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## **HS09 EVALUATION**

We are almost at the end of Homecoming Scotland 2009 and initial indications are showing that this has been an exceptional year to visit Scotland.

An extensive evaluation of the impact of Homecoming Scotland is being undertaken and will be available in Spring 2010 but initial indications show that the celebration is well on track to meet its main objectives:

1. To deliver additional tourism visits and revenue for Scotland
2. To engage and mobilise the Scottish Diaspora
3. To promote pride in Scots at home and abroad
4. To celebrate Scotland's outstanding contributions to the world

In terms of concrete findings, these will be derived principally from three sources, all independently evaluated - economic impact of events, conversion studies on marketing and media coverage.

However, and in terms of the event outcome reports so far submitted, media evaluation early results, response to the marketing campaign and abundant anecdotal evidence Homecoming Scotland is well on track to deliver its stated aims.

## **HS09: DELIVERING FOR SCOTLAND**

In advance of having the full evaluation stats its worth highlighting that the evidence shows Homecoming is already delivering a whole range of benefits for Scotland. Here's an overview of some of the key aspects of impact and legacy:

- **Economic Impact.** The target is to deliver an 8:1 return on the core investment of £5.5 million by generating £44 million of tourism revenue for Scotland in 2009.
- Providing a **catalyst for lasting and positive engagement with Scotland's Diaspora** around the world. The project has, for the first time ever, researched and drawn together the most comprehensive database of Scots interest groups around the world.
- **Stimulation of pride and confidence in Scots at home and abroad.** Just one example of this is how Scotland's schools have embraced Homecoming through the creation of rich and genuinely cross-curricular resources focusing on Scotland's contributions to the world and our literary heritage.
- **Creation of positive profile for Scotland** throughout the UK and internationally. Homecoming provided an unprecedented opportunity to raise Scotland's profile and give Scotland a distinctive voice and a unique proposition in a crowded and challenging global marketing place. Evaluation of the media coverage estimates that £40m of coverage was achieved in more than 40 countries.
- **Improved Partnership Working:** Already there has been an unprecedented coming together of public, private and voluntary sector organisations both in Scotland and overseas; all uniting around a common theme and shared goals.

- **A strengthened events industry.** The extensive programme of more than 400 events provides the heart of the Homecoming celebrations. Events organisers have not only been able to take advantage of additional funding and promotional opportunities to enhance their event but feedback so far demonstrates that their participation provides a real legacy that will take them forward, for example: greater partnership working on a local, national and international level and targeting and attracting new audiences
- **A lasting celebration of Burns and our wider cultural and creative strengths.** There is an inbuilt cultural legacy for the whole of Scotland as the Homecoming programme of events is engaging communities and stimulating participation. In particular, Homecoming has rekindled awareness abroad and at home of Robert Burns and has generated a wealth of new projects, creative ideas and international links that will be taken forward beyond 2009.

## **POSITIVE INDICATORS**

From current evaluation Homecoming is already showing impressive results:

- £19.4 million of additional spend from 25/112 funded events (EKOS analysis). This doesn't include the partner programme or wider marketing impacts.
- Some 92% of event organisers would take part in another themed year.
- 97% of events were rated very good or good by those attending
- There has been a 14.7% increase in trips from EU15 countries in the first six months of 2009 - VisitScotland's main European target markets - and a target for Homecoming marketing (Jan-June 2009).
- There has been an overall 3.4% increase in visits to visitor attractions, with a 3% increase for paid attractions and 4.2% increase for unpaid. (January -September).
- The number of Scots holidaying in Scotland is up nearly 11% - with a 3.5% increase in total from UK holiday makers (Jan-July 2009).
- Scotland is performing well against the rest of the UK (although international visitor figures are down 2.7% to Scotland and 10% for the whole of the UK). These figures are from January-June and do not include the summer months - when the majority of overseas visitors come to Scotland.
- Occupancy is up 3% for guest houses and B&Bs, up 1% for camping and caravanning and level for other sectors (January to September 2009) - a major achievement during a challenging economic year.
- More than £40million worth of media coverage had been achieved in more than 40 countries. Some 285 overseas journalists and 120 from the UK have been hosted by VisitScotland on press trips to write about Scotland across the world.
- An increased database of around 200,000 new visitor prospects through our marketing activity and an extended Diaspora and Scots interest Group database of 6,500 organisations across the world.
- 87% awareness of Homecoming in Scotland. (You Gov, July 09)

- Working in partnership with hundreds of public and private sector organisations, including more than 30 major brands.
- There have been a total of 25 million visits to all Homecoming related UK and international websites.
- Tens of millions of people saw the Caledonia advert around the world - including 12 million in UK. 78% of those seeing the Caledonia TV advert felt more positive towards Scotland.
- Excellent success stories delivered by a great many Homecoming supported events with many box office records, smashed targets and extended audiences achieved this year.
- Our international campaign, “I am a Scot”, reached 95 million potential visitors.
- Homecoming messages included on monthly emails sent to minimum 450k people in the UK and in 6 separate mailers sent to 1.4m people in the UK interested in visiting Scotland.
- As a result of VisitScotland activity (where Homecoming is part of a campaign), 344,207 people have requested their names be added to the database to receive more information about taking a break in Scotland.
- A recent poll of Scottish tourism businesses showed that more than 71% said that Homecoming Scotland has been a positive initiative for Scotland.
- 3, 600 events across 80 countries from Kazakhstan to the USA were part of the World Famous Burns Supper Campaign and took part during the launch celebrations in January.
- 86 international travel companies developed Homecoming themed products and 53 international operators carried Homecoming themed promotions.

### **Positive Indicators from Tourism Businesses**

From a recent Economic Conditions Survey carried out by VisitScotland, business responded as follows

- 96.6% of businesses were aware of Homecoming
- Over 71% said that Homecoming Scotland has been a positive initiative for Scotland
- Over 50% of the businesses promoted Homecoming to their visitors
- Over 65% felt that to some or a great extent, Homecoming has positively impacted the tourism industry in Scotland

### **Tour Operators and Airlines**

#### **Continental Airlines**

**Vic Kerckhoff, Director, National Leisure Sales**

“Homecoming Scotland 2009 was a great initiative to enhance Scotland’s destination competitiveness amidst very challenging times for international travel. Arguably it couldn’t have come at a better time.

VisitScotland’s US marketing programme in support of Homecoming was highly visible and benefitted greatly from long-lead planning and the strong appeal to Americans of the Homecoming themes; whisky, golf, Burns, Scots Ancestry and Scottish Culture. As a partner in VisitScotland’s Homecoming campaign, we were impressed with its performance and consider Homecoming: Scotland a key factor in ensuring Continental’s year-round, non-stop service to Scotland remained one of our better performing international routes.”

## **Attractions**

- Year-to-date (Jan-Sep 2009) total visits to paid and unpaid attractions show an increase of **+3.4% visits** compared to the same period of last year. The increases are widely spread across the country.
- Feedback from attractions shows that Homecoming Scotland 2009 has had an impact on their visitor numbers.
- Whisky distilleries have shown an increase in visitors from May onwards (launch of Whisky Month) and year to date have had 7% more visitors than last year.

## **Historic Scotland**

Kari Coghill, Head of Visitor Services and Business Development, said: “We were delighted to be strong participators in the Year of Homecoming 2009. We organised a series of events for the Year of Homecoming which were a huge success. *Party at the Palace 1503* alone attracted 6,150 visitors to Linlithgow Palace.

“We also had tremendous success bringing in visitors from around the world with our special Homecoming Pass – a product we created especially for this year in collaboration with National Trust for Scotland and the Historic Houses Association of Scotland to give access to all our attractions with just one ticket.

“So far this year Historic Scotland sites have seen an 8% increase in visitor numbers, which is a really positive achievement in otherwise difficult economic times.

“Certainly, we can attribute some of this year’s success to the way the whole tourism sector has worked together for the Year of Homecoming.”

## **Occupancy**

Given that we have been in a global recession, Scottish accommodation occupancy has remained robust.

- Hotel room occupancy level; Guest House and B&B room occupancy has increased +3%; and Camping and Camping and Touring Caravans have improved pitch occupancy by +1%.
- The Association of Scotland’s Self-Caterers reported a 30% rise in UK and 20% rise in European bookings.

## **Culloden House Hotel**

Stephen Davies, General Manager of the Culloden House Hotel says business is booming thanks to Homecoming 2009: "Quite simply, Homecoming 2009 has been a phenomenal success for us here at the Culloden House Hotel. In fact, I would go as far as to say it has helped us bite back at the credit crunch, it couldn't have come at a better time. We ask every visitor where they heard about the hotel at their time of booking and when they check in and over 10% of our guests have mentioned Homecoming as part of their motivation. From the end of January to the last weekend in July we've made around £71,000 as a direct result of the Homecoming campaign. Guests have mainly come from Canada and the Austrasia markets, many coming back 'home' to trace their roots. At 28 rooms, we're a fairly small hotel, but we've reaped big rewards from Homecoming 2009."

## Visitor Numbers

### Overseas

Provisional international visits data for January-June 2009 issued by the Office for National Statistics show the following:

- Scotland is performing well against the rest of the UK. Although there has been a small decrease in all overseas trips to Scotland compared to the same period in 2008, the decrease has been less than elsewhere in the UK and there has been a substantial rise in visitors from Europe and the rest of the world.
- There has been a 14.7% increase in trips from EU15 countries - VisitScotland's main target market compared to the second quarter of 2008

### UK

The United Kingdom Tourism Survey figures for January to July 2009 show the following:

- For the year to July 2009, there has been a **+3.47% in visitors numbers from 2008**.
- Business trips (up +6.8%) trips have continued to grow in the first seven months compared to the same period in 2008.

## POSITIVE INDICATORS: Events Programme

A selection of top line results from just some of the events funded by Homecoming Scotland. All funded events are either new or have introduced new Homecoming programme for 2009.

- **Iconic Burns, Alloway, 24<sup>th</sup> Jan.** There was high demand for the 1,200 tickets available by public ballot for this opening weekend outdoor event. 3,130 ticket requests were received with applications from throughout Scotland, the rest of the UK and internationally.
- **Burns Light, Dumfries, 25<sup>th</sup> Jan.** More than 17,500 people participated in this outdoor spectacle. The entire region was mobilised in support of this event with 92 community groups taking part.
- The **World Famous Burns Supper Campaign** had more than 3,600 Burns Suppers from a total of 80 countries joining the Homecoming Celebrations by registering their suppers.
- **StAnza International Poetry Festival** took place in March and reported a 15% increase in tickets sales and significantly increased media coverage.

- **Whisky Month** took place throughout May with a programme of more than 400 events. Festivals recorded increased numbers of overseas visitors with the largest numbers coming from Germany, Italy, Netherlands, Sweden, Norway and the US. Highlights included the extended **Sprit of Speyside Whisky** Festival. Doubling in length, the festival increased its attendance to more than 24,000 (up c.8, 000) and 46% of visitors were from overseas (up 6% on the previous year).
- **At Linlithgow Palace**, visitor numbers increased by 24 per cent across April and May, to 14,768, helped by the Homecoming Scotland **Party at the Palace** event.
- **Return to the Ridings**. With a total attendance of around 73,000 and events across 11 Border towns, it is estimated to have attracted around 7,000 additional visitors in this year of Homecoming.
- The **Royal Highland Show** broke all previous attendance records, achieving 176,522 visitors over the four day period, up 15,496 on the similar figure for 2008. This included doubling the number of international visitors (3000 attendees from 29 countries).
- **The Gathering 2009** - a unique weekend of celebration uniting more than 47,000 Scots, those with Scottish ancestry and those with a love of Scotland. An independent economic impact study was undertaken that estimated the event delivered an economic impact of £8.8 million for Edinburgh and a total of £10.4 million for Scotland.
- **Belladrum Tartan Heart Festival** - Belladrum also delivered a 'Box Office Best' in 2009, selling out for the first time ever in its six year history (12,000 capacity).
- **Blas Festival** - The Festival reported its best ever attendance with a 25% increase in ticket sales and record attendance by visitors from outwith Scotland.
- **Baxters Loch Ness Marathon** - 2009 was the best year yet, with Marathon entries up by over 50% and overall Festival entries up by more than 25%, including record number of entries from outwith Scotland.
- **Creative Burns & Ayrshire Innovators** - created by East Ayrshire Council especially for Homecoming Scotland 2009, celebrations at The Dick Institute in Kilmarnock saw a 40% increase in visitors from outwith Ayrshire and a 6% increase in visitor spend against 2008 figures.
- **Perthshire Amber** - Dougie MacLean's 10-day Festival is reporting its best ever attendance figures with ticket sales reaching the 6000 mark - up from 4500 in 2008 - and visitors travelling from more than 17 countries. The closing night Caledonia Concert was also the biggest concert in the Festival's five year history.
- The **Famous Scots** exhibition opened at Scotland's People Centre on 26 January 09 with Billy Connolly as the first of 6 subjects. Other subjects were Shirley Manson, Brian Cox, Tilda Swinton and Sir Jackie Stewart. By 6<sup>th</sup> November over 11,600 visitors had visited the exhibition, +25% on target.

## **Economic Impact Interim Analysis: Events Programme**

**Analysis of the economic impact of Homecoming Scotland based on information from 25/112 directly funded events has been prepared by EKOS, an independent research**

**company who specialise in economic impact studies.** Note: at this stage the analysis does not include any of the impact derived from the 'Partner' events programme of c.300 events or the wider benefit from the marketing and communications programme. In addition, **it is important not to simply extrapolate from the average performance to date** across the full range of events. However the report gives confidence that Homecoming Scotland is well on track to deliver the target of £44M of additional income for Scotland.

- There were a total of 714,533 visits to the 25 events so far analysed, 70% were day visitors 30% were overnight visitors.
- 17% of all visitors came from out with Scotland (120,437)
- 66% of all visitors to events were aware of Homecoming with 43% aware that the event was part of Homecoming prior to their attendance.
- 19% of visitors from out with Scotland visited Scotland as a direct result of Homecoming
- 97% of visitors to the events rated them 'very good' or 'good' (3% rated them 'average', there were no 'poor' ratings)
- In terms of Diaspora engagement, of those attendees from out with Scotland, 22% have family origins in Scotland
- Gross expenditure made by day and overnight visitors across the 25 events was £72M.
- However, it is the net rather than gross impacts which are important regarding the impact of Homecoming as a main trigger for visits. We are interested in the net impacts attributable to Homecoming specifically and **the report shows a net additional expenditure attributable to Homecoming of £19.1M as a result of the events so far analysed.** The target across all activity is £44m.
- The return on investment achieved, taking account of a pro rata proportion of the marketing and overhead costs is 1: 14.7 (target 1:8)
- Underlining the legacy value of participation for event organisers, the majority said Homecoming had encouraged new or enhanced activity in a number of areas. They had been able to extend their event/festival programme; work with national partners, agencies, etc; target new audiences; extend their marketing databases; work with local partners; introduce new marketing activity. Other important benefits included establishing international contacts, working with the tourist trade (creating packages, offers, etc) and developing new skills and knowledge. The majority also reported renewed interest/pride in celebrating Scotland's culture amongst event participants
- The majority of event organisers (92%) said they would take part in another themed year, if the theme was relevant to their activity.