



The Gathering Economic Impact Assessment

Report for EventScotland, The Gathering &
Homecoming Scotland

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1. Introduction

EKOS have been commissioned to assess the overall impact of the Homecoming 2009 programme of events. As part of the study, we are undertaking primary research and preparing separate economic impacts for some of the signature events, The Gathering being one of them. This report provides the economic impact assessment for The Gathering.

1.1 Background

The Gathering 2009 was a celebration of the culture and history of Scotland. The two-day event took place in Holyrood Park, Edinburgh over the weekend of Saturday 25th and Sunday 26th July.

The event featured international Highland Games athletes, outstanding pipers and highland dancers as well as a live music line up and Scotland's finest food and drink. The event attendance was 47,000 over the two days with attendees from various countries from around the world.

1.2 Objectives

The key objective of the study was to measure the overall economic impact of the event on Edinburgh and Scotland. The study also shows where visitors come from and ascertained the importance of the event in a visitor's decision to come to Edinburgh and Scotland. The study also provides an analysis of:

- the spend of visitors during their stay;
- length of visitors' stay;
- quality of visitor experience at the event;
- motivation for attending the event and if they would attend again in future years;
- means by which they heard about the event (reference marketing/PR activity);
- basic information about visitors including age, gender, residence; and
- awareness of Homecoming.

1.3 Funding

The total budget for the event was £2.4 million. Details of the public sector funding for the event is reported in **Table 1.1**. The public sector funding for the event totalled £490,500.

Table 1.1: Funding

Organisation	Amount
EventScotland	£100,000
Homecoming	£80,000
City of Edinburgh Council	£100,000
SEE&L	£100,000
Scottish Government	£100,000
Heritage Lottery Fund	£10,500
Total	£490,500

1.4 Report Structure

The remainder of this report is structured as follows:

- **Chapter 2** presents the results from the spectator survey;
- **Chapter 3** presents the economic impact analysis; and
- **Chapter 4** presents a brief set of conclusions.

2. Spectator Survey

2.1 Introduction

This Chapter presents an analysis of the survey of spectators attending The Gathering.

2.2 Background to the Survey

A face-to-face survey of the spectators was conducted to collect information from individuals over the duration of the event. In total 400 questionnaires were completed. 203 individuals were interviewed on the Saturday and 197 on the Sunday.

2.3 Visitor Origin

The visitor origin for the for those attending the event is set out in **Table 2.1**.

Table 2.1: Visitor by type and origin

Origin of visitor	Day	Overnight	Total
Edinburgh	23%	-	23%
Elsewhere in Scotland	15%	11%	26%
Elsewhere in UK	<1%	13%	13%
Overseas	-	38%	38%
Total	38%	62%	100%

2.4 Influence of The Gathering

Analysis shows that 28% of visitors would not have visited Scotland if The gathering had not taken place. However, it should be noted that three quarters of visitors were only day ticket visitors and the vast majority of these types of visitors did not come to Scotland because of the event.

2.5 Visitor Profile

The 400 visitors surveyed were split across the age groups as shown in **Table 2.2**¹. The survey sample was split relatively evenly between females (53%) and males (47%).

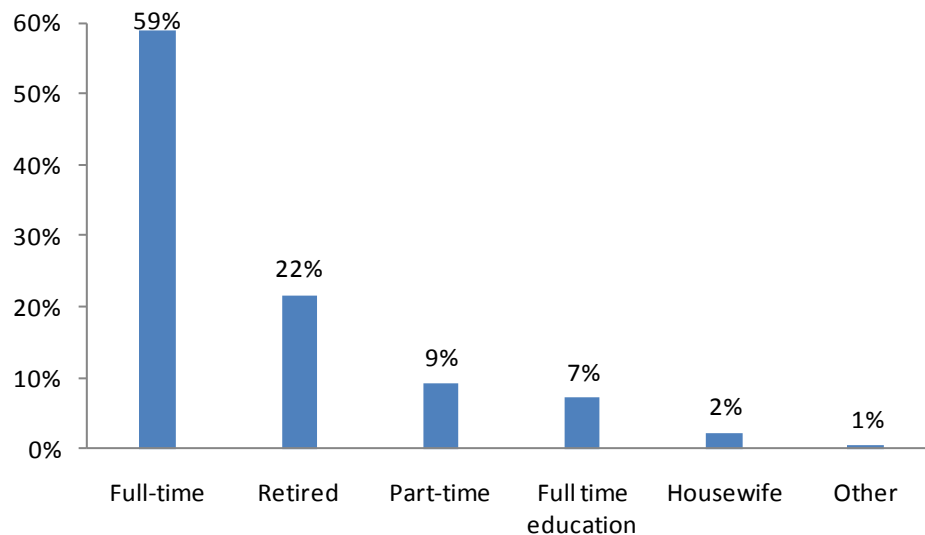
Table 2.2: Respondent Age Groups

	Number	%
16-24	35	9%
25-34	64	16%
35-44	61	15%
45-54	73	18%
55-64	104	26%
65+	63	16%
Total	400	100%

A quarter of visitors were aged 55-64, followed by those aged 45-54 (18%). The average party size had 3.7 persons and 12% of respondents came with children.

Figure 2.1, identifies the current employment status of respondents.

Figure 2.1: Working Status



N=392, 8 did not provide a response

¹ Only those aged over 16 were interviewed.

Over half of the visitors were in full-time employment (59%), followed by those who were retired (22%).

Based on survey responses to questions about the occupation and industry of the chief wage earner in the interviewee's immediate family, the following social class categories were identified²:

- AB: 38%;
- C1: 39%;
- C2: 16%;
- D: 4%; and
- E: 2%.

The survey suggests that The Gathering drew the majority of its audience from the AB and C1 social groups.

Nearly two thirds (62%) of visitors from outwith Scotland had visited the country prior to this trip. Over half (58%) of all respondents (excluding Edinburgh residents) had visited Edinburgh prior to this trip.

Over half of the visitors (54%) reported that they had/would be attending The Gathering on both days, 25% were only attending on the Saturday and 21% on the Sunday.

2.6 Awareness of Event

Figure 2.2. shows the ways in which visitors became aware of the event.

² AB is defined as upper middle/middle class (higher managerial, administrative or professional/intermediate managerial, administrative or professional)

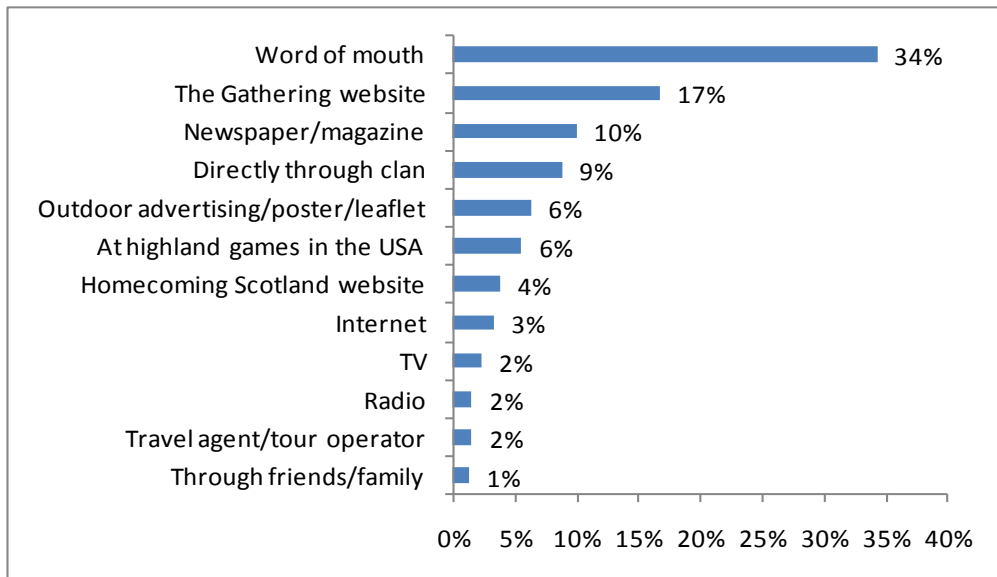
C1 is defined as lower middle class (supervisory or clerical, junior managerial, administrative or professional)

C2 is defined as skilled working class (skilled manual workers)

D is defined as working class (semi and unskilled manual workers)

E is defined as those who are unemployed/on benefits

Figure 2.2: How the respondents became aware of The Gathering.

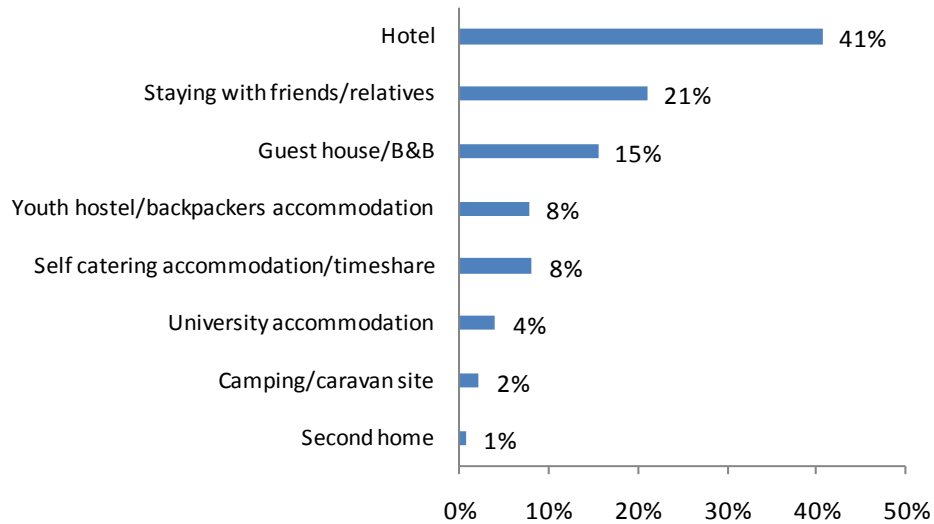


The most common way in which visitors found out about the event was through word of mouth (34%), followed by The Gathering website (17%) and newspaper/magazine (10%). The most common newspaper identified was The Scotsman.

2.7 Accommodation

Figure 2.3, over illustrates the most common types of accommodation used by those spending at least one night away from home to attend the event.

Figure 2.3: Types of Accommodation



The most popular type of accommodation for visitors staying overnight was a hotel (41%), with a fifth staying with friends or relatives.

2.8 Highlights & Dislikes

Respondents were asked what their top three highlights were at The Gathering. These have been identified as the following:

- the pipers/pipe bands: (23%);
- clan tents/village: (20%); and
- clan parade/show at the castle: (16%).

However, since different activities took place over the two days of the event we have provided a breakdown of the highlights identified by those interviewed on each day.

Those who were interviewed on the Saturday identified the following as their top three highlights:

- the pipers/pipe bands: (39%);
- the music: (26%); and
- clan tents/village: (24%).

The top three highlights identified by those who were interviewed on the Sunday were:

- the clan parade: (27%);
- clan tents/village: (26%);
- the pipers/pipe bands: (25%); and
- show at the castle: (10%).

Respondents were also asked if there were any parts of The Gathering Event that they did not like. Half of the respondents stated that there were parts they did not like and the most commonly cited included³:

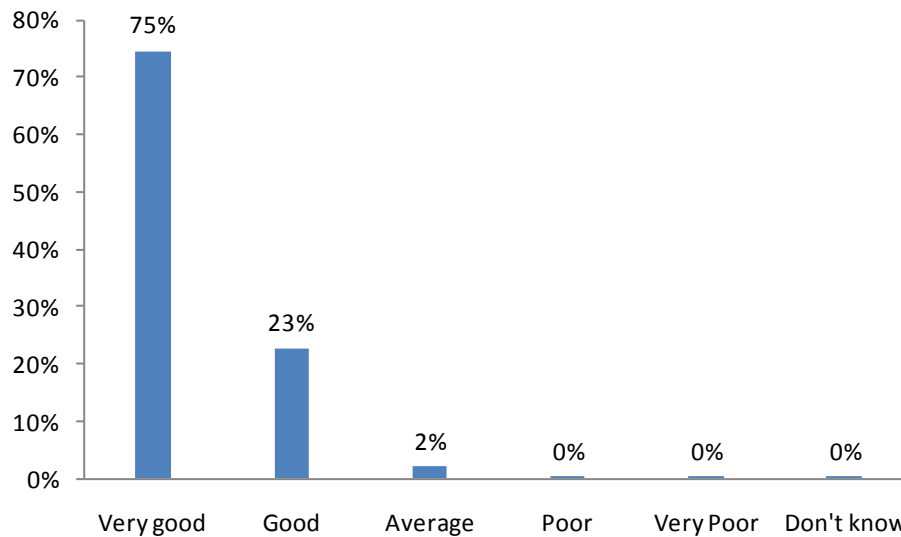
- long queues for food and drink/toilets: (28%);
- not enough seating: (20%);
- food and drink too expensive: (14%);
- ground wet and muddy: (10%); and
- parade badly organised: (5%).

2.9 Quality of Visit & Suggested Improvements

Respondents were asked to rate the overall quality of their experience at The Gathering. **Figure 2.4** details the responses.

³ As a percentage of all respondents.

Figure 2.4: Rating of Overall Quality of Experience at The Gathering



The overall quality of the event was rated highly, with 98% rating their overall experience as very good/good.

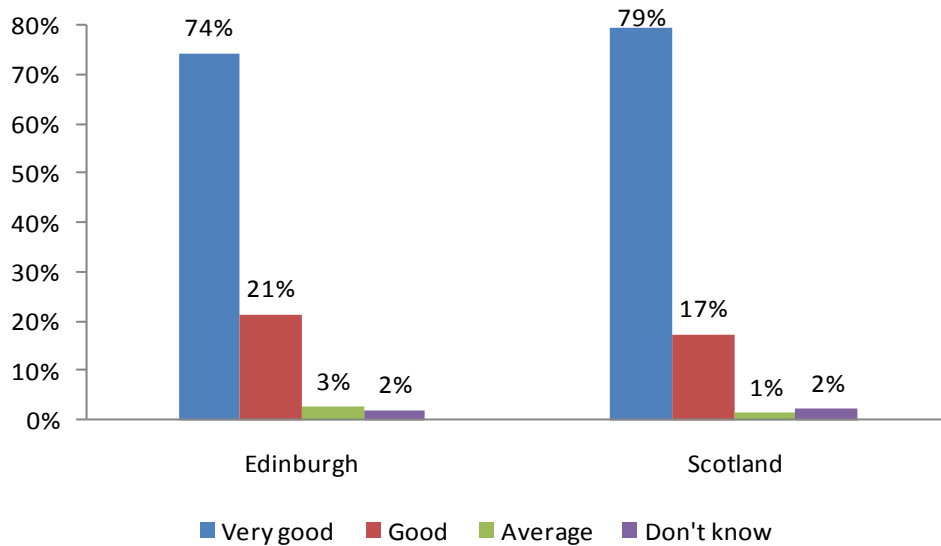
Respondents were asked if they had any suggestions as to how the event could be further improved and in total 52% provided comments. The most commonly cited responses included⁴:

- more seating/undercover areas for when it rains: (16%);
- more/better variety of food and drink outlets: (10%);
- more toilets: (3%);
- cover the mud with matting/straw: (3%);
- cheaper food and drink: (2%);
- put on a bus from the town centre to the Park: (2%); and
- better/more publicity in advance about the event: (1%).

Visitors from outside Edinburgh/Scotland were asked to rate the overall quality of their visitor experience to Edinburgh and Scotland. **Figure 2.5** reports the responses.

⁴ As a percentage of all respondents.

Figure 2.5: Rating of Visit to Edinburgh/Scotland



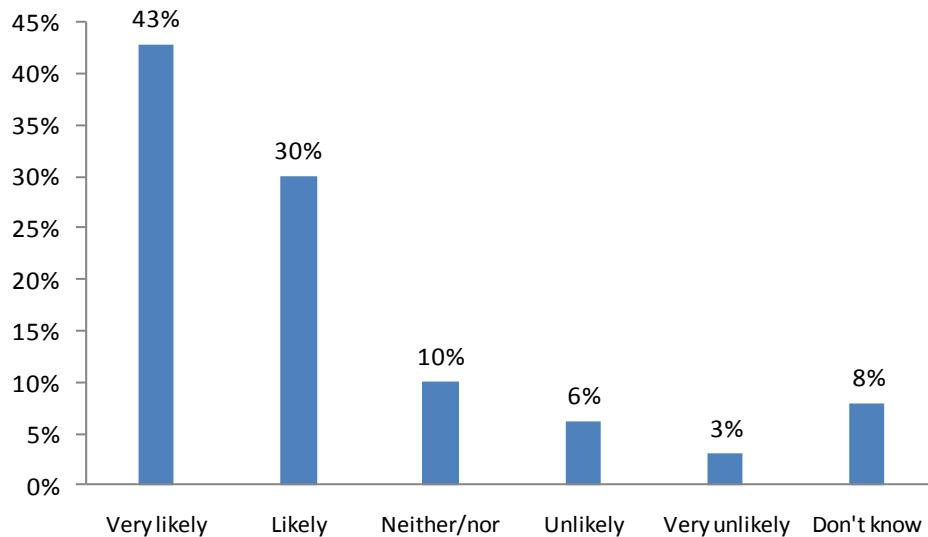
Overall respondents rated the quality of their visit to both Edinburgh and Scotland very highly, with the vast majority of visitors rating it as very good/good (95% and 96%, respectively). Reasons provided by respondents for the positive ratings included:

- like Edinburgh/Scotland and always enjoy visiting: (14%);
- friendly people/like Scottish people: (12%);
- enjoyable/excellent event/good day out: (11%); and
- beautiful city/country: (7%).

2.10 Likelihood of Re-visiting

Figure 2.6 details how likely the visitors would be to visit The Gathering again within the next four years.

Figure 2.6: Likelihood of visiting The Gathering again within the next four years



Overall, high numbers of visitors said that they would be very likely/likely to visit The Gathering again within the next four years (73%). Of those that were passport holders, 81% said they were very likely/likely to visit again and of those that were overseas visitors, 66%, said they were very likely/likely to visit again.

Those surveyed were asked why or why they would not be likely to return to The Gathering. A total of 84% responded and the most commonly cited responses included:

- enjoyable/fantastic event/day out: (26%);
- depends if in area/ where it is held and timing: (13%);
- depends on work/finances: (10%);
- like events like this: (5%);
- live locally/family live in Scotland: (4%);
- like Scotland/all things Scottish: (3%); and
- good atmosphere/nice people: (3%).

2.11 Awareness of Homecoming and Family Origins

Overall, there was a high level of awareness of the Homecoming Scotland 2009 Celebrations amongst respondents, with 88% stating that they were aware of them. Those that were aware of the Homecoming celebrations were then asked if prior to attending The Gathering they were aware that it was part of the Homecoming 2009 Celebrations, and the majority (94%) said they were.

Therefore, in total 83% of all respondents were aware that The Gathering was part of Homecoming before attending.

Just under a fifth (18%) of respondents cited that they have/are attending other Homecoming events as part of their current trip and the average number of Homecoming events that each visitor is attending is 1.5 (excluding The Gathering).

Nearly three quarters (72%) of visitors from outwith Scotland reported that they have family origins in Scotland.

2.12 Summary

The most common age groups were 55-64 and 45-54. The average party size had 3.7 persons and 12% of respondents came with children.

The most common way of finding out about the event was through word of mouth, followed by The Gathering website.

Nearly two thirds of visitors from outwith Scotland had visited the country prior to the event and three fifths of all respondents had visited Edinburgh before.

The most popular type of accommodation used by those visitors staying overnight was a hotel, followed by staying with friends/relatives.

The top highlights for visitors were the pipers/pipe bands, clan tents and the clan parade/show at the castle. Half of the respondents also identified parts of the event that they did not like. The most commonly cited were: long queues for food and drink/toilets, not enough seating and food & drink being too expensive.

Visitors rated the overall quality of the event very highly, with 98% rating it as very good/good and 73% commented that they would be very likely/likely to visit The Gathering again within the next four years.

Visitors also rated the quality of their visit to Edinburgh and Scotland very highly, with 95% and 96%, respectively rating it as very good/good.

Suggested improvements to the event by spectators included more seating/undercover areas for when it rains, more/better variety of food & drink outlets and more toilets.

Overall, awareness of Homecoming was high amongst respondents with 83% of visitors aware prior to attending The Gathering that it was part of the celebrations.

3. Economic Impact Assessment

3.1 Introduction

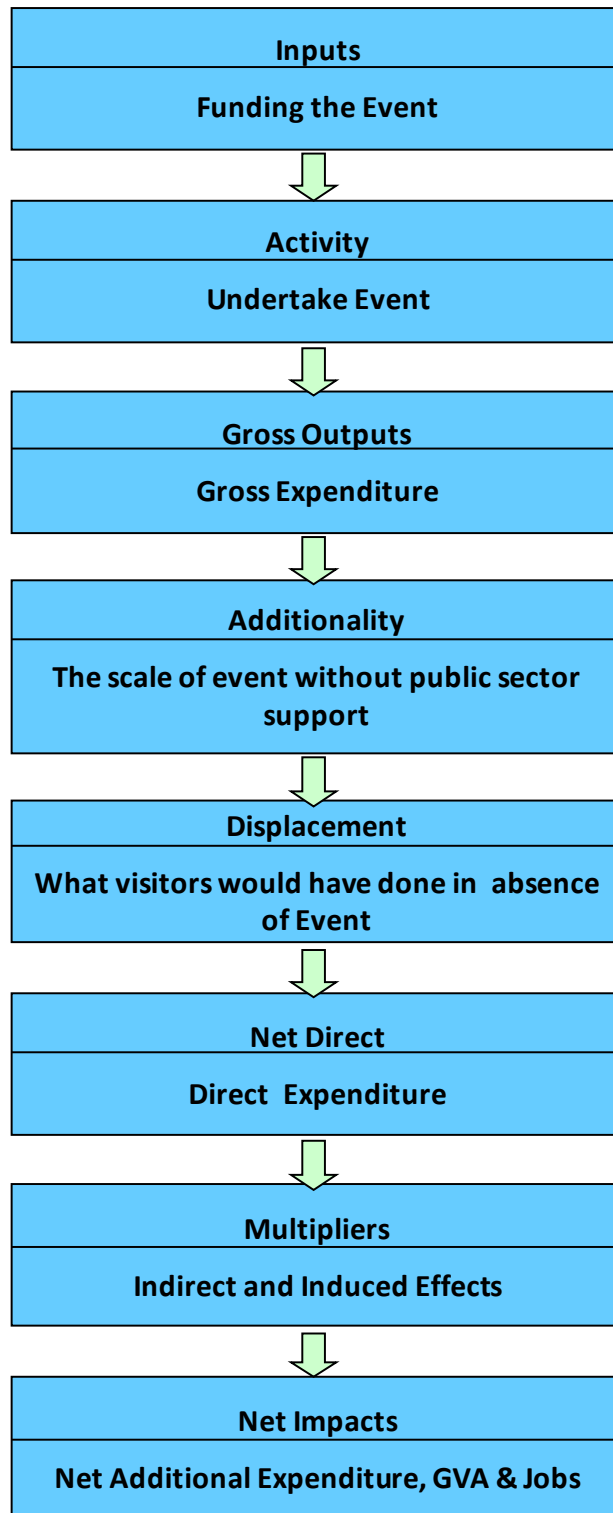
This Chapter provides an assessment of the economic impact of the event utilising data from the survey work and from the event organisers. The economic impact has been assessed at the Edinburgh and Scottish levels.

3.2 Economic Impact Assessment Method

Our approach to the economic impact assessment is given in **Figure 3.1**, over and is consistent with the Post Event Economic Impact Assessment Framework developed for EventScotland *et al* by EKOS⁵.

⁵ EKOS (2005) *Post Event Economic Impact Assessment Framework*
The framework was developed for a client group including EventScotland, VisitScotland, the Scottish Executive, and Scottish Enterprise, Highlands and Islands Enterprise and representation from the Local Authorities.

Figure 3.1: Economic Impact Assessment Method



3.3 Event Organisers Expenditure

3.3.1 Direct Expenditure

Expenditure was made by the event organisers as part of the delivery of the event. The total expenditure was £2,400,000. The amount spent in Edinburgh and Scotland is set out in **Table 3.1**.

Table 3.1: Event Organisers Expenditure

Area	Expenditure ¹
Edinburgh	£1,080,000
Scotland	£1,968,000

¹ £432,000 was spent outwith Scotland

3.3.2 Multipliers

The expenditure on staging the event will also have had two types of wider impact on the economy:

- supplier 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 local and national economies; and
- income 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 local and national economies.

The Scottish Tourism Multiplier Study (STMS) provides standard supplier and income multipliers for the tourism sector⁶. This estimates that the combined supplier and income multiplier for an urban location is:

- 1.46 at the local level; and
- 1.73 at the Scottish level.

⁶ 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.

3.3.3 Net Additional Expenditure

Applying the multipliers gives net additional expenditure from the event organisers of £1,576,800 in Edinburgh and £3,404,640 in Scotland.

3.4 Visitor Expenditure

3.4.1 Visitor Numbers and Origin

The total number of visits to The Gathering was 47,000 based on data provided by the organisers. **Table 3.2** shows visits, split by day and overnight.

Table 3.2: Type of Visitors

Type of Visit	Number	%
Day Visitor	18,053	38
Overnight	28,947	62
Total	47,000	100

A total of 62% of visitors were staying overnight as part of their visit to The Gathering.

The pattern of visitor behaviour varies by origin and type of visit i.e. day and overnight, therefore, these have been analysed separately in order to derive the economic impact. **Table 3.3** gives a breakdown of type of visit by origin.

Table 3.3: Visitor by type and origin

Origin of visitor	Day	Overnight	Total	Day	Overnight	Total
Edinburgh	10,940	0	10,940	23%	-	23%
Elsewhere in Scotland	6,941	5,138	12,079	15%	11%	26%
Elsewhere in UK	172	6,031	6,203	<1%	13%	13%
Overseas	0	17,778	17,778	-	38%	38%
Total	18,053	28,947	47,000	38%	62%	100%

The breakdown of overseas visits gives:

- USA (16%);
- Canada (7%);
- Australia (2%);

- New Zealand (1%); and
- Rest of World (12%).

3.4.2 Expenditure

The level of expenditure also varies by origin, and day and overnight visitors. The average daily expenditure for visitors is shown in **Table 3.4**.

Table 3.4: Average Daily Expenditure⁷

Origin of visitor	Day	Overnight
Edinburgh	£16.87	
Elsewhere in Scotland	£31.11	£55.10
Elsewhere in UK	£29.34	£73.57
Overseas		£88.66

The average length of stay for overnight visitors is given in **Table 3.5**.

Table 3.5: Average Length of Stay⁸

	Edinburgh	Scotland
Elsewhere in Scotland	1.6	2.7
Elsewhere in UK	2.8	4.4
Overseas	5.4	12.1

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

Applying the formula gives gross expenditure figures as detailed in **Table 3.6⁹**.

⁷ Excludes ticket expenditure as this has already been accounted for through the event organiser's expenditure. Ticket expenditure was used to help stage the event.

⁸ Scotland figures include the Edinburgh figures.

⁹ Visitors were disaggregated by visitor type before the formula was applied. Allowance has been made for overnight visitors visiting on more than one day so as to avoid double-counting.

Table 3.6: Gross Spend

	Edinburgh	Scotland
Day	£405,503	£405,503
Overnight	£7,292,966	£15,433,399
Total	£7,698,469	£15,838,902

3.5 Gross to Net

To calculate the net impact of the event, which is the true measure of the economic benefit to Edinburgh and Scotland, it is necessary to take account of additionality i.e. the additional expenditure brought into Edinburgh and Scotland by the event. The process for calculating the level of additionality is by applying:

- deadweight;
- displacement; and
- multiplier effects.

3.5.1 Deadweight

The Gathering was developed to tie in with the Year of Homecoming and is a key signature event within the overall year of celebrations. Public sector support was provided by a number of public sector agencies to establish it as a signature event. Deadweight is a measure of the extent to which public sector support was required for the event to take place. The total public sector funding for the event was £490,500 and as discussed above it was established as a signature event so would not have taken place without public sector support so the level of deadweight is zero.

3.5.2 Displacement

Displacement is a measure of the extent to which the event has simply moved expenditure from one part of the economy to another. So for example if a visitor would have been in Edinburgh anyway their expenditure would not be additional expenditure that is brought in so is displaced. Similarly where someone would have been in Scotland anyway their expenditure would be displaced at the Scottish level.

Displacement levels have been assessed using information from the survey on:

- visitor origin;
- importance of the event in the decision to visit the area; and
- counterfactual i.e. what visitors would have done in the absence of the event.

Table 3.7: Displacement (%)

	Edinburgh	Scotland
Day		
Edinburgh	99	100
Elsewhere in Scotland	2	100
Elsewhere in UK	3	100
Overnight		
Edinburgh		
Elsewhere in Scotland	16	100
Elsewhere in UK	25	56
Overseas	37	75

Taking account of displacement gives net direct additional expenditure of £4,959,714 at the Edinburgh level and £4,023,523 at the Scottish level.

3.5.3 Multipliers

The economic activity as a result of visitor expenditure will also have had two types of wider impact on the economy in terms of the supplier and income multiplier effects (as discussed earlier in **Section 3.3.2**).

3.6 Net Additional Expenditure (Visitor Expenditure)

Applying the multipliers gives net additional expenditure resulting from visitors, as set out in **Table 3.8**.

Table 3.8: Net Additional Expenditure

	Edinburgh	Scotland
Gross spend	£7,698,469	£15,838,902
Displacement	£2,738,755	£11,815,379
Net Direct	£4,959,714	£4,023,523
Multipliers	1.46	1.73
Net Additional	£7,241,183	£6,960,695

3.7 Media

3.7.1 Numbers and Origin

The staging of the event generated press and media attention. The event organisers have identified attendance at The Gathering by journalists and other media personnel. This is shown in **Table 3.9**.

Table 3.9: Number of Media Representatives and their origin

	Number	%
Edinburgh	30	13%
Elsewhere in Scotland	106	47%
Elsewhere in UK	42	19%
Overseas	48	21%
Total	226	100%

3.7.2 Gross to Net

After accounting for length of stay and average daily expenditure of £20 for those from Edinburgh, £30 for those from elsewhere in Scotland and £90 for those outwith, gross expenditure is estimated to be £19,980 at the local and national level. After accounting for displacement and multiplier effects, net expenditure generated is £28,181 at the Edinburgh level and £28,026 at the Scottish level.

3.8 Total Net Additional Expenditure

Combining the net additional expenditure from the event organisers, visitors' expenditure and media representatives gives total net additional expenditure as set out in **Table 3.10**¹⁰.

¹⁰ The Edinburgh and Scottish figures are two separate calculations. The Edinburgh figure shows the total net additional impact on Edinburgh and includes all those attracted into Edinburgh by the event i.e. Scottish (residents from elsewhere in Scotland outwith Edinburgh) and non-Scottish visitors (those from elsewhere in the UK and Overseas). The Scottish figure shows the total net additional impact on Scotland and includes all those attracted into Scotland by the event i.e. non-Scottish (those from elsewhere in the UK and Overseas). The same principles apply to the employment figures and GVA figures given later in this chapter

Table 3.10: Net Additional Expenditure

	Edinburgh	Scotland
Event Organiser's spend	£7,241,183	£6,960,695
Visitor Expenditure	£1,576,800	£3,404,640
Media Representatives	£28,181	£28,026
Total	£8,846,163	£10,393,361

3.9 Net Additional Employment

Due to the short-term nature of the event the employment impacts would not meet HM Treasury¹¹ 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 output:employment factors derived from the STMS¹² of:

- £43,925 at the local level; and
- £36,125 at the Scottish level.

Applying the output:employment factor to the net additional expenditure figures gives employment impacts of:

- 201 annual FTEs at the Edinburgh level; and
- 288 annual FTEs at the Scottish level.

3.10 Gross Valued Added

The level of gross value added (GVA) generated by the event has been estimated by applying GVA per employee ratios (£26,300 at the Edinburgh level and £19,600 at the Scottish level¹³) to the net additional employment. This gives net additional GVA of:

¹¹ "The Green Book", HM Treasury.

¹² An inflator has been applied to bring the figure up to 2009 value.

¹³ Source of the GVA per employee numbers is the Scottish Annual Business Statistics 2006

- £5,296,621 at the Edinburgh level; and
- £5,639,028 at the Scottish level.

3.11 Return on Investment

The total public sector contribution was £490,500. The net additional expenditure from the event was £8.8m and £10.4m at the Edinburgh and Scottish levels, respectively. Therefore the return on public sector investment was:

- £1:£18.03 at the Edinburgh level; and
- £1:£21.19 at the Scottish level.

3.12 Overview

The event generated net additional expenditure of £8.8m at the Edinburgh level and £10.4m at the Scottish level and supported the equivalent of 201 and 288 annual FTEs at each of these levels, respectively. The level of GVA generated was £5.3m and £5.6m. The return on investment is £1:£18.03 at the Edinburgh level and £1:£21.19 at the Scottish level.

4. Conclusions

4.1 Introduction

This chapter provides conclusions for the study covering:

- visitor profile;
- views on the event and local area;
- awareness of Homecoming; and
- economic impact.

4.2 Visitor Profile

The event attracted a total of 47,000 visits. Key findings in terms of the profile of visitors to The Gathering were:

- 23% from Edinburgh, 26% from elsewhere in Scotland, 13% from elsewhere in the UK and 38% from overseas (USA 16% and Canada 7%);
- a relatively even split between males (47%) and females (53%) and that most attendees were economically active (81%);
- the most common age group was 55-64 accounting for a quarter of visitors with a relatively even split across the other age groups (with the exception of 16-24 at only 9%);
- an average party size of 3.7 and 12% attended with children;
- the most common ways of finding out were word of mouth (34%), The Gathering website (17%); newspaper/magazine (10%) and directly through a clan (9%); and
- some 62% of visitors stayed overnight, with the most common forms of accommodation being hotels (41%) and staying with friends and relatives (21%).

4.3 Views on the Festival and Local Area

The event received a high overall rating with 98% rating it very good/good (with 75% rating it as very good). The aspects of the event that visitors liked the most (in rank order) were the pipers/pipe bands, clan tents/village and clan parade/show at the castle. However, given that the clan parade/show at the castle took place on the Saturday evening we also analysed the responses separately for the two days. This shows that for those asked on the Sunday the most popular aspects (in rank order) were the clan parade/show at castle, clan tents/village and pipers/pipe bands. A very high proportion (73%) said that they were very likely/likely to visit The Gathering again in the next four years.

Half of respondents suggested improvements for the future including more seating/undercover areas for when it rains (16%), more/better variety of food and drink outlets (10%) and more toilets (3%).

Ratings on the visitor experience to Edinburgh and Scotland were also very positive, with 95% and 96% of respondents rating their stay in Edinburgh and Scotland, respectively, as very good or good. The main reasons given for rating their visit highly were the fact that they like the city and country, the friendly people and the enjoyable event.

4.4 Homecoming

There was a high level of awareness (88%) of the Homecoming Scotland 2009 celebrations. The vast majority of these people (94%) were aware that The Gathering was part of Homecoming prior to attending. Therefore 83% of all visitors were aware that The Gathering was part of Homecoming before attending.

Just under a fifth (18%) of respondents had or are planning to attend other Homecoming events as part of their current trip.

A high proportion of those from outwith Scotland had family origins in Scotland, at 72%.

4.5 Economic Impact

The key findings from the economic impact assessment were:

- 77% of visitors were from outwith Edinburgh and 51% from outwith Scotland;
- 62% of visitors stayed overnight;
- daily expenditure of £17-29 for day visitors and £55-89 for overnight visitors;
- length of stay ranging from 1.6-5.4 nights in Edinburgh and 2.7-12.1 nights in Scotland;
- net additional impacts of:
 - expenditure: £8.8m in Edinburgh and £10.4m in Scotland
 - employment: 201 annual FTEs in Edinburgh and 288 in Scotland
 - GVA: £5.3m in Edinburgh and £5.6m in Scotland
 - ROI: £1:£18.03 at Edinburgh level and £1:£21.19 at the Scottish level.

4.6 Closing Comments

The event attracted a total of 47,000 visits over the two days and the visitor experience at the event and in Edinburgh and Scotland were both rated highly by the visitors. The event has been a key signature event within the Year of Homecoming and there was a high level of awareness of Homecoming and the event's association with it. The event generated net additional economic expenditure of £8.8m in Edinburgh and £10.4m in Scotland and the return on public sector investment was very high at £1:£18 at the Edinburgh level and £1:£21 at the Scottish level (the overall target for the Year of Homecoming is £1:£8).