

The Demand for Gaelic Artistic and Cultural Products and Services: Patterns and Impacts

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EXECUTIVE SUMMARY

* Introduction: The aims of this study are:

- (1) Mapping the levels of consumption of Gaelic arts and cultural products and services across the general population and the business community within the Western Isles and Skye and Lochalsh (the study area).
- (2) Identifying the enabling and constraining factors that will, in part, shape changes in these levels of consumption.
- (3) Identifying the impact of this consumption on the behaviour and attitudes of individuals and the business community with respect to the links between Gaelic arts and culture and economic, social and linguistic variables.
- (4) Establishing views on the future relationship between the development of the Gaelic language, art and culture and the social and economic development of the study area.

* The data for the study derives from two main sources. A postal survey within the study area directed at a random sample of adult residents and completed by 2028 individuals (over 6% of the population). An interview based survey with 85 private sector companies based in the same area employing 10 or more individuals.

* The characteristics of the postal survey sample confirm it as representative of the population as a whole. As far as can be established the business survey is also representative.

* Levels of consumption: Gaelic artistic and cultural activities are considered under 4 categories - 'Live' events (music, dance, exhibition, theatre, poetry, psalm singing); Products (CDs, tapes, books, video, sheet music, craft/print products); Television and Radio.

* Consumption levels of these 'products' within the population appears to be relatively high. High volume consumption is associated with high levels of Gaelic fluency. Those with lower levels of Gaelic competence do consume but at lower levels. The young (under 25) are heavy consumers of live events, the relatively young (under 35) are heavy consumers of TV, this pattern is reversed for radio.

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* In the reference period the level of consumption of TV and radio grew substantially. The growth audience for TV is typically less able in Gaelic than in radio and in both media growth varied by programme type.

* Enablin constraining factors on consumption: All useful sources of information on artistic and cultural events and products were local, with local papers and word-of-mouth consistently important. The most significant encouraging and discouraging factor influencing consumption was local availability. This was cited by up to 50% of respondents. This was followed by price, with the local dimension /relevance of the product, personal Gaelic competence and the personal commitment to Gaelic being of roughly equal and lesser importance.

* Impact of consumption: Gaelic artistic and cultural activity may influence economic development via direct linkages which are highly visible and well understood and via indirect linkages which are mediated through social change.

* Direct linkages include (1) labour market impacts (job creation, increasing average job quality, widening job range, creating new career paths); (2) boosting tourism which in turn creates employment and output; (3) creating business opportunities (via creation of new products/services, via new approaches to marketing, via the enhanced level of general economic activity boosted by the activities of the cultural sector).

* Indirect linkages include increasing the attachment of the people to their home area, increasing the desire of the young to continue to live and work in their home area, enhancing individual and community confidence, and increasing the attractiveness of the area to incomers. These changes may reduce out-migration, encourage returnees to the area, encourage in-migration and enhance entrepreneurial behaviour.

* A very high proportion of those surveyed in business and the community perceive the direct linkages listed above as being strong and significant.

* 70% of the business community see the impact of Gaelic artistic and cultural activities on job opportunities as positive or very positive. 56% of them take the same view on job quality. 80% see new job

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opportunities for Gaelic speakers and 46% see new jobs for non-Gaelic speakers created from the same source. The perception of positive employment impacts is much stronger in the Western Isles than in Skye and Lochalsh, a results that reflects the geographical distribution of direct employment in the Gaelic cultural sector.

* A near identical proportion of those surveyed in the community and in business (65%/66%) hold the view that Gaelic arts and cultural activities have a positive or very positive impact on the attractiveness of the area for tourists. This is position strongly supported by a significant majority of businesses in the Hotel/ Catering sector and amongst those in the general survey population whose main economic activity is tourism related (17% of the sample). Again a sub-regional split in views occurs, with 75% of businesses in the Western Isles reporting positive impacts as against 50% in Skye and Lochalsh.

* Around 50% of all businesses surveyed are of the view that business opportunities (as detailed above) had been positively or very positively enhanced by Gaelic artistic and cultural activity. The geographical split in responses reported above is reversed here, with a significantly higher proportion of Skye based businesses seeing opportunities compared to their counterparts in the Western Isles. Independently, incomers to the area appear to appreciate the business opportunities offered by cultural distinctiveness to a greater extent than natives (although their capacity to exploit these is likely to be lower).

* On the indirect linkages, 46% of the surveyed residents report Gaelic artistic and cultural activities have increased the desire of young people to live and work in their home area, a similar proportion report the same impact on the general attachment of local people to their communities, a view shared by 68% of the business community. Around half of businesses also report that Gaelic arts and culture have had a positive impact on the number of people now willing to return to their home area in search of employment, and two-thirds see the attraction of the area to incomers enhanced by these activities.

* The final indirect linkage investigated - Gaelic arts boosting levels of confidence in local communities - is identified as occurring by 60%

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of the general surveyed population and 67% of the business community.

* In conclusion on the linkages, the evidence is very strong that the Gaelic arts and cultural sector within the Western Isles, and to a lesser extent, Skye and Lochalsh, has strong direct impacts on employment numbers, job quality, career options, the enhancement of tourism and the creation of business opportunities. Currently these business opportunities are under exploited.

* The indirect impacts are all reported by high proportions of the individual survey respondents and the business community (typically between 45 and 65%). The extent to which these attitudinal and behavioural changes translate into changes in economic behaviour is unclear from the evidence available here.

* In addition to considering links between Gaelic artistic and cultural activities and economic development, the study also addressed links with levels of language use and the role of Gaelic in education.

* On the link to language use, around half of the individual survey respondents report that Gaelic arts and cultural activities have increased or greatly increased the use of Gaelic in their local community (53%) and in the home (47%). On an individual level, 36% of respondents report that they have increased their use of the language as a result of consuming the outputs of the Gaelic arts and cultural sector.

* On the link to Gaelic medium education, around 35% of the individual survey respondents with children report that Gaelic arts and cultural activities have increased or greatly increased their willingness to educate their children through the medium of Gaelic. When the question is broadened out to impacts on the perceived relevance of Gaelic arts and culture in the education and development of children, around 40% report that their perceptions have been positively changed.

* Views on future role of Gaelic arts and culture: At the end of the general survey two overarching questions were posed on the future relationship between Gaelic language, arts and culture and the economic and social development of the area and a third question on the future health and development of Gaelic.

* 60% of respondents agree or strongly agree (34%+26%) that the regeneration of Gaelic language art and culture is essential for the future economic development of their own area or island group. The figures for a similar question on whether Gaelic is essential for social development were 69% (34% agree 35% strongly agree).

* On the future of the language, 64% are optimistic or strongly optimistic (46%/18%) about the future health and development of the Gaelic language.

* General observations : The evidence generated from the surveys, from earlier work on the economics of Gaelic language development and from on-going work on the supply-side of the 'Gaelic industry' prompted a number of general observations.

* (1) The Centrality of Gaelic arts and cultural activities in the Gaelic language development process: Gaelic arts and cultural activities appear to be making a substantial contribution to many of the main objectives set by public agencies dedicated to economic, social and linguistic development in the area. These include direct and indirect employment and output creation, the encouragement of tourism, the creation of business opportunities, the raising of self-confidence and local attachment in an area historically plagued by out-migration, stimulating a greater use of the language in domestic and social spheres and prompting greater interest in (and perceived relevance of) Gaelic medium education.

It must not, of course, be forgotten that these impacts arising from Gaelic arts and cultural activity are secondary to its central purpose which is to engage in creative activities that give expression to a distinct set of inherited ideas beliefs and values.

(2) Interdependence in Gaelic language development: Education and the Arts and culture: Directly related to the point made above is the observation that the scale of interactions occurring between the two main strands of Gaelic language development - education and the arts and culture - are extensive and complex. They appear to substantially validate each other, a feature that should inform decisions on public policy support and the strategies adopted by the various agencies charged with their development.

(3) Emerging splits in perceptions regarding the economic and social role of Gaelic: A consistent split in responses to a wide range of issues addressed in the surveys occurs between individuals with any level of Gaelic (fluent to beginner), who are broadly positive on the language and its role, and those with no Gaelic who are significantly less positive.

This may be encouraging to Gaelic advocates as it indicates that broadly positive views are held across the full range of Gaelic language competence. However, the results support the view that there is a minority group (around 10% of the population) that are much less likely to see the Gaelic language, art and culture as playing a key role in the areas social and economic development. These individuals appear to be heavily represented in the upper reaches of the professional, business and public sector hierarchies, areas where many decisions affecting the evolving role of the language will be taken. The implications of this situation for the process of Gaelic language development are unclear. But as a general observation, in any linguistic situation in which there is a trend to bi-lingualism those unable to operate in both languages will find themselves at an economic and social disadvantage.

(4) The business community and the role of Gaelic in economic and social development: There is still very limited consideration given by the business community to the proposition that they can directly utilise the cultural distinctiveness of their home area to economic advantage. While a significant proportion of respondents (33%) cited the use of Gaelic products or services in the delivery of their main activity the use was very limited. In contrast, the business community appears at least as convinced as the public at large about the general relevance of Gaelic arts and cultural activities in the social and economic development processes in their area. There is widespread recognition of the contribution the Gaelic arts and cultural industry is making to employment, tourism enhancement and positive attitudinal change. The range of business opportunities presented by Gaelic appear to be broadly recognised but, as noted above are not widely acted upon.

Chapter 1 Introduction

This report describes and analyses the results of two major surveys designed to explore the scale, pattern and impact of the consumption of Gaelic related arts and cultural products and services. Almost all the survey data was gathered in late 1996 and 1997 within the geographical area comprising the Western Isles and Skye and Lochalsh. The surveys were designed, produced, administered and analysed at Glasgow Caledonian University with financial assistance covering part of the survey costs organised and delivered by the National Gaelic Arts Project. None of the bodies financially supporting the work was in any way involved with its execution. This work forms part of a larger on-going research programme into the links between minority languages and economic development.

The decision to focus in this report on Gaelic related arts and cultural services within a defined geographical area reflect two of the central findings of an earlier large scale study into the economics of Gaelic Language development conducted in 1993 (Sproull and Ashcroft, 1994). These findings relate firstly to the role of arts and cultural activities in a range of attitudinal and behavioural changes that directly or indirectly impact on the development of the local economy, and secondly to the concept of the 'Gaelic economy'.

The links between Gaelic arts and cultural products and services and economic development are considered within the framework developed in the earlier study. This characterised general Gaelic language development as influencing economic activity in three ways, through direct, indirect and dynamic development effects.

The direct effects include the jobs and activities specifically associated with the production of Gaelic related products and services and the support and promotion of the Gaelic language. The indirect effects refer to the secondary income and job generation resulting from the direct effects of Gaelic development. These divide into two types, those arising from the multiplier impacts of the spending and re-spending of the direct income generated in Gaelic related activities, and those arising from linkage effects due to the stimulation of local supply following direct income generated in Gaelic economic

activities. Finally, the dynamic /development effects refer to those arising from the possible impact of the status and role of the language on attitudes and behaviour which in turn affects social cohesion, cultural expression, the level and nature of artistic/musical output and individual and community self-confidence. If these shifts in attitude and behaviour occur they may stimulate future enterprise, raise the quality and quantity of arts and entertainment, open up opportunities for cultural tourism, reduce out-migration, stimulate in-migration and alter the skill/income profile of local economies.

The 1994 study used a range of data gathering techniques to establish the extent to which the postulated dynamic linkages between Gaelic language development and local economic development were supported. The results were broadly supportive given the limitations of the methodology used, and it was found that the range of activities most commonly cited as promoting the changes in attitudes and behaviour under investigation related to Gaelic arts and cultural activities. To many respondents the increasing relevance of the Gaelic language is becoming manifest through the growth in Gaelic medium television programmes, radio programmes, literature, poetry, music and other performance arts. The fact that this Gaelic related cultural and artistic output (TV programmes, CDs etc.) is often 'consumed' by a much wider audience than the relatively small number of Gaelic speakers further reinforces the view that Gaelic language and culture is increasingly valued and relevant within Scotland and beyond.

The earlier study provided very little detail on the range and nature of the various activities that could be categorised as Gaelic arts, it gave very limited information on the scale and growth in consumption of these activities and it did not address the issue of the exact nature of their impacts. As Gaelic arts was strongly identified as a major 'engine' of language development and a generator of the attitudinal and behavioural changes that underpin any positive dynamic linkages between the language and the economic development it clearly merited further investigation.

The geographical scope of the area that could be influenced by these dynamic linkages was also addressed in the 1994 study through its investigation of the concept of the 'Gaelic economy'. It concluded that from the standpoint of regional economics, it made little sense to

define such an economy in terms of the acts of production and exchange which are conducted through the medium of Gaelic. However, if the extent of the Gaelic economy is defined in terms of the provision of Gaelic goods and services then the 'economy' becomes analogous to a Gaelic 'industry' encompassing the consumers and providers of Gaelic services. The supply side of this industry thus covers all those activities (and jobs) whose principal purpose is the provision of Gaelic-related goods and services, including the promotion of the Gaelic culture and language.

This characterisation suggests that if wider indirect and dynamic effects are taken into account then the definition of the 'Gaelic economy' becomes

"the spatial area which stands to gain measurable economic benefits from the further development of the language."

The 1994 report stressed that this definition does not imply that it is either possible or desirable to 'ring-fence' Gaeldom. However, the definition may be useful in the formulation of policy in certain areas and is appropriate in any further investigations into the language-economy linkages such as the one reported here.

While the 1994 study attempted to map the supply side of the 'Gaelic industry' and offer estimates of associated jobs and output, it did not systematically address the issue of the demand for Gaelic products and services. The scale and impact of this demand forms the general area of inquiry for the present study, which adopts a specific focus on Gaelic arts and cultural products and services. This focus reflects the fact that such activities were identified in the earlier study as being critical both in terms of the jobs and output directly associated with their production, but also for their role in reflecting and developing a distinct Gaelic cultural tradition. There has been, as far as can be established, no prior investigation into this topic.

The following investigation is informed by the fact that three main inter-related objectives can be identified for those currently involved in Gaelic arts and culture. Firstly, and most importantly, to engage in imaginative and creative activities that reflect the inherited ideas, beliefs and values of the Gaelic community; secondly to contribute to

the regeneration and development of the Gaelic language; and thirdly to contribute to the economic and social regeneration and development of Gaelic speaking communities.

The following chapters offer indirect evidence on the first of these objectives, direct but limited evidence on the second, and more extensive and detailed evidence on the third.

The Surveys of Demand:

(1) The individual consumer survey

This study utilises two distinct sources of demand data for Gaelic related arts and cultural products and services within the target geographical area. The first is a large scale postal survey directed at a sample of all citizens within the target area. The second is a detailed interview-based survey of a sample of businesses in the Western Isles and Skye and Lochalsh.

Ideally the individual consumer survey should embrace all individuals, adults and children, in the area capable of consuming these products or services. This is effectively everyone as Gaelic radio and television outputs are accessible across the whole area. As no way could be found to gather data from the whole of this population a sample of all adult residents was drawn from the electoral registers of the area. A postal questionnaire was sent to a random sample of 8,400 people, covering approximately twenty five percent of the adult population of this area. Usable returns were received from 2028 respondents, representing almost 25% of the sample and more than 6% of the total adult population in the geographical area defined as the Gaelic economy.

The ability to infer from this sample of over 2000 adult residents to the population as a whole depends partly on the scale of the survey and partly on whether the distribution of key characteristics within the sample is similar to the incidence of these characteristics in the population as a whole. The scale of the survey and the response rate of 25% (healthy for an exercise of this type) suggests that more than sufficient data was gathered to allow statistical inference assuming no substantial bias across key characteristics.

The term 'key characteristics' refers to attributes that may be expected to influence attitudes to Gaelic issues, broadly defined. The

most obvious example is Gaelic language fluency. If the proportion of Gaelic speakers in the sample was significantly higher (or lower) than in the population as a whole then the survey results may be systematically biased by this over- or under-representation. Thus variables such as Gaelic fluency, age, gender, geographical location of residence were all checked against the most recent population census (Census Report for Western Isles, 1991; Census Report for Highland Region, 1991).

69% of the respondents to the survey live in the Western Isles and 31% in Skye and Lochalsh, with the comparative figures for the population as a whole at 71.5% and 28.5%. Thus there is a slight over sampling in Skye and Lochalsh but its extent is not likely to be significant.

Gender and age distributions were also checked for representativeness. The male/female gender split across respondents is 46/54 and is around 49.5/51.5 in the population. The age distribution of the sample is important mainly at the upper end due to the higher proportions of Gaelic speakers in older age bands. The sample contains 23% aged over 60, in the population the proportion of retirees (60+ for women; 65+ for men) is 21%. Neither of these results threaten any serious bias.

Finally, and of potentially greater significance as a source of bias, is the Gaelic language competence of respondents. In the survey 70% of those resident in the Western Isles and 34% of those resident in Skye and Lochalsh report a fluency or near fluency in Gaelic, compared to the actual proportions of the populations in these areas with Gaelic of 68% and 42% respectively as measured by the 1991 Census. The under-representation of Gaelic speakers in Skye pulls the combined proportion of respondents with Gaelic down to 58% compared to an actual population figure of 62%. It is reasonable to assume (and is supported by the actual survey results) that Gaelic speakers are generally more likely to hold positive views on propositions that link Gaelic to economic and social development than non-speakers. Hence the modest under-sampling of Gaelic speakers in the survey may impart a slight negative bias to results.

The content of the individual consumer survey reflected a desire to provide information on 4 questions.

* What is the level and pattern of demand for the full range of Gaelic arts and cultural products and services?

* What factors encourage or discourage the consumption of these Gaelic arts and cultural products and services?

* What was the impact of the consumption of each of these products and services on the attitudes and behaviour of the individual consumer?

* What was the general combined impact of consuming Gaelic arts and cultural products on attitudes and perceptions regarding the future of the language and the extent of perceived links between Gaelic and social and economic development?

The Surveys of Demand:

(2) The business survey

The other main component of demand for Gaelic arts and cultural products derives from the business sector. Some businesses use Gaelic arts and cultural products in the process of producing or supplying the products or services that constitute their main economic activity. An example of this would be the use of Gaelic music in hotels and restaurants, the use of bi-lingual menus or signage to influence the image of the product etc. While this is likely to be a relatively small component of final total demand for Gaelic arts and cultural products it may be a highly influential one in terms of public attitudes and perceptions about the language-economy linkage.

In addition to identifying the extent to which firms make direct use of Gaelic arts and cultural products in differentiating or improving the overall quality of their products or services, the survey also sought the views of the business community on the overall impact of Gaelic cultural activity on the economic environment within which they operated. Such impacts may operate through a range of channels from altering the image of the area, through attracting more tourists to altering the range of jobs and business opportunities in the area.

To establish the views of the business community on these and other issues a representative sample survey was undertaken of

establishments employing 10 or more individuals. These were drawn from all sectors and geographical locations within the study area. In the case of Skye and Lochalsh the sampling frame was supplied by the Local Enterprise Company and in the case of the Western Isles several sources were used, including Digits Young Enterprise Directory, the Western Isles Enterprise Company Directory and the Western Isles Advertising Directory.

37 establishments were contacted in Skye and Lochalsh and 72 in the Western Isles and asked to participate in an extended telephone interview. A response rate of 78% was obtained producing 85 completed interviews. The reasons for non-participation ranged from a flat refusal to difficulties in finding a mutually convenient time to conduct the lengthy interviews, to establishments owned and controlled by a parent company that centrally determined the main substantive issues of interest in the survey.

It is not possible to strictly establish the representativeness of the business survey respondents as regional or sub-regional data on non-micro enterprises (10 or over employees) is incomplete and such data is needed to compare our respondents against. All that can be claimed is that the surveyed firms were chosen at random across all sectors and locations.

Structure of the report

Chapters 2 to 4 report the main results of the consumer survey. Chapter 2 deals with the patterns and levels of consumption of the various categories of Gaelic arts and cultural products; chapter 3 the main enabling and constraining factors influencing this consumption and chapter 4 covers the impacts of consumption at an individual and community level. Chapter 5 reports the results of the business survey and chapter 6 contains a summary and draws overall conclusions.

Chapter 2 The level and pattern of demand for Gaelic related arts and cultural products and services

Introduction

The first major issue addressed in the questionnaire sent to residents concerned the patterns of consumption of Gaelic related arts and cultural products and services in the 12 month period prior to the completion of the questionnaire. The range of events and their geographical distribution during that year indicates that 1995/6 was broadly similar to that of previous years, although the pace of change and expansion in Gaelic related arts and cultural activities since 1996 has resulted in the scale of current provision significantly exceeding than which took place in the reference period used by respondents.

A fourfold categorisation of Gaelic related arts and cultural products and services was adopted. These are:

1) Live Events

This category embraced performance events broadly defined to include Gaelic music performances (concerts and ceilidhs, music performed in pubs and clubs, and choirs); traditional dance; exhibitions (such as those put on at An Lanntair), interpretative projects etc. wholly or partly in the medium of Gaelic; plays and theatrical events wholly or partly in the medium of Gaelic; Gaelic story telling and poetry reading; and finally psalm singing.

2) Products

The second category covered the consumption of Gaelic or part-Gaelic CDs, records, tapes, children's books, other books, videos, sheet music and other craft and print products, facilitated either by purchase or by loan.

3) Gaelic Television

4) Gaelic Radio

In Sections 2 to 5 below, the levels of consumption of these products and services within the sample population are outlined and any

characteristics within the population significantly associated with the consumption of individual products and services are identified.

Section 2: Levels of Consumption of Gaelic related arts and cultural products and services : Performance events

Respondents were asked how frequently they had attended or taken part in the range of live events listed above. The percentage levels of consumption are summarised in table 2.1

Table 2.1
Consumption of Live Events

Category of Event	frequency of attendance / participation				
	never	1-5	6-10	11-20	21+
Music:					
Concerts / Ceilidhs	43%	42%	8%	3%	4%
Music in Pubs/ Clubs	53%	29%	7%	5%	7%
Choirs	76%	16%	2%	2%	3%
Traditional Dance	51%	35%	8%	3%	4%
Exhibitions	56%	37%	5%	1%	1%
Plays/Theatre	74%	24%	1%	1%	1%
Story-telling / poetry	87%	11%	1%	1%	1%
Psalm singing	58%	17%	5%	3%	17%

It is difficult to get comparable data for the rest of Scotland or beyond but the information in table 2.1 suggests a lively regional Gaelic arts environment. More than half of the population are reporting attendance at, or participation in, live Gaelic music events, approaching half have attended at least one exhibition delivered (at least in part) through the medium of Gaelic, and over one quarter have attended a play or theatrical event similarly delivered. Given

the geographical distribution of the population, the traveling time to main centres of population and the very limited level of provision in some geographical areas and event categories these figures must offer encouragement to the providers of the Gaelic arts.

To provide further information on the patterns of consumption of these various artistic products the characteristics of the various consumer groups were considered to establish which features were positively or negatively associated with their consumption.

The questionnaire provided data on a range of personal characteristics covering location, age, gender, various measures of Gaelic language ability, the pattern of language use in current and childhood home, recent shifts in Gaelic use in the home, the desire to learn more Gaelic, employment characteristics, skill and formal qualification levels and income. All of these were considered in relation of the consumption of live Gaelic arts events.

Individual characteristics associated with the consumption of live Gaelic arts events

As the events covered in this category are diverse, few constant patterns of associated characteristics were expected or found. As a result it is necessary to briefly report each type of event before drawing some general points. Only variables exhibiting a significant association are reported.

Live Event Category 1: Concerts/Ceilidhs

The Gaelic language competence of consumers indicates two distinct patterns. The first is that there is a significantly greater likelihood of consumption by individuals with any level of Gaelic than those with none. Secondly, the frequency of participation/ consumption is positively associated with the extent of Gaelic competence. Those who are fluent or highly proficient in Gaelic tend to be more likely to consume higher volumes (more than 5 events per year) than those with more limited competence.

In contrast to the variables measuring Gaelic language competence or background there are no patterns evident across employment sectors, but those employed in both tourist related and cultural related activities are much more likely to report high consumption levels

than others. On the impact of income, predictably, those on the lowest incomes (below £5,000 per annum) are much less likely to report consumption than others. This group is likely to mainly consist of pensioners and those dependent on other forms of welfare provision.

Live Event Category 2 : Gaelic musical performances in pubs clubs

In contrast to concerts and ceilidhs, the consumption of music in pubs and clubs exhibits a clear and predictable geographical pattern. The likelihood of such consumption increases from north to south in the Western Isles chain and further increases in Skye and Lochalsh. there is also a rural /town difference within each of the islands.

Further predictable patterns emerge with respect to gender and age, with the probability of consumption and the level of consumption being positively associated with males and younger age bands (in this case, those under 30).

The patterns occurring between the variables capturing language competence and background are broadly similar but weaker than those identified under concerts and ceilidhs. There is a much greater probability of consumption amongst those with some level of Gaelic than amongst non-speakers, but the extent of consumption is unrelated to the degree of Gaelic competence.

Live Event Category 3 : Choirs

Predictably, given the number and organisation of Gaelic adult and children's choirs there are few significant variations across the personal variables covered in the questionnaire. Language competence is the exception and again the patterns is similar to that reported above for concerts and ceilidhs.

Live Event Category 4 : Traditional Dance

Traditional dance appears to be an artistic activity that is more commonly enjoyed in Skye and Lochalsh and the southern islands of the Western Isles chain than in Lewis and Harris. A pattern reflecting some of the differences in the cultural traditions between the islands.

There is a greater probability of participation amongst the under 30s, and again the likelihood of participation declines gradually across the

spectrum of Gaelic competence. Non-speakers are much less likely than all others to participate.

Live Event Category 5 : Exhibitions

Predictably, given the distribution of dedicated exhibition space in the geographical area covered by the survey, there are marked positive differences between the likelihood of attendance in the Western Isles compared to Skye and Lochash. Within the Western Isles location appears to have little impact at low levels of consumption (up to 5 visits per annum), but the impact of An Lanntair presumably lies behind the much greater likelihood of high levels of consumption being reported by those living in or near Stornoway.

There is no age pattern across visitors other than a somewhat lower probability of attendance amongst the over 60s. Yet again the language split is between those with some Gaelic and those with none. The other strong pattern with respect to language competence related to those reporting a positive change in levels of Gaelic use. These individuals are much more likely to attend and to attend frequently than other individuals, irrespective of their current level of Gaelic.

This is the category of live event that has the clearest association with the economic/ employment characteristics of respondents. Those working in the primary sector - crofting, fishing etc (15% of the surveyed population) are significantly less likely to attend exhibitions etc., a fact most likely explained by location and access difficulties. There is an expected and very strong positive association between involvement in the cultural industries (7% of the population) and levels of attendance, and there is a strong positive association with income levels throughout the full range of income categories.

Live Event Category 6 : Plays and Theatrical Events

As with exhibitions etc. there is a positive association between a Lewis location and consumption of these events. This is also the only category of live event covered in the survey which shows a positive association between consumption and gender, with females being more likely than males to report attendance. In addition there is a

markedly greater likelihood of consumption by those in the age bands 30-49 than amongst those both older and younger.

As expected the associations with Gaelic competence are very strong in this event category. Those fluent or highly competent are significantly more likely to attend these events than those with lower levels of Gaelic competence, who, in turn, are more likely to attend than those with no Gaelic at all.

As with exhibitions, attendance at plays and theatrical events is clearly and positively associated with income levels and the holding of post-school formal qualifications.

Live Event Category 7 : Story telling/Poetry

There are very few characteristics associated with participation in such events other than the level of Gaelic fluency.

Live Event Category 8 : Psalm singing

There is an entirely predictable and strong locational pattern shown here, with the probability of participation and scale of participation falling from rural Lewis and Harris to Stornoway, to the Southern Isles, to Skye to Lochalsh. In addition, participation levels are very much higher amongst those aged 40 and older than in younger age categories and amongst those who are fluent speakers and live in 'all Gaelic households'.

In conclusion, the patterns of consumption of live events is diverse, with age, income, location and gender variations across the various consumer groups. The one consistent pattern relates to Gaelic language competence and background. High levels of consumption are associated with fluent or near fluent speakers, lower but still clearly positive consumption is recorded for those less able in the language, and a major reduction in consumption occurs amongst the non-Gaelic minority in the sample.

Section 3 : Levels of Consumption of Gaelic related arts and cultural products and services : Gaelic arts products

The second category of Gaelic arts outputs embraces a range of physical products covering recorded music, books for children and

adults, printed music, videos (covering music, drama etc.) and Gaelic related artistic or print products.

Table 2.2 indicates the extent of purchases of these items within the sampled population.

Table 2.2 Consumption of Gaelic Arts/Cultural Products

Category of Product	frequency of purchase			
	never	1-5	6-10	11+
CDs Tapes Records	40%	47%	8%	6%
Children's books	50%*	42%*	3%*	2%*
Books	72%	25%	2%	1%
Videos	74%	24%	2%	1%
Sheet music	90%	8%	1%	1%
Artistic craft or print products	71%	25%	2%	1%

** These percentages taken from the sub population of respondents with children of school age or younger.*

Following the same procedures as above, the characteristics of the purchasers of these various products were examined to identify any which were significantly associated with purchase or non-purchase.

Again, as the products are diverse there was no expectation of any consistent patterns being found and each product was considered individually.

Product 1 : Gaelic Ds, Taes, records

A predictable age pattern emerged with the greatest probability of these purchases amongst the under 20s, falling steadily through the age groups to 40, then falling sharply.

On language competence there is a very strong positive association between the level of spoken Gaelic and the purchase of these CDs etc. Sales amongst fluent speakers are markedly higher than amongst those reporting an ability to 'handle most everyday conversations', which in turn exceed those reporting 'limited ability in simple conversations' and so on. In general, the probability of purchase appears to be associated with high levels of Gaelic ability, but not necessarily fluency. Whereas relatively high levels of purchase are heavily concentrated amongst fluent speakers.

Product 2 o Children's Books in Gaelic

Unsurprisingly these books were more likely to be bought by females and, to a very significant degree, by individuals in their 30s.

The language competence and background of those most likely to buy these books differs from the pattern established above. Children's books are as likely to be bought by parents with limited ability in the language as by those fluent or near fluent in Gaelic. The households into which the books are brought are as likely to be 'mainly English' speaking as 'always' or 'mainly Gaelic' or 'Gaelic and English equally'. The childhood language of the purchaser also shows a wide spread and the purchasing households are almost as likely to be characterised as 'minority of Gaelic speakers' as 'all Gaelic speakers'. The association between these purchases and households reporting increases in Gaelic use is again very strong.

Product 3 o Books in Gaelic

The patterns of characteristics associated with Gaelic book purchase differ substantially from those described for children's books. There is a significantly greater probability of book purchases amongst those aged 40 or over and the probability of purchasing books is very positively associated with individuals who are fluent or highly competent in the language, whose home language is always or mainly Gaelic, who were brought up in an Gaelic speaking home and whose current household can be described as 'all Gaelic speakers' or 'majority Gaelic speakers'.

Product 4 Videos wholly or partly in Gaelic

The patterns of association on this category of products is closer to those identified around children's book purchases than those around

CDs etc. and general books. The threshold age band for this product category is around 30. With a significantly lower probability of purchase amongst the under 30s than the rest of the population.

As in the case of general books, respondents fall into two broad bands with respect to Gaelic language competence but the range of ability associated with video purchases is significantly wider. Again, non-Gaelic speakers have a low probability of purchase.

Product 5 : Sheet music for Gaelic songs etc.

Very few characteristics exhibited any systematic association with the purchase of these products. The level of spoken Gaelic was positively associated with purchases as is the level of income of the individual or household.

Product 6 : Gaelic related artistic, craft and print products

Purchases of products within this rather wide ranging and unspecific category was associated with exactly the same language competence and language background variables as those linked to the purchase of sheet music described above. In addition, and distinctively, strong associations were also found with the skill categories reported by respondents. These purchases are much more likely to be found amongst those describing themselves as 'managerial' or 'professional' and reporting higher (post school) qualifications than others.

Before drawing provisional conclusions from these data it should be noted that the survey also identified the extent to which respondents borrowed from libraries or other sources items under the six product categories list above. The extent of borrowing identified was limited, with 14% reporting the borrowing of CDs etc., 11% borrowing children's books, 13% borrowing other books, 6% borrowed videos, 4% sheet music and 3% artistic or craft products. The characteristics of these borrowers were checked to establish any systematic associations and the results mirrored those reported above with respect to purchasing these products. The range and strengths of the associations identified is weaker than those holding for purchases and they unsurprisingly reinforce the conclusions that can be drawn from the purchase data.

The conclusions with respect to arts and cultural products are similar to those applying to live events. Patterns of consumption are diverse, with again age, income, location and gender variations occurring across consumer groups. The Gaelic language competence and background pattern is broadly consistent. High levels of consumption are associated with fluent or near fluent speakers, lower but still clearly positive consumption is recorded for those less able in the language, and a major reduction in consumption occurs amongst the non-Gaelic minority in the sample.

Section 4: Levels of Consumption of Gaelic related arts and cultural products and services : Gaelic Television

Fractionally over 80% of respondents reported that they watch Gaelic TV at least once per week. The characteristics of viewers are well known and mirror many English language television audience characteristics. There is a lower probability of viewing at higher income levels, at higher skill categories and amongst those with higher educational qualifications. All the linguistic measures in the survey exhibited the same very strong and expected pattern, being positively associated with Gaelic competence. 95% of those fluent or near fluent watch at least once per week, falling to between 60 and 80% amongst those less able in Gaelic, before falling to 20% or less of those with no Gaelic.

The survey allowed the identification of changes in viewing patterns across the various programme categories. The results are presented in table 3.3

This data (which is of course somewhat out of date in the fast developing area of Gaelic television) shows very healthy growth rates ranging from 36% to 14% (net 31% to 6%) and limited declines ranging from 9% to 5%

Examining the characteristics of those reporting change /no change across the programme types reveals a number of points which are common to all types of programme and a number that are distinct.

Table 2.3 Changes in viewing patterns

	great inc	slight inc	no change	slight dec.	great dec
news /current affairs (net +31%)	11%	25%	59%	2%	3%
documentary programmes (net +21%)	7%	21%	65%	3%	4%
light entertainment/drama (net +18%)	8%	19%	65%	4%	5%
music (net +22%)	8%	21%	64%	3%	4%
religious affairs (net +6%)	5%	9%	79%	3%	5%

News/Current affairs: Growth in viewing is confined mainly to younger respondents (aged under 35) and there is a much greater likelihood of an increase being reported the greater the current or historic commitment of the individual to Gaelic (as measured by their Gaelic competence, the main language of their home and the language of their childhood). Those with a limited ability in Gaelic have a much higher probability of reporting decreases in their viewing.

Documentaries: Those reporting growth exhibited a greater probability of being older (35+) otherwise the main language competence and income /skill patterns reported above hold for these programmes.

Light entertainment / drama : The common patterns noted above all hold, there is no age pattern but a clear gender bias towards female amongst those reporting growth. There is also a clear positive link between working in cultural industries and the probability of reporting growth.

Music : Again standard common patterns apply. In addition the pro-female gender and cultural industries bias to growth holds.

Religious affairs: In many ways this is the most distinct programme type. Growth is confined almost entirely to those aged over 50.

Growth is more likely in rural areas and is confined to the Western Isles. The links to language background and use are very marked, with growth is almost entirely in Gaelic only households and in households brought up using only Gaelic.

In summary, the evidence produced by the survey on Gaelic television consumption confirms what is well know, namely that it is very widely consumed and that the viewing and growth characteristics associated with various programme types vary greatly. Those aged under 35 are disproportionately represented in its audience and the growth patterns suggest a consolidation and expansions amongst those relatively competent in the language, with lower but still positive growth figures amongst the less able Gaelic speakers.

Section 5 : Levels of Consumption of Gaelic related arts and cultural products and services : Gaelic Radio

The data sought on the levels of consumption of Gaelic radio was similar to that of Gaelic television - covering how many hours on average per week did the respondent listen to various programme categories and how had that listening pattern changed in the recent past. This data is presented in the following two tables.

Table 2.4. Levels of radio listening

Category of Programme	frequency of listening				
	never	up to 2-5 2 hrs hrs	5-10 hrs	10+ hrs	
News/ current affairs	34%	33%	14%	11%	8%
Documentaries	53%	30%	9%	5%	4%
light entertainment/ drama	53%	28%	10%	5%	4%
Music	36%	37%	13%	8%	6%
Religious programmes	61%	29%	6%	2%	3%

Table 2.4 indicates that around two-thirds of the population listen to some Gaelic news/ current affairs and Gaelic music each week, around one half listen to drama and documentaries and around 40% to religious broadcasts. High levels of consumption are more evident for news, current affairs and music programmes.

Table 2.5 Changes in listening patterns

	great increase	slight increase	no change	slight decrease	great decrease
news / current affairs (net +21%)	10%	16%	69%	2%	3%
documentary progs (net +10%)	6%	11%	76%	3%	4%
light ents/ drama (net +8%)	6%	10%	76%	3%	5%
music (net +19%)	8%	17%	69%	2%	4%
religious affairs (net +5%)	5%	7%	81%	2%	5%

Table 2.5 presents a very positive picture of audience growth for Gaelic radio in the period running up to the survey. Growth is particularly marked in the two programme categories attracting the highest levels of consumption - news /current affairs and music.

To help develop a picture of this radio audience, listening patterns were examined against audience characteristics to identify systematic associations. This exercise was carried out for each programme category.

Radio Programme Categories 1-3 & 5 : News and current affairs/ Documentaries / Light entertainment & Drama / Religious programmes

There is a strong geographical pattern across listeners which unsurprisingly conforms closely to the distribution of Gaelic speakers. The probability of respondents listening to these categories

of Gaelic radio programmes rises from Lochalsh to Skye to greater Stornoway to rural areas within the Western Isles.

The likelihood of any individual listening to these programmes rises in three distinct stages by age. It is at its lowest amongst the under 25s, it is higher and consistent across the 26-50 age groups and then rises steadily with age amongst the over 50s.

The spectrum of language competence from fluency to only a few words of Gaelic is split into two groups with respect to Gaelic radio news. The probability of listening is very significantly higher amongst fluent and near fluent speakers than all others and falls very substantially across other fluency levels. This pattern is repeated across the other language dimensions captured in the survey. The language pattern of the home, the language of childhood and the balance of Gaelic speakers in the home all suggest an audience dominated by highly competent speakers of the language.

One noteworthy result concerns those households reporting significant positive change in their use of Gaelic over the last 10 years. In almost every dimension of consumption covered by the survey these households are more likely than the rest of the sample to report consumption, often at high levels. Surprisingly this is not the case with respect to Gaelic radio. This suggests radio may be playing a crucial role in consolidating and expanding the use of Gaelic amongst those with high levels of competence, but is less widely used by those less able in the language.

The characteristics associated with a greater probability of listening noted so far (rural, older, fluent or near fluent speaker) are also associated with occupations in the primary sector which also emerges as a significant characteristic together with the status - retired.

Radio Programme Category 4 : Music

The demands of linguistic competence associated with productively listening to Gaelic news, drama or documentaries is clearly greater than those required to enjoy Gaelic music and song. Unsurprisingly therefore, the pattern of characteristics positively associated with this programme category are less marked.

The pattern of rising listening (Lochalsh-Skye-Stornoway-Rural Outer Isles) still hold but is much weaker, with the likelihood of listening in areas where Gaelic is less well established being much greater than in the other programme categories. Also, with respect to language competence and background the pattern is repeated but is much weaker. There is still a greater probability of fluent and near fluent speakers listening to these programmes than others, but the differences are much lower with those possessing lower level of Gaelic competence tuning in.

The only general concluding comment that can be made on the range of Gaelic artistic and cultural activities reviewed in this chapter is that consumption levels appear to be healthy. There is considerable diversity of provision given the size of the potential audience, with a wide range of niche audiences catered for and a substantial growth in consumption recorded across many of the individual product types considered.

Chapter 3 o Factors shaping the demand for Gaelic arts and cultural products

After identifying current consumption levels of Gaelic arts and cultural products the survey generated data allowing an investigation of the enabling and constraining factors that shape demand. For this purpose data was gathered on three broad issues.

Firstly, how respondents hear about the range of arts and cultural products they consume and those activities which they wish to attend or participate in. The focus of data gathering on this issue was exclusively on these purchases and activities as the means by which individuals hear about the other categories of Gaelic arts and cultural outputs - television and radio - are reasonably well understood.

Secondly, respondents were asked to gauge the relative importance of a range of factors in encouraging attendance at, or involvement in, live events and purchases of Gaelic arts and cultural products.

Thirdly, a similar exercise was conducted to identify the relative importance of factors discouraging purchases and/or attendance or participation in these events.

The results of these questions and variations in responses across the sample are reported in sections 3.1 to 3.3.

Section 3.1 Information Sources for live events and purchases of Cultural products

The data presented in Table 3.1 indicates that the only significant sources of information are local, with the local papers and word-of-mouth being consistently important. Information on music events is drawn from a wider range of sources with leaflets, posters and local radio also being relatively important.

Table 3.1: Information sources for Live Events and Products

Category of Event or product	Information source					
	local paper	word of mouth	local radio	local leaflets etc.	Nat- ional TV	Nat- ional Radio
CDs /tapes of Gaelic song or psalm	13%	32%	17%	4%		1%
Childrens books in Gaelic	7%	8%	2%	5%	1%	1%
Other books in Gaelic	10%	11%	3%	4%	0%	1%
Videos wholly or partly in Gaelic	8%	12%	4%	3%	4%	1%
Concerts / Ceilidhs	26%	21%	11%	16%	1%	1%
Music in Pubs/ Clubs	14%	18%	5%	9%	0%	1%
Choirs	11%	11%	6%	5%	0%	1%
Traditional Dance	17%	18%	6%	13%	1%	1%
Exhibitions	24%	9%	6%	12%	1%	1%
Plays/Theatre	17%	7%	5%	10%	1%	1%
Story-telling / poetry	11%	6%	11%	6%	0%	1%

Section 3.2 : Factors encouraging or discouraging attendance/ involvement in live events

Respondents were asked to gauge the relative importance of a range of factors in encouraging or discouraging attendance at or involvement in live events. The choice of factors covers three dimensions that potentially impact on consumption. Firstly, standard economic determinants of demand - price and availability; secondly the perceived relevance of these artistic activities to the respondent,

reflecting the local dimension and sense of connection with the activity; and thirdly the role of language variables, both the level of Gaelic competence to appreciate or participate in the activity, and the respondent's general support of, or lack of interest in, Gaelic related activities.

The results on the economic variables of price and availability in encouraging consumption are presented in table 3.2 and those relating to the encouraging impact of perceived relevance and commitment to Gaelic in table 3.3. The data on the discouraging impact of broadly the same sets of economic, language competence and commitment variables are presented in tables 3.4 and 3.5.

Table 3.2: **The role of** economic variables in encouraging the consumption of live arts an cultural activities

Activity	local availability			Admission/ purchase price		
	very import-ant	quite import-ant	not import-ant	very import-ant	quite import-ant	not import-ant
concerts/ceilidhs	33%	18%	49%	12%	22%	66%
music in clubs /pubs	21%	13%	66%	8%	15%	78%
choirs	14%	11%	75%	6%	10%	84%
traditional dance	21%	14%	66%	8%	14%	78%
Exhibitions	21%	14%	64%	9%	14%	77%
plays / theatrical events	17%	12%	71%	7%	11%	82%
story telling /poetry	13%	11%	77%	6%	8%	85%

Table 3.3 : The role of language/local relevance variables in encouraging the consumption of live arts an cultural activities

Activity	local dimension			personal Gaelic competence			personal commitment to Gaelic		
	very important	quite important	not important	very important	quite important	not important	very important	quite important	not important
concerts/ ceilidhs	12%	18%	70%	14%	16%	70%	16%	14%	70%
music in clubs/pubs	7%	12%	81%	8%	11%	81%	9%	11%	80%
choirs	6%	10%	84%	8%	8%	84%	9%	8%	84%
traditional dance	8%	12%	80%	7%	9%	84%	9%	10%	81%
Exhibitions	11%	13%	76%	9%	12%	79%	10%	11%	79%
plays/theatrical events	8%	10%	82%	11%	10%	79%	9%	9%	82%
story telling/poetry	6%	9%	85%	12%	7%	82%	8%	8%	84%

The data presented in tables 3.2 and 3.3 suggest a fairly uniform pattern of influences across the live artistic and cultural activities listed. With the exception of the issue of availability, and to a lesser extent price, none of the factors listed appear to have a substantial impact on prompting attendance or participation. Local relevance, personal linguistic competence in Gaelic and a commitment to the language are identified as having some positive influence by, on average, only around one fifth of respondents. When this group of respondents is compared to respondents as a whole no clear patterns emerge with respect to age, location etc.

Table 3.4 : The role of economic and relevance variables in discouraging the consumption of live arts and cultural activities

Activity	Not available locally			Level of entry price			Perceived lack of relevance		
	very important	quite important	not important	very important	quite important	not important	very important	quite important	not important
concerts/ ceilidhs	27%	10%	63%	11%	13%	76%	10%	12%	79%
music in clubs /pubs	18%	7%	75%	8%	10%	83%	8%	8%	84%
choirs	14%	7%	80%	6%	7%	87%	8%	7%	85%
traditional dance	17%	8%	76%	7%	8%	84%	7%	8%	86%
Exhibitions	17%	9%	75%	8%	8%	83%	8%	9%	83%
plays / theatrical events	14%	7%	79%	7%	7%	86%	7%	8%	86%
story telling /poetry	11%	7%	81%	6%	6%	88%	7%	7%	86%

The material in tables 3.4 and 3.5 paint a broadly similar picture to those reporting views on enabling factors. This is unsurprising as the factors are often mirror images of each other. Again availability, and to a lesser extent price, are the main constraining factors.

The extent to which availability acts as a constraint is dependent on location, with more rural parts of the islands more likely to cite this factor. Gaelic language competence also exhibits an association with the probability of citing both availability or price as constraints in that non-Gaelic speakers are more likely to be unaffected by these factors as their basic interest in the event is likely to be lower.

Price is also more likely to be cited by younger respondents, and those in the older age bands (especially 60 and over) are less likely to mention either availability or price as an issue.

Table 3.5: The role of language/local relevance variables in discouraging the consumption of live arts and cultural activities

Activity	Personal level of Gaelic to appreciate the event			Lack of interest in Gaelic related events			Lack of interest in the specific event		
	very important	quite important	not important	very important	quite important	not important	very important	quite important	not important
concerts/ ceilidhs	11%	9%	80%	8%	8%	84%	11%	8%	81%
music in clubs/pubs	7%	7%	86%	6%	6%	88%	9%	6%	85%
choirs	7%	6%	88%	6%	5%	89%	7%	6%	86%
traditional dance	6%	6%	88%	6%	6%	89%	8%	6%	86%
Exhibitions	8%	7%	84%	6%	6%	88%	9%	7%	84%
plays/ theatrical events	10%	6%	83%	6%	6%	88%	8%	7%	88%
story telling/poetry	12%	5%	84%	6%	5%	88%	8%	6%	86%

Chapter 4 : The impact of Gaelic related arts and cultural activities

Section 1 : Introduction

The preceding chapters of this report have dealt with the levels and patterns of consumption of Gaelic related arts and cultural products and the factors that constrain or encourage the consumption of these products or services. This chapter reports on the impact these levels and patterns of consumption have had on the personal behaviour and attitudes of the respondents and on their views as to the impact of Gaelic related arts and cultural products on general behaviour and attitudes within their community.

It is necessary to separate out personal impacts on behaviour and attitudes from views on broader community impacts as the cultural, linguistic and economic background of each respondent is likely to influence his or her willingness and/ or ability to alter personal behaviour or attitudes. These differences in personal propensities or abilities does not necessarily shape views as to the nature or extent of broader changes occurring within communities as a result of the growth of Gaelic related arts and cultural products. Hence these views on community impacts are addressed separately.

The dimensions of impact investigated

In the introductory chapter three main inter-related objectives were identified for those currently involved in Gaelic arts and culture. Firstly, to engage in imaginative and creative activities that reflect the inherited ideas, beliefs and values of the Gaelic community; secondly to contribute to the regeneration and development of the Gaelic language; and thirdly to contribute to the economic and social regeneration and development of Gaelic speaking communities.

The generation of evidence on the first of these objectives via a survey such as the one reported here is inevitably indirect. The levels of demand for the full range of Gaelic related artistic and cultural products specified in chapter 2 provides indirect evidence as to the quality of the products and services currently on offer.

Thus this chapter focuses on the linguistic, economic and social impacts and the extent to which these interact. Before reporting on

the specific questions that were adopted to capture these impacts it is useful to briefly review the arguments underpinning the approach to economic impacts in the survey as they are the central concern of this study.

The survey was administered across a geographical area previously defined as the Gaelic economy - namely the Western Isles and Skye and Lochalsh (Sproull and Ashcroft, 1994). As noted in the introduction that report argued that any positive economic impacts associated with Gaelic language development would arise both from the direct and indirect jobs and outputs associated with making and delivering Gaelic related products and services and from any dynamic effects these products and services might produce via their influence on key economic decisions taken mainly at local level.

It was further argued that there are a wide range of decisions made by individuals and organisations which have an impact on the local economy. Economic development policies operate by influencing these decisions in a manner which the policy makers believe will best promote the economic well-being of that economy. In sparsely populated regions which are peripheral to main markets, such as those constituting the Gaelic economy, the key decisions which have a major impact on the economic life of the area include those determining out and in-migration, the ability and willingness to start new businesses, the decision by tourists to visit the area, and the willingness of external companies and organisations to locate within the area.

Lying behind many of these decisions is the perceived relative attractiveness of the area as a place to live, work or visit for both individuals native to the area and those from the rest of Scotland and beyond. This attractiveness is influenced in part by any characteristics of the place and its people which makes it distinctive and the extent to which these distinguishing characteristics are valued both within and beyond the area. It is incontestable that one of the major distinguishing characteristics of the area is the Gaelic language and its associated art and culture.

This realisation lies behind many of the inter-linked economic, social and cultural policies promoted by local authorities, HIE, the LECs,

the Gaelic Arts Agency and CNAG. It is now commonly proposed that the enhancement of distinctiveness can further strengthen community self-confidence and esteem which, in turn, feeds into further economic and social development.

Underlying the approach taken in the questionnaire is the view that if the development of Gaelic related arts and culture is to positively influence the local economy (beyond the direct jobs associated with its delivery and any positive 'knock-on' effects on employment and output) it will be via the influencing of decisions such as those listed above. Hence when designing the questionnaire an attempt was made to seek views on a number of these issues plus those relating directly to Gaelic language use and social development.

Impacts were captured via three sets of inter-related questions.

First set of impact questions:

Respondents were asked to identify the impact that each of the main categories of Gaelic arts and cultural products (live events; arts and cultural products; Gaelic television; Gaelic radio) had on their attitudes and behaviour with respect to a range of seven key linguistic and related economic issues. These were split into 4 issues concerning the link between language and economy, and 3 issues relating to Gaelic language use.

Issues relating to the link between language and economy:

1. The relevance of Gaelic language, art and culture to the economic development of the area.
2. The desirability of Gaelic being used in other areas of life such as business and schools.
3. The relevance of Gaelic language, art and culture to the employment and career prospects for young people in the area.
4. The desirability of continuing to live and work within the local community.

Issues relating to Gaelic language use:

5. How often the individual uses Gaelic.

6. Where applicable, the willingness of the individual to educate their children in the medium of Gaelic.

7. Where applicable, the relevance of Gaelic art and culture to the education and development of their children.

Second set of impact questions:

Questions were directed not only at establishing the impact of Gaelic arts and culture in promoting changes in personal behaviour and attitudes (the 7 issues listed above), but also establishing the individual's views as to the impact of Gaelic arts and culture on their community and area irrespective of whether their own attitudes and behaviour had been changed. The specific questions posed to address this issue were as follows.

1. What has been the impact on the regularity with which Gaelic is used in the local community?
2. What has been the impact on the regularity with which Gaelic is used in local families?
3. What is the impact on the attractiveness of the area to tourists?
4. What is the impact on the level of attachment of local people to their community?
5. What has been the impact on the level of confidence within your local community?
6. What has been the impact on the preference of individuals in your community to choose Gaelic services or products where possible?

The issues addressed here are clearly related to the seven posed above, and in combination should provide a detailed pictures of the perceived impact of Gaelic arts and cultural activities on the main issues of concern to those concerned with linguistic and related economic development in the Western Isles and Skye and Lochalsh.

Third set of impact questions:

At the end of the questionnaire eight propositions were presented to respondents who were asked to indicate the extent to which they perceived them to be valid on a scale from 'strongly agree' through 'agree', 'no view', 'disagree' to 'strongly disagree'. The value of these responses lies both as checks on the consistency of other responses and in their ability to summarise the overall cumulative impacts of developments in Gaelic language, art and culture on general perceptions of the economic and social role of the language in the future health of the communities of the Western Isles and Kyle and Lochalsh. Explicitly the propositions are as follows.

1 The regeneration of the Gaelic language art and culture is essential for the future social development of your own area /island group.

2 The regeneration of the Gaelic language art and culture is essential for the future economic development of your own area/island group.

3 The development of the Gaelic language art and culture is making an important contribution to the level of self confidence in your own area /island group.

4 The development of the Gaelic language art and culture is increasing the attractiveness of the area for tourists.

5 The development of the Gaelic language art and culture is increasing the desire of young people to live and work in their home area.

6 The development of the Gaelic language art and culture is broadening the range of employment opportunities which exist for people locally.

7 If there was reasonably priced tuition in my area, I would participate in Gaelic language classes and/or traditional music/ dance tuition.

8 Taking local and national factors into account, I am optimistic about the future health and development of the Gaelic language.

Section 2 below reports the impacts of each of the four categories of arts and cultural products on individual behaviour and attitudes, on the seven key questions posed to individuals (impact measure 1). It also reports on the main individual characteristics associated with different levels of impact. Section 3 reports responses to the assessment of community impacts arising from the combined impacts of the four categories of arts and cultural products (impact measures 2). Again, the characteristics associated with different assessments of impacts are discussed. Section 4 reports the survey results on the battery of attitude propositions (impact measure 3). The characteristics of respondents is considered according to their position on the spectrum of attitudes towards each proposition or groups of propositions.

Section 2:

The impact of Gaelic Arts and Culture on individual behaviour and attitudes

Issue 1 : The relevance of Gaelic language, art and culture to the economic development of the area.

There are a number of channels through which Gaelic arts and cultural activities could influence the public's perception of the sectors significance in the economic development of the area. These include increasing the number of jobs available to local people (where Gaelic competence is often a requirement or an advantage); widening the range of jobs available in terms of skill, remuneration and other job quality dimensions; altering in a positive way the level of knowledge and awareness of the distinctiveness and attraction of the region to a wider national and European audience; providing a distinct range of products and services that potentially enrich the experience of tourists (amongst others) and promote further tourism and related developments; reinforcing the distinction and character of the area in a way that encourages individual and community self confidence, variables which can, in turn, influence out-migration levels, the willingness to start small businesses etc.

The proportions of respondents indicating that their exposure to Gaelic language art and cultural products had altered their perceptions as to the relevance of these activities for their area are indicated in table 4.1

Table 4.1

The impact of each category of artistic and cultural activity on respondents perceptions of the relevance of Gaelic language, art and culture to the economic development of the area.

Arts category	increased	stayed same	de-creased
Live events	32%	58%	10%
Gaelic arts products	30%	62%	8%
Gaelic television	49%	41%	10%
Gaelic Radio	38%	54%	8%

Levels of net positive change vary between 20% and almost 40%, figures that are likely to be viewed by both the artists delivering these 'products' and the bodies organising and promoting such activities as very supportive of their arguments that the positive returns to Gaelic arts and cultural activities are not exclusively aesthetic.

Considering variations in response according to respondent characteristics, some clear patterns emerge.

With the exception of Gaelic radio, all the categories of activity are more likely to have a more positive impact on those under 40s than on older respondents, and the proportion reporting positive impacts on attitudes fall substantially for those aged over 60.

The location of the respondent appear to have no systematic influence on the likelihood of them reporting change (positive or negative) other than the fact that the influence of TV and radio appears significantly less positive in very sparsely populated areas

such as Harris, rural Skye and Lochalsh. It is perhaps significant that few, if any radio and television jobs are located in these areas.

All of the employment, skill and sector variables exert no systematic impact on attitudes other than in the category - live events, which appear less influential amongst those working in the primary sector (crofting, fishing etc.) and those classifying themselves as manual workers. These associations may reflect variations in consumption levels across these activities.

On the impact of the individuals Gaelic language competence and background two key points can be made. Firstly, the reported impact on attitudes appears broadly constant across the full range of language competence with a substantial reduction in reported positive effects occurring only in the groups reporting an inability to speak any Gaelic and normally living in 'all English' households. Secondly, even amongst these groups less likely to report any positive impacts on attitudes there is still a significant proportion reporting that their attitudes towards the economic relevance of Gaelic arts and culture has been positively enhanced by the output of Gaelic cultural industries. This proportion is between one-third and one-half of that occurring amongst respondents with some Gaelic.

Issue 2 : The Use of Gaelic in other areas of life (such as Business)

Many individuals and agencies committed to Gaelic language promotion have taken the view that ultimately its health and full acceptance will require its use in all aspects of personal and social life. The business community in the Highlands and Islands have been encouraged to consider the potential competitive advantages that could accrue from their products being explicitly identified with a Gaelic culture whose image has many highly positive associations in national markets, or from the purchasing decisions of consumers with an explicit preference for products and services that are Gaelic in some visible form (such as labeling and packaging). Counter arguments tend to focus on the additional costs that such product or service differentiation would entail and on the extent to which there is a significant body of customers or potential customers who partly shape their purchasing decisions according to the Gaelic 'content' of the product.

Underlying these arguments is the extent to which the local community perceives that Gaelic is a legitimate language of business in their area. This is a perception that is influenced by a wide range of factors which importantly includes the language used within the cultural activities (marketed and non-marketed) that they choose to consume, such as television, radio, live events and cultural products.

Table 4.2 reports the survey responses to the question of the impact of Gaelic arts and cultural products on the perceived desirability of a greater use of Gaelic in Business and elsewhere.

Table 4.2

Impacts of Gaelic Arts and Cultural Activities on views as to the desirability of Gaelic being used in Business etc.

Arts category	increased	stayed same	de-creased
Live events	27%	63%	10%
Gaelic arts products	25%	66%	9%
Gaelic television	46%	43%	11%
Gaelic Radio	35%	56%	10%

There are significant overlaps between those reporting a positive shift in attitudes with respect to the greater use of Gaelic in business and other areas of public life. But even when taking these into account significantly more than half of the survey respondents appear to have been positively influenced by their exposure to the outputs of the Gaelic arts and cultural sector.

While the figures in the table indicate substantial attitude change the change has not occurred evenly across the whole sample population. The characteristics of each of the two groups reporting a change in attitude and those remaining unchanged were examined to establish

whether any patterns were present that might deepen our knowledge of the change taking place.

The various measures of language competence, background, recent change and desire to learn more all exhibited a near common pattern of effect across all four categories of activity. The measures of the language of childhood, the current language of the home and perceptions regarding the range of Gaelic competence in the household are all constructed on a spectrum from all Gaelic through to no Gaelic at all. In all cases the differences in the probable impact of Gaelic arts and culture lies between those with no Gaelic at all /English only households and all others irrespective of the level of Gaelic competence. Unsurprisingly, the impact of Gaelic arts and culture in shifting attitudes towards the role Gaelic in business etc. is mainly felt by those with Gaelic. But it must be encouraging to those promoting the use of the language in business that this positive shift in attitudes is being felt fairly evenly from the households populated entirely by fluent Gaelic speakers right through to households characterised by a minority of speakers with relatively low levels of competence.

The other noteworthy variable that is associated with this issue is age. However, the variations in age are not consistent across the four categories of activity. Live events have a marked affect on shifts in attitudes amongst the youngest age bands. TV also has a differential positive impact in attitudes amongst all those aged under 35 compared to older respondents, whereas radio impacts are more clearly felt amongst the 40+ groups, a fact that reflects, at least in part, the age distribution of the radio audience.

Issue 3 : The relevance of Gaelic language, art and culture to the employment/ careers of young people

The report on the Economics of Gaelic Language Development (Sproull & Ashcroft, 1994) discussed the nature of the linkages between employment and output arising directly from the provision of any category of products or services (such as those provided by cultural industries) and the indirect and induced employment and

output arising from the income and expenditures associated with these direct activities.

The jobs arising directly within these cultural industries are diverse in content, in skill requirements and in remuneration. These characteristics, plus the fact that many of the jobs located within the Western Isles and Skye and Lochalsh are provided by small, dynamic companies is bound to have some impact on the perceived employment relevance of Gaelic arts and culture.

The proportions of respondents influenced by this employment profile are noted in table 4.3

Table 4.3

The relevance of Gaelic language, art and culture to the employment/careers of young people

Arts category	increased	stayed same	de-creased
Live events	33%	58%	10%
Gaelic arts products	30%	61%	10%
Gaelic television	54%	36%	11%
Gaelic Radio	44%	48%	8%

The relative impacts of each of the arts categories and the scale of these impacts is broadly comparable to those recorded with respect to the overall economic relevance of Gaelic arts and culture. This is an unsurprising result given the close association in the public mind between direct job creation and overall economic impact.

Variations in reported impacts across the characteristics of the respondents are limited. Positive employment/ career impacts are reported fairly evenly across all age groups, with a particularly marked positive impact arising from Gaelic TV viewing amongst the youngest category of respondents (those under 20). The range of language competence and background variables expose broadly the

same pattern as reported above. The main split in terms of impact appears to lie between those with no spoken Gaelic/ all English households and all others irrespective of their level of competence. One qualification to this final point should be added here. The proportions reporting positive impacts across the categories of arts and cultural activities appears to be slightly but consistently lower amongst fluent speakers than amongst those with lower levels of Gaelic competence. Possible explanations for this are discussed below.

Issue 4 : The desirability of continuing to live and work within your local community

The fourth of the individual impact issues with bearing on the link between language and economy related to the impact of Gaelic arts and cultural activities influencing the desirability of individuals continuing to live and work within their communities.

An individual's commitment to place is the product of a highly complex mix of family, social, cultural and economic factors. In the 1994 study referred to above (Sproull and Ashcroft) the investigations into the nature of the dynamic links between language and economy provided further evidence that the greater is the individual or household commitment to place the higher is the likelihood that employment strategies will be devised that allow individuals to live in their chosen place. In many instances this involves a mix of part-time employment or self-employment, the establishment of micro businesses and higher levels of job insecurity and lower remuneration that the individual could command in other locations such as greater Inverness or the central belt of Scotland.

These processes impact on levels of out-migration and may influence the commitment of young people to return to their communities soon after completion of formal training or education beyond the region. They may positively influence small business start-ups and retain entrepreneurial individuals within the islands.

A crude indication of the impact of Gaelic arts and culture on this complex issue is summarised in table 4.4

Table 4.4

The desirability of continuing to live and work
within your local community

Arts category	increased	stayed same	de- creased
Live events	29%	64%	7%
Gaelic arts products	27%	66%	7%
Gaelic television	39%	55%	6%
Gaelic Radio	32%	62%	6%

The proportions of both positively and negatively influenced individuals reported in this table are lower than in any of the other issues investigated in this section. But the net impacts are still substantial, varying from one fifth to one third of respondents noting a positive shift.

Significant differences in the likelihood of reporting positive shifts in attitude are associated with only two characteristics - age and language competence and background. The very youngest group participating in the survey (the under 20s) are less likely to be positively influenced than any other age group. And, as for the other issues above, those with no Gaelic are much less likely to be positively affected than all others.

Issue 5 : The willingness of respondents to choose Gaelic medium education for their children

In addition to a consideration of the direct and immediate impacts of Gaelic arts and cultural activities on the health of the local economy of the Western Isles and Skye and Lochalsh the survey also sought to establish impacts across a limited range of social/linguistic issues, Some of these will have less direct and longer term impacts on the

language/ economy relationship within the survey area. The issues cover the use of Gaelic by individual respondents, their willingness to use Gaelic medium educational provision where applicable and their perceptions as to the relevance of Gaelic art and cultural activities in the education and development of their children, where applicable.

The responses to these questions are summarised in tables 4.5 to 4.7.

Table 4.5

The impact of Gaelic arts and culture on the frequency of Gaelic language use by individual respondents

Arts category	increased	stayed same	de-creased
Live events	18%	72%	11%
Gaelic arts products	21%	71%	7%
Gaelic television	21%	74%	4%
Gaelic Radio	26%	69%	5%

The total number of respondents noting a personal increase in Gaelic language use as a result of exposure to one more of the categories of Gaelic arts is 735, or 36% of all respondents.

The use of the language is the only issue investigated here in which television is not cited as quantitatively the most important Gaelic artistic or cultural activity in terms of positively shifting attitudes or behaviours. It is noteworthy that the language competence profile of the audience of Gaelic radio is more heavily weighted towards those fluent or near fluent than the profile of the other arts and cultural categories.

The age profile of those most likely to cite an increase in use varies substantially from category to category. Live events have a marked positive impact on the youngest age group in the survey, with 25% of them citing an increase in Gaelic use as a result of involvement in live

events compared to about 16% of those in other age groups. In contrast, Gaelic products have a significantly lower impact on the use of Gaelic by these young than on the surveyed population as a whole. The positive impact of television is more clearly marked amongst those under 35, a situation reversed for Gaelic radio.

The distribution of those citing increases in use by Gaelic language background and competence reveals a predictable pattern. Growth is most marked amongst those with some competence but far from fluent (i.e. those citing an ability to handle most matters and those reporting limited ability in simple matters). Similarly, individuals in households where Gaelic and English are spoken equally or where the language used is 'mainly English' are more likely to cite increases than others.

It is also noteworthy that a positive impact generated by live events become progressively more likely the higher the income level of the individual. This may in part reflect the profile of consumers or participants of these activities.

Table 4.6

If applicable, the willingness of respondents to choose Gaelic medium education for their children

Arts category	increased	stayed same	de-creased
Live events	30%	56%	15%
Gaelic arts products	28%	58%	14%
Gaelic television	41%	43%	17%
Gaelic Radio	30%	56%	14%

The age distribution of those reporting an increased willingness to use Gaelic medium education provides encouragement for those advocating this approach. Exposure to, or consumption of 'live events', Gaelic purchases and Gaelic television all positively

influence the under 35 age groups in significantly greater numbers than older respondents.

There is also a clear language competence /language background pattern across those increasingly disposed to Gaelic medium education. Greater positive shifts in attitudes to this issue are found amongst respondents whose childhood language background was 'mainly English' and those whose language competence is less than fluent.

Table 4.7

If applicable, the relevance of the use of Gaelic art and culture in the education and development of young people

Arts category	increased	stayed same	de-creased
Live events	37%	53%	11%
Gaelic arts products	34%	56%	11%
Gaelic television	49%	40%	11%
Gaelic Radio	36%	54%	10%

The net shift in the attitudes of respondents is greater on this issue than on the specific use of Gaelic medium education. (this does not, of course, imply a higher level of support as it is changes that are being captured here). The patterns of positive change across the sample indicate that younger respondents are more likely to have shifted their attitudes as a result of Gaelic arts and cultural activities. The language pattern is similar to that of Gaelic medium education. There is a substantial difference in the probability of a positive response between those with any level of Gaelic competence and those with no Gaelic, and again the positive impact of live events appears to be particularly marked on individuals brought up in households speaking 'mainly English' and whose language competence is less than fluent.

Section 3.0 Community and area impacts arising from the total consumption of the four categories of arts and cultural products

As noted above, an attempt was made in the survey to identify the views of respondents on the impact of Gaelic arts and culture on their community and area irrespective of whether their own attitudes and behaviour had been changed. The specific questions posed and the responses received are presented in table 4.8

issue	great increase	slight increase	stayed same	slight decrease	great decrease
What has been the impact on the regularity with which Gaelic is used in the local community	14%	39%	38%	6%	5%
What has been the impact on the regularity with which Gaelic is used in local families?	11%	36%	38%	9%	7%
What is the impact on the attractiveness of the area to tourists?	22%	40%	34%	3%	2%
What is the impact on the level of attachment of local people to their community?	15%	31%	47%	5%	2%
What has been the impact on the level of confidence within your local community?	12%	30%	50%	5%	3%
What has been the impact on the preference of individuals in your community to choose Gaelic services or products where possible?	10%	41%	41%	5%	4%

Considering each of these issues in turn.

1. The regularity with which Gaelic is used in the local community
 Over half of the survey respondents report some increase in the use of Gaelic in their communities as a direct result of developments in Gaelic arts and culture, and quarter of these individuals describe use as 'greatly increased'. These figures support the argument that

there exists strong but complex linkages between cultural and artistic expression and language use. The interview based evidence incorporated into the 1994 study cited the impact that arts and cultural products (broadly defined) had on the perceived relevance of the language, particularly to young people, on its modernity and 'image', on its wider societal acceptance both within and beyond Gaelic speaking areas and on its potential economic relevance both for the individual and the local community. It is highly likely that these factors, amongst others, lie behind the substantial increases in Gaelic use reported here.

As with the impacts considered in section 2, the characteristics of respondents were considered across the range of possible responses. Older individuals, aged over 50 were more likely to cite decreases in levels of use than others. Fluent and near fluent individuals are more likely to report significant increases than those less competent in Gaelic, with slight increases being reported evenly across the sample with the unsurprising exception of non-speakers. The patterns across household measures of language use are all broadly similar, with limited variations in those citing increases across the range of Gaelic only through to minority Gaelic use.

2. What has been the impact on the regularity with which Gaelic is used in local families?

The experience base on which respondents could answer this question is likely to be narrower than that on which they could base their answers to issue 1 above. The proportion reporting increases is still substantial at 47%, with again around one quarter of these describing use as 'greatly increased'.

The characteristics associated with reported increases are very similar to those described under the previous point.

3. What is the impact on the attractiveness of the area to tourists?

17% of the respondents in the survey report that the principal economic activity in which they are engaged is tourist related. In addition, the scale and pattern of tourism in the Western Isles and Skye, typically involves extensive touring, bring a high proportion of the population into contact with tourists. This may add even greater weight to the very high positive impact figures produced in the

survey. 62% report some Gaelic arts and culture having some positive impact on the attractiveness of their area to tourists, with 35% of these respondents reporting that attractiveness had 'greatly increased'.

The perception of Gaelic arts and culture having a positive impact on tourism is much more widely held by respondents under 30 than by others. There appears to be no systematic link between the language competence or background of individuals and the probability that they will perceive a positive link between Gaelic arts and tourism apart from those with no Gaelic competence and a non-Gaelic background.

4 & 5. The level of attachment of local people to their community and the level of confidence within the local community.

The proportions reporting both substantial increases (12% and 15%) and slight increases (30%) in these variables as a result of Gaelic arts and culture are very similar. In addition, the factors associated with reported increases are very similar.

The significant associations found here relate to language competence and background, but the pattern is somewhat different to those reported in the first three issues above. The increased probability of reporting increased attachment to, and confidence in local communities relates to Gaelic speakers who are fluent or near fluent and who live within 'all Gaelic' or 'majority Gaelic' households. Those with lower levels of competence and living in 'minority Gaelic' or non Gaelic households are much less likely to report these positive changes.

6. The impact on the preference of individuals in your community to choose Gaelic services or products where possible

A range of motives may lie behind the decision to purchase Gaelic products or services where possible. These include the central motivation that such products and services best reflect the culture and serve the interests of the Gaelic community. In addition there may be a recognition that such products or services are more likely to be produced locally hence a positive consumer preference would aid

the local economy. It is also possible that such purchases have a partly symbolic significance, underscoring the cultural distinctiveness of the area and acting as a spur to other producers to similarly differentiate their products in a way that reflects local culture.

Whatever the mix of reasons, the act of 'buying Gaelic' where possible has substantial implications for the local economy. The survey suggests that Gaelic arts and culture are having some influence on consumer attitudes on this issue. Over half of those surveyed report that their preference for buying Gaelic has increased as a result of the output of the Gaelic cultural industries. Of this 51% one fifth report their preferences have 'greatly increased' due to these influences.

There are very limited variations in the incidence of these positive changes by respondent characteristic. The probability of citing a great or slight increase is not affected by the degree of Gaelic language competence or background, with only the non-Gaelic speakers unsurprisingly less likely to report positive influences.

Section 4 : Views of Individual respondents on a range of overarching questions regarding the role of Gaelic language, art and culture in the future of their Communities

The impact evidence presented so far in this chapter relates to the current attitudes, beliefs and behaviours of individuals and how these have been shaped by Gaelic artistic and cultural activity. The final set of questions posed mainly concerns views on the future social and economic development of the areas and communities covered in the survey and the perceived role of Gaelic language art and culture in this development process.

Eight statements were offered to respondents and they were asked to indicate the extent to which they strongly agreed, agreed, disagreed or strongly disagreed with them or whether they had no view on the issue. The statements, detailed in Table 4.9 below, are underpinned by the sets of possible interactions between the Gaelic language, art

Table 4.9: Views on the role of Gaelic language, art and culture in the future of the Western Isles and Skye and Lochalsh

	strongly agree	agree	no views	disagree	strongly disagree
The regeneration of the Gaelic language art and culture is essential for the future social development of your own area/ island group	35%	34%	11%	15%	5%
The regeneration of the Gaelic language art and culture is essential for the future economic development of your own area/ island group	26%	34%	15%	18%	7%
The development of the Gaelic language art and culture is making an important contribution to the level of self confidence in your own area/ island group	22%	38%	21%	15%	5%
The development of Gaelic language art and culture is increasing the attractiveness of your area to tourists	23%	42%	19%	13%	4%
The development of Gaelic language art and culture is increasing the desire of young people to live and work in their home area	15%	31%	21%	26%	6%
The development of Gaelic language art and culture is broadening the range of employment opportunities which exist for people locally	22%	45%	13%	14%	6%
If there was reasonably priced tuition in my area I would be willing to participate in Gaelic language classes and/ or traditional music/ dance tuition	15%	33%	30%	16%	7%
Taking local and national factors into account, I am optimistic about the future health and development of the Gaelic language	18%	46%	16%	14%	6%

and culture and the social and economic well-being of the Western Isle and Skye and Lochalsh outlined earlier in this chapter.

As with the other categories of impact evidence outlined above, each statement will be considered in turn covering any respondent characteristics that are significantly associated with levels of agreement or disagreement.

Statement 1 : The regeneration of the Gaelic language, art and culture is essential for the future social development of your own area / island group.

Almost 70% of those surveyed agreed with this statement, a figure that indicates that the language and its cultural manifestations are viewed as a central and necessary element in the on-going development of these island communities. 20% disagreed leaving just 11% of respondents without a definite view on the language-social development linkage.

Variations in attitudes towards this statement are apparent across only those variables relating to language competence and background and the links are complex. Those 'strongly agreeing' with the statement are mainly drawn from those fluent or near fluent in the language, whereas there is a high probability that those 'strongly disagreeing' will have no knowledge of Gaelic. In contrast, on the weaker statement - 'agree' - whether the respondent is fluent or has just 'a few words' appears to have little effect on the probability of their support. However, non-Gaelic speakers are significantly less likely to agree with the essential nature of the social development/ language linkage.

One other characteristic significantly associated with a less positive position on this statement should be noted. Respondents holding University degrees or other higher education qualifications have a significantly lower probability of agreeing or strongly agreeing with the social development linkage. This result is independent of the language background and competence of the individual.

Statement 2 : The regeneration of the Gaelic language, art and culture is essential for the future economic development of your own area / island group.

Support levels for this statement are somewhat lower than those recorded for the social development/language linkage but, with 60% expressing some form of agreement and over one quarter of all respondents strongly agreeing, this result will also be widely welcomed by those supporting or promoting Gaelic. The range of direct and indirect linkages between economy and language were outlined at the beginning of this chapter and this result suggests that in the eyes of the majority of the population of the Western Isles and Skye and Lochalsh these linkages are economically significant for the future of their communities.

Considering variations in responses to this statement across the population, the same pattern of language competence and background appears. Strong views on the validity of the link tend to be positively associated with high levels of Gaelic competence, a home background that heavily uses the language and a tradition of being brought up in an all Gaelic household. A highly disproportionate number of those expressing strong negative views come from 'all English' home backgrounds and report no competence in Gaelic. Weaker positive or negative support is much more evenly spread across the population, with the shifts in proportionate support occurring only amongst those with no Gaelic competence.

A number of other variables have a significant association with views on this linkage. Those working in tourism related activities (17%) and those working in the cultural industries (7%) are more likely to report agreement. Income levels and skill levels have a more specific negative impact that applies only to those with no Gaelic. This means that in general those reporting no Gaelic are substantially less likely to support the proposition that Gaelic language art and culture have an essential economic role to play, and that within this group of non-Gaelic speakers the higher the income level and skill category (especially those with managerial or professional status) the greater the probability of opposition to this proposition.

Statement 3 : The development of the Gaelic language, art and culture is making an important contribution to the level of self-confidence in your own area / island group.

General levels of agreement of 60%, with over one in five of those surveyed strongly agreeing, is again a result that is likely to be welcomed by advocates of Gaelic development. The concept of self confidence is extremely difficult to capture in an exercise such as this, and the nature of the events and behaviours that might prompt individuals to report an increase in self confidence are very diverse. Thus survey results on an issue like this have to be treated with even more caution than is normally afforded to data generated by postal surveys. Given this, the results do suggest that the important symbolic and enriching roles often played by artistic and cultural activity are influencing general attitudes towards future prospects in the island groups surveyed.

As usual, these impacts are not reported evenly across the survey but on the key language variables the differences are less marked between those fluent or near fluent on the language, those with lesser linguistic competence and those with no Gaelic. As above, strong positive or negative views on this statement are more likely to be reported by respectively fluent/near fluent individuals and by those with no Gaelic. However, across those agreeing with the link between arts culture and self confidence (almost 40% of the total) there is no language pattern with those without Gaelic almost as likely as those with the language to respond positively.

The link between both skill levels and income levels and the probability of a negative response that was reported above under statement 2 with respect to non-Gaelic speakers also applies here. Higher skilled, higher earning no-Gaelic speakers are more likely to be negative than other non-Gaelic speakers.

Statement 4 : The development of the Gaelic language, art and culture is increasing the attractiveness of your area to tourists

The questions covering the direct impacts of Gaelic art and culture on tourism and on general employment opportunities (reported below) explicitly address two of the key mechanisms that link minority language and regional economic development. The best people to ask about the impact of Gaelic art and culture on tourism are actual or

potential tourists. Despite this there is value in asking the views of the general population if their judgments are likely to be informed by contact with tourists to their area. There is no way of establishing the extent of this contact across the surveyed individuals, but as 17% work directly in tourism and as many of the tourists to Skye, Lochalsh and the Western Isles tour extensively it is likely that many respondents will have been able to form a judgment on the range of factors attracting visitors to their communities. These are likely to include both specific events or attractions the tourist could enjoy (such as the Feisean, An Lanntair, Aros Heritage Centre), the general informal experience of living in an area with a distinctive culture, and the image of the area portrayed by cultural products (such as television programmes) stimulating interest and prompting a visit.

Almost two in three (65%) agree that Gaelic arts and culture is positively raising the attractiveness of their area, with only 17% disagreeing. The scale of this response suggests the existence of widespread anecdotal evidence underpinning respondents' views.

Considering variations of response on this issue across the survey population reveals much weaker patterns of association. In general, a sceptical view on this issue is heavily concentrated in non-Gaelic speaking individuals often from 'all-English' households. There is very little variation across the 90% of the population who report they have some Gaelic (even if it is only a few words) at the level of 'agree'. But again, those 'strongly agreeing' are more likely to possess a high level of competence in the language.

It is also noteworthy that those whose main economic activity is tourist related are significantly more likely to report a positive impact.

Statement 5 : The development of the Gaelic language, art and culture is increasing the desire of young people to live and work in their home area.

This is the only statement posed in this part of the survey that did not receive the agreement of more than half of the surveyed population. 46% agreed in general, with one third of these (15%) strongly agreeing. One third disagreed and one fifth held no view on this proposition.

There are a limited number of variables that reflect a clear pattern of responses on this issue, and they are all language related. The pattern is broadly the one reported above but with lower levels of positive response under each category. Non-Gaelic speakers are still significantly more likely than others to respond negatively, and fluent speakers are significantly more likely to strongly agree with the proposition.

Statement 6 : The development of the Gaelic language, art and culture is broadening the range of employment opportunities which exist for people locally.

Considering that all Gaelic arts and culture related jobs beyond the Western Isles and Skye and Lochalsh are excluded from this statement, the fact that over two-thirds (67%) agree or strongly agree with it indicates a very widespread perception that the local labour market implications of Gaelic arts and culture is positive. Both job numbers and job quality in the study area have been affected.

As in the case of Gaelic arts and culture influencing the attractiveness of the area for tourism, the variations of response across the characteristics of the respondents is relatively weak but still significant and again relates only to language variables.

20% of respondents disagree with the statement and a disproportionate number of these come from non-Gaelic speaking households or are non-Gaelic speakers. This holds particularly for those who strongly disagree. Variations across those agreeing are weak and again it is important to note that not all non-Gaelic speakers respond negatively to such statements.

Statement 7 : Taking local and national factors into account, I am optimistic about the future health and development of the Gaelic language.

This is the only impact question that does not ask the respondent to consider the specific impact of Gaelic language art and culture on behaviour and attitudes. Responses to such a general question are likely to be informed by the full range of Gaelic developments from the use of the language in business to Gaelic medium education.

64% report that they are optimistic about the future of Gaelic, with almost one in five of the population (18%) noting strong optimism. Considering the widespread perception that the language was in crisis as recently as the early 1980s and the fact that the 1991 population census figures indicated a further fall in the number of Gaelic speakers this suggests that the Gaelic language development initiatives introduced or further developed in the 1990s have had a substantial impact on local perceptions of the prospects for the language.

Variations by respondent language characteristics throws up the pattern evident across many of the other statement responses outlined above. Strong positive views are much more likely from fluent or near fluent Gaelic speakers and strong negative views from English monoglots. There is limited variation across those agreeing with the statement who possess some Gaelic, but those with no Gaelic are less likely to agree. These patterns of characteristics are mirrored across those responding negatively to the statement.

Chapter 5 : The Employer Survey

The consumption of Gaelic arts and cultural products and services derives from 2 sources, individual citizens and organisations. Some of these organisations are in the public sector and can be of great significance to producers of specific categories of Gaelic products, such as those specialising in the preparation and production of learning materials for Gaelic medium schools. The factors lying behind the public sector demand for these Gaelic products and services reflect public policy priorities and funding decisions at local and national Government level. A consideration of these factors is beyond the scope of this study which concentrates on the demand for these products by private sector firms. Understanding why private organisations buy such products and services, how they are used and what their impact is on the broader objectives of the firm assists in building an overall picture of the factors driving the growth of Gaelic arts and cultural activities and their overall social and economic significance.

As noted in the introductory chapter, a random sample of firms employing 10 or more individuals was selected to investigate these issues and 85 extended interviews were completed. As far as can be established these firms are broadly representative of non-micro small and medium sized enterprises in the area.

The information sought from the surveyed firms fell under two main headings reported in sections 2 and 3 below. The first covered the use of Gaelic arts and cultural products and services by firms in the process of producing or supplying their main economic outputs. The second covered the views of the business community on a wide range of issues that potentially link Gaelic language, arts and cultural development with the broader economic development of the area.

Section 2 : The use of Gaelic arts and cultural products and services by firms in the delivery of their products and services

The central concept lying behind this aspect of the investigation is product differentiation. All producers compete on the basis of price and non-price factors, such as perceived quality, brand image, after sales service, and so on. The mix and relative importance of price and

non-price elements is dependent on a wide range of factors relating to the intensity of competition operating in the market, the nature of the product and the associated ease with which each producer can differentiate their own outputs. Development agency policy and the activities of many producers in the Highlands and Islands indicates that that culturally distinct features and regional or sub-regional images are possible sources of competitive distinction or differentiation for products from the region.

Such arguments underpin the concept of cultural tourism and the brand imaging of whisky, tweed etc. They apply equally to winning a competitive advantage against products from other regions of Britain and beyond and winning a competitive advantage against local competition, although the nature of the differentiation is likely to vary depending on the market. For example, the bi-lingual packaging and marketing of a whisky brand may gain it a competitive advantage if this image enhances its attraction to potential customers. More locally, bi-lingual signage and menus in a restaurant may convey the prospect of a more distinct experience to tourists and help the establishment win a larger share of the market. One of the aims of the business survey reported here was to establish the extent to which arguments such as these are considered by the business community, whether they influence business behaviour, and if so, what impact this has on the performance of firms.

The specific questions posed on these issues in the questionnaire asked respondents to identify and describe any role played by Gaelic arts and cultural products or services in the operation of their business, the rationale for their use and any business impacts arising from their use.

28 of the 85 organisations (33%) cited at least one form of activity. These can be clustered under 5 headings; the deliberate hiring of Gaelic speaking staff; the use of Gaelic signs, bi-lingual documents, letters, menus etc; the use of Gaelic language or bi-lingual adverts; the use of Gaelic music for main entertainment or for background to the ambiance of an establishment; and the sponsorship of Gaelic events.

Considering each of these activities in turn.

The targeted hiring of Gaelic speaking staff: This was reported by 12 employers, all of whom cited customer preference as the dominant reason for using this hiring policy. Only one reported a substantial positive impact on their business as a result of this policy, with all other noting a modest positive effect. No systematic links were found to the size of the &Lin, its location or the background characteristics of the owner/manager (including Gaelic competence).

The use of Gaelic signs, menus, business letters, documents etc: The extent to which Gaelic signage, documents etc. is used varies substantially amongst the 16 firms (18%) noting some use. Amongst those reporting its limited use all cited customer preference as the main rationale. The impacts on business were reported as substantial in 40% of these cases and limited in the remainder.

A more extensive use of Gaelic signs, documentation etc. was reported by 5 firms, all of whom noted that the adoption of this practice had boosted their trade. Again the main rationale was customer preference but in these cases the ability to ascertain the Gaelic competence of their customers or targeted potential customers was also cited as the key enabling factor and a pre-requisite for the use of more sophisticated Gaelic language communications.

It is unsurprising that the all of the respondents citing the use of more advanced forms of Gaelic communications, such as business letters, were personally fluent in the language.

The use of Gaelic in advertising etc: Only 4 firms (5%) reported this activity and in all cases it forms part of a range of activities including the use of Gaelic signs etc. All four firms explained the use of bilingual adverts as a direct attempt to attract Gaelic speakers and those sympathetic to the development of the language. Three of the four noted that in their judgments the adverts had been successful in boosting their turnover. There was no industrial, size or locational clustering of these few firms and the linguistic and other characteristics of the owner/manager are not systematically associated with the decision to advertise in Gaelic.

The use of Gaelic music as main entertainment (not directly charged for) or as background: In 8 of the 10 firms citing the use of Gaelic music this is the only activity reported. The reasons given for its use were interrelated and in the majority of cases (7) involved an attempt to gain some competitive advantage over rival establishments and reinforce the image of the establishment the proprietor wished to convey. The other 3 respondents simply noted that their use of such music was a direct response to demand. Around 40% of these firms noted that the impact of providing this music was very substantial (in all cases the music provided was live entertainment with no direct entry charge). In other cases where recorded music provided a backdrop in the establishment the impact was judged to be limited or non-existent.

In terms of industrial distribution, all except one firm operate as hotels or as cafe/restaurants. 70% of the respondents using music were non-Gaelic speakers and 60% are incomers to the area.

Sponsorship of Gaelic events etc: Although not strictly a Gaelic activity used by firms in the delivery of their products, sponsorship of Gaelic events fits in with the underlying proposition being investigated. Four firms report offering sponsorship and all explain it in terms of improving the image of their firm, reinforcing its local credentials and underlining its commitment to the area. Its discernible impact, as judged by three of the four, is simply to raise the profile of the firm. In three out of four cases the owner/manager is fluent or near fluent in Gaelic, is native to the area and all four firms are large in regional terms.

Reasons for not using Gaelic arts and cultural products in the process of producing or supplying output
As noted above 28 organisation used Gaelic arts and cultural products in their delivery processes. Those who reported non-use were asked whether, given their line of business, it was possible to engage in these kinds of activities. 40 of these 57 (70%) reported that it was possible and these firms were asked to identify the main reason for their non-use decision and what changes (if any) would lead them to reconsider their decision.

The range of reasons for non-adoption of Gaelic arts and cultural products in delivery (broadly defined as above) can be split into two groups, those that relate to the business position of the firm and those that relate to the individual attitudes or competencies of the owner/manager.

Under the first heading 27% of respondents reported no perceived demand for such activities, a further 6% felt that while the activities may bring some benefit to the firm they were unlikely to be cost effective, and 12% reported that they would be unable to undertake such initiatives without clearance from their parent company.

Under the second heading, 40% of respondents reported that their own Gaelic competence was a major reason for non adoption, 9% stated that they had simply never thought of adopting such practices and 6% reported that they were hostile to Gaelic language development and saw no place for it in business.

Responses to the question regard the types of change that would lead to a reconsideration of their decision were almost uniform. Over 80% mentioned that clear evidence of demand on the part of customers or potential customers would be needed before they would change their position.

The industrial distribution of the 40 respondents who noted the possibility of using Gaelic arts and cultural products in delivery of their own outputs is entirely dominated by hotels and catering establishments which make up 80% of the total.

Section 2 Views of the business community on possible links between Gaelic arts and culture and local economic development

The second major issue covered in the business survey concerns the views of the business community on a wide range of issues that potentially link Gaelic language, arts and cultural development with the broader economic development of the area.

The rationales underlying the choice of issues have already been elaborated in earlier chapters but the views of the business

community are clearly informed by a greater exposure to, and involvement with, the pressures impacting on local economic development than is the case for many of the consumer survey respondents.

Views were sought on the impacts, if any, of the general revival of interest and expenditure on Gaelic related activities on the local economy. Respondents were asked their views irrespective of whether their individual business was involved in producing or supplying Gaelic related products or utilised them in the production or delivery of their main output.

The issues addressed can be grouped into three categories; those directly relating to general business development in the Western Isles and Skye and Lochalsh; those relating to the labour market impacts of Gaelic language and cultural development; and those relating to broader social issues which, in most cases indirectly impact on the future development of the local economy. These are considered in turn.

The most obvious general observation on the results presented in table 5.1 is that the impact of Gaelic language art and culture is viewed as either neutral or positive in the eyes of the local business community. No negative impacts were recorded on any issue and the proportion of positive impacts are very high on all except the issue of regional image.

Considering each of the dimension in turn.

Regional image: Only one quarter of respondents felt the region's image was positively enhanced by these activities. There was no difference on this issue between the business view in Skye and Lochalsh compared to the Western Isles, nor by establishment size or other business or personal variables.

Attractiveness to tourists: There is very wide support for the proposition that Gaelic art and culture enhances the attractiveness of the area to tourists, with over two third of respondents reporting a very positive or a positive impact. A clear Skye/Western Isles split occurs on this issue, with only 50% of Skye businesses taking a

Table 5.1: Business views on the general impact of the revival of Gaelic language art and culture on issues affecting the local economy

	very positive effect	positive effect	no effect	negative effect	very negative effect
The regional image of the area for business		25%	74%		
The attractiveness of the area for tourists	9%	59%	32%		
The ability of local businesses to market products as 'unique' or distinct	12%	39%	50%		
The range of business opportunities available in your area	3%	44%	53%		
The ability of local businesses to sustain themselves		43%	55%		

positive view compared to over 75% of those in the Western Isles. The distribution of views across the industrial sectors is fairly even but it may be noteworthy that all respondents citing the impact as very positive are in the hotel or restaurant business.

Ability to market a 'unique' image: The proposition that Gaelic arts and cultural developments might assist in establishing and reinforcing the distinctiveness of the area, a distinctiveness that could be exploited by businesses in marketing their products, is one of the central channels linking language development to local economic development. Fractionally over half of the businesses surveyed supported this as a possibility, with a major difference between those located in Skye /Lochalsh and those in the Western Isles. In the former area 70% reported a positive or very positive effect in contrast

to 40% in the latter. The only point worth drawing out of the industrial distribution of views is that hotels, restaurants etc. are the least likely category to report a positive or very positive impact, with 60% reporting the Gaelic cultural development had 'no effect' on marketing opportunities.

The range of business opportunities: Slightly under half of all respondents identify a positive impact on business opportunities arising from Gaelic linguistic and cultural development. Again there is a substantial Skye and Lochalsh/Western Isles difference with 80% of businesses located in the former area reporting positively against 35% in the Western Isles. This is perhaps related to the fact that a much high proportion of business people who are incomers to the area are positive (60%) compared to individuals who are native to the area (40%).

The ability of local businesses to sustain themselves: This is positively influenced by Gaelic cultural developments according to around 45% of respondents, and no pattern is evident by size, sector, location etc.

The views of the business community regarding the general impact of Gaelic language, arts and cultural development of labour market issues is, if anything, more positive than their views on general business impacts. These two sets of impacts are, of course, closely related.

Almost 7 in 10 see job opportunities for the young enhanced, almost 8 in 10 see job opportunities for Gaelic speakers enhanced and almost one half (46%) see some increase in opportunities for non-Gaelic speakers. These opportunities are increasing the propensity of individuals to return to the area to seek employment according to half the sample and 56% report that the quality of jobs now available in the community has improved as a results of Gaelic language and cultural developments.

Table 5.2**Business views on the impact of the revival of Gaelic language, art and culture on the local labour market**

	very positive effect	positive effect	no effect	negative effect	very negative effect
Local job opportunities for the young	10%	59%	31%		
Local job opportunities for Gaelic speakers	20%	59%	22%		
Local job opportunities for non-Gaelic speakers		46%	54%		
The number of people now willing to return to your community to seek employment	5%	44%	51%		
The quality of the jobs now available in your community	19%	37%	44%		

These very positive results are not spread evenly across the sample. There are two dimension across which there are systematic differences of perception, namely location and the respondents level of competence in Gaelic.

There is a substantial difference in perceived impact between Skye and Lochalsh and the Western Isles, with the proportion of businesses in the former area reporting a positive impact consistently and substantially below that in the latter. This applies to the issues of job opportunities for young people, for Gaelic speakers and for non-Gaelic speakers. There are no location based differences on the issues of returners or job quality. These patterns undoubtedly reflect the distribution of jobs directly created in the North West by Gaelic

related arts and cultural activities. These are principally centred in Lewis.

There are also differences between those respondents with some Gaelic (fluent, near fluent and those with limited ability) and non-Gaelic in their perceptions across all these labour market issues. The proportion of positive responses amongst Gaelic speakers is consistently higher than amongst non-speakers. This presumably reflects, amongst other factors, a greater knowledge and awareness amongst speakers of job opportunities where Gaelic is essential or an

Table 5.3: Business views on the impact of the revival of Gaelic language, art and culture on social/attitudinal development

	very positive effect	positive effect	no effect	negative effect	very negative effect
The willingness of people to start up businesses		26%	74%		
The desire of people to live and work within their local community	5%	63%	32%		
The attractiveness of the area to incomers	4%	62%	33%	1%	
The attachment of local people to their community	8%	60%	33%		
The level of self confidence within your local community	11%	56%	32%	1%	

The final set of issues on which the business community were asked to comment relates to the possible impacts of Gaelic language art and cultural developments on social and attitudinal issues that indirectly impact on economic development.

The results show a broadly consistent pattern with around two thirds of respondents reporting positive impacts on the desire of their fellow citizens to live and work in their community, on the attachment now felt to the community, to the level of self confidence within these communities and to the attractiveness of their area to incomers. The only issue provoking a much lower positive response relates to the willingness of individuals to start up businesses, where only one quarter of the sample perceived any positive impact.

There are a limited range of factors that are associated with varying responses on these issues. One of the strongest relates to sub-regional variations on the impact of Gaelic cultural development on the willingness to start businesses. A much higher proportion of Skye based respondents (53%) were positive than Western Isles respondents (19%). There were also modest locational differences in the proportion of businesses citing a positive impact on attachment to community and self confidence. In both instances the Western Isles fraction is higher.

Unsurprisingly, those business respondents speaking Gaelic were more likely to report positive impacts on the social issues of desire to live and work in the area, attachment and self confidence than non-Gaelic speakers.

Chapter 6 : Summary and Conclusions

The aims of this study were elaborated in the introductory chapter. In summary, they involve taking the Western Isles and Skye and Lochalsh as the study area and firstly, mapping the levels of consumption of the full range of Gaelic arts and cultural products and services across the general population and the business community; secondly examining the enabling and constraining factors that will, in part, shape changes in these levels of consumption; thirdly, establishing the impact of this consumption on the current behaviour and attitudes of individuals and the business community with respect to the links between Gaelic arts and culture and a range of economic, social and linguistic variables; and fourthly, establishing the views of respondents on the future relationship between the development of the Gaelic language, art and culture and the social and economic development of their communities.

A consideration of the first two of these aims produced a highly diverse picture of provision across a fourfold categorisation of Gaelic artistic and cultural activities (Live events; Products; Television; Radio). The range and variety of factors that are associated with consumption levels and changes in consumption allow no useful generalisations to be made. Hence conclusions on aims three and four only are presented below in sections 6.1 and 6.2, followed by some general observations in section 6.3.

Before elaborating these conclusions it is important to add a note of caution based on the methodology adopted in this study. Three main data sources were used. The first consists of the quantitative and qualitative evidence generated in the 1994 study in to the economic of Gaelic language development (Sproull and Ashcroft; opt cit.), the second was generated by a large scale postal survey, and the third by an extensive telephone interview survey of businesses.

The earlier study provided, *inter cilia*, extensive but non-systematic evidence on the role of Gaelic arts and culture as a significant driver of change in attitudes towards the social and economic relevance of the language. This evidence was drawn from the business community, senior personnel in language and economic development bodies and all secondary school children in years 4 to 6

across five schools in the area. The exact role of Gaelic artistic and cultural activities in economic and social development was not systematically investigated and it is the shape and significance of these potential linkages that forms the central research question addressed here.

A comprehensive investigation of these linkages would require a major multi-disciplinary undertaking. The results reported here take our understanding of the scale and significance of these linkages forward but provide less robust evidence on the actual processes that underpin them. The evidence available on process is drawn from the extended interviews with the owners and managers of local businesses.

In general, survey evidence must be treated carefully, particularly if the issues addressed are relatively complex. However, given this note of caution, the scale of the survey exercises reported here, the representative nature of the survey respondents, and, critically, the logical consistency of results across a very wide range of questions and issues allows substantial confidence to be placed in the results.

Section 6.1 : The impact of consumption of Gaelic arts and cultural products and services on the perceived links between Gaelic arts and culture and economic, social and linguistic variables.

Evidence on impacts fall under two headings. The first relates to views on the links between Gaelic arts and cultural activities and the economic development of the area. The second covers views on the links between Gaelic arts and cultural activities and the use of Gaelic, its future health and its role in education.

The nature of the economic linkages

Considering firstly the links between Gaelic arts and cultural activities and economic development. These can be characterised as falling on a range that varies from very direct, highly visible and exclusively economic impacts, through to less direct effects, often with a social development dimension, that have a progressively less well understood influence on economic decision making. These linkages can be presented under two categories.

Category 1 embraces direct, highly visible and well understood linkages. These include firstly, labour market impacts. These operate via the creation of jobs, the raising of average job quality, a widening of the range of jobs in local labour markets and, as a result, an improvement in the prospects of developing a career within the area.

Secondly, increasing the attractiveness of the area for tourists which in turn supports or creates employment and income.

Thirdly, creating business opportunities via offering the chance to exploit new opportunities in the creation of products and services, via offering the opportunity to market products/services as distinct or unique, and via offering the opportunity to benefit from any general increase in the level of economic activity directly or indirectly associated with Gaelic arts and cultural activities.

Category 2 linkages are indirect and are mediated through social change which in turn impacts on economic variables. These include firstly, the impact of Gaelic arts and cultural activities in reducing out migration and/or encouraging returners by influencing the quality of life and attachment to the area. This has implications for the skill pool in local labour markets and may have an impact on entrepreneurial behaviour in the area.

Secondly, the enhancement of self confidence in the community by influencing the perceived value of Gaelic cultural distinctiveness within and beyond the Western Isle and Skye and Lochalsh. This also may have an impact on entrepreneurial behaviour in the area, influencing the willingness to start businesses and so on.

Evidence on the direct linkages

Both the individual and business surveys provides very strong support for the view that Gaelic arts and cultural activities are having a very significant impact on the quality and quantity of labour market opportunities.

On the range of job opportunities, over two-thirds of the general population and almost 70% of the business community report a positive or a very positive impact. On the quality of job opportunities in the local labour market, 56% of the business community report a

positive or very positive impact. On the distribution of the job opportunities across Gaelic and non-Gaelic speakers, almost 80% the business respondents took the view that these had improved for Gaelic speakers, with 46% perceiving an increase in opportunities for non-Gaelic speakers. These latter jobs reflecting the indirect impacts of Gaelic arts and cultural spend on the general level of business in the islands.

These positive views on the link between Gaelic artistic and cultural activities and job opportunities and job quality show very limited variation across the respondents to the two survey. Only two points stand out. Firstly, there is a sustained split in perceptions between the Western Isles and Skye and Lochalsh on all issues relating to job opportunities (but not job quality), with Skye and Lochalsh residents and businesses reporting a much less positive impact in their area than their counterparts in the Western Isles. This is a predictable reflection of the geographical distribution of jobs directly associated with the recent growth in Gaelic arts and cultural activity.

The other systematic variation across responses occurs by Gaelic competence. The split in perceptions once again occurs between those with some Gaelic, no matter its level, and those with no Gaelic. A significantly smaller proportion of the latter group report positive impacts. Explanations for this may lie in variations in awareness regarding the scale and quality of Gaelic arts related employment and / or underlying attitudes amongst non-Gaelic speakers that are sceptical or hostile to its emerging role in the study area.

The second direct linkage noted above relates to Gaelic artistic and cultural activities increasing the attractiveness of the area for tourists, a process which would, in turn, support or create employment and income in the area.

As on the labour market link, the survey evidence supports the view that this is a significant and substantial link. An almost identical proportion of the general population and the sampled business community (65% /66%) hold the view that Gaelic arts have a positive or very positive impact on the attractiveness of the area to tourists.

Those in the business community supporting this proposition are much more likely to operate in the Western Isles (75% positive or very positive) than in Skye and Lochalsh (50% positive or very positive). These positive responses are also significantly higher amongst both businesses in the hotel and catering sector, and amongst the 17% of surveyed individuals who report their main economic activity is tourist related.

The other significant variable on this issue is age. Individuals aged 30 or under are much more likely to report positive or very positive impacts than others. The frequently occurring split in the sample between Gaelic speakers of any competence and non-speakers also occurs on this issue but the differences in perceptions between these two groups is less than occurs across the other main impact issues.

As previously noted, the ways Gaelic artistic and cultural products and services influence tourism is both by raising awareness and appreciation of the area amongst potential visitors, mainly via Gaelic television and products such as CDs, poetry books etc, and by enhancing the quality of the tourist experience when the visit occurs, a process that relies heavily on the range of activities categorised as 'live events'. There is no way of establishing the relative contribution of these various activities on the basis of the data available in this exercise.

The third and final category of direct linkage identified relates to the impact of Gaelic artistic and cultural activities on business opportunities. These opportunities arise either via the creation of new products or services, or via new marketing strategies exploiting cultural distinctiveness, or via the general increase in local economic activity arising directly or indirectly for output and employment associated with Gaelic arts and culture.

Questions on these issues were addressed only to the business community, and broadly speaking, close to 50% of respondents were of the view that these opportunities have been positively or very positively enhanced in the area. Specifically, 47% reported positive on new product/service opportunities, 51% on new marketing opportunities and 46% on the improved sustainability of business as a results of the enhanced economic activi

There is only one sustained split across respondents on these issues and it is again by location. The proportion of Skye/Lochalsh businesses that agreed with the view that new opportunities were created exceed those in the Western Isles by 45% (80% to 35%). A similar variation emerged on marketing opportunities, with Skye and Lochalsh businesses recording 70% positive, against 40% in the Western Isles. When the characteristics of these managers/ owners was considered it was found that incomers to the area are 50% more likely than natives to appreciate the business opportunities referred to above (60% incomer/40% native).

One other result should be reported here although it does not fit strictly with the categorisation of impacts presented at the beginning of this section. Respondents to the individual survey were asked if Gaelic artistic and cultural activities had increased their preference for buying Gaelic products or services where possible, 51% reported that it had.

It is unclear what this means at this early stage of product differentiation by language (there is very little Gaelic or bilingual packaging, labeling, advertising etc.). But if this process is sustained then initially some local businesses may be in position to exploit this preference but in the long run the process would place pressure on all organisations to reflect the linguistic preferences of local consumers.

Evidence on category 2 indirect linkages

As noted above, these linkages are indirect and mediated through social change which in turn has an impact on economic variables. Specifically they relate to the possible impact of Gaelic arts and cultural activities on population growth and retention and to possible impacts on individual and community confidence.

On the impact of Gaelic arts and culture on population retention, the individual survey shows 46% believe such activities have increased the desire of young people to live and work in their home area. This is reinforced for the whole population by a similar proportion of the individual survey respondents reporting that Gaelic arts and culture had increased the general attachment of local people to their

communities. 68% of business survey respondents report the same perception.

On the impact of Gaelic arts and culture on population growth, half of business survey respondents reported that Gaelic arts and culture had had a positive or very positive impact on the number of people now willing to return to their island communities to seek employment.

Finally on this issue, two-thirds of the business community report that Gaelic arts and culture have had a positive or very positive impact on the attractiveness of the area to incomers. (A high proportion of the business community (33%) are themselves, incomers). It is likely that these last two results reflect the pulling effect of both job opportunities and 'quality of life' issues.

Variations across the survey respondents on this issue is again limited, but the Gaelic language competence of the respondent is significant in a somewhat different pattern from that most commonly identified in the surveys. The probability of identifying a very positive or positive link between Gaelic art, culture and a general attachment to place and an increased desire on the part of young people to live and work in the home area is significantly higher for fluent or near fluent speakers of the language than for other less able speakers. This probability falls further and very substantially between the less able in Gaelic and those with none of the language.

Turning to the other indirect linkage. 60% of the population and 67% of the business community are of the view that Gaelic artistic and cultural activity is increasing levels of confidence within communities. The perception of a strong linkage is much more likely to be held by individuals who are fluent or near fluent in Gaelic, with strong disagreement coming mainly from non-Gaelic speakers.

One of the means by which increasing individual or community confidence translates into economic impacts is via the greater probability of confident individuals starting new businesses, (confidence is, of course a necessary but not a sufficient condition for a business start up). The business community were asked directly whether they perceived the revival of interest in Gaelic arts and

culture as having had any positive impact on the willingness of people to start up businesses. Just over one quarter agreed it had. The break down of these respondents by location reveals that 53% of the Skye /Lochalsh business respondents reported positively as against 19% in the Western Isles.

Concluding comments on economic linkages

The surveys give evidence of the scale and pattern of these perceived impacts and offer insights into the underlying processes. The evidence is very strong that the Gaelic arts and cultural sector within the Western Isles, and to a lesser extent, Skye and Lochalsh, has strong direct impacts on employment numbers, job quality, career options, the enhancement of tourism and the creation of business opportunities. Currently these business opportunities are under exploited.

The indirect impacts via attachment to place, the desire of young people to continue to live and work in their home area, and community self confidence are all reported by high proportions of the individual survey respondents and the business community (typically between 45 and 65%). The extent to which these attitudinal and behavioural changes translate into changes in economic behaviour is unclear from the evidence available here (There was no expectation that this exercise would be able to adequately address these issues due to limitations imposed by the methodology).

What is apparent is that there exists a positive feed-back process between the direct impacts, (new job opportunities directly in Gaelic arts and cultural activities, in tourism and in other exploited business opportunities), and the indirect effects (returners to the islands, young people wishing to remain and work if possible, rising confidence, incomers attracted to the area). The direct labour market and other impacts are likely to act in a manner that facilitates the desires that lie behind these indirect effects.

As elaborated in chapter 4, the survey provided evidence on linkages between Gaelic artistic and cultural activities and a range of non-economic variables such as language use and attitudes to Gaelic medium education. The academic background of the authors does not equip them to offer an analysis of these results. However, what is

Gaelic, half English'. This result is unsurprising as what is being captured here are changes in attitude towards Gaelic medium education. Presumably a high proportion of those already convinced of the appropriateness of Gaelic medium education are fluent speakers, individuals who would therefore record no change in attitude.

Section 6.2 Perceptions of the future relationship between the development of the Gaelic language, art and culture and the social and economic development of Western Isles and Skye and Lochalsh

This section considers the results of two overarching questions that seek views on the respondents perception of the future relationship between Gaelic language, arts and culture and the economic and social development of the area. A third general question covering respondents views on the future health of Gaelic is also considered.

60% of respondents agree or strongly agree (34%+26%) that the regeneration of Gaelic language art and culture is essential for the future economic development of their own area or island group. As detailed in chapter 4, attitudes with regard to the essential nature of Gaelic development for economic development split by Gaelic language competence, with non-Gaelic speakers very unlikely to agree with the proposition. Similarly, those aged 35 or less are significantly more likely to support this proposition than those in their 40s and 50s. Within the non-Gaelic speaking group the higher the income level and skill status the greater the likelihood that the proposition will be opposed.

69% of respondents agree or strongly agree (34%+35%) that the regeneration of Gaelic language art and culture is essential for the future social development of their own area or island group. Variations across respondents are less extensive and marked on this issue. Fluent and near fluent speakers of Gaelic are much more likely to strongly agree with this proposition, but those recording a simple 'agreement' are evenly spread across all level of Gaelic competence. Only the non-Gaelic speakers disagree with the proposition in any numbers.

The final statement put to respondents in the individual survey concerns their views on the future of the language. 64% are optimistic or strongly optimistic (46%/18%) about the future health and development of the Gaelic language. Again, those strongly optimistic tend to be fluent speakers, with the distribution of those reporting simple 'optimism' being spread fairly evenly across all other speakers irrespective of competence.

Section 6.3 : General Observations

In this final section a number of general points are made drawing on the results of the earlier study and the material covered in this report.

(1) The Centrality of Gaelic arts and cultural activities in the Gaelic language development process

This study was prompted by the fact that in the detailed field work for the research published in 1994 into the economics of Gaelic development Gaelic arts and cultural activities were widely cited (especially by the young) as validating an increased interest in the language. The image of the language both within and beyond 'heartland' areas was being positively changed, especially by Gaelic television and Gaelic music. This increasing modernity of the language was complimented by the perception that Gaelic arts and culture offered emerging career opportunities within and beyond the Inner and Outer Hebrides.

The extent to which these early perceptions have been maintained and deepened is clearly evident from the survey evidence presented above. The scale and representativeness of the individual survey inevitably produces great diversity in the knowledge and experience used by respondents as background to inform their opinions. The fact that this very broad base of experience across the area produces such high levels of support for the central propositions considered here lends considerable authority to the results.

Gaelic arts and cultural activities appear to be making a substantial contribution to many of the main objectives set by public agencies dedicated to economic, social and linguistic development in the area. These include direct and indirect employment and output creation,

the encouragement of tourism, the creation of business opportunities, the raising of self-confidence and local attachment in an area historically plagued by out-migration, stimulating a greater use of the language in domestic and social spheres and prompting greater interest in (and perceived relevance of) Gaelic medium education.

It must not, of course, be forgotten that these impacts arising from Gaelic arts and cultural activity are secondary to its central purpose which is to engage in creative activities that give expression to a distinct set of inherited ideas beliefs and values.

(2) Interdependence in Gaelic language development: Education and the Arts and Culture

Directly related to the point made above is the observation that the scale of interactions occurring between the two main strands of Gaelic language development - education and the arts and culture, are extensive and complex. There are numerous examples noted in this report that indicate high levels of interdependence. For example, the positive impact of Gaelic arts output (especially live events and television) on the attitudes of the relatively young towards Gaelic medium education and an enhanced the role of Gaelic language and art in the broader educational process. This operates on two levels by increasing the cultural relevance of learning Gaelic and increasing its economic relevance given emerging labour market opportunities.

The increased levels of use of the language and the very high number of individuals who report that they would like to learn more Gaelic (62% of all survey respondents) are also significantly influenced by the quality and quantity of outputs from the Gaelic cultural industry.

On the other side of this relationship lie the well understood needs of those involved in the supply of Gaelic arts and cultural products for linguistically able individuals to engage in the creative process of production and for as large an audience as possible able to fully appreciate Gaelic output.

(3) Emerging splits in perceptions regarding the economic and social role of Gaelic

One of the most consistent patterns emerging for the surveys was the manner in which respondents split according to their levels of Gaelic competence on a very wide range of issues. Gaelic competence in the individual survey was reported in three bands, those fluent or near fluent, those reporting very limited ability in the language (very simple conversations/a few words) and those with no Gaelic. Throughout the survey these respondents split in their perceptions of the main issues addressed along the line of those with any Gaelic taking one position and those with no Gaelic taking another significantly less positive one.

This pattern of response is likely to be a source of satisfaction to those supporting or promoting the language as it indicates that the broadly positive views noted above with respect to Gaelic and its current and future roles are shared across the spectrum of Gaelic speakers from the fluent to the beginner.

However, there may be other implications of these variations in perceptions which have more complex social consequences in the study areas (especially the Western Isles). The results support the view that there is a minority group (around 10% of the population) that are much less likely to see the Gaelic language, art and culture as playing a key role in the areas social and economic development. When the characteristics of these individuals are compared to the population as a whole they are found to be very heavily represented at the upper ends of the income scale, are much more likely to be in managerial or professional occupations, to be self-employed and are more likely to possess higher education qualifications. In addition, a very much smaller proportion express a desire to become involved in Gaelic tuition than occurs in the population as a whole.

In other words, non-Gaelic speakers appear to be heavily represented in the upper reaches of the professional, business and public sector hierarchies, areas where many decisions affecting the evolving role of the language will be taken. The implications of this situation for the process of Gaelic language development are unclear. But as a general observation, in any linguistic situation in which there is a trend to bilingualism those unable to operate in both languages will find themselves at an economic and social disadvantage.

(4) The business community and the role of Gaelic in economic and social development

The detailed interviews with a sample of large employers in the Western Isles and Skye and Lochalsh allow two key points to be made. The first is that there is still very limited consideration given by business to the proposition that they can directly utilise the cultural distinctiveness of their home area to economic advantage. While a significant proportion of respondents (33%) cited the use of Gaelic products or services in the delivery of their main activity the use was very limited. The range of constraints on developing in this area are extensive, including the personal Gaelic competence of owners/managers, a scepticism about the effectiveness of such an approach and a lack of conviction that the demand exists to justify this approach.

In contrast, the business community appears at least as convinced as the public at large about the general relevance of Gaelic arts and cultural activities in the social and economic development processes in their area. There is widespread recognition of the contribution the Gaelic arts and cultural industry is making to employment, tourism enhancement and positive attitudinal change. The range of business opportunities presented by Gaelic appear to be broadly recognised but, as noted above are not widely acted upon.