

Economic evaluation of Homecoming Scotland 2014

Final Report - July 2015

The Moffat Centre for Travel and Tourism Business Development,
Glasgow Caledonian University, Glasgow G4 0BA

www.moffatcentre.com

Contents

0. Introduction.....	4
1. Number of people and their origins	8
2. Supply chains and trickle-down effects: multipliers	12
3. Gross value added and employment.....	16
4. Additionality, externalities and displacement	17
5. Attribution to the Homecoming campaign	19
6. Conclusions.....	19
Appendix 1: HC 2014 events surveyed as part of this evaluation.....	22
Appendix 2: Questionnaire used in primary research	26
Appendix 3: Additional calculations.....	27

The economic effects of Homecoming Scotland 2014: Executive Summary

There were more than 1000 events associated with Homecoming Scotland 2014, and a conservative estimate of the number of total attendances including performers, participants and staff is 4.6 million (m).

The approach taken in this report indicates net additional revenue in Scotland attributable to Homecoming 2014 is £136m. This represents net additional spend by visitors, businesses and supply chain spending as a direct result of the Homecoming programme.

This approach counts only spending by visitors from outside Scotland who were strongly motivated by the Homecoming campaign and those motivated by specific events, whom it weights by the proportionate contribution of Homecoming to the cost of staging those events.

Therefore, the estimate of £136m is made up of net additional expenditure of visitors out with Scotland which is estimated at £94m and business and supply chain trickle down effects. These calculations are based on the Scottish input, output tables.

Table 1 - HC 2014 Net Economic Impacts associated with HC 2014

Attributable to Homecoming	Standard Economic Methodology
Attributable number of visitors (not including Scottish residents)	326,000
Attributable net additional expenditure by visitors	£94m
Gross Output of Scottish industries (direct, indirect and induced)	£136m
Net additional GVA to Scottish Economy (direct, indirect and induced)	£46m
Employment (direct, indirect and induced FTEs) Annual Equivalent Jobs	1,713
Employment (direct, indirect and induced FTEs) Annual Equivalent FTEs	1,336

The results summarised here were based on 2700 face-to-face interviews at 17 of the 137¹ events that received a total of £3.7 m in funding contributions from the campaign. A further £2.5 m was spent on marketing at home and abroad and on management, and 941 events, designated 'partner events', used the marketing designation and other forms of in-kind assistance. Three quarters of people at events were day visitors from Scotland, with the remainder split equally between overseas, the rest of the UK, and Scottish overnight attendees.²

¹ Note that for evaluation purposes, for example 'Homecoming Hogmanay' was treated as a single event, whereas VisitScotland have counted the six events which made up the programme as separate events and therefore have record 137 funded events as having received HC2014 funding contributions'

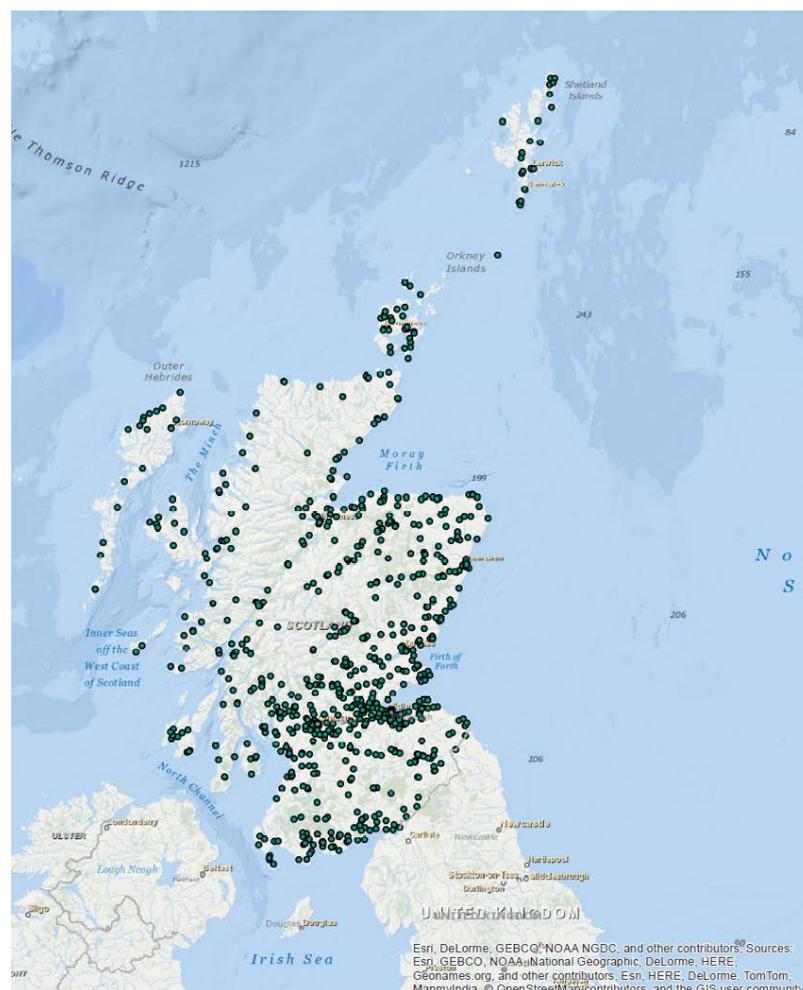
² The impact of Homecoming in 2014 compares favourably with Homecoming 2009 - which is when it was last held. In 2009, additional revenue in Scotland, based on over 400 events staged was estimated at £53.7m; in 2014 based on over 1000 events it was £136m. The number of net additional visitors from outwith Scotland that were professionally assessed as having been influenced to travel to Scotland as a result of Homecoming in 2009 was just under 72,000; in 2014 it was 326,000. Direct comparisons should be made with caution due to differences in methodology between the two reports.

0. Introduction

The Moffat Centre at Glasgow Caledonian University was commissioned by VisitScotland to research and evaluate the economic effects of Homecoming Scotland 2014 (HC 2014).

0.1 Background

Homecoming Scotland 2014 was a series of more than 1000 events that took place all over Scotland throughout the year, and also comprised the promotional campaigns and activities that brought them to the attention of people at home and abroad.



0.1.1 Objectives

The objectives of Homecoming 2014 were:

To develop a strong portfolio of activity for 2014 that will:

1. Deliver additional tourism visits and revenue for Scotland
2. Develop Scotland's event portfolio and build capacity in the industry
3. Engage, inspire and mobilise communities across Scotland through Homecoming Scotland 2014
4. Engage and mobilise Scottish businesses through Homecoming Scotland 2014
5. Enhance Scotland's profile on the international stage

In pursuit of these objectives the Homecoming 2014 campaign devoted most of its resources to direct assistance to events. This was normally targeted either to new or existing events, or to increase the reach of existing events by bringing in more people from beyond Scotland's borders. It included funding, marketing and in-kind assistance. In addition there was marketing promotion to the travel trade and direct to consumers in other countries and in Scotland, and the provision of marketing materials and in-kind assistance to 'partner events'.

0.1.2 Resources

Total funds (which include the Homecoming Core Fund of £5.5 m and all other Homecoming related expenditure), were c. £6.2 m.

0.2 The structure of this report

This report is structured around the six-step method that was used to organise information from the campaign and to analyse it. The process operated as follows:

1. Estimation of the number of people attending events and others influenced by HC2014
2. Estimation of their total direct spending, and relevant direct spending of others
3. Calculation of indirect (supply-chain) and induced (trickle-down) consequences
4. Calculations of consequential GVA and employment
5. Determination of what is additional to the Scottish economy (would not have happened without HC2014) and the degree to which it may have displaced other elements that might have occurred in the Scottish economy
6. Review the extent to which the HC2014 campaign itself was responsible for these effects

0.3 Methods:

As counted for evaluation purposes there were 1073 events associated with Homecoming Scotland 2014³. Some 137 events received funding from EventScotland, and 17 of these were the subject of in-depth primary research (listed as Appendix 1). The main survey instrument, a questionnaire, is attached as Appendix 2. The remaining 118 funded events all completed Event Organiser Outcome Reports (EOR), addressing evaluation criteria.

There were 941 partner events that received no funding but did receive assistance in kind, and benefitted from generic marketing. They were not in a contractual relationship, but 53 kindly provided information on event performance, including audience numbers.

³ This event-count figure is slightly higher than the previously reported 1049 events staged because some events were subdivided in this report for evaluation purposes. For example the Burns and 'a' that Festival consisted of two separate measurements as the event occurred in two places simultaneously.

The parameters of the remaining 888 partner events were assessed very conservatively, at one third of the level of those that had provided information.

1. Number of people and their origins

It is conservatively estimated that there were 4.6 million attendances at events associated with Homecoming 2014. Whilst attendance might not be the only motivator for visiting the destination it was a major contributing factor.

1.1 Basis of estimate

The main source for the detail of the estimate was a survey conducted at 17 events, interviewing some 2700 people. Parameters for grossing this up were primarily obtained from Event Organisers' Outcome Reports, related dialogue with the organisers, and from voluntary reports from Partner Events. This area is by nature uncertain and has been conservatively estimated. The latter were discounted very heavily to allow for optimism bias and for the smaller scale outputs expected of non-reporting events.

1.2 Characteristics of those attending HC 2014

Most of those attending HC 2014 events came from Scotland and were day visitors. There were some Scottish overnight attendees, and overnight attendees from the other countries of the United Kingdom, and a number from overseas. Not everyone was an audience member: about 10% were performers, staff, volunteers, contractors or concessionaires involved with mounting the events. The geographic breakdown is illustrated below.

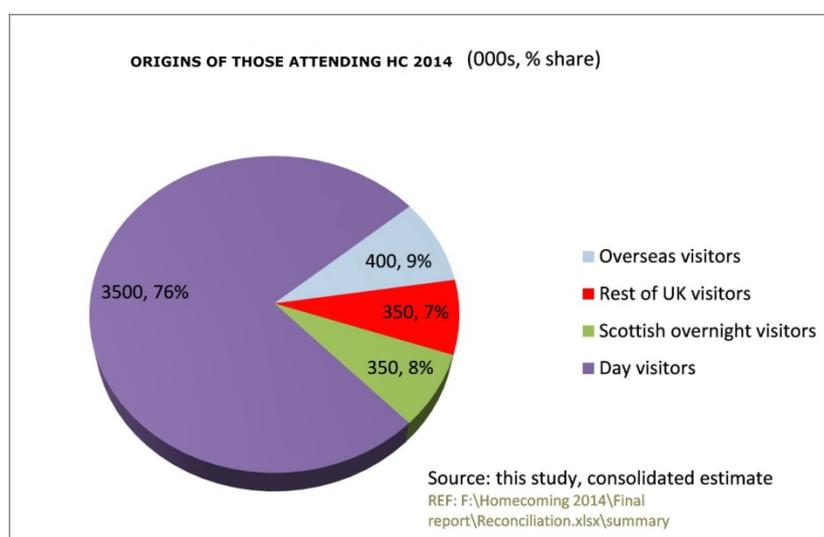


Figure 1 Homecoming 2014: Origins of consumers attending events

Depending on the specific geography of the location and the size of the Council area, about half the Scottish attendees were from the same Council area as the event and approximately half were from elsewhere. About 16% per cent of total attendees (i.e. 750,000) were from outwith Scotland. A quarter of overseas attendances were from USA visitors and this is by a significant margin the most strongly represented Direct Expenditure

The total direct expenditure by all attendees associated with HC2014 was £360m. This includes spending not just by audiences but by performers, participants and staff.

It also includes £73m (bottom-up estimate) spending on associated holidays in Scotland by people attracted to HC2014 events, and £6m by people attracted to Scotland by the HC2014 campaign who did not actually attend any events.

The expenditure by organisers in mounting these events was £43 m.

1.3 Daily and total expenditure by visitors

The average level of daily expenditure varied by origin of visitor, as shown in Figure 2. The high rate of spending for Scottish attendees may be in part due to sampling considerations, but also reflects the fact that a significant proportion of the Scots that stayed overnight were on business, helping to mount the events, and that many of the others were on holiday.

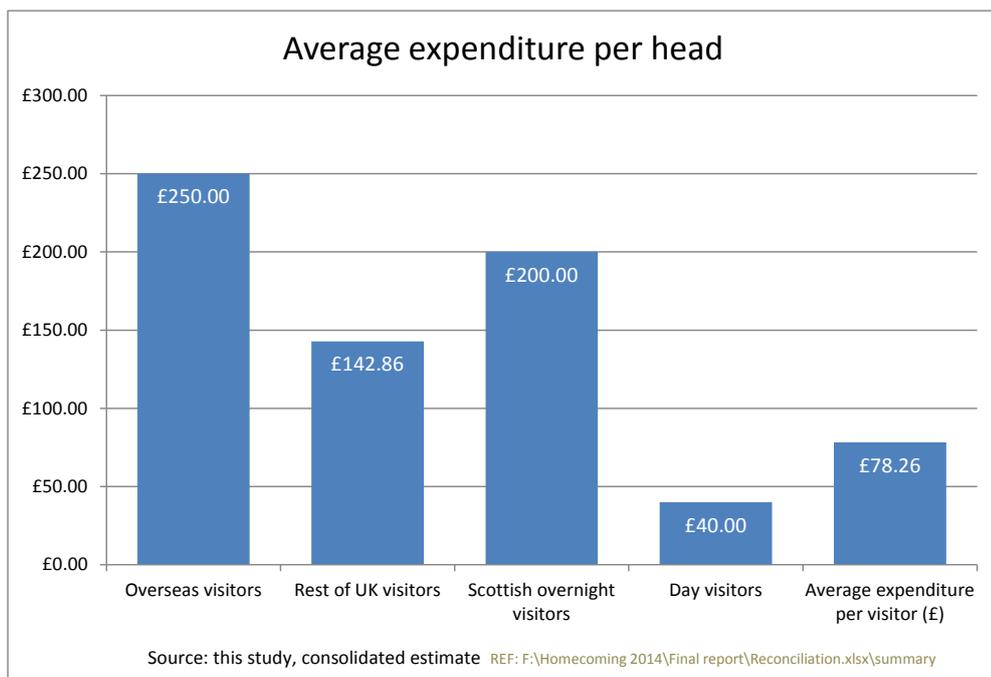


Figure 2 Expenditure per attendee, by origin

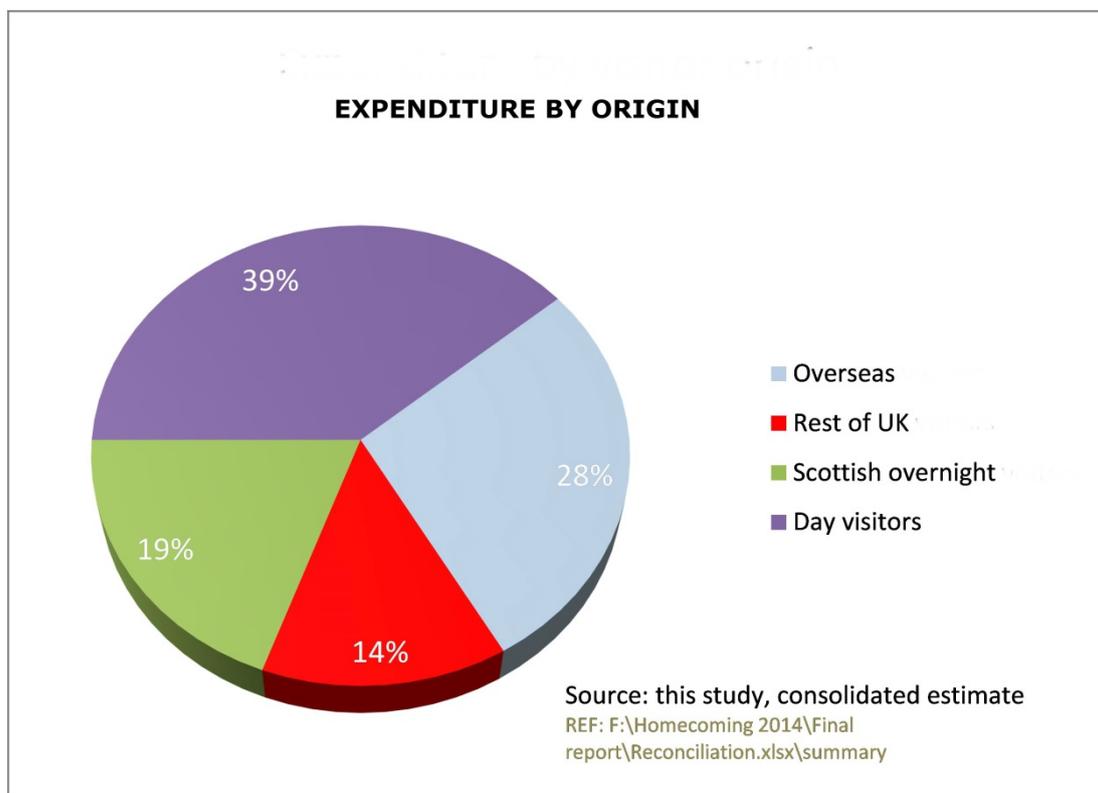


Figure 3: Expenditure by origin of attendees.

1.4 Income and expenditure by event organisers

Total expenditure by event organisers was £43m, of which less than 9% was funded by Homecoming 2014.

Table 2 Event funding and contributions

Number events	Funding, costs and audiences	Total event cost £m	HC/ related funding £m	HC contribution %	000 audience	Cost per audience member	HC contribution per audience member
17	Primary research	4,900	1,350		150	£32.67	£9.00
113	Other funded events	26,000	2,350		2920	£8.90	£0.80
53	Partner events	1,800	0,000		160	£11.25	£0.00
888	Other partner events (at 1/3 of info provided event)	10,300	0,000		900	£11.44	£0.00
1071	Total	43,100	3,700	8.6%	4130	£10.44	£0.90

2 Supply chains and trickle-down effects: multipliers

One of the main routes through which Homecoming influenced the wider Scottish economy was through the supply chains fulfilling the needs of both visitors and event organisers. Thus, for example, an Event Organiser contracts with a caterer to provide bar services. A visitor buys a whisky, so the bar buys a bottle from a wholesaler. The wholesaler buys it from the whisky firm, which buys the packaging, the water, the energy, the barley. The barley farmer buys fertiliser and so forth. At each stage, most of what does not get spent on the next stage of purchases goes to provide wages for workers, which are also largely spent, and circulate around the economy.

However at each stage the chain becomes a little weaker, since funds 'leak' out of it in ways that do not benefit the Scottish economy. From total visitor purchases of £360m at the first stage, 12% leaks into expenditure taxes (VAT, excise duty on alcohol and fuel duty) and 7% into imports (note all percentages are rounded). Thus total leakage at the first stage is 20%, leaving sales by Scottish producers at £290m. Some £12m of this figure comprises the price of event tickets which flow to event promoters (net of VAT) so £278m goes to other producers in the supply chain⁴. Some of the goods and services down the chain are also imported. The calculations on the chain are based on the input output tables, and so are net of VAT and duty.

Event organisers were asked to provide a breakdown of purchases by type. Two thirds of the spending by funded event organisers was therefore detailed in outcome reports and the pattern is illustrated below.

⁴ Ticket purchases need to be considered separately, because they are a specific service purchase, but according to national accounting conventions they should *not* be netted out.

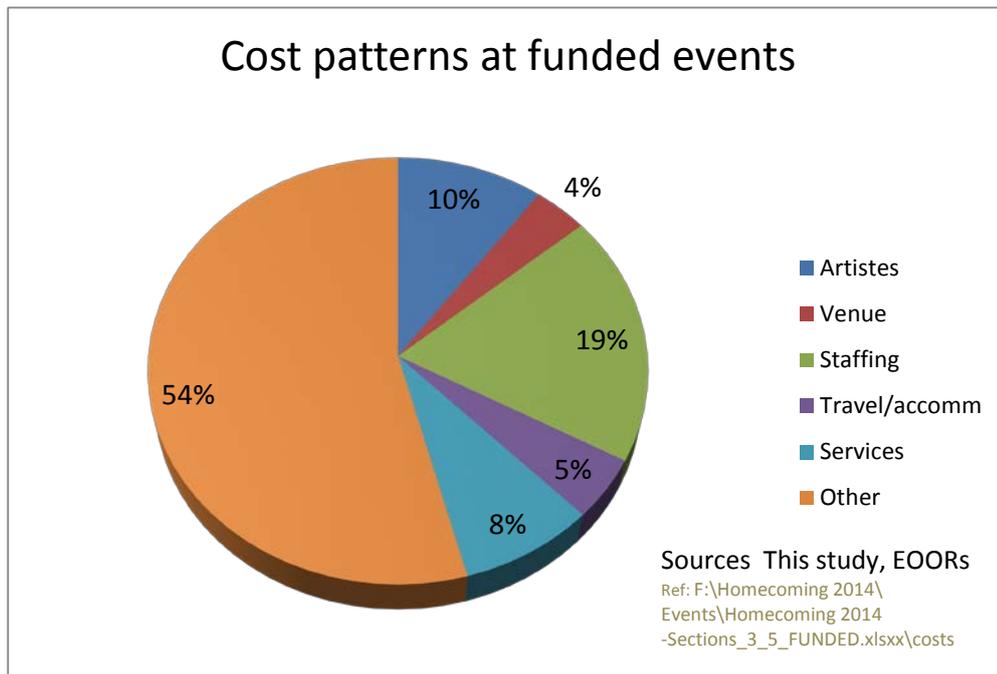


Figure 4 Cost structure for event organisers

This pattern was applied to all events. Energy, and food and drink for resale, are likely to have comprised the main elements of 'other', but were not separately itemised in the EOR template.

Organisers were also asked to identify the geographic origin of their purchases, so that leakages at this first stage of the supply chain could be measured more precisely.

Table 3 Event Organisers' cost structure

Costs and sourcing of purchases of events	Scotland	Rest of UK	Rest of world	Total
Artistes and Repertoire	8%	1%	1%	10%
Venue	3%	0%		4%
Staffing	15%	2%	3%	19%
Travel/accomm	4%	0%	0%	5%
Services	8%	1%		8%
Other	45%	8%	2%	54%
Total	82%	12%	6%	100%

Source: EORs
 Ref: F:\Homecoming 2014\Events\Homecoming 2014-Sections_3_5_FUNDED.xlsx

Leakages from promoters' spending amounted to 18% into imports and 13% into sales taxes.

All links through the economy were traced using Cogentsi's DREAM® model based on an updated version of the 2011 Scottish input-output table. The input for this was a vector of product demands. The pattern of organisers' spending (event costs) has been illustrated above and the pattern of attendee spending is detailed below.

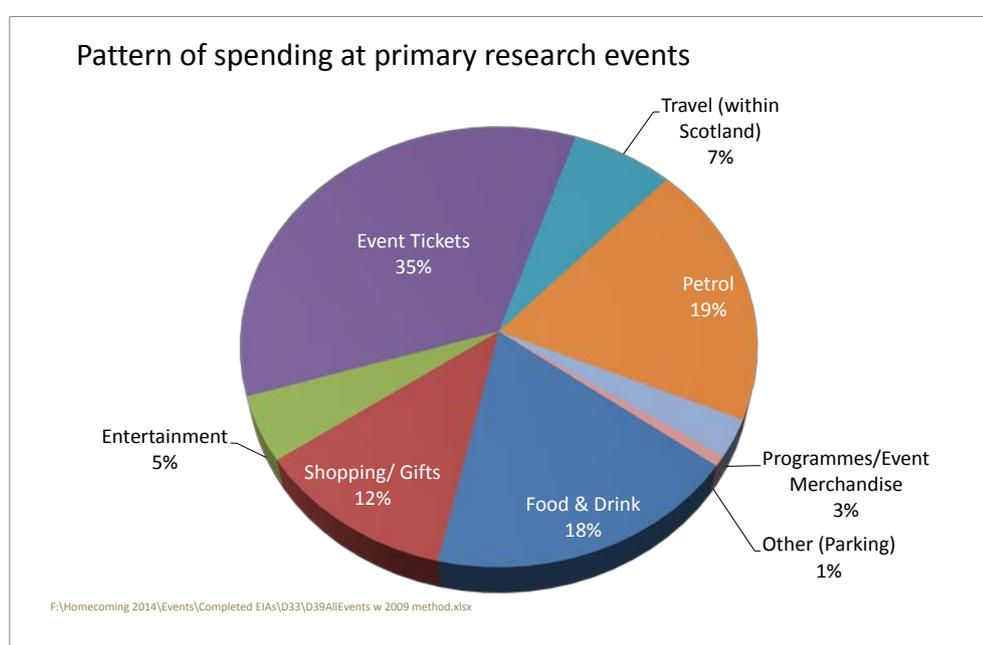


Figure 5 Composition of attendee spending on event days (based on primary research)

These broad categories were comprised of the 110 products treated in the supply and use tables. The supply chains for attendee spending (excluding the event promoters) add £110m of indirect sales by Scottish businesses, and the 'trickle down' effects on incomes adds a further £81m. Thus direct, indirect and induced Scottish sales flowing from spending are £481m (at 'basic' prices, i.e. net of VAT etc.).

Event organisers generated total revenues of £43m, but only half of this can be counted as sales. The remainder consisted of grants-in-aid from HC2014 and other public sources, and deductions for VAT and duties, so that real sales at basic prices amounted to £21m. The direct and indirect expenditure impacts from

promoter's purchases have been calculated on the basis of the real value of those purchases. Under each category we add £9m, making £38m in total. Thus taken together, the gross impact on Scottish Gross Output is £520m with a Net Additional Revenue of £136m.

3 Gross value added and employment

The input-output tables were used to convert the Gross Output figures to value added. This was done individually for each of the 110 industries identified at each stage of the supply chains. The GVA thus calculated is £174m. To enable comparisons with other non-event interventions we have calculated net additional GVA to the Scottish economy at £46m. A similar approach was applied to employment, where calculation is based on data from the Business Register Employment Survey. These estimates relate to total employment defined as employee jobs plus working proprietors.

The total annual employment generated by visits associated with HC2014 was just over 6,500 and 1,336 net Full Time Equivalent (FTE) jobs. If this is expressed in the standard HM Treasury measure of 10-year full-time-equivalent jobs it would equate to 520 new jobs.

4 Additionality, externalities and displacement

4.1 Additionality

The purpose of this section is to review how much of the gross impact would have happened anyway, without HC2014. For this report expenditure by Scots is treated as non-additional, on the conservative assumption that it would have occurred in Scotland anyway.

4.2 Externalities

The principal externalities of the Homecoming events was the attraction of visitors for a longer holiday in Scotland or to visit Scotland. Indeed this has already been encompassed by the analysis. There may be visitors for whom Homecoming was a single / minor motivator out of several reasons to visit. In terms of the scale of the effect, a conservative approach has been adopted and these visitors have been discounted.

4.3 Displacement

The Moffat Centre was able to include in its annual survey of 600 visitor attractions questions relevant to displacement and impacts of HC2014. Some 22 per cent of visitor attractions (see below) considered that HC2014 had a positive impact on their business, with the strongest response in the Heritage attractions sector and in the geographical region of Stirling, Loch Lomond and the Trossachs.

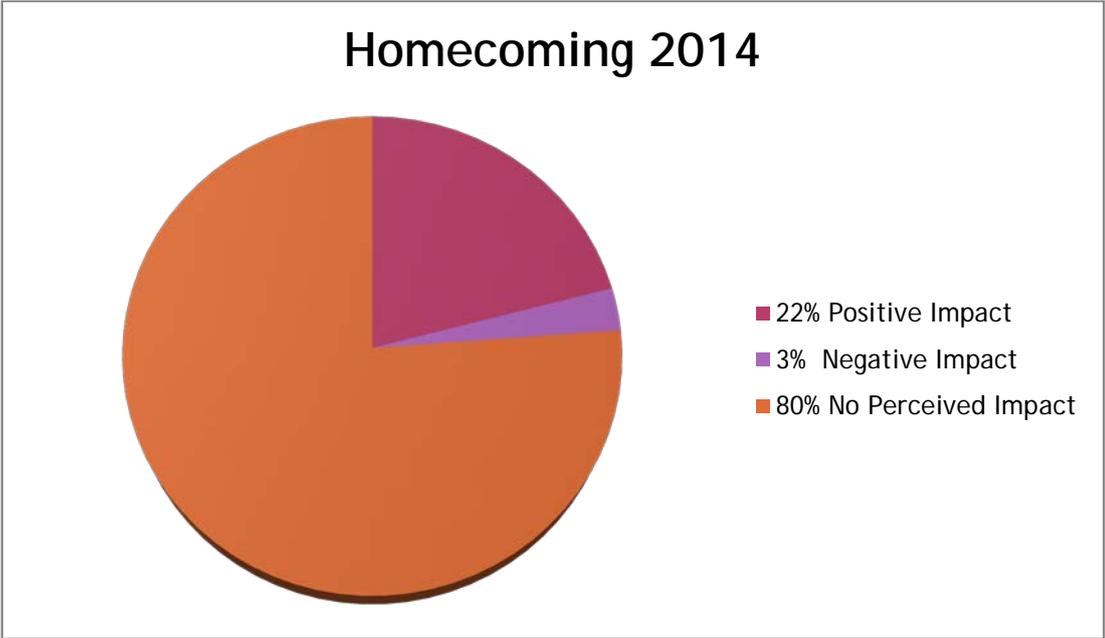


Figure 6 Visitor attractions audience response in respect of HC 2014

5 Attribution to the Homecoming campaign

Attribution relates to visitation catalysed or influenced by the HC2014 marketing campaign. It is important to note that not all visitation or attendance can necessarily be attributed to HC2014 marketing.

In the primary research, visitors were asked how much their attendance had been influenced by the Homecoming campaign per se and 24% indicated that Homecoming was important or very important.

In addition, 81% intimated that the nature of the event itself was important or very important.

Of those events included in the primary research, 20.4% of the cost of staging was contributed from HC2014 funds. A conservative view would be to attribute 20.4% of the relevant visitors and their spending to HC2014. After allowing for overlap (people who nominated both the event and Homecoming as very important reasons for visitation) some 40% of direct expenditure has been attributed to HC2014.

A range of criteria was used by VisitScotland when considering which events should receive funding - including if the funding was catalytic i.e. if funding would stimulate an event that would not otherwise occur at all.

Conclusions

The gross effects of events associated with Homecoming 2014 were as follows:

Table 4 HC2014 Gross Economic Impacts

Measures of economic impact Associated with Homecoming – Gross effects	
Number of attendees (000) (Inc. performers, participants and staff)	4,600,000
Direct visitor expenditure at market prices	£360m
Gross Output of Scottish industries (direct, indirect and induced)	£520m
GVA (direct, indirect and induced)	£174m
Employment (direct, indirect and induced, job-years)	6,535 Annual Equivalent

	FTEs
--	------

To derive a net impact the following coefficients were applied based on the responses received using the questionnaire in Appendix 2:

Table 5 Netting Coefficients

Key 'netting' coefficients	
% of attendees not of Scottish origin, etc.	18%
% expenditure attributable to non-Scottish attendees	65%
% 'Homecoming motivated' by new event funding	67%
% 'Homecoming motivated'	40%

Resulting in the following net impacts:

Table 6 HC 2014 Net Economic Impacts associated with HC 2014

Attributable to Homecoming	
Attributable number of visitors	326,000
Attributable net additional expenditure by visitors	£94m
Gross Output of Scottish industries (direct, indirect and induced)	£136m
Net additional GVA to Scottish Economy (direct, indirect and induced)	£46m
Employment (direct, indirect and induced, job-years)	1,713 Annual Equivalent Jobs
Employment (direct, indirect and induced FTEs)	1,336 Annual Equivalent FTEs

This report indicates that HC2014 was a marketing success, saw positive attendance figures and attracted visitors from outwith Scotland. As indicated above there were more than 1000 events and a conservative estimate of the number of total attendances is 4.6m. The net additional revenue in Scotland directly attributable to Homecoming 2014 is £136m. This figure represents the net additional spend by attendees, businesses supply chain spending as a direct result of the Homecoming programme. Therefore, the estimate of £136m is made up of net additional expenditure of visitors from outwith Scotland which is estimated at £94m and businesses and supply chain trickle down effects. These calculations are based on the Scottish input, output tables. To enable comparisons with other non-event interventions we have calculated net additional GVA to the Scottish economy at £46m and 1,336 net Full Time Equivalent (FTE) jobs.

Appendix 1: HC 2014 events surveyed as part of this evaluation.

	Event	Dates
1	Celtic Connections	16/01/2014 - 02/02/2014
2	Big Burns Supper	25/01/2014 - 27/01/2014
3	John Muir Festival	14/04/2014-22/04/2014
4	Helix	17/04/2014
5	European Festival of Brass	26/04/2014 - 4/05/2014
6	Bannockburn Live	28/06/2014 - 29/06/2014
7	Tin Forest	26/07/2014
8	Homecoming Muster and Commonwealth Flotilla (audience and crew events separately evaluated)	25/07/2014 - 26/07/2014
9	Mini Military Tattoo Events(Glasgow, Dundee)	7,14,21 /8 /2014
10	Harris Tweed Hebrides Tattoo 2014	08/08/2014 - 09/08/2014
11	Commonwealth Rowing Championships 2014	09/08/2014 - 10/08/2014
12	Dunlop - British Tour Car Championship	22/08/2014 - 24/08/2014

	Knockhill	
13	World Sheepdog Trial	03/09/2014 - 06/09/2014
14	Forth Bridges Festival (festival and torchlight procession separately evaluated)	04/09/2014 - 13/09/2014
15	Inverness Highland Meeting	12/09/2014-14/09/2014
16	Findhorn Bay Arts Festival	24/09/2014 - 28/09/2014
17	Commonwealth Fencing Championships	10/11/2014 - 15/11/2014

Appendix 2: Questionnaire used in primary research:



Homecoming Scotland 2014 Economic Impact Assessment

This questionnaire is undertaken by the Moffat Centre for Travel and Tourism Business Development/
Cogentsi and Grid Economics, commissioned by the event organisers.

Interviewer:

Date: / / Time: :

SECTION ONE - ABOUT YOU

Event: _____

1.1 Where do you live? (usual place of residence) Tick One Ayrshire Scotland England Wales
 N. Ireland Overseas: Please state which country? _____

1.2 If from the UK, enter your postcode: If unknown, town of residence? _____

1.3 How many adults & children (under 16 years of age) in your group today? Adults: Children:

1.4 Which of the following are you? Tick One
 Spectator Contractor Volunteer Participant/Performer
 Media Representative Staff Sponsor/VIP

SECTION TWO - ECONOMIC IMPACT

2.1 How many days are you attending this event/festival? How many events are you attending as part of this festival?

2.2 Where are you staying whilst attending this event? Tick One
 At Home (Go to Q. 2.7) With Friends/Relatives Guest House/B&B
 Hotel/Motel Self-Catering Campsite/Caravan Park
 Other (please specify) _____ Where is this accommodation located? _____

2.3 How many nights are you staying in this accommodation?

2.4 How much, if anything are you spending on accommodation per night? £ How many people is this for?

2.5 If travelling around Scotland, on this trip, how many additional DAYS & NIGHTS, are you likely to spend in other areas of Scotland, not including Q.2.3 location?

Town/ Region or Area	No. of days	No. of nights	Town/ Region or Area	No. of days	No. of nights
_____	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	_____	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>
_____	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	_____	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>

2.6 How much do you think this entire trip to/within SCOTLAND will cost? (including: accommodation, food etc, but excl. travel TO Scotland). £ How many people is this for?

2.7 To the nearest £, how much have/will you spend on yourself/ your group today at/ getting to today's event? £ How many people is this for?

Please break this amount down into the following categories:

Food & Drink	£ <input type="text"/> <input type="text"/> <input type="text"/>	Entertainment	£ <input type="text"/> <input type="text"/> <input type="text"/>	Travel (within Scotland)	£ <input type="text"/> <input type="text"/> <input type="text"/>	Petrol	£ <input type="text"/> <input type="text"/> <input type="text"/>
Shopping/Gifts	£ <input type="text"/> <input type="text"/> <input type="text"/>	Event Tickets	£ <input type="text"/> <input type="text"/> <input type="text"/>	Programmes/Event Merchandise	£ <input type="text"/> <input type="text"/> <input type="text"/>	Other (parking etc)	£ <input type="text"/> <input type="text"/> <input type="text"/>

2.8 If attending this event for more than one day, how much in total do you plan to spend whilst attending this event (excluding accommodation)? £ How many people is this for?

SECTION THREE - HOMECOMING SCOTLAND 2014

3.1 If you had not attended this event today, what would you have probably done instead? Tick One

<input type="checkbox"/> Stayed at home	<input type="checkbox"/> Visited another location/event in local area	<input type="checkbox"/> Visited another location/event outwith Scotland
<input type="checkbox"/> Gone to work	<input type="checkbox"/> Visited another location/event in Scotland	<input type="checkbox"/> Don't know



- 3.2 Are you aware of Homecoming Scotland 2014? Yes No (if No, please go to Q. 3.6)
- 3.3 Prior to attending this event, were you aware it was part of the year of Homecoming Scotland 2014? Yes No (If No, please go to Q. 3.6)
- 3.4 Where did you hear about Homecoming Scotland 2014? Tick all that apply and give details where possible

<i>Details: Specify?</i>	<i>Details: Specify?</i>
<input type="checkbox"/> Newspaper/Magazine _____	<input type="checkbox"/> Visitor Information Centre _____
<input type="checkbox"/> Website _____	<input type="checkbox"/> TV advert _____
<input type="checkbox"/> Facebook _____	<input type="checkbox"/> Other TV _____
<input type="checkbox"/> Twitter _____	<input type="checkbox"/> Youtube _____
<input type="checkbox"/> Word of mouth _____	<input type="checkbox"/> Radio _____
<input type="checkbox"/> Other _____	

- 3.5 Have you attended or do you anticipate attending any other Homecoming Scotland 2014 Events? Yes No Don't Know
If YES, how many? Please give details: _____

- 3.6 How satisfied were you with your overall experience at this event?
 Very satisfied Fairly satisfied Not very satisfied Not at all satisfied Why? _____

- 3.7 How satisfied were you with the food and drink on offer at this event?
 Very satisfied Fairly satisfied Not very satisfied Not at all satisfied Why? _____

- 3.8 If you attended this event before, was the food and drink on offer this year, better, worse or about the same as previous years?
 Better Worse No change Not applicable

- 3.9 How important was this event in your decision to visit the local area?
 Very important Quite important Neutral Not important Not at all important Live in LA area

- 3.10 How old are you? Tick One 16-24 25-34 35-44 45-54 55-64 65+

If not resident in Scotland please answer the following questions:

- 3.11 How important was this event in your decision to visit Scotland?
 Very important Quite important Neutral Not important Not at all important

- 3.12 How important were the following factors to you when deciding to visit Scotland. Tick One from each row.

	Very important	Quite important	Neutral	Not important	Not at all important
Homecoming Scotland 2014	<input type="checkbox"/>				
To see scenery & wildlife	<input type="checkbox"/>				
To experience history & culture	<input type="checkbox"/>				
To visit family/friends	<input type="checkbox"/>				
To watch a sporting competition (not GC or RC)	<input type="checkbox"/>				
To take part in a sporting activity (eg. golf)	<input type="checkbox"/>				
To attend a special event or celebration	<input type="checkbox"/>				
For business	<input type="checkbox"/>				

- 3.13 Based on your visit so far, would you consider returning to Scotland? Yes, definitely Yes, maybe Not sure No, unlikely

- 3.14 Do you have family origins in Scotland? Yes No

THANK YOU!



Appendix 3: Additional calculations

	Visitors (000)	Spending (£mn)
19 Primary Research Events	170	8.230
113 other funded events	3160	242.770
941 Partner events	1080	58.000
Total	4410	309.000
Further visits to Scotland garnered by HC14 promotion		
	10	2.446
Total by bottom-up methods	4420	311.446
Adjusted to incorporate alternative estimation methods		
	4600	360

(000,s)

Number of attendees (000), including performers, staff, etc	Bottom up surveys (with conservative grossing up for non-survey events)
Overseas visitors	493
Rest of UK visitors	571
Scottish overnight visitors	405
Day visitors	2950
Total visitors	4420
Expenditure (at event and elsewhere)	Bottom up surveys (with conservative grossing up for non-survey events)
Overseas visitors	75
Rest of UK visitors	62
Scottish overnight visitors	59
Day visitors	115
Total expenditure by visitors (£m)	309
Expenditure per head (at event and elsewhere)	Bottom up surveys
Overseas visitors	152.41
Rest of UK visitors	108.91
Scottish overnight visitors	145.56
Day visitors	38.92
Average expenditure per visitor	69.86

Summary of bottom-up surveys

All primary research events

Customer numbers			Area:
Attendee numbers at all events			Scotland1
Number of interviews			148 203
Attendees covered by interviews			2 737
Attendees who live in the area ('residents')			8 848
Attendees who live outside the area ('outsiders')			107 390
Percent of outsiders who would otherwise been outside area			40 810
Number of outsiders who would otherwise been outside area			62.6%
Percent of residents ² deflected from leaving the area			25 537
Number of residents deflected from leaving the area			0.4%
			468
Relevant Customer Numbers³	49.8%		26 005 17.5%

Relevant Customer Spend			Area:
	Spend per person /night	No. of persons /nights	Scotland1
Resident day spend (day visitors)	£19	412	£7 678
Resident day spend(overnight visitors)	£37	57	£2 079
Outsider day spend (day visitors)	£43	466	£20 245
Outsider day spend (overnight visitors)	£36	25 070	£906 924
Outsider overnight accommodation spend	£38	96 601	£3 640 668
Spend by outsiders not in the audience ⁴			£167 378
Spend by residents attending but not in audience ⁵			£593 564
Total Event Spend by Relevant Customers	per customer		£5 338 537 £205
Memo: approx spend by non relevant customers	£20		£2 891 035 £24

Motivation and additionality		Area:
Score of relevant customers motivated by homecoming per se		Scotland1
Event Spend based on HC Motive		24.0%
		1283791
Score of relevant customers motivated by the events		81.4%
Relevant spending motivated by the events		3300182
Percent of event funded by HC		26.5%
Overall motivational score		40.4%
Relevant spending attributable to Homecoming		2157421
Homecoming Funding award		

Notes: in some places amounts are shown much more precisely than the data warrant.
 These percentages apply only to the data for the 19 Primary Research events
 The percentages for all funded are similar, but different in detail.