

An Economic & Social Impact Assessment of the Royal Scottish National Orchestra

A Report to:

RSNO

SCOTLAND'S NATIONAL
ORCHESTRA

October 2025





Executive Summary

The RSNO enhances cultural vitality across Scotland, is a driver for economic activity, and a force for community wellbeing.

In 2024/25, RSNO generated **£17.2 million Gross Value Added (GVA)** for Scotland and supported more than **300 jobs**. This arose from activity related to concerts, staff wages, and musicians' recording activity for film, television, and video games.

RSNO enhances the wellbeing of the people whose life it touches, including its live and digital audiences, its 130 staff, and communities throughout Scotland. RSNO's overall wellbeing contribution was assessed at **729 WELLBYs***, valued at **£11.6 million**.

RSNO also contributes in important ways to wider outcomes, including nurturing tomorrow's musicians, ensuring accessibility and future audiences, fuelling the film, TV, and games sector in Scotland, and supporting the achievement of National Outcomes.

Each £1 RSNO receives from the Scottish Government leverages an additional £2 in income and generates **£4.10 in GVA** plus **wellbeing benefits valued at £2.80**.

An **increase in funding** would allow RSNO to secure these benefits, leverage additional income and deliver **significantly greater economic and wellbeing benefits** for the Scottish economy and society.





Contents

- **Royal Scottish National Orchestra**
 - Study Background
 - Key Numbers
 - Pathways to Impact
 - Methodology
- **Economic Impacts**
 - Direct
 - Supply Chain
 - Capital Investment
 - Staff Spending
 - Supporting Freelancers
 - Tourism
- **Wellbeing Impacts**
 - Performances
 - People
 - Community
- **Wider Impacts**
- **Summary**
- **Funding Scenario Analysis**
 - No Additional Funding
 - Additional Funding Scenarios



Royal Scottish National Orchestra

The Royal Scottish National Orchestra (RSNO) aims to inspire, educate and entertain people through national and international performances, recordings, and community work. This generates economic activity and enhances wellbeing.



Royal Scottish National Orchestra

The RSNO is one of Scotland's leading cultural institutions with a rich 125-year history, bringing value to society through economic and broader social impacts

RSNO aims to inspire, educate and entertain people throughout Scotland and beyond. It does this through:

- national and international performances;
- supporting schools, families, young professionals and wider communities; and
- producing recordings, including soundtracks for film, television and video games, through its provision of musicians to Scottish Digital Arts (SDA).

These activities impact the local and national economy, as well as bring wider social benefits that enhance wellbeing.





Study Background

Assessing the economic and social impact of the RSNO.

BiGGAR Economics was commissioned by RSNO to evaluate its economic and social impact. The aim of this report is to highlight the impact that RSNO makes across Scotland and support discussions around national investment in arts and culture.

A focus for RSNO is in attracting and retaining talented musicians in Scotland through offering their musicians permanent contracts. This enables an ongoing high-quality national programme of concerts and that RSNO remains competitive in making recordings for film, television, and video games. RSNO also has a wide-reaching community engagement programme.

This report examines RSNO's contributions across Scotland, focusing on both economic activity and wellbeing. It details how RSNO supports the local economy through employment, tourism, and supply chain spending, while also generating significant social impacts.





Key Numbers

The RSNO has a significant presence and delivers diverse engagements throughout Scotland.

88,380

people
attended live
concerts

11,100

hours of viewed
digital content

25,000+

people engaged
across
communities in
Scotland

£12.9m

income
(including SDA)

130 staff

(inclusive of 66
permanently
employed
musicians)

61

live concerts

RSNO

SCOTLAND'S NATIONAL
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Pathways to Impact

How the RSNO generates impact

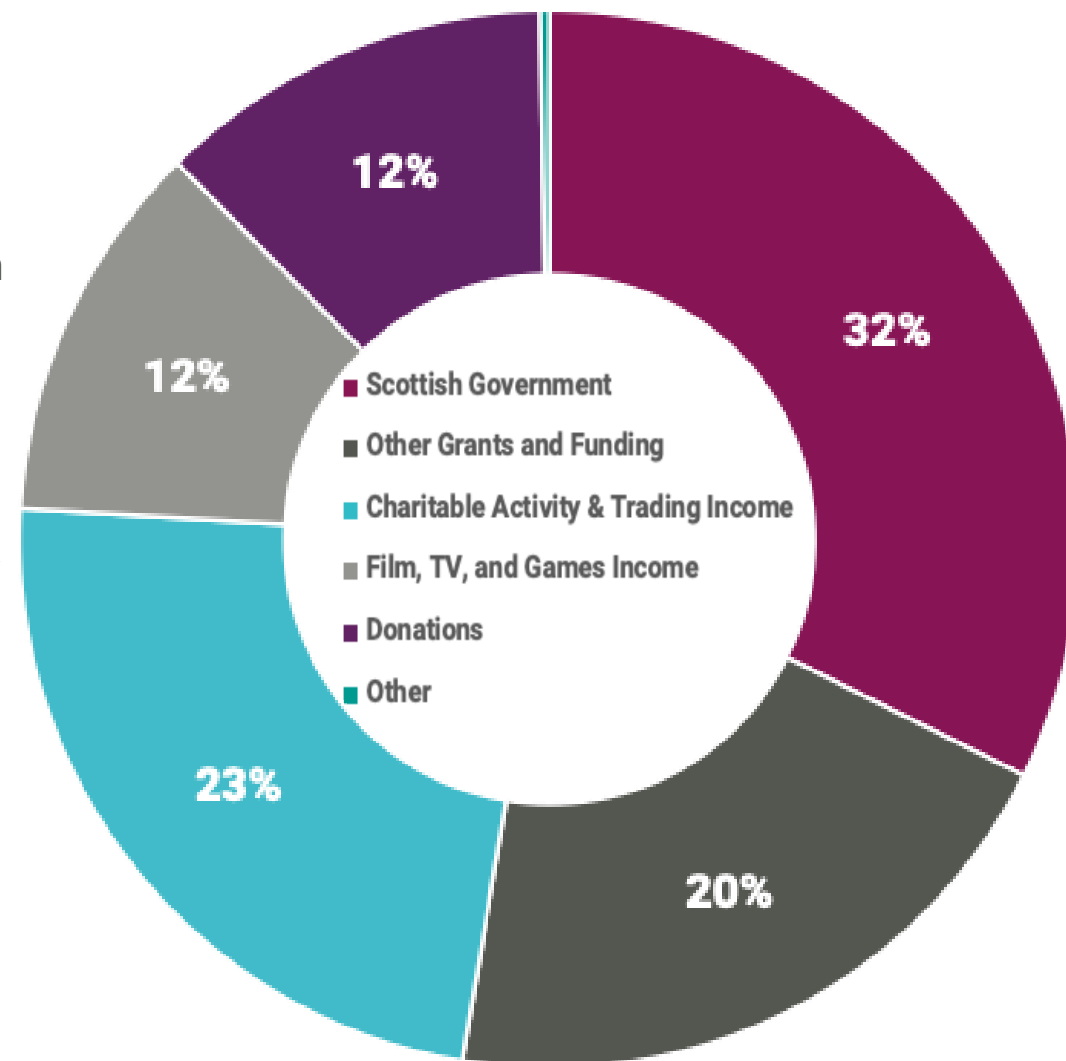
- In 2024/25, RSNO's income totalled £12.9 million (inclusive of income received via SDA)
- Of total income received, less than 1/3 (£4.2 million) came from the Scottish Government
- Over time, the grant funding received by RSNO has reduced in real terms
- RSNO has diversified and expanded other revenue generation opportunities, such as film, TV, and games income through SDA

This income enables RSNO to carry out its key activities and provide permanent, salaried, employment to its musicians.

This has allowed it to maintain a high-quality orchestra with full-time musicians (staff costs for 2024/25 were £5 million).

RSNO needs to balance revenue generation opportunities with its capacity, the delivery of RSNO's core purpose and community responsibilities.

Sources of Income





Methodology



Approach to assessing the economic and social impact of the RSNO.

The quantitative economic assessment covers:

- **Direct Impact:** including direct employment.
- **Supply Chain Spending:** goods and services
- **Capital Expenditure Impact:** specialist equipment
- **Staff Spending:** employees support the local economy through their expenditure (including freelance staff)
- **Visitor Impacts:** visitors contribute to the economy by spending money locally

Economic impacts are presented in terms of:

- **Gross Value Added (GVA)**
- **Employment (Jobs)**

The impacts are presented at the level of the **Scottish Economy**.

Estimates are inclusive of the **indirect** (supply chain) and **induced** (spending of staff wages) impacts and are based on publicly available statistics, including the **Scottish Annual Business Statistics** and **Input-Output Tables**.

The **social impact** of the RSNO has been measured using Wellbeing-Adjusted Life Years (**WELLBYs**), which represent a one-point change in life satisfaction (on a 0–10 scale) per person, per year.

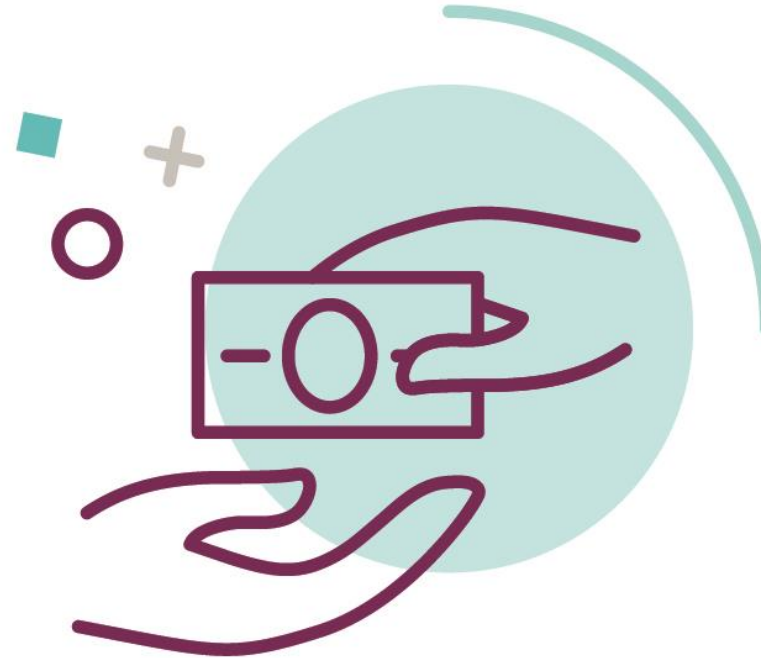
Recommended by HM Treasury, WELLBYs quantify wellbeing benefits in monetary terms, with **one WELLBY valued at £15,958** in 2023 prices.

Further information on the key assumptions and sources used can be found in an appendix at the end of this report.



Economic Impacts

This section sets out the economic impacts arising from RSNO activities.





Economic Impact: Direct



£8.6m GVA



130 Jobs

What is this Benefit?

The direct impact RSNO generates for the economy is based on its core operations, including as a direct employer.

It accounts for all the activity undertaken by RSNO and SDA, including performances and events, engagement activities, fundraising, and buying goods and services.

How is it Estimated?

The direct GVA is estimated by subtracting the non-staff related expenditure from total income.

Direct employment is based on the total number of headcount staff employed.

RSNO provides musicians with permanent employment contracts, helping to attract global talented musicians to re-locate to Scotland.

Key Findings

- The total income of RSNO in 2024/25 was £12.9 million, comprised of:
 - £11.4 million from RSNO
 - £1.5 million from SDA
- Based on an analysis of accounts provided, it was estimated that total supply chain expenditure for the same year was £4.4 million
- In 2024/25, RSNO directly employed 130 staff



Economic Impact: Supply Chain



£2.9m GVA



70 Jobs

What is this Benefit?

To support daily activities, RSNO purchases goods and services.

This includes things such as general property costs and support services, and costs incurred as part of concert activity.

Spend on these goods and services supports the businesses they are purchased from, supporting turnover and employment.

How is it Estimated?

The supply chain impact is determined by the total spend, and the location of that spend, i.e. how much of the spend goes to Scottish-based businesses.

It is also dependent on the type of goods and services purchased.

Each category of expense was assigned to a relevant economic sector, to which GVA and employment ratios and multipliers were applied.

Key Findings

- Total supply chain spend in 2024/25 was estimated at £4.4 million
- 79% of total supply chain spend was retained in the Scottish economy
- The majority of spend was related to supporting concert activity
- This impact excludes the impact generated from services associated with freelancers, which has been estimated separately



Economic Impact: Capital Expenditure



£0.3m GVA



10 Jobs

What is this Benefit?

Large capital investments, such as purchasing new equipment or buildings, generates economic impact.

In the case of RSNO, this includes the spend on recording studio set up, refurb of audio visual and refurb of recording studio.

This type of expenditure supports investment in the recording industry.

How is it Estimated?

The value of capital spending tends to vary from year to year and, as such, a 10-year average is used to estimate an annual value.

Based on the nature of the capital expenditure at RSNO, the annual spend is applied to sectoral ratios and multipliers associated with 'Motion picture, video and television programme production, sound recording and music publishing activities.'

Key Findings

- The average value of capital investments at RSNO is £512,000



Economic Impact: Staff Spending



£2.6m GVA



20 Jobs

What is this Benefit?

The staff employed by RSNO are paid wages and salaries. These wages and salaries are then spent in the local, and national, economy.

This spending supports turnover and employment in the places they are spent, enabling local businesses to sustain operations and continue employing their own staff.

How is it Estimated?

The level of spend in the economy is determined both by the value of wages and salaries paid, and by the location of this spend.

The latter is largely dependent on where staff live.

Through an examination of household expenditure habits, it was possible to project the geographic distribution of staff expenditure.

Economic ratios and multipliers for the household spending sector were then applied to these expenditure figures.

Key Findings

- RSNO had 130 staff in 2024/25
- Wages and salaries paid to staff totalled £5.0 million
- All staff live in Scotland; 81% live in Glasgow



Economic Impact: Supporting Freelancers



£1.1m GVA



10 Jobs (FTE)

What is this Benefit?

In addition to providing permanent employment for 130 staff, RSNO supports freelancers in the industry, contracting their services for performances, events, or specialist activities.

At SDA, all activity is undertaken by freelancers – including opportunities for employed RSNO staff.

This supports additional income for musicians and opportunities to work on a variety of projects.

How is it Estimated?

Payments to freelancers stimulate economic activity in the same way as that of the spending of permanent staff's wages and salaries.

The level of spend by freelancers in the economy is determined by the number of freelancers contracted and the monetary value of the payments made to them.

Economic ratios and multipliers for the household spending sector were then applied to the value of total payments made.

Key Findings

- Over 500 freelancers were contracted over the 2024/25 period, inclusive of RSNO staff working for SDA
- Payments made to freelancers totalled £2.1 million



Economic Impact: Tourism & Hospitality



£3.4m GVA



110 Jobs

What is this Benefit?

Concerts and events hosted by RSNO attracts visitors to the location of performances, such as Edinburgh or Glasgow.

As part of their visit, visitors are likely to also spend in the local economy, such as in local hospitality and accommodation.

This supports the local tourism industry and is spend by visitors that may not otherwise have gone to the area if it were not for the RSNO event.

*Note: only the tourism and hospitality impact generated by non-Scottish visitors has been included as part of the final GVA and employment impacts at the level of the Scottish economy. However, the total spend by Scottish and non-Scottish visitors makes an important contribution to local tourism and hospitality sectors.

How is it Estimated?

The level of additional spend that can be attributed to this type of impact is determined by where visitors to RSNO events travel from, and their associated spend in the local tourism economy.

Visitors travelling to events from out-with Scotland will have a larger daily spend, as they will likely require accommodation as part of their trip, whereas Scottish visitors may have some additional day spend in the local hospitality sector as part of their visit to the event, such as dining out before or afterwards.

The impact of this spend was determined by applying the spend to sectors associated with tourism and hospitality, such as accommodation and food and beverage services.

Key Findings

- Almost 84,000 tickets sold in 2024/25
 - Over 72,000 tickets sold to Scottish visitors, of which 55,000 visitors were based in Glasgow or Edinburgh
 - Around 11,500 were sold to visitors living outside of Scotland's, including 1,500 visitors from outwith the UK
- The average RSNO ticket price per customer in 2024/25 was £22
- Scottish visitors supported an estimated economic activity worth £1.6 million GVA and 50 jobs for the local economies where performances were held
- Non-Scottish visitors supported an estimated £1.7 million GVA and 60 jobs.



Total Economic Impact



£17.2m GVA*

&



300 jobs

Across the Scottish Economy

**Excluding tourism and hospitality impacts from those living in Scotland*

RSNO:

- directly employs **130 staff**, providing permanent employment for 66 musicians
- generates an **income of £12.9 million**
- spends around **£4.4 million on goods and services** to support operational activity
- spends an **average of £512,000 on capital investment each year**
- pays **wages and salaries totalling £5 million**
- hires **over 500 freelancers** to support activities and provides opportunities for permanent staff to freelance to SDA, supporting additional income for musicians
- holds performances and events that **attract visitors from across the world**, supporting tourism activity of around £1.7 million GVA.

Collectively, these sources of impact indicate that RSNO generates an economic impact worth £17.2 million GVA for the Scottish economy, supporting 300 jobs.



Wellbeing Impacts

This section sets out the wellbeing impacts arising from RSNO activities.



Wellbeing Impacts

Engaging with music is a powerful source of wellbeing

Music is a powerful source of wellbeing, with substantial evidence showing that engaging with music whether it be through participation (playing an instrument, as well as singing) or being a member of the audience is associated with having higher life satisfaction.

Music engagement also benefits other wellbeing variables including experienced happiness, a sense of meaning and purpose, and both physical and mental health.

There are three key areas in which the RSNO has wellbeing benefits:

- **Performances** - the wellbeing benefit of RSNO's live and digital events to its audiences
- **People** – the wellbeing benefit to those who work for or volunteer for the RSNO
- **Community** – the benefit from RSNO's wider community engagement which aims to bring music to diverse communities and support musicians and singers.





Wellbeing Benefits: Performances



386.9 WELLBYs
£6.2 million

What is this Benefit?

Listening to music is an enjoyable and satisfying everyday activity that can reduce stress, help relaxation, and enhance social relationships. Concerts, whether live or recorded, therefore have important wellbeing benefits.

Drivers of Impact

The total wellbeing benefit from RSNO performances depends on whether the performance was watched live or digitally, the size of the audience, and the number of people attending who are from disadvantaged backgrounds. It will also depend on the extent to which the wellbeing benefit would have otherwise occurred (i.e., additionality).

Live Performances

88,380 tickets sold, of which 4,626 were comped: 383.0 WELLBYs, worth £6.1 million.

Digital Performances

11,100 hours of viewing: 3.9 WELLBYs, worth <£0.1 million.

The WELLBY estimates draw on available literature rather than surveys from actual audiences.



Wellbeing Benefits: People



88.9 WELLBYS
£1.4 million

What is this Benefit?

Investing in people through providing secure work and development opportunities significantly boosts their wellbeing.

Professional musicians also tend to have higher than average wellbeing due to being able to be creative and share their passionate with others.

Drivers of Impact

The total wellbeing benefit from RSNO's investment in people depends on the number of employees and how secure the jobs are. There will also be benefits from offering training to employees and supporting volunteers.

Employees

130 job-years supported: 59.8 WELLBYS, worth £1.0 million

Of which 66 are musicians on permanent contracts, who have:

- above average life satisfaction: 16.2 WELLBYS, worth £0.3 million
- secure Jobs: 85.1 WELLBYS, worth £0.1 million

Employee Training Events: 2.2 WELLBYS, worth <£.1 million

Volunteers

16 regular volunteers: 1.6 WELLBYS, worth <£0.1 million

The WELLBY estimates draw partly on available literature and information about RSNO employees and volunteers.



Wellbeing Benefits: Community



253.3 WELLBYS
£4.0 million

What is this Benefit?

Working with communities can help develop new skills to help them develop. Engagement helps to bring communities together, which can help to create a sense of belonging.

Drivers of Impact

The total wellbeing benefit from RSNO's community engagement depends on the number of people engaged and the type of engagement.

Community Performances

20,293 people engaged through live or digital community performances (schools, public places, digital recordings): 42.6 WELLBYS, worth £0.7 million.

Community Training

692 people engaged in training (e.g., side-by-sides, mentoring, skills development): 30.9 WELLBYS, worth £0.5 million

Choirs/Community Orchestra Support

1,757 supported: 171.7 WELLBYS, worth £2.7 million

Health Care Interventions

1,052 people engaged: 8.1 WELLBYS, worth £0.1 million

The WELLBY estimates draw on available literature rather than surveys from engagement events.



Wider Impacts

This section sets out the wider qualitative impacts.



Nurturing Tomorrow's Musicians

The RSNO plays a vital role in ensuring that Scotland's future generations continue to experience wellbeing benefits from music.

Charanga is a leading online music education platform used by tens of thousands of teachers and millions of students globally. The RSNO partners with Charanga to integrate its world-class educational content into this widely used platform. This collaboration helps:

- ensure the RSNO's music is enjoyed widely;
- teachers develop varied music lessons;
- inspire young people to develop musically; and
- cultivates new audiences for orchestral music.

The partnership is designed to **secure long-term benefits** by fostering the musical engagement of future generations. As this collaboration has only recently commenced, its impacts are anticipated to **scale up and support future impacts**.



In 2024, RSNO digital materials were accessed for classroom viewing **7,586 times** across Scotland. With a typical class size of 30 children and a value of £10 per child, this represents an engagement of **227,580 individual views**, with a **total value of £2.3 million**.

Regional Venues Tour: To enhance classroom learning, Charanga's digital resources are complemented by live orchestral experiences. The RSNO tours schools, directly supporting music education through Charanga. The RSNO's Regional Venues Tour engaged 677 children, bringing the magic of live orchestral music directly into their learning.

Ensuring Accessibility and Future Audiences

By making music more accessible across Scotland, the RSNO plays a vital role in cultivating a vibrant and engaged audience for years to come.

Astar, the RSNO's innovative app, introduces babies and young children to the joy of classical music. It is included in the Scottish Government's Baby Box scheme and free to download. Early music exposure can enhance brain development, improve communication and coordination, foster emotional regulation and expression, and strengthen bonding. In 2023/24 there were 21,902 downloads of the app equating to 7% of baby boxes distributed. There are about 200 active users each day. Like Charanga, Astar supports the engagement of future generations, supporting future audiences



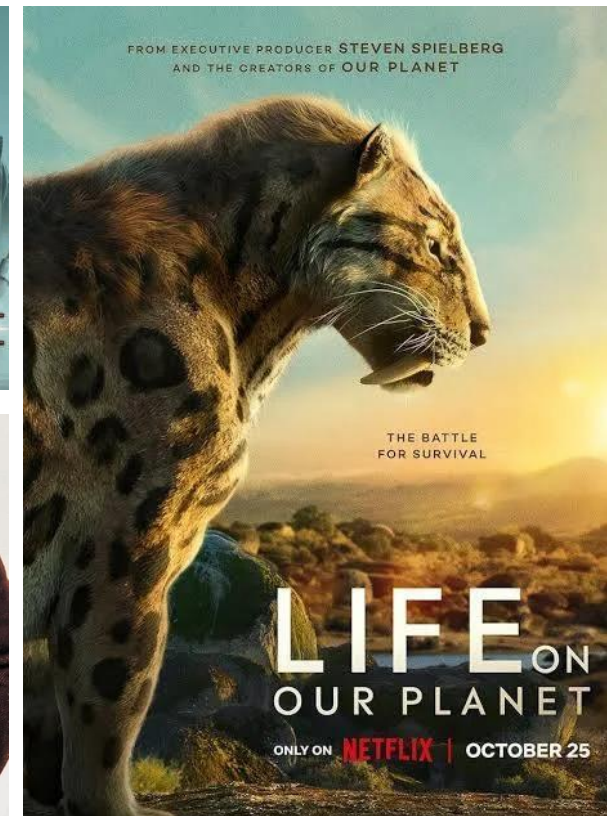
RSNO's Noisy Library is a free online platform for children, offering engaging musical stories and resources to introduce classical music and spark early appreciation. In 2023/24, the platform's webpage received 588 visits, serving as a key digital gateway into RSNO's performances for families.

Fuelling the Film, TV, and Games Sector in Scotland

The RSNO's provision of musicians to the SDA, has led to wide-ranging success in producing film, TV, and video game scores, profoundly influencing the sector.

SDA is competitive in producing scores for film, TV, and video games. Although there are long-standing relationships with key film-composers that have helped, this competitiveness has been achieved not only through active investment in state-of-the-art sound-recording technology but crucially through the availability of world-class musicians at RSNO. As such, recordings have become a substantial part of RSNO's economic model, supporting staff income, with this expected to grow.

While orchestral film scores may represent a relatively small portion of a film's overall budget, they are a high-profile element that significantly shapes the sector. Therefore, SDA/RSNO's success has been an important contributor to an expanding sector, attracting companies to Scotland and enhancing its appeal as a filming destination.



Source: RSNO



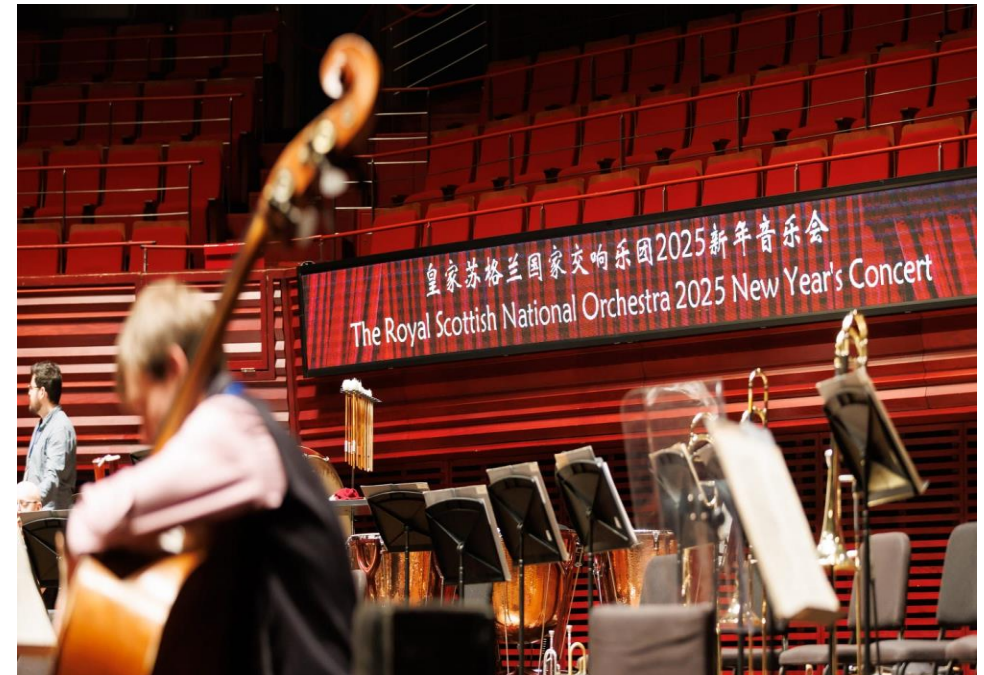
International Touring

The RSNO has an excellent international reputation, regularly touring in Europe and beyond including to China over Hogmanay 2024

RSNO is regularly invited to perform across the world, including European concert halls in Antwerp, Eindhoven, Ljubljana, Paris, and Budapest.

In December 2024, RSNO toured to China performing concerts in Shenzhen Concert Hall, Nanjing Jiangsu Centre for the Performing Arts, Nanchang Poly Grand Theatre, Beijing National Centre for the Performing Arts, and Hangzhou Grand Theatre. Overall audience figures were 13,387, which generated income and equates to 56.5 WELLBYs, worth £0.9 million.

International touring offers opportunities to attend receptions and meet local officials and dignitaries. In China, this has led to several new partnerships, including Kuro Games and composer jixwang, and a long-term touring commitment with Wu Promotions, which have already generated income.



Source: RSNO

Scotland's National Performance & Fair Work Frameworks

The RSNO impacts widely across Scotland's National Outcomes, as well as the Fair Work Framework

Scotland's National Performance Framework sets out 11 national outcomes to ensure progress that is both sustainable and inclusive. RSNO has impacts to some degree on all the outcomes, but have particularly strong contributions on at least seven, including:

- Culture
- Communities
- Economy
- Education
- Fair Work and Business
- Children and Young People
- International

Scotland's Fair Work Framework sets out five areas – effective voice, opportunity, security, fulfilment, and respect – that balances the rights and responsibilities of employers and workers and brings societal benefits. RSNO's approach to employment supports progress on this framework.





Summary

This section presents the summary of impacts.





Summary

The RSNO generates annual economic benefits for the Scottish economy and enhances community wellbeing.

- The total quantifiable impacts include:
 - **£17.2 million GVA**
 - **300 Jobs** (*plus supporting over 500 freelancers*)
 - **729.1 WELLBYs**, worth £11.6 million
 - ***Additional* potential £1.6 million GVA and 50 jobs supported in local tourism & hospitality economies where RSNO events and performances are held**
- There are also **wider impacts** including
 - nurturing tomorrow's musicians (e.g., Charanga engagement estimated to be worth £2.3 million)
 - ensuring accessibility and future audiences
 - fuelling the film, TV, and games sector in Scotland
 - enhancing Scotland's reputation across the world
 - supporting the National Performance & Fair Work Frameworks





Costs and Benefits



Costs

Total income = £12.9m

Scottish Government = £4.2m

Other Public = £2.6m

Benefits

Economic Impact (Jobs) = 300

Economic Impact (GVA) = £17.2m

WELLBYs = 729

Value of WELLBYs = £11.6m

Costs : Benefits

£1 from Scottish Government, leverages +£2 in income & generates:

- **£4.10** in GVA

Plus

- wellbeing benefits valued at **£2.80**



Funding Scenario Analysis

This section explores potential scenarios: If RSNO were to receive additional funding, contrasting it with a scenario where it does not.



Funding Scenario Analysis

The RSNO is at a critical juncture and in the face of funding constraints will need to change its business model, with the potential for substantial economic and social losses.

In 2024/25 less than 1/3 of RSNO's total income came from Scottish Government funding (£4.2 million). This level of funding has remained flat since 2009, despite an inflation rate since then of 65%. **This represents a significant real terms funding reduction.**

However, **funding received from the Scottish Government enables other sources of funding to be leveraged** (e.g. film TV and games income, charitable activities, investments, other grants and funding, donations, etc.), allowing activity and impacts to occur.

It has become increasingly difficult for RSNO to sustain its employees on permanent contracts. If funding remains at 2009 levels, RSNO is likely to revert to a freelance model of employment.

Three scenarios have been modelled to illustrate the scale of potential economic and wellbeing impact that could be generated if additional funding was received, based on increases of:

- **£1.5 million**
- **£3 million**
- **£5 million**



A scenario is also provided indicating the potential impact if no additional funding is received.



Scenario Analysis: No Additional Funding

If funding were to remain flat, then a likely change in employment model will result in economic losses to Scotland totalling £1 million, and wellbeing losses of £2.2 million.

If the RSNO were to revert to a freelance model of employment to manage the funding constraint this will reduce RSNO musician staff costs by an estimated 30%. This would **reduce staff costs to around £3.5 million** from £5 million, with freelance wages expected to rise to around £1 million.

However, with musicians not on permanent contracts it is expected that:

- RSNO musicians would be less secure in their jobs;
- some RSNO musicians would leave Scotland for opportunities elsewhere;
- there would be both a loss in quality and quantity of performances and reduced community engagement; and
- RSNO would become less competitive in soundtracks for film, TV and games and lose business

Modelling this scenario, under the assumption that there would be a 20% decrease in engagement and concert activity, the following outcomes are expected:

- **Total economic impact worth £16.2 million GVA (decrease of 6%)**
- **Total wellbeing impact worth £9.4 million in WELLBYs (decrease of 19%)**





Additional £1.5 Million Funding

If funding were to increase by £1.5 million, this could generate **economic gains** to Scotland worth an additional **£5.6 million GVA**, and **wellbeing gains** worth **£5.4 million**.

An additional £1.5 million of funding will help RSNO leverage income from other sources, help sustain its musicians on permanent contracts and pay competitive rates, and support increase activity.

Total income of RSNO is currently 3x that of Scottish Government funding. An increase in income would likely **leverage an increase in funding from other sources, as well as facilitate a small increase in performance and trading activity**. In this way, total future income supported from this initial funding would increase to around £15.5 million (or £16.1 million after adjusting for inflation).

This income increase would enable the RSNO to **sustain its musicians on permanent contracts and pay competitive rates** in line with other world class orchestras and build capacity to deliver more high-quality performances, record soundtracks, and deliver on its community responsibilities.

Modelling this scenario, the following outcomes are expected:

- **Total economic impact worth £22.8 million GVA (increase of 33% based on increased income, expenditure, and staff costs)**
- **Total wellbeing impact worth £17.0 million in WELLBYs (increase of 46%)**





Additional £3 Million Funding

Additional funding of £3 million would restore real-term funding cuts and could generate **economic gains** to Scotland worth an additional **£13.9 million GVA**, and **wellbeing gains** worth **£10.3 million**.

An additional £3 million of funding would restore real-term funding cuts. This would enable RSNO to achieve outcomes over and above the £1.5 million scenario, including:

- an expansion of film, TV and games activity; and
- supporting a wider live programme coverage across venues in Scotland.

This increase in activity would likely necessitate an increase in permanent and freelance employment.

Modelling this scenario, the following outcomes are expected:

- **Total economic impact worth £31.1 million GVA (increase of 80%)**
- **Total wellbeing impact worth £22.0 million in WELLBYs (increase of 89%)**





Additional £5 Million Funding

Additional funding of £5 million would strengthen RSNO's impact across Scotland and globally, generating **economic gains** to Scotland worth an additional **£21.5 million GVA**, and **wellbeing gains** worth **£17.7 million**.

An additional £5 million of funding would enable a sustained programme of growth, including:

- enhancing capacity to expand film, TV and games activity;
- ensuring regular programme presence across all of Scotland, including a commitment to bring live orchestral music to all regions of Scotland at least every 3 years;
- developing an RSNO festival partnership, whereby RSNO supports music festivals around Scotland;
- development of an RSNO record label; and
- expanding recording and broadcasting activity.

This increase in activity would necessitate an increase in permanent and freelance employment.

Modelling this scenario, the following outcomes are expected:

- **Total economic impact worth £38.7 million GVA (increase of 125%)**
- **Total wellbeing impact worth £29.3 million in WELLBYs (increase of 152%)**





Future Funding Scenario Analysis: Summary

Increasing funding to the RSNO would enable an expansion of activities and result in **substantial economic and wellbeing benefits** across Scotland.

The difference between the funding remaining at current levels, versus each of the scenarios is:

Funding Scenario	Additional Economic Impact (GVA)	Wellbeing Impact Change
No Additional Funding	(£1.1m)	(£2.2m)
Additional £1.5 million	£5.6m	£5.4m
Additional £3 million	£13.9m	£10.3m
Additional £5 million	£21.5m	£17.7m





Appendix

This section presents the key assumptions and sources used in the assessment.





Key Assumptions and Sources: Economic Impact

Source of Impact	Key Assumptions & Sources
Direct	- Total income: £12.9 million (£11.4 million RSNO, £1.5 million SDA) - Total non-staff expenditure: £4.4 million (£4.2 million RSNO, £0.2 million SDA) - Total number of staff (headcount): 130 (66 musicians, 47 administrative staff and 17 flexible staff) <i>Sources: RSNO Annual Accounts 2024/25, SDA Financial Information provided by RSNO</i>
Supply Chain	- Total supply chain spend: £4.4 million - Share of supply chain spend going to Scottish companies: 79% (<i>Provided by RSNO</i>) - Turnover to GVA and Turnover to Employment ratios and multipliers for sectors of spend <i>Sources: RSNO Annual Accounts, SDA Financial Information, Scottish Annual Business Statistics & Scottish Government Input-Output Tables</i>
Staff Spending/Freelancers	- Total wages and salaries paid: £5 million - additional £2.1 million spent on freelancers - Share of salaries spent in the Scottish economy: 75% - Spending on VAT: 8% - Turnover to GVA and Turnover to Employment ratios and multipliers for Household Spending sector <i>Sources: RSNO Annual Accounts 2024/25, BiGGAR Economics Analysis of Household Expenditure, Scottish Annual Business Statistics & Scottish Government Input-Output Tables</i>
Capital Investment	- Average annual value of capital investments - based on past five, and projected next five, years: £512,000 - Turnover to GVA and Turnover to Employment ratios and multipliers for relevant sectors <i>Sources: Information provided by RSNO, Scottish Annual Business Statistics & Scottish Government Input-Output Tables</i>
Tourism	- Total number of visitors to performances and events: 83,679 (54,647 based in Glasgow and Edinburgh, 29,032 from elsewhere) - Average ticket price to RSNO event per visitor: £22 - Average additional spend in local hospitality sector by local visitor: £31 - Average additional spend in local tourism economy by overnight visitors: £196 - Turnover to GVA and Turnover to Employment ratios and multipliers for hospitality sectors <i>Sources: Information provided by RSNO, Visit Scotland, Scottish Annual Business Statistics & Scottish Government Input-Output Tables</i>



Key Assumptions and Sources: Wellbeing Impact

Source of Impact	Key Assumptions & Sources
Performances	88,380 tickets for live performances were sold, of which 4,626 were comped - WELLBY impact of viewing a live performance – 0.0056 WELLBYs – based on Wheatley & Bickerton (2019), who find, after controlling for various confounding factors, that those who attend arts events at least once a year are 0.043 higher on a 1 to 7 life satisfaction scale. 0.043 converts to 0.068 on a 0 to 10 scale. According to their data, 12.8% of people go to an arts event one a year, 19.0% twice a year, 43.7% 3 to 4 times a year, 21.4% between once a month and once a week, and 3.1% once a week. This suggest an average attendance of approximately 6 times a year to a general arts event. When divided by 6 this gives a per attendance value of 0.011, but to be conservative it was instead divided by 12. Other evidence is consistent with this wellbeing value see e.g., Fujiwara, Kudrna, & Dolan (2014) who estimate a wellbeing value of between £47 and £62 in 2013 prices. See also Dolan & Testoni (2016), Wang et al. (2020). - WELLBY impact on those with comped tickets – 0.0084 WELLBYs – based on the assumption that most comped tickets go to those from disadvantaged backgrounds, who are less likely to attend such events and will benefit 50% more. 75% additionality for live performances – RSNO events are a significant cultural attraction, encouraging some people (assumed 50%) to engage proactively in something that raises their wellbeing when they might ordinarily be passive (e.g., watching TV or shopping), and for those who do readily engage with these types of activities (the remaining 50%), RSNO delivers a wellbeing benefit that is over and above what they otherwise might have done (assumed 50%). Therefore, 50% of listeners will experience the full impact and of the other 50%, only 50% experience the full impact - $50\% + 25\% = 75\%$. 11,100 hours of viewing digital performances - WELLBY impact of viewing one hour of a digital recording – 0.0014 WELLBYs – based on Dolan & Testoni (2016), who show that listening to recorded music has about half the life satisfaction relationship of listening to a live classical performance. Assuming a live performance is 2 hours, an hour of listening to a digital recording gives an overall WELLBY estimate per hour that is 4 times smaller than the live effect. 25% additionality for digital recordings – there are many alternatives a person could otherwise engage with, including comparable orchestras or other music. Nevertheless, RSNO performances are assumed distinct enough to bring wellbeing rises to some that they might not otherwise have experienced. <i>Sources: Information provided by RSNO</i> <i>Key References:</i> Wheatley, D., & Bickerton, C. (2019). Measuring changes in subjective well-being from engagement in the arts, culture and sport. <i>Journal of Cultural Economics</i>, 43, 421-442. Dolan, P., & Testoni, S. Assessing the relationships between engagement in music and subjective wellbeing. <i>Supporting analysis. What Works Wellbeing, Culture, Sport and Wellbeing Evidence Review Programme.</i>



Key Assumptions and Sources: Wellbeing Impact

Source of Impact	Key Assumptions & Sources
People	• 130 jobs supported, of which 66 are musicians. • WELLBY value of one job – 0.46 WELLBYs – based on the difference between being employed and unemployed. This reflects RSNO’s role in job creation, whereby without these jobs someone in the economy, though not necessarily RSNO employees, will be unemployed. • Additional WELLBY value per job of working as a professional musician – 0.246 WELLBYs – based on life satisfaction within the industry being higher than the UK average – 7.696 versus 7.45 in 2013. • Additional WELLBY value of a secure job – 0.23 WELLBYs across 60% of RSNO musicians – based on a secure job being worth 0.23 WELLBYs (Clark et al., 2019), with at least 60% of RSNO musicians expected to feel secure in their job, which is the UK-wide average against an assumed industry average of 0% due to work being primarily freelance. • 61 staff participating in training events • WELLBY value of one training event – 0.035 WELLBYs – based on Dolan & Fujiwara (2012), who show that adult learning has a 0.045 effect on a 1 to 7 life satisfaction scale. 0.045 equates to 0.071 on a 0 to 10 scale and is assumed to last 6 months. • 16 regular volunteers • WELLBY value of one regular volunteer – 0.1 WELLBYs – based on several studies (e.g., Fujiwara et al., 2013; Binder and Freytag, 2013; Lawton et al., 2021) showing that regular volunteering is associated with enhanced life satisfaction of approximately 0.1 on a 0 to 10 life satisfaction scale. • <i>Sources: RSNO Annual Accounts 2024/25</i> • <i>Key References:</i> Treasury, H. M. S. (2021). Wellbeing guidance for appraisal: supplementary green book guidance. <i>HM Treasury, ondon.</i> Clark, A., Flèche, S., Ward, G., Powdthavee, N., & Layard, R. (2019). The origins of happiness: the science of well-being over the life course. Dolan, P., & Fujiwara, D. (2012). <i>Valuing adult learning: comparing wellbeing valuation to contingent valuation</i>. Department for Business Innovation & Skills. Lawton, R. N., Gramatki, I., Watt, W., & Fujiwara, D. (2021). Does volunteering make us happier, or are happier people more likely to volunteer? Addressing the problem of reverse causality when estimating the wellbeing impacts of volunteering. <i>Journal of happiness studies</i>, 22, 599-624.



Key Assumptions and Sources: Wellbeing Impact

Source of Impact	Key Assumptions & Sources
Community	• RSNO delivers a wide range of community engagement activities including live performances in schools and public places, offering digital recordings, various education offerings and mentorships, supporting community choirs and orchestras, and health care interventions. These were assessed from a wellbeing perspective by matching specific engagement activities with activities where WELLBY estimates are available. • Community performances – 20,293 people engaged through live or digital community performances (schools, public places, digital recordings) – 0.0056 WELLBYs per live performance, 0.0014 WELLBYs per hour viewed of digital content (see section in appendix on performances for justification). Various adjustments were made across each type of engagement to account for disadvantaged communities, any factors that reduced engagement, and additionality). • Community Training – 692 people engaged in training (e.g., side-by-sides, mentoring, skills development) – based on an assessment of whether the training was like a work experience placement or a training event (0.035 WELLBYs, see section in appendix on people for justification), or an internship (0.11 WELLBYs, based on a 3-month internship having a quarter of the 0.046 WELLBYs of having a job, and accounting for engagement with a disadvantaged community). • Choirs/Community Orchestra Support – 1,757 people engaged with either an RSNO supported community choir or orchestra – 0.1 WELLBY benefit per regular choir/orchestra participant – based on participation having a similar effect to regular volunteering which similarly involves engaging with a meaningful activity that enhances social connection. • Health Care Interventions – 1,052 people engaged in various health care interventions – based on individual assessments of the interventions and various adjustments – WELLBY values ranging from 0.002 to 0.2 per participant. • <i>Sources: RSNO Community Engagement Data</i> • <i>Key References:</i> Castillejos, C., & Godoy-Izquierdo, D. (2021). “Music makes my old heart beat”: A randomised controlled study on the benefits of the use of music in comprehensive care for institutionalised older adults. <i>Applied Psychology: Health and Well-Being</i>, 13, 84-108.



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