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# Economic perspectives

## A review of the constraints, limitations and success of Homecoming Scotland 2009

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***'Whether you are Scottish or simply love Scotland, you are invited to come home – home to the land of your ancestors so you can experience a living culture'***

Minister for Enterprise, Energy and Tourism (Scottish Government, 2007a)

### **Introduction**

The aim of this review is to provide insight and analysis of a government tourism initiative within the geographic context of Scotland. It highlights the centrality of public-private partnership and the catalytic role of key government agencies in channelling investment, energies, events and marketing effort for a nationally focused tourism theme of Homecoming Scotland 2009 (HS09). The review also delves below the public relations veneer of many such activities to uncover the political debates and controversies, and the wider issues that may have detracted from the degree of success achieved by the initiative. Given that, the initiative was concluded only within the last few months and has still to be fully evaluated; it is only possible to draw tentative conclusions on the projects outcomes for tourism destination marketing and management in general. The longer-term impacts of HS09 such as repeat visitation and changes in the perception of Scotland will take a number of years to monitor, and only then will we be able to assess the legacy benefits of HS09.

### **Background**

The devolved Government for Scotland is responsible for most of the day-to-day concerns of the people of Scotland, including health, education, justice, rural affairs, transport and economic development, including tourism. As part of a wider political process for the devolved administration for the constituent parts of the UK, the Scottish Government (then called the Scottish Executive) was formed in 1999. For its first eight years, the Scottish Labour Party led the

**Opinions expressed in economic perspectives are those of the authors and not necessarily those of the Fraser of Allander Institute**

**Table 1: Volume and value of tourism in Scotland**

	UK Trips (mills)	Overseas Trips (mills)	Total Trips (mills)	UK Spend (£ mills)	Overseas Spend (£ mills)	Total Spend (£ mills)
2007	13.12	2.79	15.91	2,836	1,367	4,203
2008	12.15	2.48	14.63	2,812	1,235	4,047
2009	12.47	2.56	15.03	2,736	1,359	4,095

**Source:** VisitScotland. Notes: Spend in cash prices, 2009 overseas data provisional

Scottish Government, but in 2007, the Scottish National Party (SNP) was voted into power for the first time, as they held the largest number of seats, although they did not have an overall majority. The lack of a clear majority placed a constraint on their actions and encouraged a degree of cross-party collaboration. One of the SNP's early announcements in 2007 was its support for a tourism destination marketing initiative called Homecoming Scotland 2009, an idea that was first formed under the previous Labour administration and its origins can be traced back to April 2003 (Anon, 2003). Although HS09 was a Scottish Government initiative, its day-to-day management was devolved to EventScotland, the national events agency, working in partnership with VisitScotland the country's national tourism agency. Since its formulation in 2003, Event Scotland has always been located in the same building as VisitScotland and shared a number of common services and staff, and in April 2007 it became a directorate within VisitScotland.

The HS09 initiative was financed by funds from a consortium of organisations including the European Union (through the European Regional Development Fund) and the Scottish Government. VisitScotland and VisitBritain also provided additional support through their generic marketing campaigns. As well as marketing activities, HS09 also distributed grants of between £5,000 and £50,000 either to provide support to existing events or to encourage new events designed to attract visitors of Scottish birth, descent or affinity to Scotland. The grants were administered through EventScotland, and were designed to attract partners to the initiative, and to build on existing work and relationships. The aim was to help private, community and public organisations to stage events to support and mobilise a year-long celebration of Scotland's culture and heritage.

VisitScotland has a strategic role as the public sector agency in providing leadership and direction for the development of Scottish tourism in order to achieve its maximum economic benefit. In total, tourism contributed almost £4.1bn to the Scottish economy in 2009 (4.4% of Scottish GVA in 2007), compared to approximately £4.2bn in 2007, and over 15.0 million tourists took overnight trips to Scotland in 2009, a decline of 5% from 2007. Tourism related employment accounts for around 219,000 jobs, many of which are part-time and seasonal, working in some 20,000 businesses (16,000 VAT/PAYE registered

businesses, of which 94% are Scottish owned), supporting around 9% of employment in Scotland (13% in the Highlands). The sector is dominated by SMEs, with 99% of businesses employing fewer than 250 staff. (VisitScotland, 2009a; Scottish Government, 2009a).

As with many destinations, tourism is critical to the future economic growth of Scotland. Therefore VisitScotland works with the tourism industry and other partners (such as, Scottish Enterprise, Highlands & Island Enterprise and the Scottish Tourism Forum) to achieve an ambitious target of 50% growth in tourism revenues for Scotland by 2015, from the base year of 2005 (Scottish Executive 2006). This growth target is increasingly unlikely to be achieved, but nevertheless it has acted as a useful ambition to drive the growth of tourism in Scotland, HS09 represents an important initiative within this context, as is reflected in the following:

*'By trading on 'affinity' for Scotland felt by diaspora whose forebears sailed for foreign lands, whether from steely ambition or cleared from their homes by despotic landowners, the year long celebration of Scottishness underlines the importance of international tourism to the economy.'* (Anon, 2009)

This affinity to Scotland by people living overseas was recently highlighted in a review for the Scottish Government, which explored the Scottish Diaspora and compared it to that of Ireland (Ancien, et al., 2009). Two of the conclusions of the review were (a) the importance of the intangible benefits and (b) the need for any actions to work over the long term, both of which fit neatly into the aims of HS09.

### Homecoming Scotland 2009

There were four formally-stated core aims of the HS09 initiative (VisitScotland, 2009b), and these are listed along with their targets:

1. To deliver additional tourism visits and revenue for Scotland: Target was to achieve a total economic impact of at least £40m;
2. To engage and mobilise the Scottish Diaspora: Target was to deliver 50,000 new consumer prospects, and 2,500 engaged 'gatekeeper' contacts;

3. To promote pride in Scots at home and abroad: Target was to create a critical mass and a rolling programme of events achieving an approval rating of at least 70%;
4. To Celebrate Scotland's outstanding contributions to the world: Target was to deliver a programme of 100+ events (funded and partner) and maximise media coverage.

Thus, central to HS09 was the leveraging of incoming tourist demand through Scottish links with the diaspora, estimated at between 28m-40m worldwide (Eirich and McLaren, 2008), living in countries throughout the world to visit Scotland in 2009, along with the engagement and participation of Scottish residents in one or more of a series of events. An integrated communication campaign urged these target groups to take part in an 'inspirational celebration' of Scottish culture, heritage and the many great contributions that Scotland has given the world in fields, such as, medicine, engineering and ship building. Reinforcing this message, was the fact that 2009 was also the 250th anniversary of the birth of Scots cultural icon and national poet Robert Burns.

A ten-month programme of more than 400 events and activities ran from Burns' weekend of the 23rd-25th January to 30th November 2009, St. Andrew's Day – Scotland's day for celebrating its national identity. HS09 focused on five themes: Burns, Golf, Whisky, Great Minds and Innovations, and Scottish Clans and Ancestry. As the ancestral home of people of Scots descent worldwide, heavily persuasive messages were used to entice the Scottish Diaspora, playing on emotional connections through the use of words, such as: *reconnect, homeland, native shores, come home, kindle pride, the promise of return*. These intangible emotions were combined with more tangible anchors, such as for example, key events like the Gathering 2009. This particular event, seen as emblematic of the spirit of HS09, was held in July 2009 in Edinburgh's Holyrood Park/Queens Park, attracting more than 47,000 people of Scots ancestry to the festival. It was the world's largest clan gathering and Highland Games, some 20,000 spectators lined the streets of the Royal Mile in Edinburgh as well as many thousands who took part in the actual Clan Parade from Holyrood to Edinburgh Castle. As part of the marketing activities 'Gathering Passports' to all associated events were sold in advance to visitors from the following countries: 38% to the USA, 35% to the UK, 10% Canada, 7% Australia, 2% New Zealand; and 8% to the rest of the world. These passports, which had 'passport stamps' added at each event attended encouraged visitors to participate in as many events as possible, and to take home as a memento of HS09, which could act as a reminder to visit at some date in the future.

Although HS09 had been developed as a tourism marketing event, it also represented an example of political intervention, which implemented a nation-wide campaign, co-ordinating, promoting and encouraging partnerships, and

providing grants for events that meet the initiative's aims and objectives. Furthermore, the concept of public-private partnership was central to HS09, with VisitScotland taking the role as the 'lead entrepreneur' in the process by providing impetus, funding, structure, staff support, marketing opportunities and incentives to co-ordinate and partner collaboration in HS09. This is reflected in VisitScotland's umbrella strategy, which explicitly used the slogan: *'one team for tourism working in partnership'*. Furthermore, VisitScotland emphasises that: *'we will operate our business as one team, on best value principles, through a combination of management and delivery against co-ordinated national and local tourism growth agendas'*. This centrality of partnership was supported by the then Chairman of VisitScotland, Peter Lederer who stated that *'Homecoming Scotland is perhaps THE best example of how partnership working can make a real difference, with Team Scotland pulling together behind one common theme'* (Lederer, 2009). One illustration of this partnership theme was the Burns' Light event in Dumfries, when 17,500 people took part in an outdoor spectacle to celebrate the launch of HS09. People across this region attended this event, with ninety-two different community groups taking part. This regional aspect reflects an important feature of HS09, that of deliberately encouraging the dispersal of tourism activity from the metropolitan centres of Edinburgh and Glasgow.

There is no doubt that HS09 financial incentives; and the HS09 marketing and promotion strategies helped to stimulate action at the local, regional and national levels. This facilitated the participation of public and private partners in the initiative, which allowed the development and packaging of a series of related products under the HS09 brand, to the mutual benefit of all partners. The concept of public-private partnerships *'emerged in the early 1990s as a development of the then Conservative Government's approach to questions of public-sector funding and the quality of public-service provision'* (Falconer & McLaughlin, 2000). Although opposed by the UK Labour Government when elected in 1997, public-private partnership has now been embraced by the main political parties as a way of developing public services, and over time has clearly developed a strong record of accomplishment. This use of public-private partnerships also represents a growing trend internationally, as it is seen to have the potential to leverage private sector knowledge, skills and resources through partnerships with industry to deliver on a range of public strategic objectives (Hall, 2005), thereby aiding their collective competitive capabilities and effectiveness (Lynch and Morrison, 2007). In the HS09 case, 'partners' took various forms, as detailed in Appendix 1. It required the skilled management of a complex process of alignment of the interests of each partner group and the HS09 project, as was found by Bhat and Milne (2008). Furthermore, this was of particular significance due to the diversity, fragmentation, and 'free-agent' or voluntary nature of the majority of the partners, such as; community groups, corporations, celebrities, population 'ambassadors' and tour operators.

**Table 2: HS09 marketing, communications and programme budget**

Market	EventScotland	VisitScotland	VisitBritain
UK & Ireland	£784,000	£957,000	
North America/Australia/New Zealand	£525,000	£1,353,000	
Europe		£127,000	
Emerging Markets		£216,000	
Worldwide activity (research, website, PR)	£606,000		£419,000
Total Marketing Spend	£1,915,000	£2,653,000	£419,000
Programme Spend	£3,000,000		
Supplementary Grant	£500,000		
Total Spend	£5,415,000	£2,653,000	£419,000

**Source:** Adapted from data supplied to Scottish Parliament Questions (S3W-21419) on the 11th March 2009

Their participation was seen as being crucial and integral to the success of a world-wide destination marketing programme, in more than forty countries.

In terms of public expenditure on HS09, in response to a number of questions from Members of the Scottish Parliament (MSPs) to the Tourism Minister (Scottish Parliament, 2009a) he indicated that HS09 had a core budget of £5.5m (table 2). From this budget, £3m was allocated to programme expenditure (supporting events, etc.) and £1.9m for marketing and communications, which was supplemented by an additional in-year grant of £0.5m. To support HS09, VisitScotland also undertook additional marketing activity (£2.65m) with Homecoming as theme running through its marketing campaigns, particularly through its “I am a Scot campaign”. VisitBritain also supported HS09 with an expenditure of some £0.42m. In total, these three agencies provided a total planned marketing spend of almost £5.5m, plus £3m on programme activity, to give an overall spend of almost £8.5m on HS09 activities. In addition, a number of agencies provided almost £0.5m of direct financial support to the Gathering 2009, plus a short-term loan of £180,000 from the Scottish Government, which subsequently was written-off when the company managing the event was liquidated (Audit Scotland, 2010).

This expenditure on HS09 of course, excludes direct spend by the many other public, private and voluntary organisations that supported HS09 by staging events, and indirect support, for example ‘free’ bus-side advertising worth an estimated £70,000.

### Homecoming’s communication strategy

Scotland possesses a wealth of attributes, which are regarded as being inalienably Scottish. These are generally not substitutable; and appear to inspire a significant degree of consumer loyalty and motivation to visit, not only in tourists but also in Scots themselves. As such, Scotland can be regarded as a niche destination with competitive advantage and enduring retention of unique appeal, strongly positioning it as a tourist destination for the diaspora target

market. Given the core theme of HS09, it is not surprising that the HS09 marketing campaign content drew heavily on the traditional images of Scotland, and crafted messages evocative of ‘returning home to Scotland’. Through marketing stimuli, it aimed to tap into the consumer’s affinity for Scotland, their emotional attachment, sense of belonging, mythology and romance in the selling proposition. Central to the strategy was the simple, focused message in the memorable and evocative slogan ‘Homecoming Scotland’, cutting through the ‘noise’ of messages bombarding consumers from a wide variety of media and competing tourism destinations (Ryan, 2005). An integrated communication strategy was developed involving partner groups and VisitScotland in an attempt to promote with one voice the key USPs of HS09. It unashamedly employed an arsenal of powerful imagery of place, products, services, sport and entertainment, traditionally associated with Scotland, and was designed to reconnect the diaspora with the past and present, while also aiming to showcase ‘modern Scotland’ with a promise of more achievements in the future. This concept was also endorsed by the Ancien (2009) study on Scottish Diaspora for the Scottish Government.

However, this communications strategy did not take place in a vacuum. While the HS09 activities were about celebrating national identity and achievements, some national and international issues were sending out contradictory messages that had the potential to create dissonance with those emanating from HS09. For example, the:

- Released Libyan Lockerbie bomber arrived in Tripoli to be greeted by Scottish Saltire flags being waved;
- Scotland’s football team failed to make it to the 2010 World Cup in South Africa;
- Harris Tweed company’s decision to drop Scotland as a brand selling point;
- Drinks’ giant Diageo closed the Kilmarnock bottling plant of Johnnie Walker whisky, moving it to Fife, thereby removing the link between image/roots, which could be a precedent for any future moves;

- Scotland (along with the rest of UK and the Western World) experienced the worst economic recession since the 2nd World War and in Scotland unemployment rose between October 2008 and October 2009 from 67,000 to 194,000, representing 7.2% of the working population;
- The almost complete collapse of the Royal Bank of Scotland, which had been seen around the world as a symbol of the dynamic economy of Scotland;
- The opposition to the Trump golf resort development in Aberdeenshire.

Furthermore, the merits of tourism destination marketing on the basis of traditional images were being debated. Some brand experts insist that Scotland's brand equity retains resilience, power and positive imagery in the wider world, such as, Worthington (cited in Kemp, 2009: 8) who said: *'Scotland has to maintain and protect the quality of its iconic images [kilts, haggis, whisky, bagpipes, golf] – and not allow things to slip or become pure tartan tat'*. Kemp disagrees: *'In Scotland there has been much navel-gazing about the kiltfest that has been HS09. As it moves towards a conclusion there have been many questioning its validity and portrayal of modern Scotland'*. This is supported by Blythman (2009) who judges the aforementioned iconic images as *'so last century'*. It must be recognised that with a limited marketing budget for HS09, VisitScotland opted to target safe markets which had an established pattern of travel to Scotland. Nevertheless, initiatives to attract visitors to Scotland do not have to be kitsch, stereotypical, inward-looking, and addressing only wealthy whites from the US, Canada and the Antipodes, while ignoring Europeans along with all the people of colour with Scottish ties. For example, despite the proliferation of Jamaicans with Scottish blood and clan family names originating from the days of slavery, the country was not identified as a target market. There was also little attempt to link HS09 into the wider overseas Scottish and UK business networks.

Thus, opinion is split. On one hand is the perception that the value of Scotland's heritage to the economy is significant in defining, communicating and positioning its "personality" as a tourism destination. For example, the ubiquitous tartan shortbread tin, with Walkers launching a special edition featuring Robert Burns, which helped to promote HS09 in about seventy countries. The tin featured a picture of the national poet and a new variety of shortbread shapes, including a thistle and lion rampant (the symbol of the Scottish monarchy). The global brand Coca-Cola's endorsement (see Appendix 1) can be taken as a vote of confidence in the pulling-power of Scotland's global connections, with Scotland's First Minister saying that it: *'translates our heritage and identity into the language of popular culture and highlights Scotland's contribution to the world'* (Scottish Government, 2009b). In contrast, there was a call to disassociate Scotland from historic icons that are viewed as pulling the country back into the past, revelling in achievements gone by, rather than looking outwards, and engaging with the modern world. Thus, 'to icon or not to

icon' within the context of the 21st century seems to be a very difficult question which the country's marketing experts are grappling to understand and to manage. However, in seeking a better understanding of the dynamics at play, Hall (2005) sagely advises that it becomes important not so much to look inside tourism for explanations but rather outside, which is why the issue of politics, tourism and HS09 needs addressed.

### Politics of tourism in Scotland

*'Tourism is highly politicized as, in practice, tourism policies are often vehicles of national political ambitions by countries seeking to harness the economic and political benefits of a buoyant tourism industry'* (Page and Connell, 2006; 297)

It can be generalised that the development of tourism in any specific country is a function of the individual government's predisposition towards this type of economic activity, and the extent to which it impacts significantly on a country's society, environment, culture and economy (Hall, 2005). However, within the Scottish context it is more complex. The primary stated aim of the SNP is to take Scotland forward to independence. Thus, HS09, which was already overtly nationalistic in nature, played perfectly into the political ideology and agenda of the day; an agenda that was explicitly nationalistic. Hence, there existed dissonance within the other political parties and HS09 became highly politicised as especially over the period, there were increasing calls for a UK election, and HS09 was seen by some Scottish politicians as a SNP driven vehicle to persuade the populace as to the value of independence. This influenced the degree of political harmony achievable across the political parties. For example, the former Scottish Labour Party leader accused *'the First Minister and the SNP are more interested in publicizing themselves and Scottish identity in Scotland than in promoting Scotland as a destination to those who live elsewhere. It was never meant to be an internal publicity campaign for Scottishness, instead of being a great investment in our future. The First Minister has been hijacking the campaign for his own personal crusade. Scotland should be outraged. I am.'* (cited in Hutcheon, 2009). In contrast, the SNP's Tourism Minister's perspective of HS09 was that: *'This year-long celebration will benefit our country in terms of additional tourism, which will contribute to our economy. But it's also an outstanding opportunity to reconnect with the Scottish Diaspora around the world and provide impetus for them to visit their homeland'* (Scottish Government, 2007b). This brings into scrutiny a government's role in serving the collective interests of the population and not the narrow self-interests of their political manifesto (Hall, 2005).

Undoubtedly, for the SNP, HS09 held considerable appeal because of its high nationalistic profile both within Scotland; for Scots and for those Scots living outside Scotland with an affinity to their "homeland". An additional attraction of HS09 was the potential to generate highly visible economic results in a short period of time, within the context of a global economic recession, which was impacting negatively on

tourism revenues and visitor numbers. HS09 was also attractive to the SNP as it took place prior to the May 2010 UK General Election. By January 2009, a number of individual members of the Scottish Parliament (but not the political parties) were publicly divided over support for HS09 and some were attacking the promotion, scope and scale of the event. Perhaps the reason for the lack of comments from the main political parties was the degree of support they provided over the years. For example, the initiative was first announced by the Liberal Democrats when they shared power with Labour, Labour supported the event in its planning stages and the SNP provided ring-fenced funding for its implementation. Evidence of this disquiet of HS09 took the form of:

- Along with calls by opposition politicians to increase the HS09 budget, concern was expressed within VisitScotland about whether HS09 could meet its stated aims, and Ministers were forced to pump an extra £500,000 into the 'troubled' HS09 campaign amid fears it was being ignored by the public. This represented an increase of 40% on EventScotland's previous direct marketing budget of £1.3m.
- A £200,000 TV advert of famous Scots singing Caledonia was not initially intended to be shown outside the UK and Ireland. Government, as well as opposition and tourism experts' outrage prompted a rapid rethink by Scottish Ministers as it was thought that HS09 was aimed only at attracting overseas visitors. However, it was often forgotten that HS09 was also aimed at encouraging UK/Irish tourists to holiday in Scotland and this television advertisement was aimed at this market segment, nevertheless the advertisement was also shown overseas.
- An HS09 promotional poster showing a crowd of stereotypical, white kilted Scots had to be redrawn after someone noticed that it was devoid of Scotland's ethnic minorities, and this went against the Scottish Government anti-racist campaign of "One Nation, Many Cultures". In later versions of the poster, a solitary Asian man was electronically adjusted into the montage.
- Although there were a number of measures to assess the general impact of HS09, as at January 2009 there were no procedures in place to monitor how many expatriates have been tempted back to Scotland by HS09.
- Delays to completion of a £21m national Robert Burns Museum in the bard's birthplace of Alloway meant that tourists travelling to the country for HS09 celebrations did not have this particular motivation to visit the area, but there were other events in Ayrshire, including the Open Championship.
- One leading Burns figure has accused HS09 of mishandling Burns (McCracken, 2008). In the bidding process for support from EventScotland for

HS09 events, it is inevitable that not all bids would be successful; several Burns-related projects had been denied HS09 funding, and the biggest Burns event of the year was not part of the official celebrations. Ironically, most of the Burns celebrations were organised by volunteers with no public funding.

- The company managing the Gathering 2009 went into liquidation, despite receiving grants of almost £0.5m from a number of Scottish agencies and the Scottish Government, as well as a short-term loan of £180,000 from the Scottish Government (Hutcheon, 2009, Audit Scotland, 2010). The First Minister acknowledged these financial difficulties and stated that Destination Edinburgh Marketing Alliance (DEMA) had issued a press release saying that they were taking over the company running the event, because of its positive economic benefits (EventScotland, 2009), along with their remaining private sector obligations. However, DEMA did not take over the company, and it went into liquidation (Audit Scotland, 2010).

*'Homecoming was never going to be anything other than a dull, hackneyed vanity project for the SNP. With its tired, old, unimaginative Scottish Tourist Board fixation on tartan, ancestry and that clichéd dirge, Caledonia, it was meant to make us all feel more patriotic and thus more inclined to vote SNP, as well as making Scotland irresistible to visitors.'* (Blythman, 2009:3)

### Measurements of success?

As previously stated HS09 had its 'Final Fling' event on St. Andrew's Day, 30th November 2009 with a series of 40 events across the finale weekend, so any definitive statements regarding its success or otherwise are premature at the time of writing. Furthermore, VisitScotland has commissioned EKOS consultants (a company specialising in economic and social development) to conduct an extensive performance monitoring and evaluation study, which was undertaken between March 2009 – March 2010, from which an interim report was published in April 2010 (VisitScotland 2010a). Audit Scotland (2010) will also be conducting a review of the Gathering 2009, which will look at the governance and financial management of the event and will "include a review of the Scottish Government's decision to provide additional funding to the event in the form of a short-term loan to the event-management company". In addition, it is likely that the Scottish Parliament, through its research arm (SPICe) will commission an independent researcher to undertake an external research study of HS09 (Scottish Parliament, 2010a). They reported that VisitScotland's study on the impact of HS09 would be derived principally from three sources, all of which will be independently evaluated:

- *Economic assessment:* An economic impact assessment will be undertaken by EKOS consultants, as all funded events were required to

submit Event Outcome Reports that focused on economic impact. Assessment of some of the bigger events e.g. The Gathering 2009 was supplemented by additional research fieldwork (EventScotland, 2009). Partner events (non-funded) will also be evaluated in the context of economic impact assessment. In addition, identification of long-term legacy outcomes for the events industry etc. will be identified and developed.

- *Conversion studies:* Will be undertaken by TNS, a market research consultancy, with respondents to international and national campaigns will be surveyed, participation in HS09 events, and effectiveness of marketing materials.
- *Media coverage:* Media Measurements will be used to assess the reach, value, quality and tone of messages.

On an ongoing basis throughout 2009, performance monitoring measures were developed and included:

- Advertising and Brand Diagnostics;
- Regular YouGov polling – awareness, approval, and propensity to attend events;
- Variety of web metrics which convey levels of engagement with HS09;
- Database additions;
- Response rates to e-communications;
- Ongoing media coverage evaluation; and
- Ongoing feedback from events organisers.

However, because of a variety of reasons there was an expectation that HS09 was attracting additional visitors to Scotland and these would be further boosted by increased numbers of Britons taking their holidays at home (staycations), as a result of the economic recession, and Europeans benefiting from the strength of the Euro (VisitScotland, 2009d). Examples include:

- During the May Whisky Month, the 10th Spirit of Speyside Whisky Festival, 10 day 'dramfest', with 40 events, is expected to be worth £750,000 to the local economy. It recorded increased numbers of overseas visitors with the largest numbers coming from Germany, Italy, Netherlands, Sweden, Norway and the US. It offered a chance to explore Scotland's five malt whisky regions, the Highlands, the Lowlands, Speyside, Islay and Campbeltown.
- The Royal Highland Show broke all previous attendance records, with almost 177,000 visitors, up 15,000 on 2008. This included doubling the number of international visitors, which accounted for 3,000 from 29 countries.
- The Gathering 2009, one of the major events in the Programme, made a loss as has been stated above. An independent economic impact assessment (EventScotland, 2009) showed that the Gathering 2009 generated £10.4m in revenue

for Scotland with Edinburgh accounting for £8.8m of the total. The report highlights the fact that 73% of visitors to the Gathering 2009 would be likely to visit a future Gathering within the next four years.

Furthermore, relative to the success of the communication strategy, as at October 2009, some £28m of PR coverage had been achieved, equating to 4,500 articles across the world, being seen by 78m people globally. It also resulted in 87% of the Scottish public being aware of HS09 by July 2009, compared to 29% in August 2008, and 75% 'strongly agree' or 'agree' that it was a good thing for Scotland (YouGov Poll).

Given the objectives of HS09 as outlined in the introduction, VisitScotland has released the results of some initial work, and concluded that HS09 'is well on track to deliver its stated aims' (VisitScotland 2010a):

- £19.1m of additional income from 25 of the 112 funded events analysed to date;
- 14.7% increase in trips from EU15 countries in the first six months of 2009;
- 3.4% increase in visits to attractions (Jan-Sept 2009)
- 11% increase in Scots holidays tourist's trips and 3.5% increase from UK holidays tourist trips in Scotland;
- Overseas visitors to Scotland were down slightly, but compared well to the UK figures;
- Guesthouse and B&B occupancy rates in Scotland were up by 3%, but steady across other parts of the UK;
- £40m of media coverage from more than 40 countries
- 200,000 new visitor prospects from names added to VisitScotland database, from 6,500 organisations across the world;
- 87% awareness of Homecoming in Scotland;
- 25m visits to all Homecoming related websites;
- 71% of tourism business in Scotland claimed that HS09 had been a positive initiative for Scotland;
- 86 international travel companies developed HS09 themed products and 53 international operators carried HS09.
- **Source:** HS09 Evaluation VisitScotland 2010a

The above interim report does not include data from approximately 300 'partner' events, nor from the conversion studies being undertaken by TNS to evaluate the impact of advertising. However, the EKOS study does suggest that HS09 is well on target to deliver the target of "£44m of additional income to Scotland", with the analysis undertaken of the 25 events so far suggesting a "net additional expenditure attributable to Homecoming of £19.1" against a target of £40m (VisitScotland, 2010a).



## Conclusions

In terms of conclusions, according to Lederer (2009), the recent Chairman of VisitScotland, HS09:

- will greatly assist with the planning of future major events and national initiatives;
- has provided a catalyst for lasting and positive engagement with Scotland's Diaspora around the world;
- generated the most comprehensive database of Scots interest groups around the world; and
- added value to Scotland on the global stage as a place to visit, study, invest or live.

The success of any project can be measured by many criteria, but they should at least be measured by reviewing the four aims of HS09, and assessing them against these aims:

1. To deliver additional tourism visits and revenue for Scotland: Target was to achieve a total economic impact of at least £40m. The 2009 tourism data does suggest an increase in visits, while the EKOS study for VisitScotland indicates an increase in tourism revenue, although it would be interesting to explore the split in benefits between the private and public sectors.
2. To engage and mobilise the Scottish Diaspora: Target was to deliver 50,000 new consumer prospects, and 2,500 engaged 'gatekeeper' contacts. By October 2009, some 200,000 new visitors' names were added to the VisitScotland database along with 6,500 new organisations contacts.
3. To promote pride in Scots at home and abroad: Target was to create a critical mass and rolling programme of events achieving an approval rating of at least 70%. The October 2009 approval rating amongst Scots was measured at 75%.
4. To celebrate Scotland's outstanding contributions to the world: Target was to deliver a programme of 100+ events (funded and partner supported) and maximise media coverage. The media coverage is estimated at £40m, while some 400 events took place, and by October 2009 an estimated £28m of media coverage had been achieved.

The processes and procedures to develop these targets are very unclear, as is the question as to who actually set the targets and whether they are really smart and challenging targets, for example:

1. What is really meant by £40m of economic impact, and could the HS09 budget be better spent on other activities? Should the £40m of economic impacts be judged against the full economic costs of supporting HS09, not just HS09 direct marketing costs?
2. Engaging the Scottish Diaspora is fine, but what does this mean? Collecting contact details on

individuals and organisations is not really engagement, it is a mechanical process, what about the cost of updating and maintaining this database? Also engagement does not necessarily imply action?

3. Pride at home and abroad, is fine, but why only measure approval by Scots? Also approval does not imply support, nor is it the same as pride?
4. Media coverage again is fine, but what is really being measured are advertising costs equivalency rates, that is the cost of buying the same amount of media coverage, but would you want to buy this media coverage?

As with all marketing activities, there are always questions about its effectiveness and long-term benefits, and HS09 is no different. Some questions worth asking are:

1. in terms of economic benefits, there are indications that Scotland did attract extra visitors, but questions remain as to whether these were truly additional tourists, or whether their trips would have occurred anyway, in 2009 or in subsequent years.
2. We may also have to wait to see if HS09 had any impact in terms of temporal displacements, that is trips brought forward from some date in the future.
3. As to the impact of HS09 on the generation of future visits to Scotland, it is very difficult to understand how this will be monitored?
4. External factors may also had impacted on HS09, such the strength of the Euro in 2009 and the degree to which this influenced Europeans attending HS09 events is unclear. It could be that they attended HS09 events because they happened to be in the area, and their participation had little to do with HS09?
5. While the focus of HS09 was on the overseas markets, did it influence the UK markets, or was any increase in UK visitors driven by the recession and an increase in the popularity of staycations?
6. The lead in-time from the initial allocation of funds and the development of the HS09 team in 2007, to the staging of Homecoming events in 2009 was very short?
7. The issue of legacy benefits, particularly in terms of developing sustainable events that may have an economic impact both locally and nationally, is unclear. As with all such events, perhaps many of the benefits are and will remain unseen, benefits such as an increase in co-operation between the public and private sector, development of event-management skills, development of new audiences, making new international contacts may all prove to be beneficial, but maybe immeasurable in quantitative terms?
8. While the development of marketing databases does make it easier to keep in contact with prospective visitors, these are expensive to

- maintain, so will investment and staffing resources be provided to keep the databases up to date?
9. The measurement of pride in Scotland, as stated in the aims of HS09, is very difficult to track, this is much more than awareness, the basis of the current measurement, so how will this be monitored?
  10. The non-tourism wider impacts of HS09 have been extolled by some, but these wider impacts such as living, studying or investing in Scotland are very difficult to investigate?
  11. How many of the HS09 supported events were organised specifically because of Homecoming, or were they already annual events with Homecoming added to the title, just to get funds from EventScotland?
  12. The long-term sustainability of events funded by HS09 is unclear, given that many events received financial support from EventScotland, is there an expectation of future public sector funding or has HS09 funding provided them with a confidence that they can now manage on their own?
  13. Given the often stated aim of tourism is to spread its benefits both seasonally and temporally, an analysis of the distribution of HS09 supported events, may prove to be interesting?
  14. The extensive use of volunteers in many HS09 events may support the argument that HS09 was successful, as these events did not have to rely so much on public funding?
  15. Perhaps HS09 did help to dispel some of the deep-seated concerns in Scotland of the often discredited public-private partnerships, and helped to show that sometimes it can work when we accept that both sectors have a role in developing tourism. Therefore, could HS09 be seen as a good example of the effectiveness of public-private partnerships?
  16. Given that most of financial benefits of HS09 accrued to the private sector, what payback is there for the public sector from its investment in HS09?
  17. Comparison with similar event in other parts of the world, may help in any benchmarking of HS09?

Maybe the real issue is how to better measure returns on marketing activity. While the Treasury Green book (Treasury, 2003) is the standard tool used to assess investment projects, it is not really suitable for soft activities, like tourism marketing. If there is one clear message from this review, it is the real need for a standardised and agreed approach across all government marketing activities, on measuring marketing effectiveness.

Perhaps the lasting benefit of HS09 is that it has established EventScotland as a major player in event organisation, funding and promotion. HS09 also showed that Scotland could develop additional capacity in event tourism, but we may need to wait to see how many of the events associated

with HS09 are sustainable in the long-term. Although VisitScotland has suggested that HS09 will be repeated within the next four to five years (Anon, 2010). Given the willingness on the part of both the private and public sectors to co-operate in the organisation of an international event such as HS09, it did show that Scotland could play on the world stage. Whether this ability to play on the world stage is then hijacked for overtly political purposes, remains unclear.

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## Appendix 1: HS09 Examples of Partners

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<b>Partners Group</b>	<b>Examples</b>
Other government agencies	Scottish Arts Council, Scottish Enterprise, Highlands and Islands Enterprise, Scottish Natural Heritage, Historic Scotland, Forestry Commission, Convention Scotland, SportScotland, National Trust for Scotland (not a government agency)
Formally funded events	The Gathering 2009, Highland Homecoming, Homecoming Live – the Final Fling,
Non-funded events/ in programme	Co-branding with Turnberry Open Golf Championship, Edinburgh Military Tattoo, Fashion Awards, Forbes CEO Forum, Celtic Connections, Tiree Wave Classic, Royal National Mod
Corporations	30+ of Scotland's biggest brands and most successful companies e.g. Clydesdale Bank, Famous Grouse, Walker's Shortbread, Tunnocks. Tesco involved 30+ Scottish suppliers in HS09 promotion, reaching c. 2m customers. First Group donated adverts on three of its double-decker buses, with a commercial value of more than £70,000, to further awareness. Coca Cola launched a limited edition of c. 1m HS Coke bottle featuring an iconic image of Robert Burns, the first time an individual has been immortalised on a Coca-Cola bottle, and designated to one nation.
Celebrity Ambassadors	Scottish celebrities were recruited, giving time and testimonial for free for the 'greater good' e.g. Sir Sean Connery, Chris Hoy, Lulu, Sam Torrance, Sandi Thom. Contributed to VisitScotland/EventScotland produced advert using Dougie MacLean's song Caledonia, and a DVD promoting golf premiered at the 2008 Ryder Cup at Valhalla Golf Club in the US.
Travel agents	Number trained to promote Scotland increased by more than 1000 to 5000 to coincide with the HS09 campaign. This is as a result of the Visit Scotland specialist Scots Agents' programme, an online education package.
Population ambassadors	Aimed to inspire people in Scotland to get involved as a crucial element of promotion, for Scots to get in touch with friends and family around the world and invite them to join in the celebrations.
Regional communities	Assisted by ERDF and HS09 funding, events organised in rural communities to push traffic out of metropolitan areas into the regions.
Cities	Edinburgh International Festivals, World Pipe Band Championship
Hospitality and Tourism trades	Created specific HS09 packages, offers, etc. tied into the events programme within particular geographic locations

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**Source:** Visit Scotland (2009b)

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