



# Homecoming Scotland 2009 Economic Impact

Report for Homecoming Scotland

March 2010

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# Executive Summary

## Introduction

Homecoming Scotland 2009 (HS09) sought to motivate people of Scottish descent, Scottish residents and those who simply love Scotland, to visit in 2009 and take part in a celebration of the culture, heritage and the many contributions Scotland has given to the world. This report provides an assessment of the net additional visitors and expenditure that resulted from HS09<sup>1</sup>.

## Economic Impact

Homecoming attracted 72,000 net additional visitors from outwith Scotland drawn specifically as a result of the Year of Homecoming. In addition, there were another 23,000 visitors that cited Homecoming as one of the reasons for visiting. However, in terms of performance against the expenditure target our assessment relates only to those where Homecoming was the main reason for visiting.

### Summary of Impacts

Indicator	Impact
Net Additional Expenditure	£53.7m
Net Additional FTEs	1,536
Net Additional GVA	£29.8m
ROI	1:9.8

The level of net additional expenditure from Homecoming was £53.7m compared to a target of £44m (22% above target). The return on investment (ROI) was 1:9.8 compared with a target of 1:8.

## Awareness and Family Origins

A total of 68% of visitors to the events were aware of Homecoming 2009 with 46% being aware that the event they were attending was part of Homecoming prior to attending. Of those attendees from outwith Scotland, 49% have family origins in Scotland.

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<sup>1</sup> It forms part of a wider evaluation process that includes: TNS – market conversion study; and Media Measurement – assessment of media value.

## Events Coverage and Marketing

The majority of events had achieved local/regional and national coverage but the coverage has extended well beyond this to include UK and international coverage. This has particularly been in the case through:

- newspapers/magazines (51%-66% of events); and
- online (61%-67% of events).

Coverage has been most common in those countries with strong tourism and/or diaspora links with Scotland such as the USA (54%), Ireland (36%), Canada (36%) and Australia (28%) but has also extended to many other countries (particularly in Europe). For existing events, Homecoming has had a positive impact on the number that had:

- increased their media coverage in 2009 (78%);
- extended their media contacts (74%); and
- extended their marketing databases (84%).

## Wider Benefits for Event Organisers

The most commonly cited benefits by event organisers from taking part in Homecoming were:

- being able to extend their event/festival programme (86%);
- targeting new audiences (84%);
- working with local partners (82%);
- working with national partners/agencies (79%);
- renewed interest/pride in celebrating Scotland's culture (73%); and
- the introduction of new marketing activity (67%).

Half of the events highlighted that they had reached new and extended markets through being part of a wider campaign.

The vast majority of event organisers found working with the Homecoming Team very positive with many referring to them as being helpful and supportive.

A total of 90% of event organisers would take part in another themed year, if the theme was relevant to their activity.

## 1. Introduction

EKOS was commissioned by the Homecoming Scotland Team to prepare a report in relation to Core Aim 1, which is directly related to measuring the immediate economic impacts of the Homecoming Scotland 2009 (HS09) events programme. The Homecoming Team had requested that EKOS also report against some of the wider benefits that were identified from the Outcome Reports provided by funded events. This analysis is also included in this report.

### 1.1 Background

HS09 sought to motivate people of Scottish descent, Scottish residents and those who simply love Scotland, to visit in 2009 and take part in a celebration of the culture, heritage and the many contributions Scotland has given to the world. 2009 also marked the 250<sup>th</sup> anniversary of the birth of Scottish cultural icon and national poet Robert Burns.

A 10-month programme featuring more than 400 directly funded and 'partner' events and festivals (running from 24<sup>th</sup> January to 30<sup>th</sup> November 2009) was designed to celebrate some of Scotland's great contributions to the world including Burns, Golf, Whisky, Great Scottish minds and innovations and its rich ancestry, culture and heritage.

The four core aims associated with the HS09 project, were to:

1. deliver additional tourism visits and revenue for Scotland;
2. engage and mobilise the Scottish diaspora, who in this context were identified as those with ancestral links to Scotland and Scots living abroad;
3. promote pride in Scots at home and abroad; and
4. celebrate Scotland's outstanding contributions to the world.

Homecoming had a budget of £5.5 million and a target of £44 million net additional expenditure (a return on investment of 1:8).

## 1.2 Objectives of this Study

EKOS's responsibility was to report against Core Aim 1 in terms of assessing the number of additional visitors and revenue for Scotland (i.e. the net additional visitors and expenditure as a result of HS09), and this is the key focus of this report.

Also wider information was gathered through the Outcome Report process (discussed in greater detail in the next Section). We have analysed some of this information at the request of the Homecoming Team and this is also provided in this report. When EKOS were brought into the process an evaluation framework had already been established. We were asked to comment on ways to enhance this around Core Aim 1, within the parameters that had already been established.

## 1.3 Evaluation Process

EKOS were commissioned as part of the wider evaluation process. This includes:

- EKOS – economic impact from additional tourism visits;
- TNS – market conversion study; and
- Media Measurement – assessment of media value.

This report feeds into that wider evaluation process. There were four strands to the HS09 events programme:

- signature: funded flagship events;
- themed: funded events;
- rolling: funded events (activity taking place over several months during 2009); and
- partner: these were not funded events but were promoted by Homecoming and were able to utilise the Homecoming message and branding.

The Homecoming Scotland Team set up an evaluation process that involved it collecting information from the signature, themed and rolling events. In total there were 111 of these events. The information was collected through Outcome Reports, an example of the Outcome Report can be found in **Appendix 1**.

The Homecoming Scotland Team had already developed the Outcome Report template when EKOS were brought into the evaluation process. We suggested some additional questions and some amendments to existing questions in the Outcome Report in order to gather sufficient information for the economic impact assessment. We also provided sample questions for funded events to use in their survey work in order to complete relevant parts of the Outcome Report. It was an obligation of events directly funded by HS09 to complete an Outcome Report. For the partner events (of which there were 317 in total<sup>2</sup>), there was no contractual requirement for them to report back to the Homecoming Team as they did not receive funding for their event.

As part of the overall evaluation framework for HS09, VisitScotland undertook evaluation of the Homecoming Scotland 2009 national and international marketing campaign. TNS were commissioned by VisitScotland to undertake an independent conversion study, conducted online, in order to establish the value of the additionality delivered to the Scottish economy by those who responded to the campaign and accessed information provided by VisitScotland on holidaying in Scotland. The e-surveys were split into:

- UK;
- USA;
- Canada;
- Australia;
- New Zealand; and
- Rest of World (predominantly Europe).

## 1.4 Structure of Report

The remainder of this report is structured as follows:

- Chapter 2: Economic Impact;
- Chapter 3: Media Coverage of Events;
- Chapter 4: Wider Benefits for Event Organisers; and
- Chapter 5: Conclusions.

The Outcome Report and Sample Questions Template are provided in **Appendix 1**.

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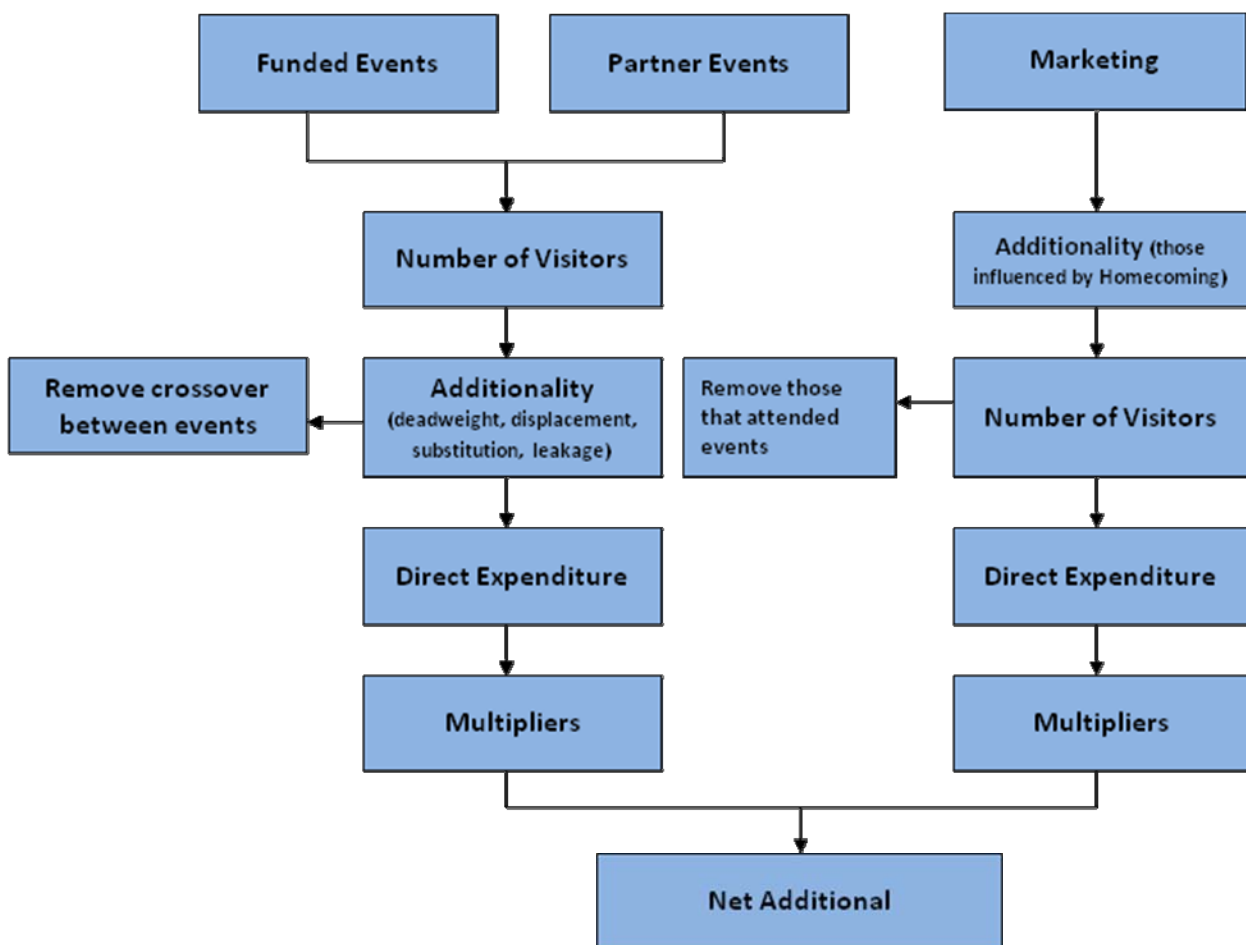
<sup>2</sup> List provided by Homecoming Scotland

## 2. Economic Impact

### 2.1 Introduction

The process for calculating the economic impact is set out below in **Figure 2.1**.

**Figure 2.1: Process for Calculating Economic Impact**



This report has calculated the economic impact from those that attended events and those identified through the marketing campaign. For those identified through the marketing campaign we removed those that had attended events, as they are already captured through the events impact assessment.

## 2.2 Events

### 2.2.1 Outcome Reports

In total there were 111 signature, themed and rolling events. Three were designed to be promotional activities that would help launch the year<sup>3</sup> and the impact from these has been included in the measurement of the PR value of HS09 which is separate from this report. For a further three<sup>4</sup> EKOS were asked to gather survey data to allow assessment of the economic impact. Of the remaining 105, we received 97 Outcome Reports<sup>5</sup>. For a further four events we did not receive the Outcome Reports but were given information on the visitor numbers and origin so that we could incorporate them into the economic impact assessment<sup>6</sup>.

### 2.2.2 Awareness, Family Origins and Ratings

#### Awareness and Family Origins

Visitors to the events<sup>7</sup> were asked if they were aware of Homecoming 2009 and also if they were aware that the event they were attending was part of Homecoming 2009; the results are shown in **Figure 2.2**.

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<sup>3</sup> Homecoming Burns Supper, World Famous Burns Supper and Iconic Burns.

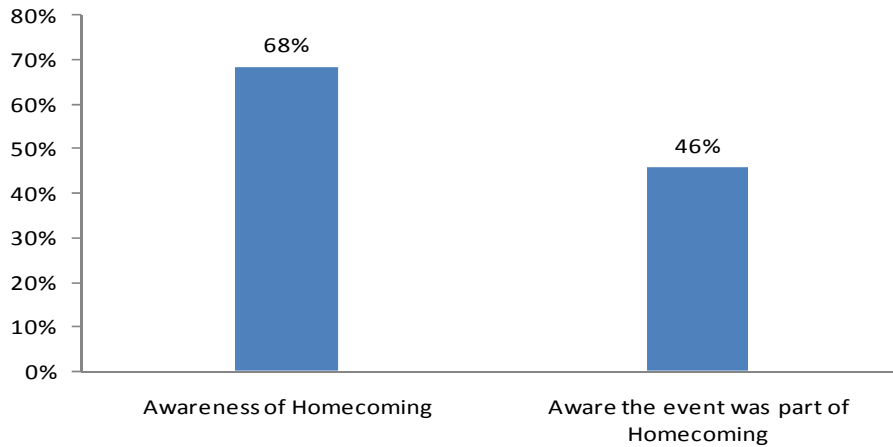
<sup>4</sup> The Open Championship, Forbes Conference and Intercontinental Rally Challenge.

<sup>5</sup> Received by the deadline for preparing the report.

<sup>6</sup> Four events did not provide the data required to be included.

<sup>7</sup> Samples of visitors to events. The events gathered data and provided it through the Outcome Reports.

**Figure 2.2: Awareness of Homecoming**



A total of 68% of visitors to the events were aware of Homecoming 2009 whilst a total of 46% were aware that the event they were attending was part of Homecoming 2009 prior to their attendance at the event.

Respondents were also asked about their family origins. Of those attendees from outwith Scotland, 49% have family origins in Scotland.

### Rating of the Events

Event organisers were asked to provide information on the visitors overall rating of their event. **Table 2.1** shows the responses.

**Table 2.1: Rating of Event**

	%
Very Good	66%
Good	28%
Average	4%
Poor	1%
Very Poor	0%

As the table shows, the majority (94%) of visitors rated the events as ‘very good’ or ‘good’.

## 2.2.3 Funded Events

### Visit Numbers

There were a total of 1.78 million visits to the funded events with 69% being day visitors and 31% overnight.

**Table 2.2: Visit Numbers**

	Number	%
Day	1,227,979	69%
Overnight	554,514	31%
Total	1,782,493	100%

**Table 2.3** shows the split by origin.

**Table 2.3: Visits by Origin (%)**

Origin	%		Number	
	Day	Overnight	Day	Overnight
Local Authority	46.9%	1.0%	836,500	17,513
Elsewhere in Scotland	21.5%	11.5%	383,677	204,556
Elsewhere in UK	0.4%	10.1%	7,802	179,981
Overseas	0%	8.6%	-	152,464
Total	68.9%	31.1%	1,227,979	554,514

A total of 19% of visits were from outwith Scotland, of which 10.5% were from elsewhere in the UK and 8.6% from overseas.

## 2.2.4 Average Expenditure and Length of Stay

The average level of daily expenditure and length of stay varies by event. These have been applied accordingly<sup>8</sup>. The ranges and weighted averages for daily expenditure by origin are given in **Table 2.4** and length of stay in **Table 2.5**.

<sup>8</sup> For events where spend and/or length of stay figures have not been available we have assumed the levels from the VisitScotland Factsheet for that area.

**Table 2.4: Average Daily Expenditure**

Origin	Range		Mean	
	Day	Overnight	Day	Overnight
Local Authority	£10-106	£25-100	£21.99	£56.44
Elsewhere in Scotland	£10-106	£28-138	£28.34	£62.17
Elsewhere in UK	£10-57	£39-138	£33.31	£74.56
Overseas	-	£40-168	-	£79.95

**Table 2.5: Average Length of Stay**

Origin	Days	
	Range	Mean
Local Authority	1-10	2.3
Elsewhere in Scotland	1-9	3.1
Elsewhere in UK	1-12	4.2
Overseas	1-14	7.7

## 2.2.5 Gross Expenditure

Gross expenditure is calculated as follows:

$$GE = dv.ndv + ov.l.nov$$

Where GE	gross expenditure
dv	average daily expenditure of day visitors
ndv	number of day visitors
ov	average daily expenditure of overnight visitors
l	average length of stay
nov	number of overnight visitors

Allowance has been made for overnight visitors visiting an event on more than one day, where appropriate, to avoid double-counting. To do this we need to divide the overnight visit numbers by 1.44<sup>9</sup> to get overnight visitors. This gives total visitor numbers of 1.61m as detailed in **Table 2.6**.

<sup>9</sup> The average number of days they attended events (rounded figure).

**Table 2.6: Visitor Numbers**

	Number
Day	1,227,979
Overnight	386,355
Total	1,614,334

Applying the formula gives gross expenditure of £163m, as set out in **Table 2.7** (further detail is provided in Appendix 2).

**Table 2.7: Gross Expenditure**

	Number
Day	£29,525,011
Overnight	£133,815,404
Total	£163,340,415

### 2.2.6 Gross to Net

However, it is the net rather than the gross impacts which are important. We are interested in the net impacts that are attributable to Homecoming 2009. To assess this we need to take account of:

- deadweight;
- substitution;
- leakage;
- displacement; and
- multipliers.

#### Deadweight

Deadweight is a measure of the extent to which Homecoming would have taken place anyway, been of the same scale and/or quality in the absence of public sector support. The Homecoming initiative would not have taken place without public sector funding so the level of deadweight has been assessed as being zero.

## Substitution

Substitution is a situation where an organisation substitutes one activity for a similar activity to take advantage of public sector support.

Part of the appraisal process for Homecoming providing support to events involved ensuring that the funding was for a specific new relevant<sup>10</sup> activity that would not have taken place without the support. This ensured that substitution did not take place, and is therefore assessed as being zero.

## Leakage

Leakage is a measure of the benefits that leak out to a spatial area or group which the intervention is not intended to benefit. However, we are only assessing the impacts that accrue within Scotland, so leakage has already been accounted for within the process as we are not including any expenditure that took place outwith Scotland.

## Displacement

Displacement is a measure of the extent to which the event has simply moved expenditure from one part of the Scottish economy to another. Displacement has been accounted for through assessing the level of influence of Homecoming 2009 on an individual's decision to visit Scotland<sup>11</sup>. The expenditure of those where it is considered that Homecoming was not an important influence is displaced and therefore deducted from the gross expenditure. The average level of displacement is 84% and equates to £137,840,654.

## Multipliers

Direct expenditure will also have had two types of wider impact on the economy:

- supplier (indirect) effect: an increase in sales in a business will require it to purchase more supplies than it would have otherwise. A proportion of this 'knock-on' effect will benefit suppliers in the national economy; and

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<sup>10</sup> Relevant to the themes of Homecoming

<sup>11</sup> We have applied the average level of displacement across those where this was unknown.

- income (induced) effect: an increase in sales in a business will usually lead to either an increase in employment or an increase in incomes for those already employed. A proportion of these increased incomes will be re-spent in the national economy.

The Scottish Tourism Multiplier Study (STMS) provides standard supplier and income multipliers for the tourism sector<sup>12</sup>. This provides a split by urban, rural and remote rural and the most appropriate have been applied to each event based on where they took place.

### 2.2.7 Net Direct Additional Expenditure

Taking account of displacement gives net additional visitors to Scotland of 56,689 and net direct expenditure of £25.5m.

**Table 2.8: Net Direct Additional Expenditure**

	Expenditure
Gross Expenditure	£163,340,415
Less Displaced Expenditure	£137,840,654
Net Direct Expenditure	£25,499,761

The multipliers are then applied (the different multipliers used are summarised in **Appendix 2**) giving net additional expenditure attributable to Homecoming 2009 from funded events of £43,077,831.

There will be an element of double-counting in the estimate at this point as some people will have visited more than one Homecoming event. However, before removing this crossover between events we need to include visits to Partner Events.

### 2.2.8 Partner Events

#### Visitor Numbers and Origin

As noted earlier in Section 1.3, the partner events were not contractually required to report back to the Homecoming Team. Therefore, EKOS instigated a process to access some information from partner events in terms of:

<sup>12</sup> The concept of the multiplier is based on recognition that the various sectors within an economy are interdependent. This means that each sector purchases goods and services produced by other sectors within the local economy.

- visitor numbers;
- origin of visitors; and
- any research they had undertaken on visitors to their event.

This was undertaken through a combination of an e-survey and telephone calls. A total of 115 out of 317 partner events (36%) provided visitor numbers. The Homecoming Team also had details for a further 47 events that had provided projected visitor numbers before the event. However, it is recognised that at the appraisal stage project managers (in this case event organisers) can be prone to ‘optimism bias’ where they tend to overestimate the outputs from their project. The Homecoming Team also had projected visitor number for a further 30 events where EKOS had also gathered the actual visitor numbers.

From this we calculated that to allow for optimism bias we would need to reduce their projected figures by 12%, thus we reduced the figures for the 47 events where we only had projected numbers by this factor (the calculation for this is set out in **Appendix 2**).

For the remaining 155 events we have assumed the average level of visitors from those where we have figures.

A total of 28 of the events were able to provide details on the origin of visitors to their event. Using this as a proxy for the other events gives total visitor numbers as set out in **Table 2.9**.

**Table 2.9: Origin**

Origin	%	Number
Local Authority	45%	1,020,962
Elsewhere in Scotland	38%	861,641
Elsewhere in UK	13%	305,802
Overseas	4%	102,961
Total	100%	2,291,366

### Influence of Homecoming

However, not all of the visitors are relevant to our current assessment. We are only interested in those where Homecoming influenced their decision to visit Scotland. Our request for information from partner events on the level of influence of Homecoming on visitors’ decision to come to Scotland had limited success with only seven events providing the information.

This is not surprising as accessing this information would have involved the events instigating costly survey work or extending their existing survey work which would also have incurred additional costs. As they were not receiving any funding from Homecoming Scotland it is understandable that whilst they would be willing to help spread the message they were unwilling to gather data where the costs to do so would considerably outweigh the usefulness of that information to them.

Therefore, we need to use the limited number of events to provide guidance on the level of influence. Reviewing the events shows a range between 1-11% of those from outwith Scotland visiting as a result of Homecoming. The average across the events is approximately 5% (that compares with 24% for the funded events).

**Table 2.10: Number Influenced**

Origin	% influenced	Number
Elsewhere in UK	5%	15,290
Overseas	5%	5,148
Total		20,438

Applying this level of influence gives a total of 20,438 visits. However, this is the number of visits rather than visitors. As with the funded events we need to allow for the fact that some visitors may attend an event on more than one day. In the absence of this information for the partner events we have assumed the average gathered from the funded events of 1.44.

This gives a total number of visitors from outwith Scotland that were influenced by Homecoming of 14,193.

## 2.2.9 Crossover between Events

The total number of visitors influenced by Homecoming across the funded and partner events is 70,882.

**Table 2.11: Number Influenced**

Origin	Number of Visitors
Funded	56,689
Partner	14,193
Total	70,882

However, some of these will be the same visitors moving between events. We need to allow for this crossover between events to avoid double-counting. Feedback from the funded events shows that 23% of visitors were attending other events. If we apply this to both the funded and partner events it gives 16,303. On average they attended 2.7 Homecoming events which gives a total of 6,038 visitors.

**Table 2.12: Number Influenced at Events**

Origin	Number of Visitors
No crossover	54,579
Allowance for crossover	16,303
Average number attended	2.7
Number from crossover	6,038
Total Number	60,617

The total number of visitors from both those attending and not attending other Homecoming events is 60,617. For the partner events we do not have the same range of data that we have for the funded events i.e. length of stay, average expenditure, etc.

Therefore we have assumed that those that attended the partner events have a similar profile, in these respects, to those that attended the funded events. A total of 56,689 visitors to funded events generated £43,077,831 so 60,617 visitors to funded and partner events gives an estimated spend of £46,062,896<sup>13</sup>.

## 2.3 Marketing

A marketing campaign was undertaken by HS09 and VisitScotland. E-surveys were undertaken by TNS (on behalf of VisitScotland) with people contacted through the campaign. This allowed them to establish how many of the people had subsequently gone on to make a trip to Scotland during 2009.

It also provided the opportunity to include questions relating to Homecoming and its influence on a visitor's decision to visit Scotland in 2009.

<sup>13</sup> Includes direct, indirect and induced expenditure

### 2.3.1 Number of Visitors

The number that had been exposed to the marketing campaign who then subsequently visited Scotland was 219,458<sup>14</sup>. To measure the level of economic impact generated by this group, we first need to identify how many were influenced by Homecoming to visit Scotland in 2009 (to take account of displacement). Respondents were asked “Thinking about the reasons for taking your trip to Scotland this year, was Homecoming 2009 ...?”

- the main reason for my visit to Scotland this year;
- just one of the reasons for my visit to Scotland this year;
- I was planning to come to Scotland some time, and Homecoming made me come in 2009; and
- not a reason for my visit.”

Those that stated it was a main reason or that Homecoming led to them coming in 2009 have been included in our analysis as having been influenced by Homecoming. That equates to 12.4% of the total that visited Scotland, giving a total of 27,145 visitors.

However, some of these visitors will have attended Homecoming events during their visit to Scotland. Their expenditure will already have been captured in the earlier analysis covering the events.

We asked respondents whether they had attended Homecoming events during their trip to Scotland. This allows us to remove them from the calculations at this point so that we do not double-count their impacts. Making allowance for those that had attended a Homecoming event reduces the number in this group to 11,316 visitors.

The number that identified that it was just one of the reasons for their visit to Scotland this year (and had not attended an event) was 23,293. For this group we do not know how many influences there were on their decision to visit Scotland and the importance attached to Homecoming.

We have assumed that if Homecoming had not taken place these visitors would have come to Scotland anyway, because if Homecoming not taking place had led to them not visiting then it would be reasonable to assume that Homecoming would have been their main reason for visiting.

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<sup>14</sup> Figure provided by VisitScotland

These people have not cited it as their main reason and our view is that it is not appropriate to include them in the number of net additional visitors.

Therefore, the net additional visitors are the 11,316 who stated that Homecoming was their main reason or it led to them coming in 2009.

### 2.3.2 Expenditure

The VisitScotland surveys also captured information on the level of expenditure made by visitors. This covered both the total for their holiday and the total spent in Scotland. We have used the latter for our calculations<sup>15</sup>. The level of visitors and spend per trip were identified separately for each of the UK, USA, Canada, Australia, New Zealand and Rest of World (details are provided in **Appendix 2**). Combining the results for each of the areas gives a total of £4,468,523 of direct expenditure.

**Table 2.13: Net Direct Additional Expenditure**

	Values
Number	11,316
Average Trip Spend	£395
Net Direct	£4,468,523

### 2.3.3 Deadweight, Substitution, Leakage and Multipliers

Deadweight is zero because the marketing activity would not have taken place without public sector funding and substitution is zero as the public sector spent the money directly. We have only taken account of expenditure that was made by visitors whilst in Scotland so this addresses leakage (displacement has already been addressed in the previous section).

As discussed earlier in Section 2.2.6 we need to apply multipliers to this direct expenditure. For the events we used the appropriate multiplier depending on whether the event was in an urban, rural or remote rural area. For these visitors we do not know where they actually visited in Scotland. Therefore, we have applied the average for the urban, rural and remote rural multipliers which is 1.7. This gives net additional expenditure of £7,596,489.

<sup>15</sup> Based on average expenditure figures provided by VisitScotland.

### 2.3.4 Summary of Net Additional Expenditure

The net additional expenditure impacts from Homecoming 2009 are set out in **Table 2.14**.

**Table 2.14: Net Additional Expenditure**

Origin	Events	Marketing <sup>1</sup>	Total
Net additional visitors	60,617	11,316	71,934
Net additional expenditure	£46,062,896	£7,596,489	£53,659,385

<sup>1</sup> Those identified through the marketing campaign that did not attend events

### 2.3.5 Net Additional Employment

Due to the short-term nature of the events the employment impacts would not meet HM Treasury<sup>16</sup> criteria of being full-time and of a 10 year duration.

It is, instead, likely that the employment impacts will be short-lived. We have, therefore, calculated annual equivalent jobs. We have applied the most appropriate spend:employment factors (urban, rural or remote rural) derived from the STMS<sup>17</sup>.

Applying the spend:employment factor to the net additional expenditure figures gives employment impacts of 1,536.4 annual FTEs.

### 2.3.6 Net Additional GVA

The level of gross value added (GVA) generated has been estimated by applying a GVA per employee ratio of £19,400<sup>18</sup>. This generates net additional annual GVA of £29,805,703.

### 2.3.7 Return on Investment

The expenditure for Homecoming Scotland is set out in **Table 2.15**<sup>19</sup>.

<sup>16</sup> "The Green Book", HM Treasury.

<sup>17</sup> The values of these are given in Appendix 2.

<sup>18</sup> Scottish Annual Business Statistics 2007

<sup>19</sup> Note these are inputs for Homecoming 2009 and do not form part of the impacts, as the target was to use this funding to generate net additional visitors and expenditure to Scotland.

**Table 2.15: Homecoming Expenditure**

Category	Spend
Event Funding	£3m
Marketing	£1.75m
Overheads	£0.75m
Total	£5.5m

The level of net additional expenditure from Homecoming was £53.7m compared to a target of £44m (22% above target). The return on investment (ROI) was 1:9.8. The ROI target for Homecoming was 1:8, also above target.

## 2.4 Summary of Impacts

**Table 2.16** provides a summary of the impacts generated by Homecoming 2009. The net additional expenditure totals £53.7m.

**Table 2.16: Summary of Impacts**

Indicator	Impact
Net Additional Expenditure	£53.7m
Net Additional annual FTEs	1,536
Net Additional GVA	£29.8m
ROI	1:9.8

## 3. Media Coverage of Events

### 3.1 Introduction

This section provides feedback on media coverage and marketing taken from the Outcome Reports submitted by event organisers. This only relates to the event organisers feedback on the type of media coverage their event achieved. A separate study analysing the overall reach, tone and value of all the media coverage relating to Homecoming is being undertaken elsewhere and this chapter reports only on feedback provided in the Outcome Reports.

### 3.2 Media Coverage and Marketing

The event organisers were asked what kind of media coverage their event had achieved and where this was generated. The results are shown in **Table 3.1**.

**Table 3.1: Type of Media Coverage (% of Events)**

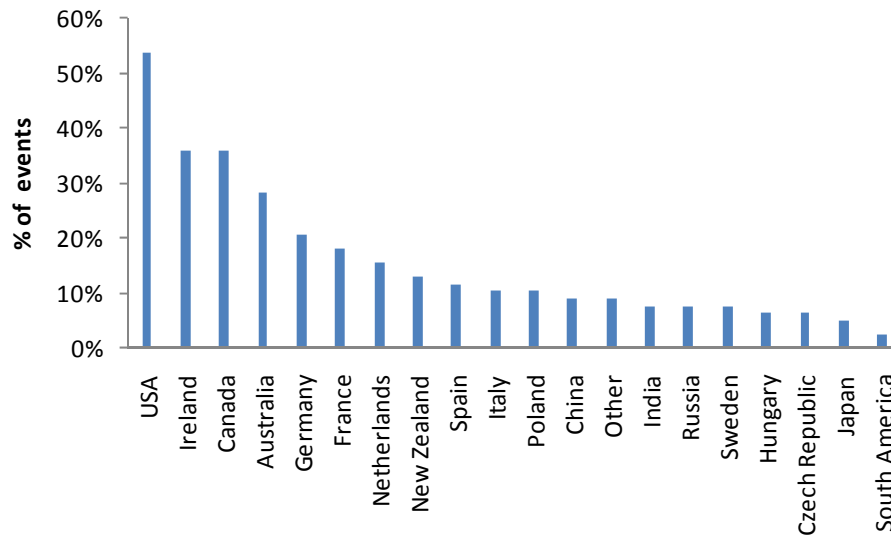
	Local/regional	National (Scotland)	UK	International
Newspapers/magazines	97%	85%	66%	51%
TV	52%	48%	18%	16%
Radio	83%	63%	25%	18%
Online	82%	78%	67%	61%

N=93, 4 did not provide a response

The majority of the events achieved local/regional coverage particularly through newspapers/magazines, radio and online. A high proportion also received national coverage through these media channels. As would be expected the number of events achieving coverage at a UK and international level was lower. However, there were certain mediums through which events received more UK and international coverage – newspapers/magazines and online. Whilst coverage through these mediums was lower than at the local and national level, between one half and two thirds of events still achieved coverage through these media channels. Coverage through the other mediums of TV and radio were much lower at the UK and international level.

Event organisers were also asked to indicate which overseas countries they had achieved media coverage in. The results are shown in **Figure 3.1**.

**Figure 3.1: Countries Media Coverage Achieved in**



N=78

The countries where most events received coverage tended to be those that have traditionally had strong tourism and/or diaspora links with Scotland – USA, Ireland, Canada and Australia. There is also a concentration around European countries but also extended to other parts of the world such as China and Japan.

Of the seven that cited ‘other’, three said that they achieved coverage ‘worldwide’; with the remaining four achieving media coverage in the following countries: Turkey, Singapore, Austria, Bulgaria, Finland, Latvia, Moldova, Norway, Romania, Switzerland, Belgium, Greece, Iceland, Korea, Dubai and Cyprus.

### 3.2.1 Existing Events

Some of the questions asked in the Outcome Report only related to existing events. In total there are 60 new events<sup>20</sup>, therefore **Tables 3.2 to 3.5**, over do not apply to them.

Event organisers were asked if they felt that the event had achieved increased media coverage this year and **Table 3.2** illustrates the responses.

<sup>20</sup> List checked by the Homecoming Team.

**Table 3.2: Did the event experience increased media coverage this year?**

	Number	%
Yes	28	80%
No – about the same	6	17%
No – less than last time	0	0%
Don't know	1	3%
<b>Total</b>	<b>35</b>	<b>100%</b>

Note: 2 did not provide a response

The majority of events (80%) that had generated media coverage in previous years reported that they had achieved increased media coverage this year. None said that they had experienced less than last time.

They were then asked whether they thought the Homecoming Scotland campaign had influenced the level of media coverage. **Table 3.3** provides details.

**Table 3.3: Did the Homecoming Scotland campaign influence the level of media coverage?**

	Number	%
Yes	29	78%
No	6	16%
Don't know	2	5%
<b>Total</b>	<b>37</b>	<b>100%</b>

For existing events, the majority of event organisers reported that Homecoming has had a role in influencing the level of media coverage that was achieved by these events in 2009.

The event organisers were asked whether they made any new media contacts this year as a result of Homecoming activity and **Table 3.4** shows the responses.

**Table 3.4: Did you make any new media contacts this year as a result of your Homecoming activity?**

	Number	%
Yes	25	74%
No	6	18%
Don't know	3	9%
<b>Total</b>	<b>34</b>	<b>100%</b>

Note: 3 did not provide a response

As well as helping to increase media coverage, Homecoming has also helped the majority of existing events to increase their media contacts and extend their marketing database (see **Table 3.5** below).

**Table 3.5: Have you extended your marketing database as a result of your participation in Homecoming Scotland 2009?**

	Number	%
Yes	31	84%
No	5	14%
Don't know	1	3%
<b>Total</b>	<b>37</b>	<b>100%</b>

### 3.3 Overview

The majority of events had achieved local/regional and national coverage but the coverage has extended well beyond this to include UK and international coverage. This has particularly been in the case through newspapers/magazines and online.

Coverage has been most common in those countries with strong tourism and/or diaspora links with Scotland such as USA, Ireland, Canada and Australia but has also extended too many other countries (particularly in Europe).

For the majority of existing events, Homecoming has had a positive impact on increasing the level of media coverage that they had in 2009 and extending their media contacts and marketing databases.

## 4. Wider Benefits for Event Organisers

### 4.1 Introduction

As set out earlier in **Chapter 2**, Homecoming generated benefits in terms of the economic impact. However, there are also other benefits that have been realised and this Chapter presents an analysis of other benefits as reported by event organisers in the Outcome Reports<sup>21</sup>.

### 4.2 New or Enhanced Activity

The event organisers<sup>22</sup> were asked if Homecoming had encouraged new or enhanced activity in a number of areas, (94 provided responses) as set out in **Figure 4.1**.

**Figure 4.1: Other Benefits from Homecoming 2009**



N=97

<sup>21</sup> These are the views of event organisers not visitors.

<sup>22</sup> Includes all event existing and new.

Underlining the legacy value of participation for event organisers, the majority of the events had been able to extend their event/festival programme, target new audiences and work with local partners and national agencies.

However, other important benefits included renewed interest/pride in celebrating Scotland’s culture amongst event participants and introduction of new marketing activity.

### 4.3 Participate in another Themed Year

As **Table 4.1** illustrates, the majority of event organisers (90%) said that they would take part in another themed year, if the theme was relevant to their activity.

**Table 4.1: Would you take part in another Themed Year?**

	Number	%
Yes	87	90%
Don’t know	9	9%
No	1	1%
<b>Total</b>	<b>97</b>	<b>100%</b>

### 4.4 Events Industry Legacy of Homecoming

The remaining analysis in the Chapter is from open ended questions<sup>23</sup>. The analysis reflects the words and phrases that the event organisers have chosen to respond with. Therefore, it cannot be assumed that if some gave one response that everyone else did not agree with this, rather they may simply have chosen to express their views in a different way. The Homecoming Team asked us to analyse the responses to identify the key themes within each rather than an exhaustive analysis of all responses.

Event Organisers were asked to comment on what kind of legacy they thought Homecoming Scotland would leave. All the events provided a response (97). The most commonly cited responses included:

<sup>23</sup> Multiple responses possible.

- potential plans to repeat and or further develop events: 33% (32);
- increased reputation/awareness of event/Scotland on international stage: 32% (31);
- celebration of Scotland/Scottish culture: 28% (27);
- new partnerships and contacts established: 26% (25);
- reputation/awareness of event locally: 18% (18);
- tangible outcomes (new works of art, DVDs, books, websites, etc.) 17% (17); and
- raised/increased profile: 16% (16).

The most popular response was that Homecoming will potentially allow them to repeat the event next year or further develop their event. Some events commented that the increase in publicity and attendance had allowed them to look at developing their current event further or ways in which they could repeat their event.

Increasing the awareness and reputation of events, particularly on an international stage, was also highlighted as an important legacy. The additional marketing and promotional activity had increased the awareness and popularity of events.

## 4.5 Benefits for Individual/Organisation/Event

The event organisers were asked to state what kind of benefits being part of Homecoming Scotland had generated for their organisation/event. The majority (94) provided a response. The most frequently suggested benefits were:

- ability to reach new and extended markets through being part of a wider campaign: 52% (51);
- easier to attract press/media coverage: 21% (21);
- increased awareness/profile: 18% (18);
- easier to attract support and funding/sponsorship: 17% (17); and
- increased partnership working/new contacts: 16% (16).

The most popular benefit was the ability to reach new and extended markets as a result of being part of the wider Homecoming Scotland marketing campaign. Over half of the events stated this as a benefit.

Attracting press and media coverage was seen as a benefit for over a fifth of events (21%).

## 4.6 Activity or Developments Generated

Listed below are the main activities and developments that events generated as a result of being part of Homecoming Scotland with 70 events providing responses:

- new products/events created: 24% (23);
- new networks/links: 11% (11);
- extended programmes: 7% (7); and
- marketing: 5% (5).

Nearly a quarter (24%) said they had created new products or events as a result of being part of the Homecoming Scotland celebrations. New networks and links was the main development identified by just over a tenth (11%).

## 4.7 Working with Homecoming Scotland Team

The event organisers were asked for their experience of working with the Homecoming Team and how they regarded the support provided. All (97) respondents provided an answer with the most popular ones shown below:

- helpful: 33% (40);
- supportive: 32% (39);
- positive experience/other positive comments: 31% (30);
- negative comments: 12% (12);
- professional: 11% (11); and
- excellent: 10% (10).

Please note our earlier comment in **Section 4.4**, that the questions were open ended. Therefore, because one third said the Homecoming Team was helpful does not mean that two thirds thought they were unhelpful. Rather because the responses were open-ended they chose other terms such as supportive or professional. Therefore there is a need to look at whether the comments were generally positive or negative.

Analysis of the responses shows that the majority were positive with 84 (88%) providing positive comments, 11 (11%) providing both positive and negative comments and 1 (1%) providing only a negative comment. The focus of the negative comments tended to be on: the fact that the Homecoming Team had a lot of work to do and so did not really have the capacity to support their event as much as they would have liked; and the Outcome Report requested a lot of information in relation to the level of funding they received.

## 4.8 Overall Experience

Event organisers were asked about their overall experience of taking part in Homecoming Scotland. A number of these responses were re-iterating the comments provided previously but the most popular comments are listed below:

- positive experience: 39% (38);
- the benefits of being marketed within a national programme: 25% (24);
- lasting benefits to be taken forward: 14% (14); and
- sense of national pride: 11% (11).

## 4.9 Overview

The most commonly cited benefits from taking part in Homecoming were being able to extend their event/festival programme, targeting new audiences, working with local and national partners, renewed interest/pride in celebrating Scotland's culture and the introduction of new marketing activity. Half of the events had highlighted that they had reached new and extended markets through being part of a wider campaign.

The vast majority of event organisers found working with the Homecoming Team very positive with many referring to them as being helpful and supportive. Whilst some had negative comments about working with the Team this mostly related to the Team being stretched and therefore not having enough time for their event and the large amount of information requested through the Outcome Report.

A total of 90% of event organisers would take part in another themed year, if the theme was relevant to their activity.

## 5. Conclusions

### 5.1 Introduction

This Section provides a brief set of conclusions in terms of the economic impact of Homecoming 2009 and some of the wider benefits.

### 5.2 Awareness and Family Origins

A total of 68% of visitors to the events were aware of Homecoming 2009 with 46% being aware that the event they were attending was part of Homecoming prior to attending.

Of those attendees from outwith Scotland, 49% have family origins in Scotland.

### 5.3 Economic Impact

The economic impact of Homecoming 2009 is set out in **Table 5.1**. Homecoming generated just under 72,000 net additional visitors from outwith Scotland drawn specifically as a result of Homecoming.

**Table 5.1: Summary of Impacts**

Indicator	Impact
Net Additional Expenditure	£53.7m
Net Additional FTEs	1,536
Net Additional GVA	£29.8m
ROI	1:9.8

The level of net additional expenditure from Homecoming was £53.7m compared to a target of £44m (22% above target). The return on investment (ROI) was 1:9.8. The ROI target for Homecoming was 1:8, so again well above target.

### 5.4 Events Coverage and Marketing

The majority of events had achieved local/regional and national coverage but the coverage has extended well beyond this to include UK and international coverage.

This has particularly been in the case through:

- newspapers/magazines (51%-66% of events); and
- online (61%-67% of events).

Coverage of events has been most common in those countries with strong tourism and/or diaspora links with Scotland such as the USA (54%), Ireland (36%), Canada (36%) and Australia (28%) but has also extended to many other countries (particularly in Europe). For existing events, Homecoming has had a positive impact on the number that had:

- increased their media coverage in 2009 (78%);
- extended their media contacts (74%); and
- extended their marketing databases (84%).

## 5.5 Wider Benefits for Event Organisers

The most commonly cited benefits by event organisers from taking part in Homecoming were:

- being able to extend their event/festival programme (86%);
- targeting new audiences (84%);
- working with local partners (82%);
- working with national partners/agencies (79%);
- renewed interest/pride in celebrating Scotland's culture (73%); and
- the introduction of new marketing activity (67%).

Half of the event organisers highlighted that they had reached new and extended markets through being part of a wider campaign.

The vast majority of event organisers found working with the Homecoming Team very positive with many referring to them as being helpful and supportive. Whilst some had negative comments about working with the Team this mostly related to the Team being stretched and therefore not having enough time for their event and the large amount of information requested through the Outcome Report.

A total of 90% of event organisers would take part in another themed year, if the theme was relevant to their activity.

## **Appendix 1: Outcome Report and Survey Sample Questions**

Please see separate document.

## Appendix 2: Additional Information

### Gross Expenditure

The gross expenditure from those attending events is set out below.

	Local Authority	Elsewhere in Scotland	Elsewhere in UK	Overseas	Total
<b>Day</b>					
Number	836,500	383,677	7,802	-	1,227,979
Average Daily Spend	£21.99	£28.34	£33.31	-	-
Total Spend – Day					
Visitors	£18,392,640	£10,872,478	£259,894	-	£29,525,011
<b>Overnight</b>					
Visitors	11,022	141,439	126,059	107,835	386,355
Average Daily Spend	£56.44	£62.17	£74.56	£79.95	-
Length of stay	2.3	3.1	4.2	7.7	-
<b>Total Spend -</b>					
<b>Overnight Visitors</b>	<b>£1,440,505</b>	<b>£27,367,626</b>	<b>£39,014,477</b>	<b>£65,992,795</b>	<b>£133,815,404</b>
<b>Total Spend - Day and Overnight</b>	<b>£19,833,145</b>	<b>£38,240,104</b>	<b>£39,274,371</b>	<b>£65,992,795</b>	<b>£163,340,415</b>

### Multipliers

The multipliers that have been used in the study have been taken from the Scottish Tourism Multipliers Study (STMS) and are summarised below.

	Urban	Rural	Remote Rural
Day	1.72	1.65	1.81
Overnight	1.73	1.57	1.80

### Optimism Bias

The calculation for optimism bias on the partner events is set out below.

<b>Optimism Bias Calculation</b>	
Events with actual and projected numbers	30
Projected Visitors	129,005
Actual Visitors	113,483
Difference	-12.0%

## Marketing – Net Direct Additional Expenditure

The net direct additional expenditure of visitors influenced by Homecoming but that had not attended an event is set out in the table below.

<b>Net Direct Additional Expenditure</b>	
USA and Canada	£2,310,899
Australia and New Zealand	£135,883
UK	£1,563,422
ROW	£458,320
<b>Total</b>	<b>£4,468,523</b>

## Spend:Employment Factors

The spend:employment factors used to convert to employment impacts are given in the table below.

	<b>Urban</b>	<b>Rural</b>	<b>Remote Rural</b>
Day	£35,750	£31,400	£36,950
Overnight	£35,500	£33,750	£33,650

The average level is £34,926.

<b>Employment Impacts</b>	
Net Additional Expenditure	£53,659,385
Average spend:employment factor	£34,926
Net additional employment	1,536.4