

Gaelic Economy in Glasgow

Executive Summary

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Commissioned by



Supported by



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Aims of 'Gaelic Economy in Glasgow' Research Study (Section 1)

Glasgow City Council, with support from Bòrd na Gàidhlig (BnG), commissioned DC Research Ltd. – in partnership with Prof Mike Danson, Dr Douglas Chalmers and Eilidh Danson – to carry out a research study about the '**Gaelic Economy in Glasgow**'.

The aim of the study was to demonstrate the value, growth, and impact of Gaelic in Glasgow. The study sought to estimate the economic value of Gaelic, show the growth in its use, and illustrate how the language and culture impacted on the wellbeing of Glasgow.

The scope of the Gaelic Economy in Glasgow is set out in the main report, and this reflects the key sectors for Gaelic in Glasgow – i.e., Creative Industries; Education and Learning; Tourism, Hospitality and Events; and Language Promotion and Development – as well as the contribution of Gaelic to wellbeing.

Economic Contribution of Gaelic Economy in Glasgow (Section 2)

The research considered a range of economic impacts and contributions that Gaelic makes to the Glasgow economy. Whilst attempts were made to capture as much data as possible, for a variety of reasons outlined in the main report the results presented here are acknowledged as being partial and will be an underestimate of the contribution of Gaelic to the Glasgow economy.

Analysis of data collected specifically for this study **identified more than 200 Gaelic essential posts (a combination of full-time and part-time positions) which, it is estimated, equates to around 154 FTE jobs.**

In addition to Gaelic essential posts, organisations identified a wider range of posts currently filled by individuals with some level of Gaelic ability (including those fluent in Gaelic) as well as roles that will become Gaelic essential posts but have not yet been designated as such. Furthermore, there were Gaelic desirable posts identified and other posts that are not Gaelic essential/desirable but where the positions are dedicated to the delivery of Gaelic-related services and goods.

Taking all of these into account – and this is only possible for those organisations and businesses that have actively engaged in this research – the number of **Gaelic essential/desirable posts, alongside posts dedicated to the provision of Gaelic services and goods for these organisations and businesses, is almost 300 jobs (estimated to equate to 235 FTE jobs).** Again, this is likely to be an underreporting of the overall scale of Gaelic essential/desirable posts.

The **sectoral pattern**, whilst similar to the national profile from the 2017 Skills Development Scotland report, **highlights the importance of the Creative Industries – most notably the media – for the Gaelic Economy in Glasgow.**

Focussing on the **Gaelic essential posts shows that Creative Industries is the largest sector, accounting for 41% of the FTE jobs** – the vast majority of which are media-related jobs. The next largest sector is **Local Government jobs, which account for 27% of the FTE jobs** – the vast majority of which are education-related.

If the larger figure of circa 300 posts (i.e. including the Gaelic-desirable posts, future Gaelic-essential, and non-Gaelic posts involved in the production of Gaelic goods and services etc.) **is considered, then Local Authority jobs (the vast majority of which are education posts) account for the greatest proportion (43%); followed by Creative Industries (again, dominated by media posts) at 36%.**

In addition to the jobs, the study also identified **more than £20 million of investment in Gaelic for the most recent year (2020-21).** Like sectoral patterns for employment, this is **dominated by the media and Creative Industries** (including arts and cultural provision) which **accounts for more than 50%** of this total; alongside **education**

provision (especially primary and secondary Gaelic-Medium Education) – which **accounts for more than 40%**.

Furthermore, the research also considered the economic impact of festivals and events where Gaelic plays a key role (i.e., Celtic Connections, Piping Live, World Pipe Band Championships, Scottish Gaelic Awards.). Taken together (and recognising that these results are all from pre-COVID-19 economic impact assessments), **the overall annual economic impact of these festivals and events that can be attributed to Gaelic is estimated to be £7.2million.**

Once any double-counting within the various elements was addressed, official economic data was used to identify relevant ratios for turnover per job, GVA per job, and economic multipliers. **This allowed an overall estimate to be developed which found that more than 700 FTE jobs can be attributed to Gaelic based on the analysis presented in the report. These 700 jobs can also be expressed in terms of the GVA they provide to the Glasgow Economy – estimated to be in the region of £21.6million per annum.**

The sectoral breakdown of the 700 jobs shows that Education and Learning accounts for the largest proportion of jobs (58% of the total), followed by Creative Industries (23%), and then Tourism and Events (16%).

The relative importance of the different sectors to the Gaelic Economy in Glasgow varies between the jobs and GVA results, reflecting the GVA per job contributions of different sectors, most notably the higher rates for Creative Industries (especially media-related jobs), when compared to the rates for other sectors. Therefore, in terms of the estimate of the £21.6million GVA contribution, the largest sector is the Creative Industries, accounting for 56% of the total GVA, followed by Education and Learning which accounts for 33% of the GVA, and then Tourism and Events which accounts for 10% of the GVA.

Creative Industries (Section 3)

Without Gaelic, Glasgow's creative sector would not be as vibrant – and there is a mutually beneficial synergy at work here. BBC ALBA is based in the city as are many of the independent Gaelic media companies. There is no question that BBC ALBA has a positive impact well beyond the Gaelic community and helps make the case for the living relevance of the language and culture today, as well as being a large player in terms of jobs created and value added to the local creative economy. It is one of the main routes that brings Gaelic into homes all over Scotland as viewing figures show.

Without Gaelic's contribution, Celtic Connections would not have the same level of impact, but Gaelic's impact spreads further afield, from Highland Associations, piping and traditional cultural activities such as Gaelic choirs and the Mòd, through to modern facing bands such as the Alasdair Whyte band and Niteworks, in venues such as the Barrowlands, Glasgow Royal Concert Hall, and the CCA which hosts the Gaelic music initiative Ceòl `s Craic. Young Glaswegians are brought to Gaelic arts and culture through activities such as the Fèisean which go beyond music alone, also encompassing Shinty (Camanachd) and drama. Drama is a key and growing component in the Gaelic artistic scene in Glasgow with Theatre gu Leòr recognised for their work in presenting modern Gaelic medium as well as bilingual or trilingual productions - featuring British Sign Language to aid inclusivity. The creative sector could not exist without vibrant literature and, since the late 1960s, Còmhairle nan Leabhraichean (the Gaelic Books Council) has served the people of Glasgow, Scotland and wider afield with a range of contemporary work, which could never have been imagined before the turn of the century. The success of FilmG (short films in Gaelic) also show the digital talents of Scotland's young budding film makers.

Education and Learning (Section 3)

With three state-funded and one private nursery, over 800 pupils in three primary schools with a fourth planned, and the secondary school Glasgow Gaelic School/Sgoil Ghàidhlig Ghlaschu (SGG) with 415 pupils, Glasgow is a major provider of Gaelic Medium Education (GME). SGG offers 14 subjects through the medium of Gaelic, more than any other school in Scotland. Gaelic is also offered as an additional language to learners in 29 primary schools across Glasgow through Gaelic Language at Primary School (GLPS). Therefore, the city offers more GME provision and across more subjects than anywhere else in the world, confirming the significance of the city's Gaelic education provision for the nation and the language.

At all stages and qualification levels, the percentages of pupils gaining awards is significantly better than Scottish national averages and for similar schools and pupils, and is therefore beyond expectations given the balanced intake from areas of deprivation. With higher pupil-teacher ratios and average class sizes, costs for the provision of GME are no greater than average. Therefore, there are substantial net benefits to the city overall from this bilingual education, both in terms of education outcomes for Glasgow but also in offering significantly higher value for money than is often appreciated. With their entry into work, there are further strong positive benefits to the supply of skilled, qualified labour in the local economy; better uptake and application of these talents and skills by local employers would enhance these added values to an even greater extent.

These enhancements to the life and the economy of Glasgow continue through further and higher education, adult and community learning enriching the city's status as a leading place of lifelong and inclusive learning, research, and knowledge exchange. The contributions to identity, literature, culture, and heritage confirm the role of Gaelic in this cosmopolitan city.

Tourism, Hospitality and Events (Section 3)

Glasgow's growing recognition as an 'experiential city' destination has been reinforced and enhanced through Gaelic both in its reputation for activities and venues of culture, history, museums, sport and also as a gateway to the rest of Scotland. This has been promoted through a number of annual events being hosted in the city to exercise and exhibit the Gaelic dimensions and roots of Glasgow, confirming Gaelic as an essential element and characteristic of the fabric and signature of the society and the city. Notably amongst these are: Celtic Connections and then *FilmG*, World Pipe Band Championships, and Scottish Gaelic Awards and their gathering momentum has reaffirmed an image of Glasgow as a rich cosmopolitan city, with Gaelic estimated to add an economic impact of around £7.2million annually to these events. Essentially, these events and activities have firmly recognised Glasgow as a 'city of the Gael' with regard to arts and culture and they are complemented by other annual events within the city displaying a Gaelic element as well as the occasional significant national events hosted by the city, such as An Comunn Gàidhealach's 2019 Royal National Mòd.

However, beyond these major annual cultural events there is little recognition or promotion of the city as a Gaelic destination for tourists and other visitors meaning there is limited realisation of the potential opportunities for investment, benefits and expenditure by organisers, tourists, and conference participants beyond the specific Gaelic events. Previous research, and findings from this study, indicate that major benefits for businesses from using Gaelic include enhancing the distinctiveness/uniqueness of their offer and enhancing customer perceptions of authenticity and provenance. There is an unrealised or underdeveloped potential for Gaelic to be used and add value in this way for the hospitality and tourism sectors. This suggests a concerted, coherent, and proactive approach across Glasgow City Council, Glasgow Life and its sector partners is needed to develop a strategy to deliver increased value added, quality jobs, and profits through explicitly incorporating Gaelic into the tourism and hospitality offering. Integral to this

must be a much greater appreciation of the potential of the Gaelic language and culture in order to realise these benefits, referencing the real gains achieved by other experiential city initiatives.

Language Promotion and Development (Section 3)

Studies have shown that the **visual presence** of a minoritised language like Gaelic can help promote a language through its 'normalisation'. The 2019 Glasgow Mòd saw the launch of a campaign to use Gaelic in business (#cleachdi) and in the home (#chleachdiaigantaigh), which is an initiative to help raise the profile of Gaelic in Glasgow. There is already great work being done at Glasgow University to preserve and make available the richness of Gaelic used in Glasgow and elsewhere in the past (the Digital Archive of Scottish Gaelic) but the use of Gaelic is also a forward-looking question. The COP26 international conference in Glasgow was used proactively to promote the language with three artists delivering Gaelic-focused work in different wards of the city – including street art about the 'Chailleach' (the goddess of the weather), and the inclusion of Gaelic and other local languages in a 'Pantoum' – a large scale community poem in Pollokshields. A popular initiative over the last few years is Glasgow Life's 'Litir gu Glaschu' ('A Letter to Glasgow') in Gaelic for adults, allowing them to express their aspirations for the city in their Gaelic mother tongue.

A key issue for Gaelic speakers, however, is to see the use of the language in more of their everyday life. Whilst events like Celtic Connections, and initiatives like Ceòl 's Craic, are well recognised for highlighting the language and culture, there is much more that could be done to show the increasing number of young Gaels emerging successfully from the Gaelic Schools and Gaelic Medium Education that the language is something that can be seen being used in the city – in Galleries, Museums, Libraries and Sport Centres, and of course in the Glasgow Subway as well as more widely across public transport.

Contribution of Gaelic to Wellbeing (Section 4)

The research involved a survey of individuals about Gaelic and Wellbeing, and the results show the range of ways in which Gaelic contributes to economic and social wellbeing for those with Gaelic who live, work, or study in and around Glasgow.

The results show that 79% of respondents are in employment (either full time (63%) or part time (16%)), and **when asked how important Gaelic is to their current employment situation**, 31% report that Gaelic is critical or essential to their employment situation, whilst 38% report that Gaelic has no role at all.

Once 'not applicable' responses (from those not in employment) are discounted, the results show **an almost equal split between those for whom Gaelic is critical, highly important or moderately important** for their current employment situation (49.7%) **and those for whom Gaelic has no role at all or is of minor importance** for their current employment situation (50.3%).

Almost half of respondents' report that they take part in regular volunteering (46%) and, once 'not applicable' responses are discounted, there is a **fairly even split between those for whom Gaelic has a critical, highly important or moderately important role in their volunteering (53%) and those for whom Gaelic has no role at all or is of minor importance in their volunteering activities/roles (47%)**.

Respondents were asked to assess the scale of contribution that Gaelic has to their, and their family's, wellbeing. The **aspects where the greatest percentage of respondents indicated that Gaelic had a major impact on their wellbeing were: Greater sense of own identity (58%); Increased interest in Scotland and/or increased pride in Scotland (56%); Greater pride in your local community (50%); Increased happiness (48%)**.

Combining the results for major or moderate impact reinforces these findings, showing that more than three-quarters of respondents report the impact of Gaelic as being major or moderate for the following aspects:

- Increased interest in Scotland and/or increased pride in Scotland (86%)
- Greater sense of own identity (82%)
- Greater pride in your local community (81%)
- Improved mental health and wellbeing (77%)
- Increased happiness (77%)

Consistent with the analysis about major impacts, the same aspects emerge where the lowest proportion of respondents report a major or moderate impact of Gaelic on this aspect of wellbeing – i.e.: Greater range of job opportunities (48%); Increased income (31%); and Increased engagement in physical activity (e.g., through sport) (30%).

Overall, these survey results show that the **strongest aspects of wellbeing where Gaelic has a positive impact** are around **national and local pride, sense of identity, pride in local community, individual mental health and wellbeing, and happiness.**

Strategic Contribution of Gaelic (Section 5)

The research also considered the strategic contributions of Gaelic in Glasgow with specific reference to key strategies - Glasgow City Council's Strategic Plan 2017-2022, the Scottish Government's National Performance Framework, and the National Gaelic Language Plan 2018-2023.

Gaelic clearly contributes to at least four of the seven themes of Glasgow City Council's Strategic Plan 2017-2022: A Thriving Economy; A Vibrant City; A Healthier City; Excellent and Inclusive Education – with the findings highlighting that these themes are where the contribution of Gaelic is strongest (see Table 5.1 in the main report).

The report also highlights the ways in which Gaelic in Glasgow contributes to the Scottish Government's National Performance Framework – with **examples provided of Gaelic's contribution, to varying degrees, to all the outcomes of the NPF** (see Figure 5.1 in the main report).

The research also considered the key **contributions to the National Gaelic Language Plan 2018-2023, showing the extent to which the range of Gaelic activities, events, jobs, education, learning, goods and services, and other economic and wellbeing activities and impacts within Glasgow clearly contribute to the national priorities** (see Table 5.2 and Annex 7 in the main report).

Key Messages and Recommendations (Section 5)

Finally, the study reflected on the findings from the research and the issues and opportunities for the Gaelic Economy in Glasgow and developed five high-level messages and a range of related recommendations (see the main report) that could be taken to help realise the further potential of Gaelic for Glasgow.

1: More and better cooperation between agencies in Glasgow

2: Making Gaelic more visible in the life and economy of Glasgow

3: Supporting the application and use of Gaelic in business, social and community activities across Glasgow

4: Improving the Gaelic labour market structure and information

5: Promoting Gaelic learning and language facilities and development