots' venues and musicians, and smaller hospitality operators, to make visitors aware of local activities.
- Creative Scotland and other funding bodies should plan for the impact of any new visa and carnet restrictions on Scottish musicians playing in Europe, including working with relevant industry groups to consider training and support for bands hoping to develop their European fanbase. Regional 'Music Offices' could play a role helping musicians navigate the new visa

http://data.parliament.uk/writtenevidence/committeeevidence.svc/evidencedocument/digital-culture-media-and-sport-committee/live-music/written/82216.pdf. Accessed: 25 March 2019.
[100] Lilian Edwards, "Brexit: "You don't know what you've got till it's gone"", (2016) 13:2 *SCRIPTed* 112 https://script-ed.org/?p=3147. DOI: 10.2966/scrip.130216.112
[101] Kate Hutchinson (2018) 'What the Womad visa fiasco tells us about live music in Brexit Britain' *The Guardian* [online] Available at: https://www.theguardian.com/global/2018/aug/02/womad-visa-fiasco-brexit-britain-live-music-festival. Accessed 25 March 2019.

environment and for promoters and venues to mitigate additional complications in bringing musicians *to* Scotland.

- Glasgow, Edinburgh and other cities should consider 'musician friendly' policies to deal with the cycle of gentrification and its effect on musicians, engineers and producers.
- Visit Scotland should work with festivals and promoters to actively promote Scottish music events to northern English fans as nearer than comparable English events.

Chapter 3. Music tourism, policy and government

Introduction

This final chapter considers the impact on music tourism of aspects of policy including cultural funding, licensing, business support, transport, and planning. Although a wide range of policy areas potentially impact on music tourism, there is currently no individual or organisation with oversight of how the policy landscape affects music tourism specifically. It also addresses the current lack of a cohesive policy on music tourism itself at the national level. Neither Scotland nor its two largest cities currently have a specific music tourism strategy. While there has been work in this direction at the UK level (e.g. UK Music's annual *Wish You Were Here* reports) and city level (e.g., the report *Growing the Value for Music Tourism in Glasgow*) there is currently no music tourism action plan for Scotland as a whole, and music features only as a sub-category of 'Heritage and Culture' in Visit Scotland's 2016 development framework.[1]

There are, however, precedents for more targeted strategic activities. The *Food Tourism Scotland* action plan produced by Scotland Food and Drink and the Scottish Tourism Alliance, for instance, drew on a Strategy Board including members of the Scottish Government's Food and Drink Growth Team, Highlands and Islands Enterprise and Visit Scotland, and was endorsed by the Cabinet Secretaries for Rural Economy and for Culture, Tourism and External Affairs[2]. The 'Creative Industries', like 'Food and Drink' and 'Sustainable Tourism', are listed in Scotland's Economic Strategy as 'Growth Sectors' with a competitive advantage.[3] While its Growth Sector briefings, however, include activities such as 'Restaurants and mobile service food service', 'Museum activities' and 'Historical sites' the Creative Industries (and music, specifically) are not listed. This may partly derive from the Standard Industrial Classification (SIC) Codes upon which the strategy documents draw. These connect with broader UK-wide and international uses, and have been identified as underserving music more broadly (e.g. by grouping it under 'Performing Arts' as a whole).[4] Complications around SIC codes notwithstanding, there does still appear to be scope for closer consideration of music related activities. For instance, the International Definition of Tourism,

---

[1] Dougal Perman, Tim Wright and Fay Young (2018) *Growing the Value for Music Tourism in Glasgow: Research Report and Promotional Plan*; Visit Scotland (2016) *Tourism Development Framework for Scotland.*
[2] Scotland Food and Drink/Scottish Tourism Alliance (2018) *Food Tourism Scotland*. Available at: https://view.pagetiger.com/STAwebsite/01/PDF.pdf. Accessed 25 March 2019
[3] Scottish Government Growth Sector Statistics. Available at:
https://www2.gov.scot/Topics/Statistics/Browse/Business/Publications/GrowthSectors
Scottish Government (2015) *Scotland's Economic Strategy*. Edinburgh: Scottish Government, 42
[4] Helen Burrows and Kitty Ussher (2011) *Risky Business*. London: Demos, 109
Demos (2013) *Written evidence submitted to Culture Media and Sport Committee inquiry 'Supporting the Creative Economy'*, London: House of Commons. para 27. Available at:
https://publications.parliament.uk/pa/cm201314/cmselect/cmcumeds/674/674vw35.htm#footnote_1
Jonathan Todd (2013) 'SIC to Death: Why the Music Industry Wants to be Redefined', *UK Music website*. April 23, 2013. Available at: https://www.ukmusic.org/news/sic-to-death-why-the-music-industry-wants-to-be-redefined. Accessed 25 March 2019

outlined in the Scottish Government Tourism Leadership Group's report of 2018 includes other SIC coded activities, notably 'Creative, Arts and Entertainment'.[5]

The point here is one of focus, and a connected approach, rather than that there is a lack of concern for music overall, or its potential role in Scotland's overall 'brand'. Indeed, Scottish Enterprise and the Glasgow City Marketing Bureau, as well as the SMIA, supported Music Tourist's 2016 'Music Tourism Summit'. Likewise, respondents in our research acknowledged the Scottish Government's role in promoting Scottish music both at home and overseas. Alan Morrison of Creative Scotland noted the support of Cabinet Secretary Fiona Hyslop, remarking that 'the amount she has spoken at different places about this music scene […] has really been a shot in the arm for us'.[6] Recent music tourism initiatives in Glasgow have also received vocal support in parliament from members including Adam Tomkins who lodged a motion in May 2018 to recognise the value of music tourism in Glasgow and the 'rich opportunities for growth in this area' while also making a case for protecting Scotland's small venues by placing the agent of change principle 'on a statutory footing' by incorporating it fully into planning legislation.[7] Despite increasing official acknowledgement of the cultural and economic value of Scotland's 'thriving and growing independent music scene', however, several respondents voiced frustration with the continued negative impact of other areas of policy, in particular licencing laws and planning and development legislation.

At city level, Glasgow Life have recognised music as a key component of their city's appeal as a tourist destination, pledging to 'continue to showcase the city on the global stage and create more opportunities for visitors to experience one of the world's top sporting, cultural and music cities.' Glasgow's recognition of music as a driver of economic development has directly impacted on some interviewees. Jonathan Trew of Glasgow Music City Tours remarked that, 'one of the reasons why we have had whatever success we've had in Glasgow is because […] Glasgow Life decided that they could probably do more to leverage Glasgow's music reputation as a way of making Glasgow an attractive place to study, to visit, to live in to work in, and so they've been very supportive'.[8] Others, however, were more ambivalent about government attitudes towards the value of music and the night-time economy. Some respondents suggested that entrenched hierarchies of cultural value impacted negatively on popular music particularly.

---

[5] Scottish Government Tourism Leadership Group/APS Scotland (2018) *Tourism in Scotland: The Economic Contribution of the Sector*. Edinburgh: Scottish Government, 35. Available at: https://www.gov.scot/binaries/content/documents/govscot/publications/research-publication/2018/04/tourism-scotland-economic-contribution-sector/documents/00534505-pdf/00534505-pdf/govscot%3Adocument
[6] Alan Morrison, fieldwork interview, 2018.
[7] Adam Tomkins, 'Glasgow (Music Tourism)', Motion before Scottish Parliament, S5M-12516, 20 June 2018.
[8] Jonathan Trew, fieldwork interview 2018.

In Edinburgh, whose city brand focuses on literary and architectural heritage,[9] some identified a reluctance at the local government level to view popular music as a valuable part of the city's cultural brand. As one interviewee pointed out, 'there's a plaque where Percy Shelley stayed on his wedding night […] the guy was on holiday! So surely, this is where Edwyn Collins went to school, […] or something about the Exploited, Nazareth, the Incredible String Band […] they're worthy of plaques.'[10] As discussed above in relation to 'music cities', perceptions are important regarding city brands. In addition to music itself as a point of focus, it is worth considering the international reach, across varying demographics (and potential visitors) of different *kinds* of music.

In Glasgow, where music – including popular music – *is* a core component of the city's brand, a review in *The Herald* questioned the effectiveness of public sector promotional efforts, suggesting that the 'shamefully small turnout for elder stateswoman pianist Elisabeth Leonskaja' at a recent concert was largely due to a 'deadly Glasgow Life marketing interface'.[11] This can be seen as an indirect effect of the perceived 'paternalism' of local cultural policy identified by some respondents, who suggested that 'the public sector in Glasgow is […] strangling innovation, they run the ticket box offices and the experience online isn't good, you can't find the tickets where the consumers are, so they're a wee bit behind the times in that sense'.[12]

These types of comment indicate the existence of divergent views of the role of the private and public sectors in the future development of Scottish culture and that rather than just *more* government support for music and music tourism, more fundamental changes may be required in both policy and in the cultural attitudes informing policy.

Music businesses, government and policy

Funding applications are a major point of contact between cultural producers and government and the problems of accessing it were a prominent theme in the interviews. Several respondents had received funding from Creative Scotland, Event Scotland or Scottish Enterprise, as well as local authorities and various EU programmes including Creative Europe and the LEADER fund for rural development. While many music businesses rely on public sector funding, often from multiple sources, for their survival, this funding is often short-term and insecure. For Electric Fields Festival, the applications process is a substantial element of their annual workload and carries with it a great deal of anxiety:

[9] Ben Somerset How (2012) 'City Leader Brands – Edinburgh', *Creative Brief* [Blog] available at: http://www.creativebrief.com/blog/2012/11/20/city-brand-leaders-%E2%80%93-edinburgh-2/. Accessed: 17 October 2018.
[10] Darren Yeats, fieldwork interview, 2018.
[11] Kate Molleson (2016) 'What is happening in Glasgow, UNESCO City of Music?', *The Herald* [online] 28 September. Available at: https://www.heraldscotland.com/arts_ents/14767878.what-is-happening-in-glasgow-unesco-city-of-music/. Accessed: 17 October 2018.
[12] Daniel Macintyre, fieldwork interview, 2018.

Every year or so you have a nail-biting few months spending a long time writing these very laborious funding applications which effectively – we're in year five now and we've been telling the same funding bodies what we do for the past four years you know and everyone kind of winks at each other and goes "I know it's a bit of a process and it's a bit boring but it's hoops you have to jump through".[13]

In addition to this duplication of efforts, various funding sources impose different conditions and respondents mentioned the much more 'stringent' nature of those imposed by government sources in comparison with private or corporate sponsors:

They've all got kind of different criteria, the local council want to know how many people we're bringing to the area and what jobs we're creating, Event Scotland are more about Scotland as a whole, how many we bring to the region, what light are we painting the country in, is it a positive thing? Creative Scotland is obviously a bit more on the performance side – are we developing artists, are we developing audiences? So everyone's got their various boxes to tick.[14]

The volume of paperwork both during and after the application process entails time and personnel constraints whose impact is felt most keenly by smaller businesses. A recent Scottish Government consultation with representatives of the cultural industries concluded that 'there is a need to reduce bureaucracy around funding applications (including requirements to demonstrate outcomes)'.[15] Respondents pointed in particular to a lack of differentiation 'between the different levels of activity', suggesting that funders should seek to make it 'easy for people, no matter what level you're doing […] to get in touch and promote themselves, without just saying you're doing a 10,000 people festival, you're over there you're doing a 30-person jazz gig, you guys have to fill out the same forms. That's not fair'.[16] The complexity of applications was also a concern. One small venue owner told us that:

when the chap came to tell us about it he visited a number of times. One of his visits he was here from 1 in the afternoon until 5 o'clock showing us through the paperwork and the computer system, and it was littered with statements like "on page 37 on the computer screen there will be drop down menus which will not appear until you enter something on page 38" and things like that, and he said "you may have to supply up to 80 supporting documents,

[13] Nick Roberts, fieldwork interview, 2018.
[14] Ibid.
[15] Scottish Government (2017) 'A Report Summarising Key Themes from a Culture Sector Gathering at Glasgow Women's Library, with the Cabinet Secretary for Culture, Tourism and External Affairs at Glasgow Women's Library, Bridgeton, on Monday 26 June 2017', Arts, Culture and Heritage, *Scottish Government* [website] Available at: https://beta.gov.scot/policies/arts-culture-heritage/latest/. Accessed 17 October 2018.
[16] Adrian Gomes, fieldwork interview 2018.

three quotes for every finding". It's just a phenomenal amount of time and paperwork to be done.[17]

Several respondents, however, spoke positively of the level of support they received from local authorities. Chris Wemyss of MacArts in Galashiels told us that 'the people that deal with funding in the local authority are quite supportive if you're making grant applications.'[18] Jonathan Trew of Glasgow Music City Tours remarked that Glasgow Life had 'been fantastic, they've just been, in terms of […] awareness of what we do, they've been great very supportive […] we can't complain we've had plenty of help and support and it's up to us to make things work basically'.[19] The specificities of place play a role here too: in Dumfries and Galloway, Nick Roberts remarked that 'we've got a supportive local community. Even with the local authority, they are very supportive of having things there which I suppose is the result of having a festival like Wicker Man for so many years. You're not trying to convince your local authority about the benefits of events like this so it's kind of like the perfect storm'.[20] However, in cities such as 'Edinburgh or Glasgow', Roberts noted, 'it's a lot harder to get a good amount time to sit down with certain authorities', and organisational structures can be difficult to comprehend and to negotiate:

> Glasgow Life […] must have 12 different layers management, from people who are at the box office to people who are event managers to the manager who manages the venue the music and admin manager and then you've got all these […] because the marketing team's in a different department. So, it's all very convoluted.[21]

Daniel Macintyre also pointed to incompatible working cultures as a factor, suggesting that musicians, promoters and venues were placed at a particular disadvantage: 'these guys work in the night time economy, they work at the weekend, they don't turn up to meetings at council offices and council chambers […] you've got a counterculture, an underground culture that doesn't sit comfortably, sitting round board rooms and speaking politics'.[22] Attending local council forums was felt by some to be a poor use of time

> I'm not really interested in going along to the licensing forum even though it's technically my industry. It's kind of a faff. I don't get involved in the Aberdeen City Council type stuff, because again you can spend all day in meetings like that and not really achieve anything […] the return on investment going to be really low in terms of my time.[23]

---

[17] Chris Wemyss, fieldwork interview, 2018.
[18] Ibid.
[19] Fieldwork interview, 2018.
[20] Nick Roberts, fieldwork interview, 2018.
[21] Daniel Macintyre, fieldwork interview, 2018.
[22] Daniel Macintyre, fieldwork interview, 2018.
[23] Adrian Gomes, fieldwork interview, 2018.

Others mentioned the speed at which the council moves in following through with proposed initiatives: 'there had been some chat about it from Edinburgh Council a while ago, but it's not really led to anything yet because the wheels of the council turn very, very slowly.'[24]

Bureaucracy was also a concern for several interviewees who provided anecdotal evidence of 'red tape':

> I'm just off the phone with a guy […] who runs music tours and he's got [major multinational company] over with him on a tour and he got thrown out […] of […] a music venue[25] because he hadn't signed a risk assessment so every single time he goes into the building he has to sign a risk assessment which makes absolutely no sense at all […] These are examples where it's not policy that's needed it's just common sense.[26]

This respondent identified a more fundamental problem in the tendency for culture sector businesses to have to adjust their strategy to local policy frameworks rather than the other way around. Local policy and structures, he argued, are not 'driven by outcomes. You need the structures and frameworks to be driven by outcomes rather than the other way around'.[27] One respondent, for example, mentioned the difficulty of obtaining licenses for one-off events, and that this had the effect of limiting the economic potential of other events such as Record Store Day and city festivals:

> I tried to close this street for Record Store Day one year and I had a meeting with 11 people in a council office – parades and marches, environmental health, parking, health and safety bits and bobs, noise pollution – they wanted us to be able to move a stage at short notice so that a fire engine could [in principle] come down and rescue someone from these flats. […] they wanted to be able to shut us down at a moment's notice if there was one noise complaint. Plus they said it would be £500 to close the street and it needed to be stewarded here, there and there, police were on the phone saying it's legal to drink in the streets of Edinburgh and £20 for a licence to sell alcohol for the day – that's cheap! But £500 to close the street. So they wouldn't let us do it.[28]

The Scottish Government's Draft Culture strategy revealed that many participants had voiced similar concerns, indicating 'widespread views aired throughout the engagement phase that it is not the role of government to define culture and that an inclusive view of culture is needed'. This 'inclusive view' included a recognition that 'culture exists with or without government-led strategies or interventions and […] must be free to be inspiring, disruptive and plural'.[29] This may be interpreted as broadly

---

[24] Darren Yeats, fieldwork interview, 2018.
[25] Owned and operated by Glasgow Life.
[26] Daniel Macintyre, fieldwork interview, 2018.
[27] Daniel Macintyre, fieldwork interview, 2018.
[28] Darren Yeats, fieldwork interview, 2018.
[29] Scottish Government (2018) *A Draft Culture Strategy for Scotland*, 16.

resonating with the view that the public sector should resist attempts to prescribe or curate the content of Scottish culture and should instead adopt a more responsive facilitatory role.

Licensing and music as 'noise': reactive policies

Licensing is a salient issue for growing music businesses not least because the relatively early closing in cities like Glasgow can negatively affect the kind of experience tourists have when they come to Scotland to attend gigs and festivals. A recent report suggested that

> 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.[30]

Interviewees also registered concern that the lack of a sufficiently 'cosmopolitan experience' puts Glasgow on the back-foot relative to their European comparators as a music city:

> Glasgow's music venues close at 2 o clock or 3 o clock whereas our comparators in Adelaide or Berlin, Barcelona or whatever, they don't close – these places are open 'til 6, 7, 8 o clock in the morning. Well, you know, people are traveling into Glasgow, and they're mesmerised that they're getting off a plane, you know they're playing at 10 o clock till 2 o clock and that's it. It's over.[31]

As well as pointing to the difficulties faced by retailers or promoters trying to negotiate short-term licenses, it was suggested that underlying the decisions made by local government was a tendency to approach music as an issue of public order rather than culture. One respondent suggested that music, as a potential source of noise complaints, was subject to unequal treatment by the council:

> During the festival they tear up the rule book, this whole idea that music should be inaudible, it's just – it's like they're worried about complaints for one-off event, here, but they don't worry about complaints for a whole month. They'll just say, this is the festival. It brings tourists in.[32]

This suggests that music is often viewed as a potential 'nuisance' with public order implications, rather than a cultural activity with the potential to drive tourism and point to a possible disconnect between music's importance within local culture, the efforts to incorporate music into Scotland's tourist brand image and the ways music is treated at the level of local government. As one respondent noted, 'it's kind of weird how it's a very important of the local culture, yet it's considered a nuisance

---

[30] Perman et al. (2018) *Growing the Value for Music Tourism*, 26.
[31] Daniel Macintyre, fieldwork interview, 2018.
[32] Darren Yeats, fieldwork interview, 2018.

when it comes to, like I say, the kind of infrastructure aspect so, it's quite odd'.[33] This entrenched view of music as a poor relation (the 'bad little brother')[34] of the other arts is reflected in the different attitudes towards film and music events in Edinburgh:

> the film festival is given a bit of support, but a music festival wouldn't be given any support cause it's noisy. And maybe there's booze, alcohol associated with a music event that they see rowdiness potentially. It's like the police being worried about people having beers here – erm – it's not that kind of crowd, don't worry about it.[35]

Efforts to promote Scotland as a music tourism destination thus appear to run headlong into persistent concerns about the impact of 'noise' on local residents and businesses which may reflect an implicit distinction between high and low culture – and fail to reflect the attitudes of visitors. 86% of London tourists surveyed by market researchers at the University of Westminster were in favour of busking and other forms of street performance.[36] The research led to a mayoral initiative to support music in public spaces around London.[37] Fay Young of Glasgow's Walking Heads reported that an attempt to include Glasgow's busking culture in a recent report on music tourism was resisted in terms which suggested that the practice was seen more as a potential nuisance than an authentic part of the city's musical life:

> I wanted to include busking as one of the case studies. And I was directed to someone at the city council who was quite clearly appalled at the idea. They have a lot of trouble apparently in Sauchiehall Street and Buchanan street because […] they're amplified, and this guy says, you know, you hear a song as you're walking down and that's OK but imagine you're working in that particular shop and you hear it over and over again.[38]

The apparent tendency to see music (particularly popular music) as a potential nuisance rather than as a cultural asset affects the possibilities for commercial musical activity in city centres. One interviewee suggested that setting up a professional recording studio in Glasgow city centre can carry substantial financial risks not borne by other creative businesses:

> even if you spend money trying to control the noise issues in it, there's no guarantee that you won't upset a neighbour straight away, so the risk is absolutely huge, if you spend 10 grand on sound insulation and you get a complaint then you've wasted ten grand. I've got a friend who built a £30,000 vocal booth inside a unit, quite nearby and the first day he used it he got

[33] Kenny Inglis, fieldwork interview, 2018.
[34] Ibid.
[35] Darren Yeats, fieldwork interview, 2018.
[36] Guerrero Orozco, Shapiro and Jones (2018) *Music is the New Gastronomy.*
[37] Ibid.
[38] Fay Young, fieldwork interview 2018.

complaints from his neighbours and he had to eventually just break it up and put it in a skip, because the unit was no use to him.[39]

Impact on music infrastructure: venues

Perhaps the most important implication of this for the sustainability of local live music cultures is the risk that noise complaints will be used to shut venues. One AHRC funded study, which included Glasgow as a case-study, identified small to medium-sized venues as 'the weakest point of the live music ecology', noting however that 'this situation could be mitigated by greater harmonisation of regulatory regimes and their implementation across the UK'.[40] In a press interview, Mike Grieve, managing director of Sub Club argued that:

> Nightlife is a massive contributor to the cultural wellbeing of our city [and] it's vital that Glasgow's creative community is protected from the threat posed by developers, many of whom seem apathetic to the concerns of music and arts venues, some of which may well be forced to close due to inadequate soundproofing in proposed new buildings.

Scottish planning regulations, he argued 'must be brought into line urgently if we want to avoid losing the venues which create the very conditions which most appeal to visitors to the city in the first place.'[41]

There has been progress. Campaigns by UK Music and the Music Venue Trust to bring the 'agent of change' principle into planning law resulted in a private member's bill brought forward by John Spellar MP which gathered cross-party support. Ed Vaizey MP called the bill 'an important step in protecting the future of our country's many excellent small music venues [...] and in enabling our world-leading creative industries to continue to grow'.[42] Spellar subsequently withdrew the Bill in light[43] of the cross-party efforts that saw the agent of change included in the National Planning Policy Framework for England, via the stipulation that:

> Planning policies and decisions should ensure that new development can be integrated effectively with existing businesses and community facilities (such as places of worship,

---

[39] Kenny Inglis, fieldwork interview 2018.

[40] Adam Behr et al. (2014) *Cultural Value of Live Music*, 24.

[41] Phil Miller (2018) 'Noise pollution complaints 'killing our businesses', say Glasgow music venues', *Evening Times* online 30 January 2018. Available at: https://www.eveningtimes.co.uk/news/15905837.noise-pollution-complaints-killing-our-businesses-say-glasgow-music-venues/. Accessed 25 March 2019

[42] Live Music Exchange (2017) 'Agent of Change progresses to second reading in Parliament – Music Venue Trust', *Live Music Exchange Blog* [website] 11 January 2018. Available at: http://livemusicexchange.org/blog/agent-of-change-progresses-to-a-second-reading-in-parliament-music-venue-trust/. Accessed 25 March 2019

[43] UK Music (2018) 'John Spellar MP Withdraws Bill After Government Backs Plan to Protect Music Venues'. *UK Music* [website] Available at: https://www.ukmusic.org/news/john-spellar-mp-withdraws-bill-after-government-backs-plan-to-protect-music. Accessed 25 March 2019.

pubs, music venues and sports clubs). Existing businesses and facilities should not have unreasonable restrictions placed on them as a result of development permitted after they were established.[44]

Likewise, there is movement in Scotland on the matter, with the government working towards the inclusion of agent of change principles in revisions of its National Planning Framework (a long-term strategy) and Scottish Planning Policy (which sets out priorities on land use and planning). The Planning (Scotland) Bill, now past Stage 2 and with amendments being lodged for Stage 3, would see the NPF amended to include the content of the Scottish Planning Policy. Explicit stipulations that would support music venues have been mooted in the last round of amendments to the Bill. The Bill, amended after Stage 2, stipulates in its present form that planning authorities must periodically assess which part of their area are 'culturally significant zones' wherein it is desirable to 'identify, preserve or enhance existing cultural venues, facilities and uses'.[45] Whilst the definitions are not at this stage precise, it does note that '[r]eferences in this section to cultural venues and facilities include in particular venues and facilities used for the performance of live music'[46] and currently stipulates that certain development orders require consultation with the Music Venue Trust where they concern land on which there is a music venue.[47]

These developments indicate the music infrastructure is becoming more central to legislative concerns, alongside a growing recognition of the cultural value of grassroots venues, This is necessary. Geoff Ellis of DF Concerts has said, 'music venues in Scotland are under threat and we need to act quickly to protect their future', arguing that in addition to their cultural value, venues 'generate £334 million to the Scottish tourism economy - therefore it's crucial we make sure they remain open'.[48] The UK Live Music Census report also recommended that 'policymakers need to pay more heed to the economic and cultural contribution of smaller venues [while] local regimes often focus their attention on major developments whose key beneficiaries are larger businesses'.[49] More

[44] Ministry of Housing, Communities and Local Government (2019) *National Planning Policy Framework*. CP 48. 15 (182). London: Ministry of Housing, Communities and Local Government. Available at: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/740441/National_Planning_Policy_Framework_web_accessible_version.pdf. Accessed 25 March 2019.
[45] Scottish Parliament (2018) Planning (Scotland) Bill [AS AMENDED AT STAGE 2]. Part 2 56A (1) a-c. Available at: https://www.parliament.scot/S5_Bills/Planning%20(Scotland)%20Bill/SPBill23AS052018.pdf. Accessed 25 March 2019.
[46] Ibid., 56A(8)
[47] Ibid., Part 3, 14E. This could effectively create a 'statutory consultee' status, akin to other organisations such as the Theatres Trust. A comparable recommendation was made at Westminster in the DCMS Committee's Live Music Report.
House of Commons DCMS Committee (2019) *Live music: Ninth Report of Session 2017–19*. London: House of Commons, 27
[48] Magdalene Dalziel 'Glasgow's music venue bosses join forces for campaign to protect live gig spaces', *Glasgow Live*, [online] 1 February 201. Available at: https://www.glasgowlive.co.uk/news/glasgow-news/to-protect-live-gig-spaces-14231155. Accessed: 18 October 2018.
[49] Emma Webster, Matt Brennan, Adam Behr and Martin Cloonan with Jake Ansell (2018) *Valuing live music The UK Live Music Census 2017 report,* UK Live Music Census.

research into this (e.g. the estimates provided by Perman et al. of the economic value of small venues in Glasgow's music tourism economy, specifically) will help to further support the case for protecting venues from development.[50]

A related matter is that national planning and licensing policies require mindful and sensitive implementation at local level by councils. Some progress has been made in Edinburgh, where an 'inaudibility clause' which stipulated that music should not be audible in neighbouring residences was replaced by a reworded stipulation that music should not be an audible *nuisance* following the Edinburgh Live Music Census and consultation between the Licensing Board of representatives from Musicians' Union the local live music scene and community councils. However, there is still concern that 'Environmental Health can come down, record you and say, that's got to stop'.[51] Further, a new Licensing Board (several members of which had no part in the change) is looking to review and evaluate the policy.[52]

Hopes that recommendations that the agent of change principle be applied would improve the situation for venues also received a setback when the terms of a planning approval for a new residence next door to iconic Glasgow venue King Tut's became known, the City Council stating that 'the nearby licensed concert venue has a duty and obligation to control and manage noise within the premises, and any noise escape, and ensure their premises is suitably sound attenuated.'[53] As Lewis MacDonald MSP noted in the parliamentary debate on music tourism in Glasgow, unless local planners decide to abide by the planning officers recommendations, venues remain vulnerable and policy responses piecemeal and inconsistent.

Darren Yeats of Edinburgh's VoxBox suggested a lack of knowledge among local music businesses, audiences and communities about local planning and development processes exacerbated this threat:

> down in Leith […] there's a pub that's got a venue upstairs. Now the people that own the block are wanting to demolish it to create student flats. So that's the latest Edinburgh council thing where they're going to be refusing initially and then the company will appeal because everyone's got enough energy to fight something once but not for the appeal, or they think that they've done the job, they sign the petition. People sign petitions but don't put a comment so the petition itself isn't looked at properly unless you put a comment or you're just a number.[54]

---

[50] Perman et al. (2018) *Growing the Value for Music Tourism in Glasgow*.
[51] Darren Yeats, fieldwork interview, 2018.
[52] City of Edinburgh Council (2018) *Meeting Papers – Licensing Board*. 26 November 2018. p.24, 7.4 Available at: http://www.edinburgh.gov.uk/download/meetings/id/59302/full_meeting_papers_-_licensing_board_-_26_november_2018
[53] S5M-12516, *Glasgow (Music Tourism)*, 20 June 2018.
[54] Darren Yeats, Fieldwork interview, 2018.

A lack of knowledge about and how to engage with these processes in order to protect venues was also identified:

> people need to be schooled in local politics […] people complain about 'why are you shutting down my local venue' – well, there's a meeting about it, go to the council meetings and say your bit, otherwise you don't really have a right to complain when these things get taken away from you.[55]

The venue in question here is The Leith Depot. A comparatively new venture (opened in 2014), its operators soon found that, as well as learning how to operate a thriving music venue, they were also having to navigate the minutiae of planning regulations when the building that houses them was bought by property developers.[56] A stay of execution was achieved following a vocal campaign against the proposed development at Stead's Place – the Save Leith Walk Campaign – and the council's rejection of the plans to demolish the existing site, one that the developers may appeal up to Scottish Government level. Nevertheless, spaces such as the Leith Depot, particularly in aggregate, can be significant in widening the cultural appeal and geographical reach within a city for visitors. As its owners note:

> A network of musicians has already developed, just through our small capacity venue, by way of encouraging local acts to play with touring acts and vice versa.[57]

Progress in national policy frameworks with wide remits can be slow, and valuable cultural assets lost in the interim. Notwithstanding a successful local campaign in this instance, responses to challenges faced by smaller venues and attempts to affect policy change tend to be led by national bodies such as the Music Venues Trust (and their Scottish venues sub-group). Despite support from high-profile musicians as advocates (e.g. KT Tunstall) and voices within the UK and Scottish parliaments, their resources are limited. More direct channels of communication to connect these organisations to local policymakers in Scotland, along with more focused political leadership on this and other policy issues affecting music tourism and music more widely, would be highly beneficial for Scotland's music tourism economy.

Funding principles: conceptualizing the musical career

Several respondents discussed cultural funding in terms of the underlying principles and attitudes they saw at work and the impact of these on individuals, businesses and the wider music sector in Scotland. Creative Scotland's music policy is informed at a basic level by the ethos of internationalism that

---

[55] Ibid.

[56] Julie Carty (2018) 'What it's like to open a venue: the experience and the context'. *Live Music Exchange* [blog] Available at: http://livemusicexchange.org/blog/what-its-like-to-open-a-venue-the-experience-and-the-context-julie-cartyleith-depot/. Accessed 25 March 2019.

[57] Ibid.

underpins the Scottish Government's manifesto. Head of Music at Creative Scotland, Alan Morrison, contrasted the organisation's policy with more insular formulations of cultural nationalism:

> With all the political stuff that's going on at the moment, how we are able to show Scotland as a distinct cultural nation that is open to internationalism, that internationalism is embedded in our cultural identity, that we are a nation of artists that embrace collaboration, that we want to work with artists from different countries in their countries, sometimes have them come over and work with us […] by participating in many different showcases and festivals across the world? We show that that's the type of people that live and work in Scotland.[58]

Alongside this kind of 'cultural diplomacy', Creative Scotland's main focus is on artist and audience development, which in recent years has including international showcasing as well as support for touring acts. Morrison acknowledges that Scotland's domestic market is insufficient to support professional careers for Scotland's musicians and that there is a need to 'open up new territories and new income for the musicians and artists'.[59] In its approach to audience development, Creative Scotland does not distinguish between domestic and overseas audiences, on the principle that raising the overall standard of Scottish music will in itself drive greater inbound tourism: 'there's not anything that we do that we get involved with that is necessarily there with a particular tourism draw that would be distinct from something that was good for Scottish audiences […] We would just be interested in funding quality work in ways that were accessible and well-marketed to any audiences, whether they're from home or abroad'.[60]

Career pathways that involve developing music tourism are not at present explicitly supported by Creative Scotland. While they 'do have career development in our heads for artists […] it's never specifically geared towards anything to do with tourism'.[61] It could be argued that the implicit definition of 'career' development here is one which sees the musical career in terms of a relatively firm distinction between culture and commerce. Respondents hinted at a hierarchy of cultural forms at work, in which traditionally high-status genres got a better deal than popular and commercial musics:

> the *arts* arts gets funding out of proportion with the amount of people that are actually attending. So Classical music gets a lot of funding […] experimental things I suppose [are] seen as worthy because they're not seen as commercially viable, whereas if you're a band you're seen as commercially viable.[62]

As Darren Yeats suggests here, the distinction between music as culture and music as commerce could negatively affect the career chances of popular musicians in particular, many of whose work

[58] Alan Morrison, fieldwork interview, 2018.
[59] Ibid.
[60] Ibid.
[61] Alan Morrison, fieldwork interview, 2018.
[62] Darren Yeats, fieldwork interview, 2018.

crosses this imaginary dividing line. Morrison argues that 'what Creative Scotland should be doing [is] developing and helping the artists in all the different art forms become sustainable'.[63] Retaining an implicit distinction between art and commerce could mean, however, that while the organisation can invest significantly in work by individual musicians deemed to have high cultural value, it is constrained from investing in the infrastructure necessary to bring that work to a wider audience. Yeats argues, however, that such investment is precisely what is needed: 'What we're missing is the big hitter – I think that's where Creative Scotland should spend its money […] say to Warner, if you sign some Scottish bands we'll give you a bunch of money to help with promotion and they might well do it'.[64] This point returns to the question of the respective roles of public and private sectors in the development of the creative economy raised by several interviewees. The Scottish Government's draft culture strategy notes that:

> often lines are drawn between the public and private sectors, and the subsidised and the commercial, in terms of the perceived appropriateness of some commercial sponsorship and commercially successful activities. These lines can be rooted within ideas of quality and ethics, and the debate about how the public and the private sectors both support society are an important part of overall culture. In reality, public funding provides a base from which individuals and organisations can co-exist and operate inter-dependently across public funding and commercial opportunities and support.[65]

Moves have been made to boost bands and artists operating in 'commercial' music forms, including by Creative Scotland, which announced in 2018 that it was contributing to the PRS Foundation's Momentum grant scheme – thereby opening it up to Scotland-based musicians – which provides funding for artists at a 'tipping point' in their careers to support touring, recording and marketing.[66] This growing awareness of musical career models which continually cross the boundary between the cultural and commercial spheres could also provide a framework for more explicit recognition from organisations like Creative Scotland of the potential role of music tourism in creating career development opportunities for Scottish musicians. This could build on existing work: Creative Scotland's showcasing initiatives, which may have the knock-on effect of bringing in tourists by promoting Scotland's high-quality music culture overseas, have given rise to successful collaborations with Visit Scotland, most notably at the Festival Interceltique in Lorient, France. As already suggested, it could be highly beneficial for the two organisations to publish a joint report to demonstrate the impact of their collaborative efforts on inbound tourism and explore the value and nature of future work of a similar nature.

---

[63] Ibid.
[64] Darren Yeats, fieldwork interview, 2018.
[65] Scottish Government (2018) *A Draft Culture Strategy for Scotland*. Edinburgh: Scottish Government, 33.
[66] The PRS Foundation is an independent charitable foundation, funded by PRS for Music – the UK's collective rights management society – to support new music (of any genre). The Momentum Music Fund was first launched by the PRS Foundation and Arts Council England in 2013.

Another possible avenue to explore would be a joint Creative Scotland/Visit Scotland/Scottish Enterprise/Highlands and Islands Enterprise initiative to find ways to support musicians' career development beyond traditional models, including music tourism. Visit Scotland Growth Funds could potentially fund collaborative efforts between music and tourism groups. Alternatively a joint funding call, with the four organisations allocating resources to develop music tourism projects of high cultural value, might help to develop sustainable career opportunities for musicians in the tourism field.

Accreditation and awards

There is more to government involvement in music tourism than arts funding, and the public sector has a role to play in helping new businesses to grow by facilitating access to knowledge and skills as well as mediating between sectors through networking building. The fact that nascent music tourism businesses may comprise people with expertise in the cultural sector rather than in tourism, may mean that they have to work harder to establish themselves as a provider of high-quality tourism experiences, which may in turn create reluctance on the part of accommodation providers, for example, to recommend them or to form promotional partnerships. Glasgow City Music Tours noted the sense that they were initially considered too 'scuzzy' for 5-star hotels and felt that accreditation from Visit Scotland offered a potential means of overcoming this. Nevertheless they felt this was some way in the future:

> maybe a couple of years down the line, we would feel confident and ready to try and go through that process to get an actual, whatever that seal, that stamp of authority, as hopefully a 5-star visitor attraction. We entered the Thistle Awards in terms of the Best Visitor Attraction last year, and were shortlisted for the regional shortlist, and we've been nominated again this year, so we'll see how that pans out basically.[67]

Actively supporting new music tourism businesses in acquiring official accreditation from Visit Scotland, for example, might present one way of boosting their presence and credibility. The creation of a new category for music tourism experiences in the Thistle Awards, for example, would not only reinforce the significance of music tourism as an emerging strand within Scotland's tourism economy but would also allow music-related tourism businesses to compete with one another, rather than with a much wider and better-established field of applicants.

Interviews also suggested that Glasgow Life, Business Gateway, and Scottish Enterprise all have an important role in skills development:

---

[67] Jonathan Trew, fieldwork interview, 2018.

Glasgow Life and also SE [Scottish Enterprise], when we first started out we were completely clueless, they gave us a lot of advice and a lot of help. They steered us in the right direction, they pointed us towards real resources in terms of training which helped us get the business out of the dirt basically. If we hadn't had that help, I don't think we'd be running today.[68]

Government organisations also provide cultural capital, and convening power, in the form of contacts and can help to legitimise the work of music businesses. As noted in chapter 1, they also occupy a brokerage position between sectors:

I'm going to speak to Scottish Enterprise and see if they can organise a sort of meeting where 5-6 of us walking tour operators in Glasgow have a meeting with a selection of interested hoteliers so we can pitch directly to them. I think if SE helped organise that then it would give all of us a bit of authority because most of us are small independents I think that maybe the bigger hotels, they're reluctant to push customers towards us, unless they know we're going to look after their customers.[69]

Research suggests that an understanding of the web of connections between sectors is important, and that 'policymakers need to consider ways of supporting those small and micro creative businesses with the highest growth potential to scale up, as well as helping those that don't but nonetheless play an important indirect role in the ecosystem'.[70]

Support for music (tourism) businesses is non-specific and 'ad hoc',[71] and there is thus a need to develop support specifically aimed for music tourism businesses. Focusing in specifically on music tourism as a discrete strand within the tourism industry and finding ways to address the specific needs of music tourist businesses could add momentum to an existing groundswell in this area.

Rethinking cultural leadership

As noted above, some interviewees identified a tendency for public sector 'curation' of culture to underserve grassroots music. Daniel Macintyre, for example, argued that the public sector should resist the temptation to be prescriptive and to privilege 'stuff that was owned by the public sector, or the big national organisations, rather than the grass roots, popular culture, pop, electronic dance music, all the things, that aren't within their gift'.[72] Suggesting that the cultural life of Glasgow is

---

[68] Ibid.
[69] Ibid.
[70] Juan Mateos-Garcia and Hasan Bakhshi (2016) *The Geography of Creativity in the UK: Creative clusters, creative people and creative networks*, Nesta/Creative England, 40.
[71] Adam Behr and Matt Brennan (2013) *Scotland on Tour: Strategies for Promoting the Scottish Music Industry Within and Outwith Scotland.* [research report] Edinburgh University, III.
[72] Daniel Macintyre, fieldwork interview, 2018.

driven by the commercial sector, he argued for a more effective championing of commercial music within government:

> what [the private sector] need is someone to listen to them […] they're keeping the wolf from the door […] that needs funding support for somebody to do it, on their behalf, or they feed in their priorities to somebody else in the public sector who then goes and drives it forward for them […] I think a music officer or something that was dedicated to, you know, quite high-level in the city so we' could all feed into there and then you know, hotels and things would be able to go to what's on Glasgow city of music would be able to help in that way.[73]

This implies the need for a change in how the role of the public sector in Scotland's cultural life is understood:

> the public sector should always respond to the private sector, that's what the public sector's there for, it's to address market failure – it's not for them to build their brand and their identity, the public should be the last brick in the wall to try and fund and get something moving that'll not happen organically by itself.[74]

Macintyre noted that Glasgow was still without an official plan for developing music tourism; 'we're still waiting for a music tourism strategy or a framework, and it's not forthcoming'.[75] Without an over-arching understanding of the specific policy constraints on music tourism (and commercial music more broadly), the growth of the sector depends on its continued conformity with existing structures and frameworks.

Funding and Taxation

Recent developments at local and Scottish Government level point towards the introduction of a 'tourist tax' or 'Transient Visitor Levy' [TVL] in various locations with the approval of the tax and spending plans for 2019-20 including powers for local councils to levy taxes on hotel stays (and also workplace parking). This aligns with developments at local level. City of Edinburgh Council, for instance, has voted in favour of such a levy following a consultation which saw 85% of respondents (out of a total of 2,650) expressing strong support for the introduction of a TVL compared to 9% expressing strong opposition.[76]

---

[73] Daniel Macintyre, fieldwork interview, 2018.
[74] Ibid.
[75] Ibid.
[76] City of Edinburgh Council (2019) 'Transient Visitor Levy: Summary Of The Response to the City of Edinburgh Council's Draft Proposal for a Transient Visitor Levy' Available at: https://consultationhub.edinburgh.gov.uk/ce/tvl/user_uploads/tvl-consultation-report.pdf. Accessed: 25 March 2019.

A report on traditional music and the rural economy in Argyle and Bute[77] also recommended the introduction of such a levy to "fund micro-enterprises in the creative rural economy or provide incentives for hoteliers and tour operators to improve the cultural offering in and around the communities of Argyll and Bute".[78] The Scottish Government's own Discussion Document notes that there is limited evidence on the broader nationwide effect of TVLs (at either Scottish or UK level)[79] but, notwithstanding concerns raised by parts of the hospitality sector – the Scottish Tourism Alliance, for instance[80] – there are several possibilities for the introduction of these levies to be used to support music tourism as part of their broader remit.

The implementation of such taxes and resultant spending may depend on local context. Demands on local economies will vary, for instance, from Argyll and Bute to Edinburgh across a wide range of costs from marketing budgets, tourism specific infrastructure and broader structural costs associated with accommodating visitors (in different numbers). CoSLA has suggested, for instance, that 'revenues could be used to support general infrastructure, such as public transport, the roads network, and cleanliness; tourism superstructure, such as signage, attractions and refuse facilities; and tourist services.'[81] There are also numerous precedents in Europe and elsewhere for such taxes being implemented in different ways and with different exemptions.[82] This includes different levels and types of hypothecation in, for instance, France, Lithuania, North Carolina, New York and New Zealand.[83]

There are many demands on both local and national revenues across national, local and international contexts. A report produced by PWC for the European Commission while describing some elasticity of demand in response to price (and taxes) as a whole, also noted variance due to other factors, such as the perceived 'uniqueness' of a location in terms of landmarks and activities. Further,

---

[77] This was also funded by the AHRC's Northern Bridge consortium as Creative Economy Engagement Fellowship.

[78] Simon McKerrell and Jasmine Hornabrook (2018), *Traditional Music and the Rural Creative Economy in Argyll & Bute, Mapping Report, 2018*, Newcastle: Newcastle University, 7. Available at: https://research.ncl.ac.uk/musicinargyll/outputs/FINAL%20Creative%20Economy%20Argyll%20Traditional%20Music%20Report%20small.pdf. Accessed 25 March 2019.

[79] Scottish Government (2019)*Transient Visitor Taxes in Scotland: Supporting a National Discussion a Scottish Government Discussion Document*, Edinburgh: Scottish Government, 24. Available at: https://www.gov.scot/publications/transient-visitor-taxes-scotland-supporting-national-discussion/. Accessed: 25 March 2019.

[80] Ian Swanson (2019) 'Tourist body warns over visitor tax plan for Edinburgh' *Edinburgh News* [online] 2 January 2019. Available at: https://www.edinburghnews.scotsman.com/news/business/tourist-body-warns-over-visitor-tax-plan-for-edinburgh-1-4851191. Accessed: 25 March 2019.

[81] Scottish Government (2019) *Transient Visitor Taxes in Scotland*, 27.

[82] Ibid., 28.

[83] Anon. (2018) 'New Zealand announces tourist tax to fund straining infrastructure'. Reuters [online] Available at: https://www.reuters.com/article/us-newzealand-politics-tourism/new-zealand-announces-tourist-tax-to-fund-straining-infrastructure-idUSKBN1JA3CS. Accessed: 25 March 2019; Scottish Government (2019) *Transient Visitor Taxes in Scotland*, 27-28; McKerrell and Hornabrook (2018) *Traditional Music and the Rural Creative Economy in Argyll & Bute*, 7.

it notes that "[h]ow a tourist tax is introduced and administered has important implications for how the sector responds to it" [84]

> Such taxes may also be better received and accepted by the industry if the revenues raised are credibly set aside (hypothecated) to support the tourism sector… Where hypothecation does occur, its benefits can be further strengthened by including key industry stakeholders in the actual decision-making process for the expenditure itself.[85]

Given the likelihood of such revenue raising schemes being introduced in Scotland, we therefore point towards the benefits of some hypothecation on the part of levying bodies. This would be one way of contributing to the cost of other recommendations in this report, notably the setting up of local music boards (outlined further below) and maintenance of more comprehensive digital and other listings to promote the flow of information between the hospitality and music sectors. Since national or local music offices would feed into relevant policy bodies, they could also serve as a point of contact or representation for other sectors regarding the deployment of revenues from visitor levies.

Music offices/advisory boards

A number of music cities around the world have created music offices and/or advisory boards in order to address the need for a co-ordinated approach to music as part of their creative economy. The organisation Sound Diplomacy has argued that the policy issues affecting many live music venues reflect a tendency for policy makers to be 'reactive' rather than 'proactive' in their attitudes towards the night-time economy, including their treatment of music venues.[86] The installation of 'night mayors' or 'czars' and the setting up of entertainment and/or music offices and advisory boards in cities such as Amsterdam and, subsequently, London reflects attempts by policymakers to rethink the socio-cultural significance and economic value of the night-time and thus change the conceptual underpinning of policy towards live music and street culture from broadly prescriptive to actively supportive, in the hope of generating a range of social, cultural and economic benefits.[87]

These bodies have varied memberships, powers and responsibilities. London's Night Time Commission comprises 'policy experts and industry leaders, including the Metropolitan Police, borough council members, venue owners, business alliances and the transport authority'.[88] The San Francisco Entertainment Commission has the right to conduct noise assessments; the city of Bogota awards accreditation to venues which meet certain safety standards in terms of 'emergency plans and

---

[84] Price Waterhouse Cooper (2017) *The Impact of Taxes on the Competitiveness of European Tourism*, London: PWC, 160.
[85] Ibid.
[86] Sound Diplomacy and Andreina Seijas (2017) *A Guide to Managing Your Night Time Economy*. London: Sound Diplomacy.
[87] Ibid.
[88] Ibid., 63.

exits, soundproofing, surveillance, garbage disposal, insurance policies […] and safe transportation for patrons'.[89] Many music offices also provide access to information on best practice for musicians, promoters, and venues, including advice on relevant policy and legislation, as well as providing an additional promotional channel for the music sector. What they share is a recognition of the economic and cultural value of local music scenes, and that this value is best protected by establishing a context for dialogue between public and private sector stakeholders, residents and policymakers. In the UK, Brighton and more recently Sheffield have created music offices in order to promote their cities' musical heritage and provide information and resources for musicians and venues. In Brighton, the music office is connected to a live music roundtable representing 'live music venues, live music hosts, promoters, booking agents, musicians, sound engineers, festival organisers, and key representatives from relevant council departments including Environmental Health, Licensing and Planning'.[90] The setting up of the office reflects an awareness that 'success will depend on many stakeholders across the city joining and taking part' and the need for 'an open network with various channels of participation'.[91] In Sheffield, the music board will similarly include 'public and private sector representatives including the Mayor, music hub leads, one of [the] regions MPs, ward councillors and representatives from festivals' with 'Michael Dugher, CEO of UK Music, and Tom Kiehl, director of government and public affairs at UK Music' acting as advisors.[92] The board is tasked with considering 'how people across the region, including musicians, venues, training organisations, local authorities and politicians, can work together to champion talent and use these strengths to grow the region's cultural economy'.

Applying a comparable approach in Scotland could provide a forum for cross-sectoral dialogue on the specific policy issues affecting the music sectors drawing on expertise from existing music-sector organisations including the SMIA, Music Tourist and the MVT. As with the development of any new institution – and as noted above with regard to 'tourist taxes' – one issue to negotiate would be that of a 'cookie cutter' approach. Local and regional contexts, as respondents have indicated throughout, will be important. London's, or Sheffield's approaches, for example, may not apply directly to Scotland. In particular, Scotland has the characteristics in industry and policy terms of both a nation and a region. Hence some of the activities of 'music boards' elsewhere are already being undertaken by organisations like the SMIA, particularly since becoming one of Creative Scotland's Regularly Funded Organisations in 2018. Nevertheless, broader precedents for the support and development of cross-cutting approaches within the public sector, such as the Screen Unit, which

---

[89] Ibid., 34.
[90] Chelsea Rixson (2018) 'Brighton & Hove Live Music Venue Partnership Report March 2018', *Brighton Live Music Office*, 19.
[91] Ibid.
[92] Anon (2018) 'Mayor Announces New Music Board to Drive Creativity in Sheffield City Region', *Sheffield City Region* [website] 23 October 2018, available at: https://sheffieldcityregion.org.uk/2018/10/23/mayor-announces-new-music-board-to-drive-creativity-in-sheffield-city-region/, accessed: 8 November 2018.

draws together Creative Scotland, Highlands and Islands Enterprise, Skills Development Scotland, Scottish Enterprise and the Scottish Funding Council.[93]

As the issues raised throughout this report illustrate, it is also the case that support for 'music tourism' is difficult to differentiate from Scotland's music industries more broadly. In policy and industry terms, Scotland as both a constituent of the broader UK but also a nation in and of itself means that the logistics of convening a national music board are therefore different to those in the cities mentioned above. Furthermore, there is some interconnectedness and overlap regarding broader remits that arise from Scotland's status as a small nation. For instance, there is a relationship between consumption at local level by visitors and the promotion of Scotland's music abroad (as per the Government's National Performance Framework). Supporting Scotland's music exports and music tourism within its borders are therefore related and consideration of the remit of any new office or similar body would need to take account of this.

Likewise, there is the matter of both overlap between and the different needs of major cities, neighbouring towns, and rural areas. One advantage of a national forum is that, as well as taking soundings from other sectors, it can also do so from relevant businesses and organisations outside of urban centres, whose local music sectors are potentially rich sites of music tourism yet exist in complex relationships with major cities. To this end, we note the potential value of 'music boards' (or similar) at regional level within Scotland that align the concerns of cities with those of their surroundings. These could draw on existing work on Regional Enterprise Partnerships and City Region Deals as well as leveraging the current trajectory for support for local music boards as evidenced in the DCMS Committee's recent call for (UK) government support for such initiatives through its devolution deals.[94]

We suggest, also, that given the evidence for the growing importance of music tourism within Scotland's creative economy, and particularly its underdeveloped potential in Glasgow and Edinburgh and elsewhere, a formal framework should also include representatives of and/or capacity to take soundings from the tourism, hospitality and leisure industries.

Finally, given the inter-sectoral relationships that pertain, convening logistics – and especially in light of the issues around information flow discussed above regarding the need for an online music hub – the work of any national forum could include a digital component in the first instance to ensure both coverage of regional concerns, and to facilitate the provision of up-to-date information to an outward facing web presence/music hub for visitors.

---

[93] Creative Scotland (2018) 'Progress update on Screen Unit - April 2018', *Creative Scotland website,* 03 April 2018. Available at:
https://www.creativescotland.com/what-we-do/latest-news/archive/2018/04/screen-unit-progress. Accessed 25 March 2019
[94] House of Commons DCMS Committee (2019), *Live music: Ninth Report of Session 2017–19.* London: House of Commons, 10

Conclusion

Music and music tourism businesses are subject to a unique set of policy constraints, including (but not limited to) the complexity of funding applications, lack of knowledge about planning and development policy, and the lack of a co-ordinated approach amongst the various stakeholders involved to the various areas of policy which affect local music. The lack of an overall music tourism strategy and a central point of contact for musicians, music businesses, promoters etc. at the local level are issues which could be addressed by the creation of a music office or advisory board tasked with liaising between public and private sector interests and with identifying and developing responses to the particular challenges faced by music-related businesses, including music tourism businesses. Some of the interviews suggest however, that organisational culture and the fundamental principles that underpin arts funding may represent more significant problems. Nevertheless, the core expertise is present in Scotland, and there is evidence of willingness to provide a supportive environment for music tourism. A more strategic and cohesive approach – that protects Scotland's music sector at large, and aligns it with tourism in a focused manner – will help to unlock this potential.

Recommendations

This report recommends that the Scottish Government consider setting up a national forum with a remit to include addressing and promoting music tourism and with a robust channel into policymaking, alongside regional music advisory boards, in order to:

- Provide a space for regular and structured dialogue between representatives of the music, leisure, tourism and hospitality industries, policymakers and local communities. This could have a digital component to facilitate convening, and to address issues of information flow between stakeholders nationally and regionally.
- Align concerns about *inward* aspects of music tourism with key contextual aspects of support for Scotland's music industries and national reputation, such as music exports.
- Support and feed into a national, online music tourism hub with regularly updated information for visitors about events and initiatives nationwide
- Consider how to facilitate access to relevant knowledge and resources for musicians and music-related businesses. This might include, for example, information on funding and visa applications, and aspects of local policy (including licensing and planning and development) insofar as they impact on music.
- Facilitate music tourism by acting as a point of contact with overseas tour operators.

- Commission a regular national survey of music tourism activity with a focus on the Scottish economy and experience.

At the local and regional levels, music advisory boards as part of council and regional enterprise frameworks could:

- Commission regional maps/directories of music venues and shops to be distributed online, at tourist information offices, hotels and airports.
- Facilitate networking opportunities to establish stronger links across relevant sectors (horizontally) and within (vertically); support musicians and music venues in developing closer relationships with local accommodation providers and other businesses.
- Strengthen music city branding efforts; work to identify and protect existing assets such as historic venues and the Glasgow Album Pathway; protect key 'spaces and places' for musicians to rehearse, record and perform; negotiate the related but distinct concerns of cities, towns and rural areas

The following recommendations relate to public and funding bodies:

- Visit Scotland and Scottish government to collaborate with relevant cultural organisations and trade associations on developing a music tourism strategy for the whole of Scotland

- Visit Scotland to create a revamped music tourism hub on their website and allocate resources for its upkeep

- Visit Scotland and Creative Scotland to produce a joint report on their recent successful collaborations with a view to developing further collaborative projects

- Creative Scotland, Visit Scotland, Scottish Enterprise and Highlands and Islands Enterprise could consider ways to support musicians' career development beyond traditional models, including music tourism: for example, Creative Scotland and Visit Scotland could create a joint funding call specifically for music tourism projects, encouraging closer collaboration between the two organisations and helping to create sustainable careers for musicians in music tourism

Conclusion: facilitating music tourism – key challenges

The interview material presented here gives some insight into the opinions and experiences of individuals currently working in the fields of music, retail, tourism, hospitality and leisure, all of whom are actual or potential beneficiaries of music tourism. Although our respondents identified significant barriers ranging from specific policies to questions of local culture, there are also reasons for optimism. The fact that more people are travelling to experience music than ever before creates clear opportunities for a wide range of stakeholders across Scotland from buskers to hoteliers. At present, however, evidence suggests that music's importance for Scotland's brand image is not necessarily indicative of effective integration between the music and tourism industries. Realising the potential of music tourism is therefore not simply a matter of increasing the numbers of tourists coming to Scotland but of combining the existing resources of the music and tourism industries in stable and effective networks. As part of this, individuals and businesses may need to reassess the value of their resources, knowledge and skills, rethink their relationship with other sectors and develop new collaborative models. The interviews indicate that some are beginning to do this effectively while for others, more support and encouragement may be required to enable them to unlock the full potential of music tourism for their business.

One of the main challenges faced by businesses is how to facilitate the kinds of local experience demanded by tourists, enabling their participation in local scenes by providing them with the information they need. This may mean literally mapping music scenes and music heritage and providing more accurate and up-to-date listings information, but also finding ways to connect the various components of the music tourism ecology, including hotels, record shops, venues and heritage sites, and unlocking their importance as sources of knowledge for music tourists and for each other. Technologies offer potential answers to some of these problems, but face-to-face interactions are probably just as crucial in creating an integrated and navigable music tourism ecology.

Fundamentally, this is a question of knowledge, the challenge being to ensure that music tourism businesses and their customers have access to accurate, timely and authentic knowledge in the form they want to receive it. For this reason, this report has recommended that more research be undertaken to understand the types of knowledge required by businesses and tourists, and ways in which knowledge circulates, in order to create a more fully integrated music tourism economy.

As a number of participants noted, there is currently no clear leadership on music tourism in Scotland. There is, however, a growing body of research both within and outside Scotland to build upon, as well as examples of successful strategies from around the world. One challenge for policymakers and local authorities in Scotland is how to move beyond reactive policies which treat music and the night-time economy as something to be managed rather than a major economic and social resource. As the work of Sound Diplomacy indicates, however, many countries and cities in the

world have done this and seen social and economic benefits as a result. But none of this can be done without a shared sense of purpose rooted in an appreciation of the social and economic value of music. This will require leadership and vision as well as the space to create strategies for overcoming constraints, whether they are the result of policy, geography or gaps in knowledge, in which the voices of all of those concerned are represented. This is why a key recommendation of this report is that Scotland should look to examples in North America, Australia, Europe and Latin America and begin to build the governmental structures necessary, such as music offices and advisory boards, to develop cohesive national and regional music tourism strategies. The global rise in music tourism offers cultural producers, businesses and policymakers a chance to place Scotland's musical ecology on a more secure basis by moving towards a situation in which a long-term strategy based on knowledge and shared goals can begin to emerge.

References

Airbnb (2016) 'Don't go there. Live there', YouTube [video clip] Available at: https://www.youtube.com/watch?v=bbdF8Muiwtk. Accessed: 18 October 2018.

Anon (2018) 'Interview with Dr Fiona-Jane Brown of Hidden Aberdeen Tours', *History Scotland* [website]

Anon (2018) 'Mayor Announces New Music Board to Drive Creativity in Sheffield City Region', *Sheffield City Region* [website] 23 October 2018, available at: https://sheffieldcityregion.org.uk/2018/10/23/mayor-announces-new-music-board-to-drive-creativity-in-sheffield-city-region/, accessed: 8 November 2018.

Anon (2019) 'QS world university rankings 2018: performing arts', *The Guardian* [online] Available at: https://www.theguardian.com/higher-education-network/2018/feb/28/qs-world-university-rankings-2018-performing-arts. Accessed 25 March 2019.

Anon. (2018) 'New Zealand announces tourist tax to fund straining infrastructure'. *Reuters* [online] Available at: https://www.reuters.com/article/us-newzealand-politics-tourism/new-zealand-announces-tourist-tax-to-fund-straining-infrastructure-idUSKBN1JA3CS. Accessed: 25 March 2019.

Baker, A. (2017). 'Algorithms to Assess Music Cities: Case Study—Melbourne as a Music Capital'. *SAGE Open*. https://doi.org/10.1177/2158244017691801, 10.

Behr, Adam (2015) 'Cultural Policy and the Creative Industries', in John Shepherd and Kyle Devine (eds.) *The Routledge Reader on The Sociology of Music*. London: Routledge, 277-286.

Behr, Adam and Brennan, Matt (2013) *Scotland on Tour: Strategies for Promoting the Scottish Music Industry Within and Outwith Scotland*. [research report] University of Edinburgh

Behr, Adam, Brennan, Matt and Martin Cloonan (2014) *The Cultural Value of Live Music from the Pub to the Stadium: Getting beyond the numbers*. University of Edinburgh and University of Glasgow, AHRC research report.

Behr, Adam, Brennan, Matt and Cloonan, Martin (2016) 'Cultural Value and Cultural Policy: Some evidence from the world of live music', *International Journal of Cultural Policy*, 22:3, 403-418

Behr, Adam and Webster, Emma with Brennan, Matt (2015) *Edinburgh Live Music Census 2015 Pilot Study*. [Research report], Edinburgh: University of Edinburgh/Live Music Exchange, 52. Available at: http://livemusicexchange.org/wp-content/uploads/Edinburgh-Live-Music-Census-Report.pdf. Accessed 25 March 2019.

Behr, Adam, Brennan, Matt, Cloonan, Martin, Frith, Simon and Webster, Emma (2016) 'Live Concert Performance: An Ecological Approach'. *Rock Music Studies* 3:1.

Blake, Adam (2012) *Destination Music: The Contribution of Festivals and Major Concerts to Tourism in the UK*. UK Music.

Brighton Music Office (2018) 'Home', *Brighton Music Office* [website] Available at: https://www.brightonmusicoffice.co.uk/. Accessed 28 October 2018.

Buchanan, Ian (2010) *Oxford Dictionary of Critical Theory*. Oxford: Oxford University Press.

Burrows, Helen and Ussher, Kitty (2011) *Risky Business*. London: Demo

Carty, Julie (2018) 'What it's like to open a venue: the experience and the context'. *Live Music Exchange* [blog] Available at: http://livemusicexchange.org/blog/what-its-like-to-open-a-venue-the-experience-and-the-context-julie-cartyleith-depot/. Accessed 25 March 2019.

Casanueva, Cristóbal, Gallego, Ángeles, and Castro, Ignacio and Sancho, Maria (2014) 'Airline alliances: Mobilizing network resources', *Tourism Management* 44, 88-98.

City of Edinburgh Council (2019) 'Transient Visitor Levy: Summary Of The Response to the City of Edinburgh Council's Draft Proposal for a Transient Visitor Levy' Available at: https://consultationhub.edinburgh.gov.uk/ce/tvl/user_uploads/tvl-consultation-report.pdf. Accessed: 25 March 2019.

City of Edinburgh Council (2018) *Meeting Papers – Licensing Board*. 26 November 2018. Available at: http://www.edinburgh.gov.uk/download/meetings/id/59302/full_meeting_papers_-_licensing_board_-_26_november_2018

Cooper, Neil (2015) 'The Only Fun in Town?' *Live Music Exchange* [blog] Available at: http://livemusicexchange.org/blog/the-only-fun-in-town-neil-cooper/. Accessed 25 March 2019.

Dalziel, Magdalene (2018) 'Glasgow's music venue bosses join forces for campaign to protect live gig spaces', *Glasgow Live*, [online] 1 February 2018. Available at: https://www.glasgowlive.co.uk/news/glasgow-news/to-protect-live-gig-spaces-14231155. Accessed: 18 October 2018.

Demos (2013) *Written evidence submitted to Culture Media and Sport Committee inquiry 'Supporting the Creative Economy'*, London: House of Commons. Available at:https://publications.parliament.uk/pa/cm201314/cmselect/cmcumeds/674/674vw35.htm#footnote_1

Department for Digital, Culture, Media and Sport (2018) *The potential impact of Brexit on the creative industries, tourism and the digital single market*. HC 365. London: DCMS.

Edwards, Lillian (2016) "Brexit: "You don't know what you've got till it's gone"", (2016) 13:2 *SCRIPTed* 112 https://script-ed.org/?p=3147. DOI: 10.2966/scrip.130216.112.

Ferguson, Brian (2016) 'World's first 'music tourism' summit to be staged in Glasgow', *The Scotsman*, 13 October 2016. https://www.scotsman.com/business/companies/media-leisure/world-s-first-music-tourism-summit-to-be-staged-in-glasgow-1-4257682

Frith, Simon (2013) 'The Social Value of Music (in the context of European regeneration policy)' *Live Music Exchange* [blog] Available at: http://livemusicexchange.org/blog/the-social-value-of-music-in-the-context-of-european-regeneration-policy-simon-frith/. Accessed 25 March 2019.

Frith, Simon, Brennan, Matt, Cloonan Martin and Webster, Emma (2013) *The History of Live Music in Britain. Volume I: 1950-1967 From Dance Hall to 100 Club*. Aldershot: Ashgate.

Glasgow Life (2016) *Glasgow City of Music A UNESCO Creative City 2008-2016 REPORT*, Glasgow: Glasgow Life.

Glasgow Life (2017) *Glasgow's Tourism and Visitor Plan to 2023*. Glasgow: Glasgow Life.

Guerrero Orozco, Julián, Shapiro, Shain and Jones, Julia (2018) *Music is the New Gastronomy: Your Guide to Connecting Music and Tourism and Making the Most Out of it*, White paper on Music and Tourism, UNWTO, ProColombia and Sound Diplomacy.

Harper, Garrett, Chris Cotton and Zandra Benefield (2013) *Nashville Music Industry: Impact, Contribution and Cluster Analysis*. Nashville: Nashville Area Chamber of Commerce/Music City Music Council. Available at: https://www.nashville.gov/Portals/0/SiteContent/MayorsOffice/EcDev/docs/NashvilleMusicIndustryStudy.pdf. Accessed 25 March 2019.

House of Commons DCMS Committee (2019), *Live music: Ninth Report of Session 2017–19*. London: House of Commons.

Howell, Ryan (2008) 'Throw the Bums Out - A Discussion of the Effects of Historic Preservation Statutes on Low-Income Households through the Process of Urban Gentrification in Old Neighborhoods', *Journal of Gender Race & Justice*, 11, 541-599.

Hunt, Elle (2017) 'Want a more 'authentic' tourist experience? There's an app for that', *The Guardian* [online] 15 September 2017.

Hutchinson, Kate (2018) 'What the Womad visa fiasco tells us about live music in Brexit Britain' *The Guardian* [online] Available at: https://www.theguardian.com/global/2018/aug/02/womad-visa-fiasco-brexit-britain-live-music-festival. Accessed 25 March 2019.

Live Music Exchange (2017) 'Agent of Change progresses to second reading in Parliament – Music Venue Trust', *Live Music Exchange Blog* [website] 11 January 2018.

Live Music Office (2016) *Adelaide Live Music Census 2016*: Adelaide: MusicSA/Live Music Office. Available at: https://www.ahasa.com.au/__files/f/21042/LMO_-_Adelaide_Live_Music_Census_2016_Final.pdf. Accessed: 25 March 2019.

Live Music Office (2017) *Adelaide Live Music Census 2017*. Adelaide: MusicSA/Live Music Office. Available at: http://www.musicsa.com.au/wp-content/uploads/2017/12/LMO-Adelaide-Live-Music-Census-2017_v2.pdf. Accessed 25 March 2019.

Live Music Office (2018) 'About Us', *Live Music Office: Live and Local* [website] Available at: http://livemusicoffice.com.au/about-us/about/. Accessed 28 October 2018.

London Music Board (2016) 'Minutes: London Music Board Thursday 3 November 2016'. *Greater London Authority* [website] Available at: https://www.london.gov.uk/sites/default/files/minutes_-_london_music_board_-_3_nov_2016.pdf. Accessed 25 March 2019.

Masuda, Jeffrey R. (2018) 'Neighbourhood branding and the right to the city', *Progress in Human Geography* 2018, Vol. 42(2), 165-182.

Mateos-Garcia, Juan and Bakhshi, Hasan (2016) *The Geography of Creativity in the UK: Creative clusters, creative people and creative networks*. London: Nesta/Creative England.

McKerrell, Simon and Hornabrook, Jasmine (2018) *Traditional Music and the Rural Creative Economy in Argyll & Bute, Mapping Report, 2018*, Newcastle: Newcastle University.

McLeod, Michelle Theresa, Vaughan, David Roger and Edwards, Jonathan (2010) 'Knowledge networks in the tourism sector of the Bournemouth, Poole, and Christchurch conurbation: preliminary analysis', *The Service Industries Journal*, Vol. 30, No. 10, August 2010, 1651–1667.

Miller, Phil (2018) 'Noise pollution complaints 'killing our businesses', say Glasgow music venues', *Evening Times* online 30 January 2018. Available at: https://www.eveningtimes.co.uk/news/15905837.noise-pollution-complaints-killing-our-businesses-say-glasgow-music-venues/. Accessed 25 March 2019

Ministry of Housing, Communities and Local Government (2019) *National Planning Policy Framework*. CP 48. London: MHCLG. Available at: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/740441/National_Planning_Policy_Framework_web_accessible_version.pdf. Accessed 25 March 2019.

Molleson, Kate (2016) 'What is happening in Glasgow, UNESCO City of Music?', *The Herald* [online] 28 September. Available at: https://www.heraldscotland.com/arts_ents/14767878.what-is-happening-in-glasgow-unesco-city-of-music/. Accessed: 17 October 2018.

Mukhina, Ksenia D., Rakitin, Stepan V. and Visheratin, Alexander A. (2017) 'Detection of tourists attraction points using Instagram profiles', *Procedia Computer Science* 108C (2017) 2378–2382.

Murray, Kieran (2017) 'Hog's Head music shop set to close after 25 years', Edinburgh News [online] 8 December 2017.

Music Canada (2015) *The Mastering of a Music City: Key elements, effective strategies and why it's worth pursuing*. [research report] Toronto: IFPI/Music Canada.

Music Victoria/City of Melbourne (2012) *Victorian live music census 2012*. Melbourne: Music Victoria/City of Melbourne. Available at: www.musicvictoria.com.au/assets/Documents/Victorian_Live_Music_Census_2012.pdf

Nashville Convention & Visitors Corp (2018) 'Nashville's Free Live Music Guide App', *Nashville Music City* [website] Available at: https://www.visitmusiccity.com/plan/tripplanning/nashvillemusicapp. Accessed: 28 October 2018.

Newcastle Live Music Taskforce/Live Music Office (2018) *Newcastle Live Music Census 2018*. Newcastle, NSW. Available at: http://livemusicoffice.com.au/wp-content/uploads/2018/11/LMO-Newcastle-Live-Music-Census-2018_v5_web.pdf

Newton, Dobe and Coyle-Hayward, Rosa (2018) *Melbourne Live Music Census 2017 Report*, Music Victoria/City of Melbourne/Collarts/RMIT/City of Yarra/City of Port Phillip. Available at: https://www.musicvictoria.com.au/assets/2018/MLMC-2017-Report-compressed.pdf

Perman, Dougal, Wright, Tim and Young, Fay (2018) *Growing the Value for Music Tourism in Glasgow: Research Report and Promotional Plan*. Glasgow: Scottish Enterprise and Glasgow Life.

Price Waterhouse Cooper (2017) *The Impact of Taxes on the Competitiveness of European Tourism*. London: PWC.

Risskov Rejser (2018) 'Skotland' *Risskov Rejser* [website] https://www.risskovrejser.dk/rejser/rejser-til-skotland/. Accessed: 18 October 2018.

Rixson, Chelsea (2018) *Brighton & Hove Live Music Venue Partnership Report March 2018*. Brighton: Brighton Live Music Office.

Scotland Food and Drink/Scottish Tourism Alliance (2018) *Food Tourism Scotland*. Available at: https://view.pagetiger.com/STAwebsite/01/PDF.pdf

Scottish Government Tourism Leadership Group/APS Scotland (2018) *Tourism in Scotland: The Economic Contribution of the Sector*. Edinburgh: Scottish Government. Available at: https://www.gov.scot/binaries/content/documents/govscot/publications/research-publication/2018/04/tourism-scotland-economic-contribution-sector/documents/00534505-pdf/00534505-pdf/govscot%3Adocument

Scottish Government (2017) 'A Report Summarising Key Themes from a Culture Sector Gathering at Glasgow Women's Library, with the Cabinet Secretary for Culture, Tourism and External Affairs at Glasgow Women's Library, Bridgeton, on Monday 26 June 2017', Arts, Culture and Heritage, *Scottish Government* [website] Available at: https://beta.gov.scot/policies/arts-culture-heritage/latest/. Accessed: 17 October 2018.

Scottish Government (2017) 'National indicator performance: Children and Young People' *Scottish Government/Riaghaltas na h-Alba* [website] Accessible at: https://nationalperformance.gov.scot/measuring-progress/national-indicator-performance. Accessed 25 March 2019.

Scottish Government (2018) *A Draft Culture Strategy for Scotland*. [policy paper] Edinburgh: Scottish Government.

Scottish Government (2019)*Transient Visitor Taxes in Scotland: Supporting a National Discussion a Scottish Government Discussion Document*, Edinburgh: Scottish Government, 24. Available at: https://www.gov.scot/publications/transient-visitor-taxes-scotland-supporting-national-discussion/. Accessed: 25 March 2019.

Scottish Parliament (2018) Planning (Scotland) Bill [AS AMENDED AT STAGE 2]. Part 2 56A (1) a-c. Available at: https://www.parliament.scot/S5_Bills/Planning%20(Scotland)%20Bill/SPBill23AS052018.pdf. Accessed 25 March 2019. Accessed 25 March 2019.

Sell, George (2017) 'The Shadow of Brexit', *Boutique Hotel News* [online], 25 January 2017, Available at: https://www.boutiquehotelnews.com/home/blog/2017/1/25/the-shadow-of-brexit/ Accessed: 31 October 2018.

Shoval, Noam and Ahas, Rein (2016) 'The use of tracking technologies in tourism research: the first decade', *Tourism Geographies*, 18(5), 587-606.

Somerset How, Ben (2012) 'City Leader Brands – Edinburgh', *Creative Brief* [Blog] available at: http://www.creativebrief.com/blog/2012/11/20/city-brand-leaders-%E2%80%93-edinburgh-2/. Accessed: 17 October 2018.

Sound Diplomacy and Seijas, Andreina (2017) *A Guide to Managing Your Night Time Economy*. London: Sound Diplomacy.

Swanson, Ian (2019) 'Tourist body warns over visitor tax plan for Edinburgh' *Edinburgh News* [online] 2 January 2019. Available at: https://www.edinburghnews.scotsman.com/news/business/tourist-body-warns-over-visitor-tax-plan-for-edinburgh-1-4851191. Accessed: 25 March 2019.

This is Edinburgh (2016) *City Centre Marketing Campaign: This Is Edinburgh* [survey report], (no pagination).

Thurnell-Read, Thomas (2012) 'Tourism Place and Space: British Stag Tourism in Poland', *Annals of Tourism Research* 39(2), 801-819.

Thornton, Sara (1995) *Club cultures: music, media and subcultural capital*. Cambridge, UK: Polity Press.

Titan Music Group (2012) *Accelerating Toronto's Music Industry Growth: Leveraging Best Practices from Austin, Texas* [research report] Toronto: Music Canada.

Titan Music Group (2015) *The Austin Music Census: A Data-driven Assessment of Austin's Commercial Music Economy* [research report] Austin: Titan Music Group. Available at: http://www.austintexas.gov/sites/default/files/files/Austin_Music_Census_Interactive_PDF_53115.pdf. Accessed 25 March 2019.

Todd, Jonathan (2013) 'SIC to Death: Why the Music Industry Wants to be Redefined', *UK Music website*. April 23, 2013. Available at: https://www.ukmusic.org/news/sic-to-death-why-the-music-industry-wants-to-be-redefined

Tomkins, Adam. 'Glasgow (Music Tourism)', *Motion before Scottish Parliament*, S5M-12516, 20 June 2018.

UK Music (2013) *Wish You Were Here 2013: Music Tourism's Contribution to the UK Economy* [research report] October 2013. London: UK Music.

UK Music (2016) *Measuring Music*. [research report] London: UK Music.

UK Music (2016) *Wish You Were Here 2016: The Contribution of Live Music to the UK Economy* [research report] London: UK Music.

UK Music (2017) *Wish You Were Here 2017: The Contribution of Live Music to the UK Economy* [research report] London: UK Music.

UK Music (2018) 'John Spellar MP Withdraws Bill After Government Backs Plan to Protect Music Venues'. *UK Music* [website] Available at: https://www.ukmusic.org/news/john-spellar-mp-withdraws-bill-after-government-backs-plan-to-protect-music. Accessed 25 March 2019.

Urry, John (1995) *Consuming Places*. London and New York: Routledge.

Visit Scotland (2016) *Tourism Development Framework for Scotland*. Edinburgh: Visit Scotland.

Visit Scotland (2017) *Insight Department: Trends 2018*. Edinburgh: Visit Scotland.

Visit Scotland (2017) *Scotland Visitor Survey 2015-2016*. [research presentation] Available at: https://www.visitscotland.org/binaries/content/assets/dot-org/pdf/research-papers/scotland-visitor-survey-2015-16-full.pdf. Accessed 27 March 2019.

Webster, Emma, Brennan, Matt, Behr, Adam and Cloonan, Martin with Ansell, Jake (2018) *Valuing live music The UK Live Music Census 2017 report*. Edinburgh: UK Live Music Census.

Appendix I: List of interviewees

Recorded interviews

Adrian Gomes

Marketing Director, Single Estate Spirits Ltd.

Alan Morrison

Head of Music, Creative Scotland

Alex Hinton

Marketing Manager National Museums Scotland

Angela Michael

Festivals and Culture Director, Aberdeen Festivals and Visit Aberdeenshire

Chris Wemyss

Venue Manager, MacArts

Daniel Macintyre

Director, Little Bay Trading Company

Darren Yeats

Manager, VoxBox Records

Derek Macmillan

Hotel Sales Manager, CitizenM Glasgow

Duncan Johnston

General Manager, Hotel Indigo Glasgow

Emma Jackson

Director of Sales, Radisson RED, Glasgow

Fay Young

Research and Editorial Director, Walking Heads

George Macdonald

Underground Solushun

Helen Urquhart

National Piping Centre

Iain Stewart

Incoming Tour Operator and Guide, Serenity Scotland

Jonathan Trew

Freelance Journalist; Glasgow Music City Tours

Kenny Inglis

Independent Producer, Airbnb Experience Host

Lynn Fairley

Sales Manager, Eurohostel Glasgow

Nick Roberts

Director, Electric Fields Festival

Pia Walker

Tour Guide

Rachel Smillie

Manager, Glad Café

The following people also contributed via informal (non-recorded) interviews or email correspondence:

Catriona Macdonald

University lecturer; independent music professional

Chris Pentney

Booking agent; Sharper Than

Shona Mooney

Independent music professional

Tim Keppie

Manager, Hogshead Records