
Report To: Regeneration Committee

Date: 19 January 2012

**Report By: Corporate Director Regeneration and
Environment**

**Report No:
R230/11/AF/SH**

Contact Officer: Sharon Hodgson

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**Subject: The Tall Ships Event, Greenock, July 2011 – Economic Impact
Assessment**

1.0 PURPOSE

- 1.1 The purpose of this report is to provide Committee with an overview of the findings of an independent economic impact assessment of the Tall Ships Event in Inverclyde in July 2011. This report was commissioned from EKOS Ltd in accordance with Sail Inverclyde's procurement policy and a full copy of the report is attached at Appendix 1.

2.0 BACKGROUND

- 2.1 Given the scale of the Tall Ships Event and the level of investment involved, an economic impact assessment was commissioned to address the following objectives:
- Increase understanding of the impact of large events on the local economy and consequently the local community, enabling key learning points to be identified for targeting future tourism work more effectively;
 - Demonstrate the impacts at the Inverclyde, West of Scotland and Scotland levels;
 - Contribute to national debates about the value of events to promote Scotland; and
 - Generate additional evidence in support of future events.
- 2.2 The funding for this study was secured from EventScotland who worked with Sail Inverclyde to agree the scope and methodology of the work. During the event itself face to face surveys were carried out with almost 1,300 people; visitors and participating crew. Copies of the questionnaires are attached at Appendices 2 and 3.

3.0 SUMMARY

- 3.1 Working to a total visitor number of 750,000 as provided by Sail Inverclyde Board and having analysed survey responses, the key findings of the economic impact assessment include the following:
- 75% of visitors were from outside Inverclyde with 30% from outside the West of Scotland;
 - 20% stayed overnight;
 - Spend by day visitors was £17-24 per day and overnight visitors spent £37 - £60;
 - Net additional impacts of £10.4m in Inverclyde, £8.6m in the West of Scotland

and £5.2m in Scotland; and

- Return on investment for the public sector was £1:£5.2 at the Inverclyde level, £1:£4.3 at the West of Scotland level and £1:£2.6 at the Scotland level.

3.2 In terms of the quality of the event, the ships and overall experience were rated very highly, with 99% and 97% respectively rating these as very good/good. This was followed by the entertainment (91%) and the stalls and exhibitions (88%).

3.3 The majority of respondents (90%) reported that they would be very likely/likely to attend the event if it was held in Inverclyde again and for the majority (96%) the experience of visiting Inverclyde was hugely positive. 60% of visitors confirmed that they were likely to visit Inverclyde again in the next three years.

4.0 RECOMMENDATION

4.1 That Committee

1. Note the content of the economic impact assessment; and
2. Note the positive impacts of the Tall Ships Event for both Inverclyde and for the wider Scottish economy.

Appendix 1



Economic Impact Assessment of the Tall Ships Event in Greenock

Report for Sail Inverclyde

August 2011

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1. Introduction

This report provides an assessment of the economic impact of the Tall Ships Event in Greenock.

1.1 Background

Greenock hosted the Tall Ships Races at James Watt Dock and the Inchgreen Quay from the 9th-12th July 2011. A total of 53 ships visited the port with a total crew of 1,722. The event is expected to attract a total of 750,000 visitors over the four days.

1.2 Objectives

The main reasons for undertaking the study were to:

- increase understanding of the impact of large events on the local economy and consequently the local community, enabling key learning points to be identified for targeting future tourism work more effectively;
- demonstrate the impacts at the Inverclyde, West of Scotland and Scotland levels;
- contribute to national debates about the value of events to promote Scotland; and
- generate additional evidence in support of future events.

1.3 Structure of Report

The remainder of this report is structured as follows:

- **Chapter 2** presents a description of the event;
- **Chapter 3** provides analysis of the survey of spectators and crew;
- **Chapter 4** presents the economic impact assessment of the event; and
- **Chapter 5** sets out a summary and conclusions of the findings.

2. Greenock Tall Ships Event

2.1 Introduction

This Chapter provides a description of the Greenock Tall Ships event and its funding.

2.2 The Event

The Tall Ships races were held in Greenock at the James Watt Dock and Inchgreen Quay over four days from Saturday 9th-Tuesday 12th July. The event was free and across Saturday, Sunday and Monday the opening hours were 11am to 10.30pm and on the Tuesday the opening hours were 11am to 1pm.

The events programme also included the following from the Saturday-Monday:

- **children's entertainment** – this included balloon modelling, face painting, circus workshops and storytelling;
- **stage performances** – this included performances from a variety of acts across the five main stages with headliners Lulu, The Magic Numbers and Deacon Blue. Other acts performing included Tall Ships Tales by Inverclyde Primary 5s, Davy Nicol, Inverclyde Pipes and Drums, The Woopi Choir, The Soviets, The Raw Kings, The Skarsoles and The Drams.
- **street theatre**¹ – this featured performances from acts including: Giant Seagulls, Captain Jack Sparrow, Mischief La Bas & Heritage Community Group, Pirate Captain Darke & Shipmate Liza Rudge and Death Row Jethro.

On the final day of the event there was a display from The Red Arrows and a Parade of Sail.

¹ This did not take place on the Monday.

2.3 Funding

The funding for the event totalled £2,426,000 with a split of:

- Inverclyde Council - £580,000;
- Riverside Inverclyde - £1,200,000;
- EventScotland £40,000; and
- Private sector - £606,000.

2.4 Community Groups and Volunteers

A key aspect of the event was engagement with the local community. The event organisers developed a community programme to ensure direct community involvement in the events through local community groups, schools, etc. This included directly involving local community groups in the entertainment that was offered over the four days of the event. A total of 24 community groups from Inverclyde with 180 members taking part in the entertainment.

The event also had support from volunteers to help with its delivery. In total there were 200 volunteers of which 150 were from Inverclyde.

3. Spectator and Crew Survey

3.1 Introduction

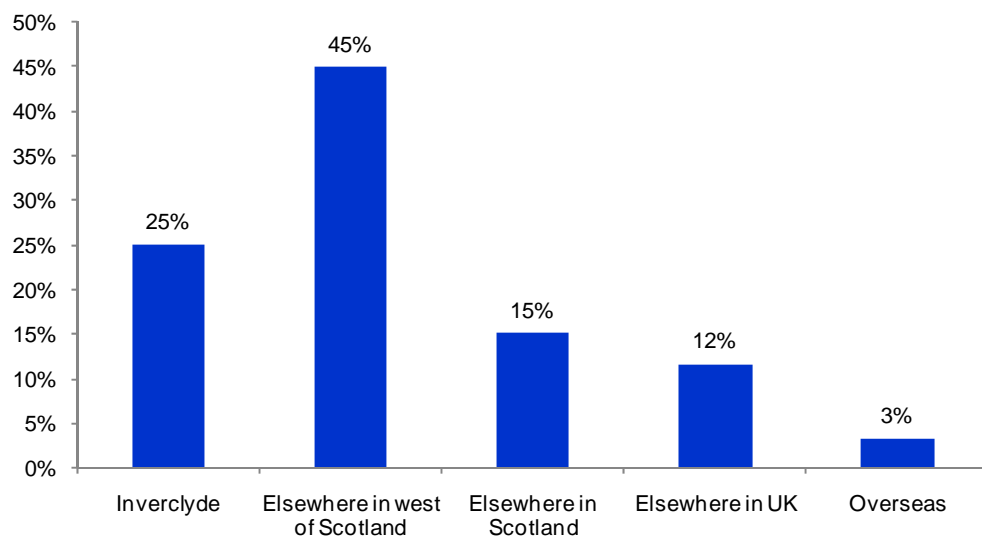
This Chapter presents analysis of the survey of spectators that attended the Greenock Tall Ships Event as well as analysis of the survey of crew members from the Tall Ships. Some of the data collected through the survey of visitors and crew has been used to assess the economic impact of the event and is reported later in **Chapter 4**.

3.2 Spectator Survey Analysis

A face-to-face survey of the spectators was conducted to collect information from individuals over the duration of the event. In total 1,047 interviews were completed.

3.2.1 Visitor Origin

Figure 3.1: Visitor Origin



N=1,047

Over two thirds of the visitors (70%) came from the West of Scotland, with a quarter from Inverclyde.

Those visitors that came from elsewhere in the West of Scotland/Scotland were asked which Local Authority area they live in and the most commonly reported responses were:

- Glasgow: (14%);
- Renfrewshire/East Renfrewshire: (11%);
- Ayrshire²: (9%);
- Lanarkshire³: (6%);
- Dunbartonshire⁴: (4%);
- Argyll & Bute: (3%); and
- Lothian⁵: (2%).

Those visitors that came from outwith Scotland were asked which country they were from and England was the most commonly cited response (11%).

3.2.2 Visitor Profile

The visitors surveyed were split across the age groups as shown in **Table 3.1**. The survey sample consisted of a larger proportion of females (58%).

² Note: this includes those resident in North, East, South Ayrshire as well as those who did not make a distinction between these.

³ Note: this includes those resident in North & South Lanarkshire, as well as those who did not make a distinction between these.

⁴ Note: this includes those resident in East & West Dunbartonshire, as well as those who did not make a distinction between these.

⁵ Note: this includes those resident in East, West & Midlothian as well as those who did not make a distinction between these.

Table 3.1: Respondent Age Groups

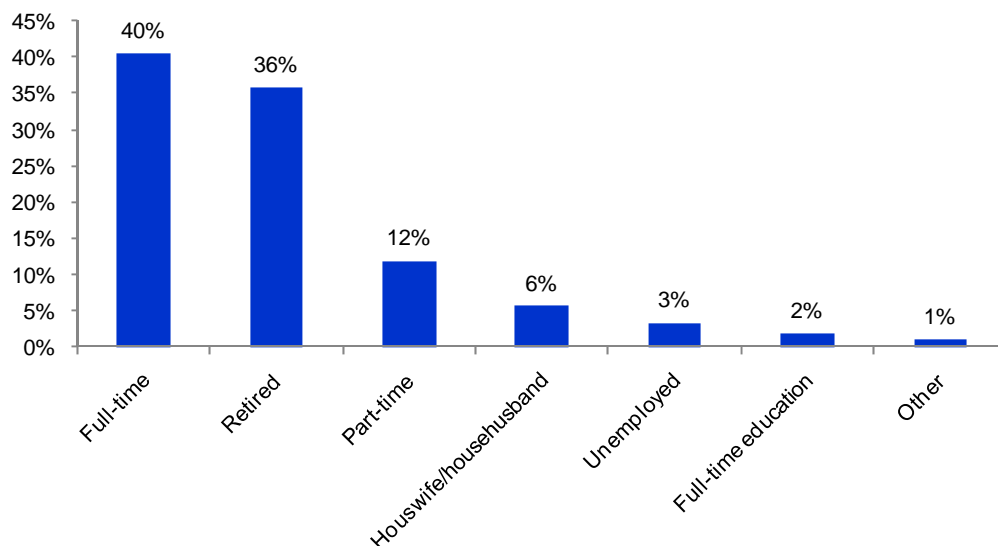
	Number	%
16-24	35	3%
25-34	114	11%
35-44	155	15%
45-54	185	18%
55-64	269	26%
65+	288	28%
Total	1,046	100%

Just under three quarters of those surveyed were aged 45 or over (72%).

The majority of visitors from outwith Scotland (86%) had visited Scotland prior to attending the event and three quarters of visitors from outwith Inverclyde had visited Inverclyde prior to the event.

Figure 3.2 shows that over half of the visitors (52%) were in employment (full or part-time), followed by those who were retired (36%).

Figure 3.2: Employment Status

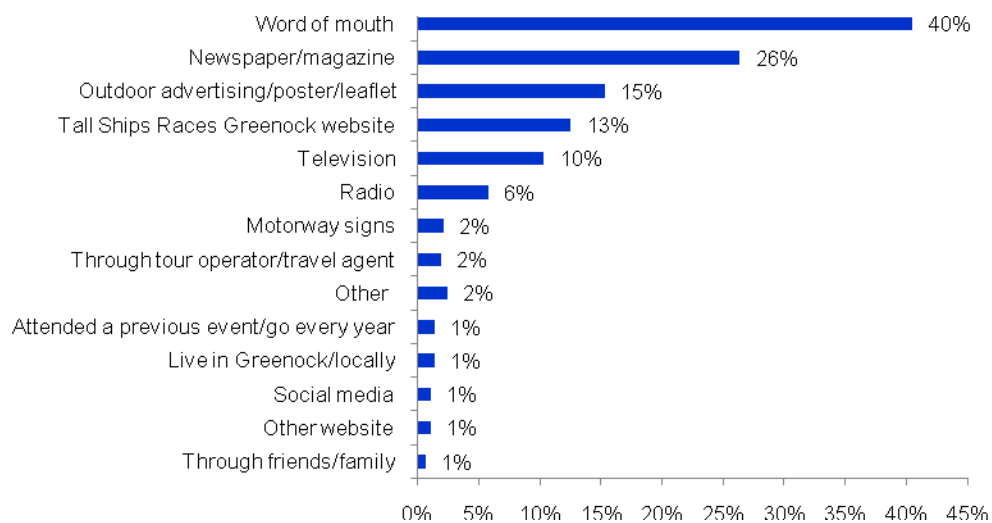


N=1,047

3.2.3 Awareness of the Event

Figure 3.3 shows how the respondents found out about the event.

Figure 3.3: Awareness of Tall Ships Event



N=1,047, multiple responses possible

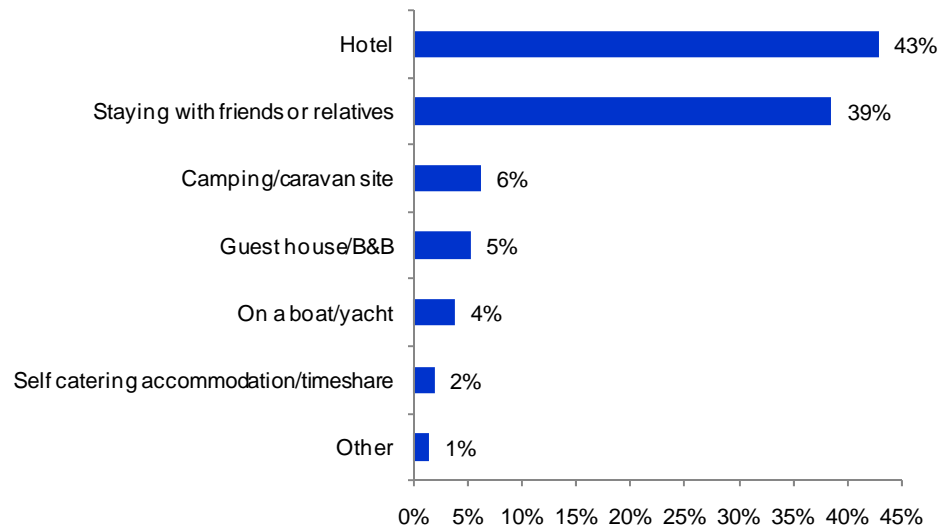
The most common way in which respondents found out about the event was through word of mouth (40%), followed by a newspaper/magazine (26%). The most common newspapers identified were: The Greenock Telegraph (7%); The Herald (5%) and The Evening Times (3%).

3.2.4 Accommodation

A fifth of the visitors were spending at least one night away from home as part of their trip.

As shown in **Figure 3.4**, the most popular type of accommodation for visitors was a hotel (43%), followed by staying with friends or relatives (39%).

Figure 3.4: Types of Accommodation



N=210

3.2.5 Quality of Event

The respondents were asked to rate a number of different aspects of the event and **Table 3.2** illustrates the responses.

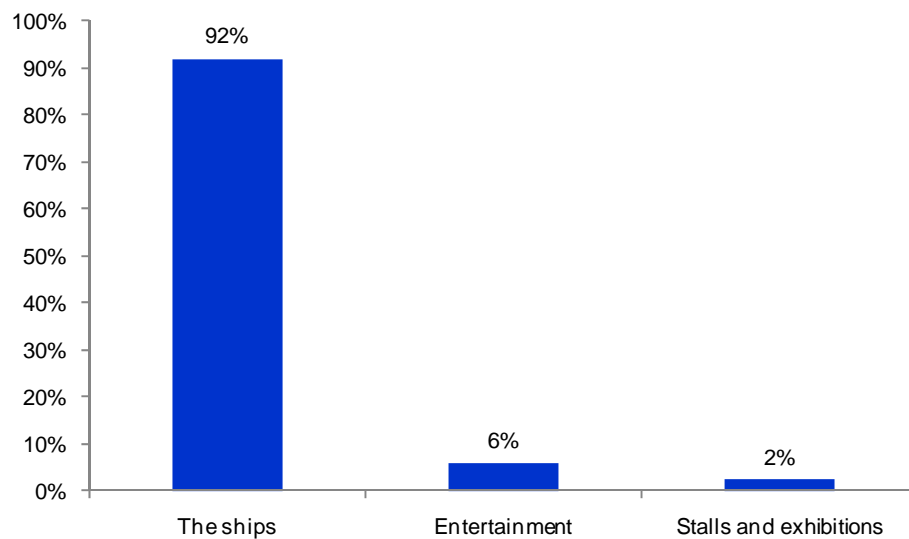
Table 3.2: How would you rate the following aspects of the Greenock Tall Ships Event? (%)

	Very good	Good	Average	Poor	Very poor
The ships	92%	7%	1%	0%	0%
Entertainment	51%	40%	9%	0%	0%
Stalls & exhibitions	45%	43%	11%	1%	0%
Food & drink	29%	43%	23%	4%	1%
Overall experience	69%	28%	2%	0%	0%

The ships and overall experience were rated very highly, with 99% and 97%, respectively rating these as very good/good. This was followed by the entertainment (91%) and the stalls and exhibitions (88%). The lowest proportion was for food and drink (72%) with 23% rating it as average.

Respondents were asked which aspect of the event they enjoyed the most, and the majority (92%) enjoyed the ships the most, see **Figure 3.6**.

Figure 3.6: Which aspect of the event did you enjoy the most?



N=1,006

A total of 68% of respondents provided suggestions as to how the event could be improved and the most common responses included⁶:

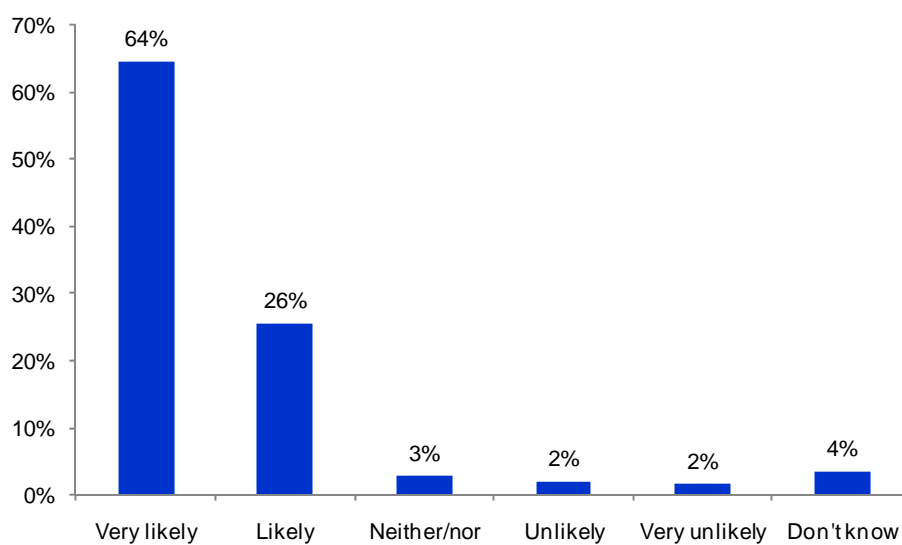
- more/better seating: (13%);
- more/better/cleaner toilets: (13%);
- improve the walking surface: (13%);
- cheaper food and drink: (7%);
- better/more signage/directions: (6%);
- better/nearer parking: (4%);
- cheaper parking: (4%); and
- better/more information: (2%).

⁶ As a percentage of all respondents

3.2.6 Likelihood of Visiting Again & Quality of Visit

The majority of respondents (90%) reported that they would be very likely/likely to attend the event if it was held in Inverclyde again, **Figure 3.7**.

Figure 3.7: Likelihood of attending event if it was held in Inverclyde again



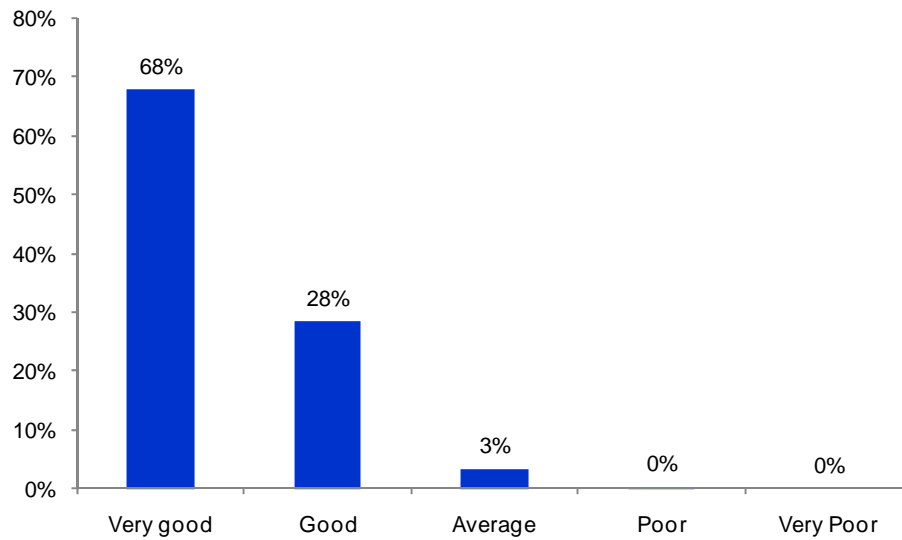
N=1,047

The reasons given by the respondents for being very likely/likely to attend the event again included:

- good/enjoyable day out: (29%);
- live locally: (9%);
- like/love/follow the Tall Ships: (7%);
- the atmosphere: (4%); and
- the ships are wonderful/fantastic: (7%).

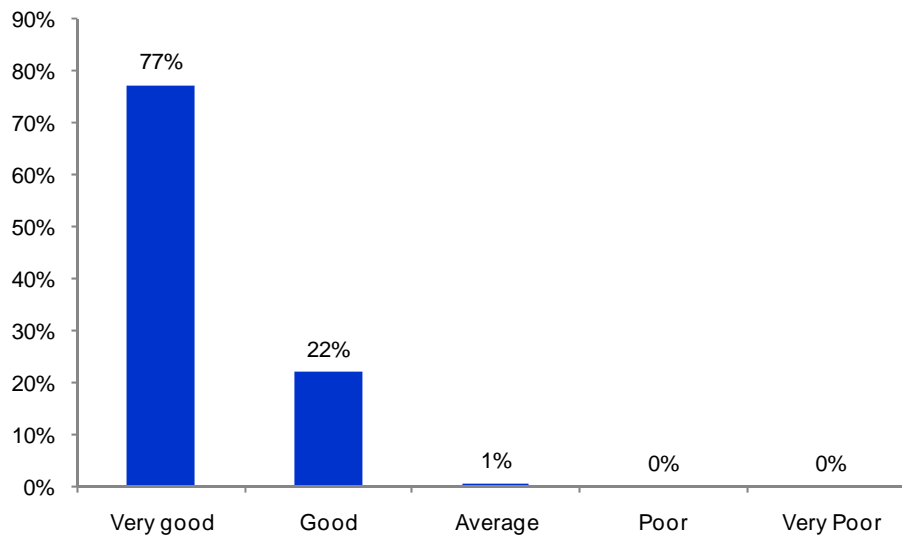
The visitor experience to both Inverclyde and Scotland was rated highly with the majority of respondents (96% and 99%, respectively) rating it as very good or good, see **Figures 3.8** and **3.9**.

Figure 3.8: How would you rate the quality of your visitor experience to Inverclyde? (excludes Inverclyde residents)



N=774

Figure 3.9: How would you rate the quality of your visitor experience to Scotland? (excludes Scotland residents)



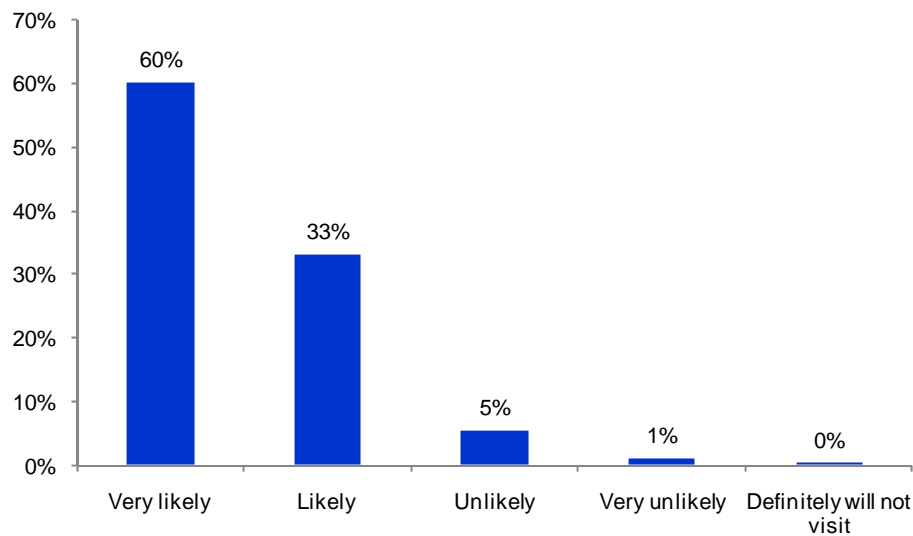
N=154

The reasons given for rating their visit so highly included:

- enjoyable/great event/experience: (20%);
- good atmosphere: (5%);
- well organised/laid out: (5%); and
- attraction of Greenock/Scotland: (5%).

Respondents were asked how likely they would be to return to Inverclyde and Scotland within the next three years. **Figures 3.10** and **3.11** detail their responses.

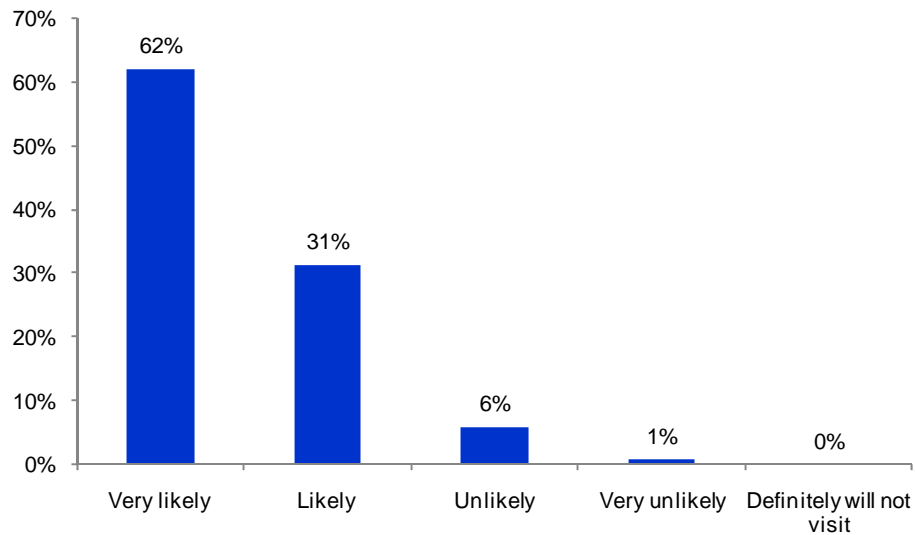
Figure 3.10: Likelihood of visiting Inverclyde again in the next three years (excludes Inverclyde residents)



N=769

The majority of respondents (93%) reported that they are very likely/likely to return to Inverclyde/Scotland again in the next three years.

**Figure 3.11: Likelihood of visiting Scotland again in the next three years
(excludes Scotland residents)**



N=153

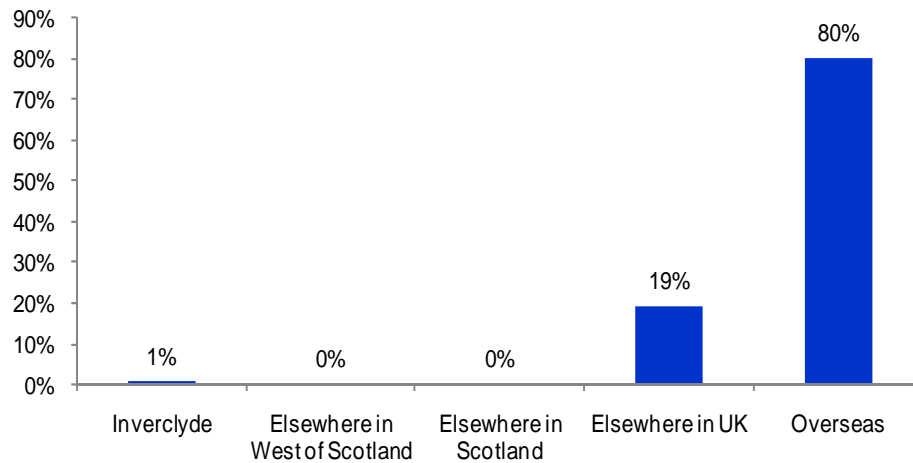
3.3 Crew Survey Analysis

A face-to-face survey of the crew members was conducted and in total 150 interviews were completed.

3.3.1 Origin of Crew

Figure 3.12 shows the origin of the crew members interviewed.

Figure 3.12: Crew member origin



N=150

All of the crew members interviewed (except one) came from outwith Scotland, with the majority coming from overseas (80%). The respondents were asked what country they live in and the most commonly cited responses included:

- Ireland/Northern Ireland: (35%);
- England: (18%);
- Colombia: (12%);
- Belgium: (8%);
- Poland: (6%);
- Sweden: (6%); and
- Russia: (3%).

3.3.2 Profile of Crew

The crew members surveyed were split across the age groups as shown in **Table 3.3**. The survey sample consisted of a much larger proportion of males (77%).

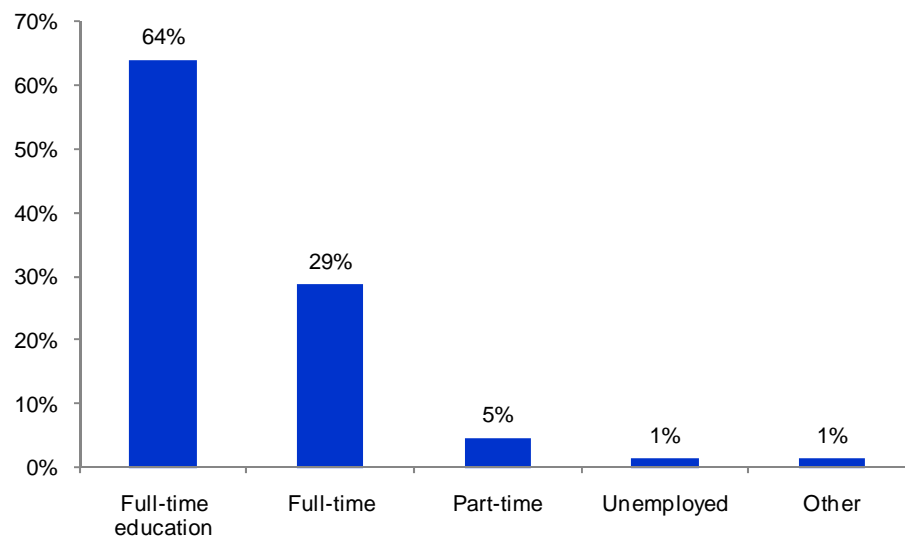
Table 3.3: Respondent Age Groups

	Number	%
16-24	124	83%
25-34	10	7%
35-44	6	4%
45-54	7	5%
55-64	3	2%
65+	0	0%
Total	150	100%

Less than a third of the crew members from outwith Scotland (30%) had visited Scotland prior to the event taking place and only 8% had visited Inverclyde prior to the event.

Figure 3.13 shows that almost two thirds of the crew members (64%) were in full-time education, followed by those who were in employment (34%).

Figure 3.13: Employment Status



N=150

3.3.3 Quality of Event

The crew members were asked to rate a number of different aspects of the event and **Table 3.4** illustrates the responses.

Table 3.4: How would you rate the following aspects of the Greenock Tall Ships Event? (%)

	Very good	Good	Average	Poor	Very poor
Entertainment	53%	40%	4%	2%	0%
Stalls and exhibitions	53%	39%	5%	3%	1%
Food and drink	50%	42%	6%	1%	1%
Overall experience	61%	31%	6%	1%	0%

All of the aspects were rated highly, with between 92-94% of respondents rating each of the aspects as very good or good.

A third of respondents provided suggestions for improving the event and the most commonly cited responses included⁷:

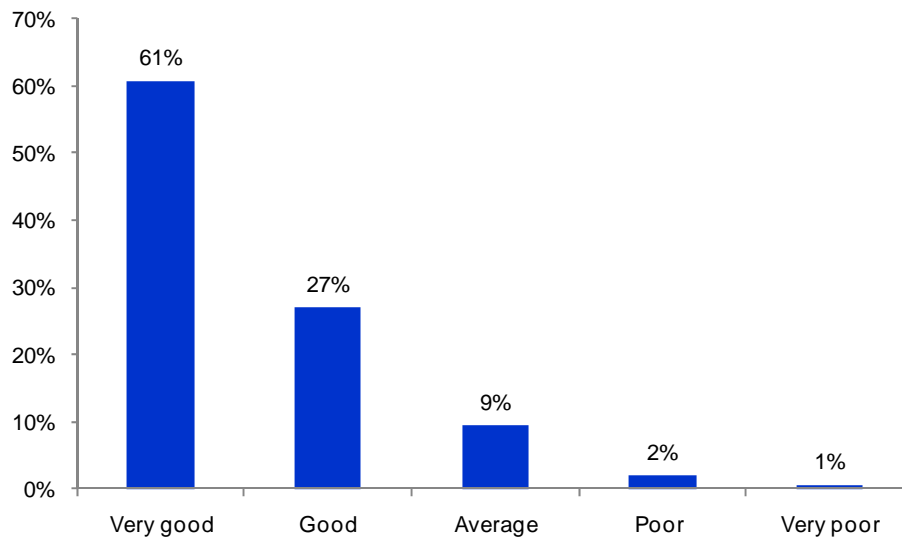
- better/more/cleaner showers: (11%);
- more toilets: (4%);
- more events/activities for crew: (3%);
- clean up the dock: (3%);
- cheaper drink: (2%);
- better/more signage: (2%); and
- more transport to/from town: (2%).

3.3.4 Quality of Visit & Likelihood of Visiting Again

The visitor experience to both Inverclyde and Scotland was rated highly with the majority of respondents (88% and 92%, respectively) rating it as very good or good, see **Figures 3.14 and 3.15**.

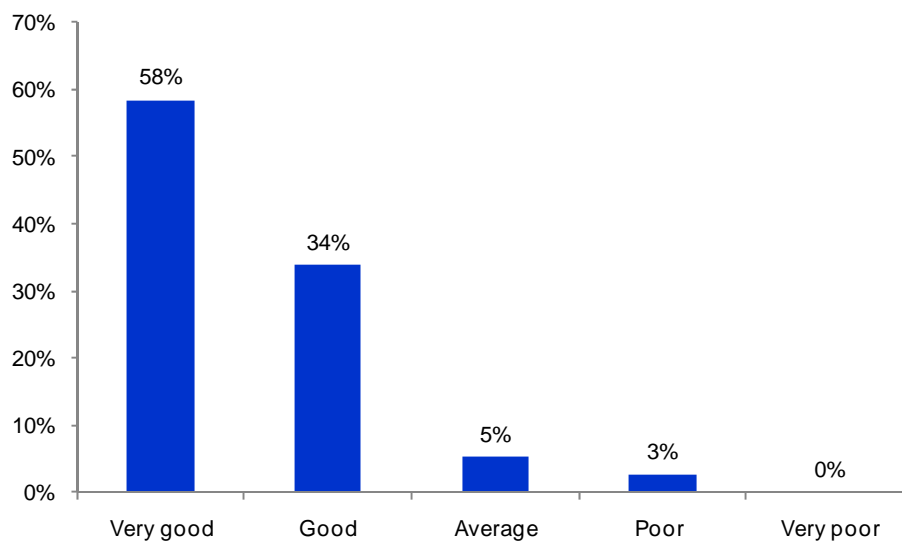
⁷ As a percentage of all respondents.

Figure 3.14: How would you rate the quality of your visitor experience to Inverclyde (excludes Inverclyde resident)



N=148

Figure 3.15: How would you rate the quality of your visitor experience to Scotland? (excludes Scotland resident)



N=77

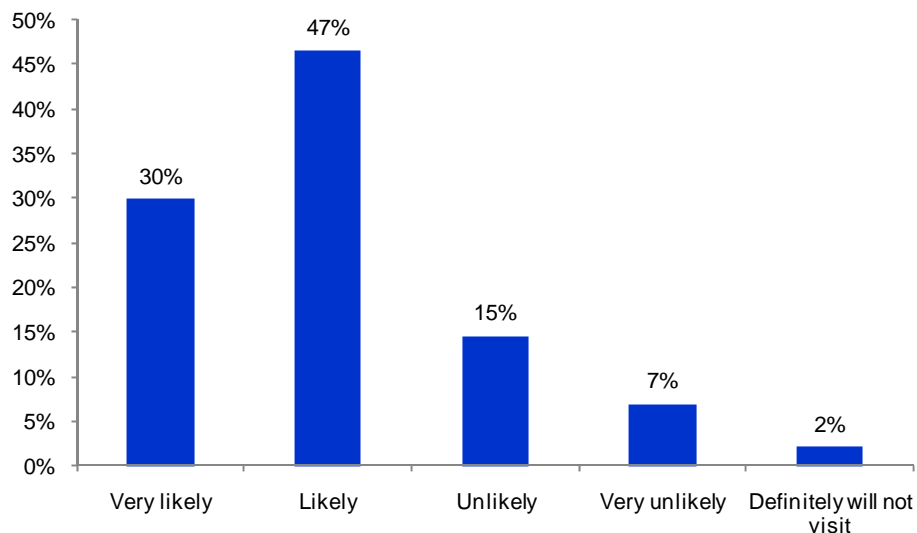
The reasons given by the respondents for the positive ratings included:

- nice/friendly people: (29%);
- beautiful/nice scenery: (15%);
- enjoyable/great experience: (11%);
- nice place: (5%); and
- loved everything: (3%).

Respondents were asked how likely they would be to return to Inverclyde and Scotland within the next three years and **Figures 3.16** and **3.17** detail their responses.

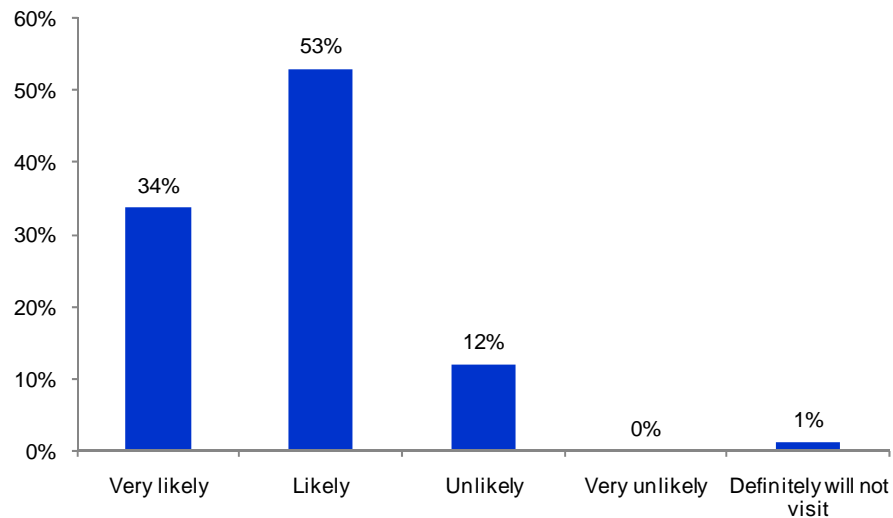
Over three quarters of respondents (77%) reported that they are very likely/likely to return to Inverclyde again in the next three years, with 87% very likely/likely to visit Scotland again.

Figure 3.16: Likelihood of visiting Inverclyde again in the next three years (excludes Inverclyde resident)



N=144

**Figure 3.17: Likelihood of visiting Scotland again in the next three years
(excludes Scotland resident)**



N=83

3.3.5 Summary

Spectator Survey

Over two thirds of the visitors (70%) came from the West of Scotland. Just under three quarters of the visitors (72%) were aged 45 or over. Over half of the visitors (52%) were in employment (full or part-time), followed by those who were retired (36%).

A fifth of the visitors were spending at least one night away from home as part of their trip and the most common type of accommodation used was a hotel (43%), followed by staying with friends or relatives (39%).

The most common way in which respondents found out about the event was through word of mouth (40%), followed by a newspaper/magazine (26%).

The quality of the ships and overall experience were rated very highly, with 99% and 97%, respectively rating these as very good/good. The majority of respondents (92%) enjoyed the ships the most. Suggested improvements to the event included more/better seating, more/better/cleaner toilets, improve the walking surface and cheaper food and drink.

The majority of respondents (90%) said that they would be very likely/likely to attend the event if it was held in Inverclyde again. The reasons for this included good/enjoyable day out and live locally.

The visitor experience to both Inverclyde and Scotland was rated very highly with 96% and 99%, respectively rating it as very good/good.

The majority of respondents (93%) said that they are very likely/likely to return to Inverclyde/Scotland again in the next three years.

Crew Survey

All of the aspects of the event were rated highly, with between 92-94% of respondents giving each aspect a very good/good rating. Suggested improvements to the event included better/more/cleaner showers; more toilets; more events/activities for crew and clean up the dock.

The visitor experience to both Inverclyde and Scotland was rated highly with 88% and 92%, respectively rating it as very good/good. The majority of respondents reported that they would be very likely/likely to visit Inverclyde and Scotland again in the next three years (77% and 87%, respectively).

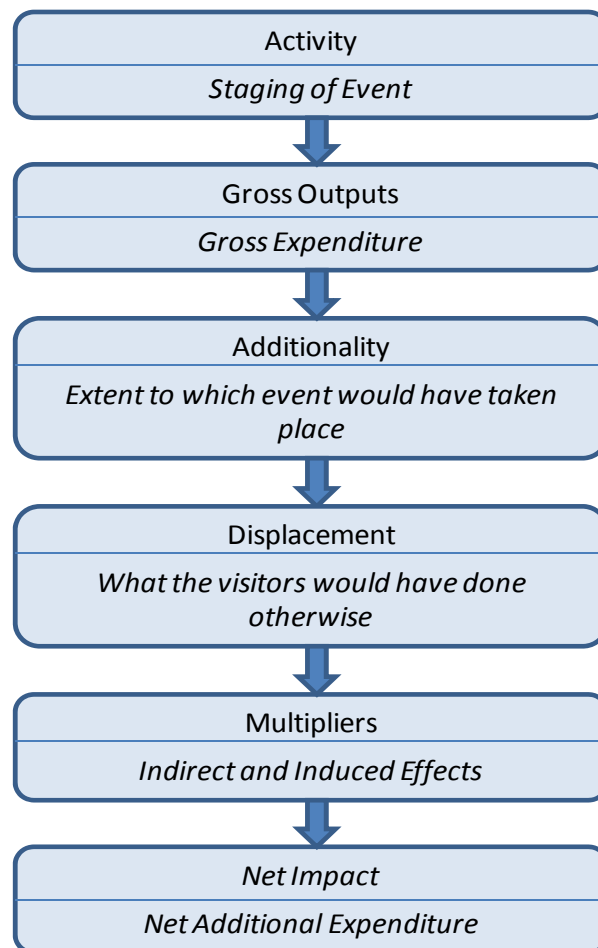
4. Economic Impact

This chapter provides an assessment of the economic impact of the event utilising data from the survey work and the event organisers.

4.1 Economic Impact Assessment Method

Our approach to the economic impact assessment is given in **Figure 4.1**, and is consistent with the Post Event Economic Impact Assessment Framework developed for EventScotland et al by EKOS.

Figure 4.1: Economic Impact Assessment Method



4.2 Gross Impacts

4.2.1 Visitor Numbers and Origin

The event organisers estimate that there were a total of 750,000 attendances over the four day event. The origin of visitors is given in **Table 4.1**.

Table 4.1: Visitor Origin (%)

Spectators	
Inverclyde	25%
Elsewhere in West of Scotland	45%
Elsewhere in Scotland	15%
Elsewhere in UK	12%
Overseas	3%
Total	100%

A quarter of the visits were by Inverclyde residents with 45% those from elsewhere in the West of Scotland.

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 4.2** gives a breakdown of type of visitor by origin.

Table 4.2: Visitor by Type and Origin (%)

Spectators		
	Day	Overnight
Inverclyde	25%	0%
Elsewhere in West of Scotland	44%	1%
Elsewhere in Scotland	10%	5%
Elsewhere in UK	1%	11%
Overseas	0%	3%
Total	80%	20%

4.2.2 Expenditure

The average daily expenditure is shown in **Table 4.3**.

Table 4.3: Average Daily Expenditure

	Day	Overnight
Inverclyde	£16.80	-
Elsewhere in West of Scotland	£20.10	£37.11
Elsewhere in Scotland	£20.58	£39.29
Elsewhere in UK	£23.26	£47.17
Overseas	-	£59.83

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 at the Inverclyde, West of Scotland and Scotland levels, as detailed in **Table 4.4**⁸.

⁸ Visitors were disaggregated by visitor type before the formula was applied. We have taken account of how much of the expenditure took place with businesses within Inverclyde, West of Scotland and Scotland, respectively.

Table 4.4: Gross Expenditure

	Gross Expenditure
Inverclyde	£9,606,227
West of Scotland	£17,264,235
Scotland	£22,775,648

4.3 Gross to Net

To calculate the net impact of the event, which is the true measure of the economic benefit to Inverclyde, West of Scotland and Scotland, it is necessary to take account of:

- additionality;
- displacement; and
- multiplier effects.

4.3.1 Additionality

Additionality is a measure of the extent to which public sector funding was required for the event to take place. In this case public sector support was required for the event to take place so the level of additionality is 100%.

4.3.2 Displacement

Displacement is a measure of the extent to which the event has simply moved expenditure from one part of the economy to another. 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 4.5: Displacement Factors (%)

	Inverclyde	West of Scotland	Scotland
Day			
Inverclyde	93	99	100
Elsewhere in West of Scotland	5	98	100
Elsewhere in Scotland	3	16	100
Elsewhere in UK	18	27	27
Overnight			
Elsewhere in West of Scotland	27	87	100
Elsewhere in Scotland	24	41	100
Elsewhere in UK	25	54	72
Overseas	33	73	85

Taking account of displacement gives net direct additional expenditure of £6,985,503 at the Inverclyde level, £5,452,561 at the West of Scotland level and £2,800,175 at the Scottish level.

4.3.3 Multipliers

The economic activity as a result of 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 economy; 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 economy.

The combined supplier and income multipliers from the STMS are:

- 1.46 at the Inverclyde level;
- 1.53 at the West of Scotland level⁹; and
- 1.73 at the Scottish level.

⁹ STMS only provides multipliers at the local and national level. So West of Scotland is an EKOS estimate.

4.4 Net Additional Spectator Expenditure

Table 4.6: Net Additional Expenditure

	Net Additional Spectator Expenditure
Inverclyde	£10,198,835
West of Scotland	£8,342,418
Scotland	£4,844,303

Applying additionality, displacement and multipliers to the gross expenditure gives net additional expenditure of £10.2m at the Inverclyde level, £8.3m at the West of Scotland level and £4.8m at the Scottish level, as set out in **Table 4.6**.

4.5 Crew Expenditure

The event organisers provided details on crew numbers, with a total of 1,722 attending.

Table 4.7: Crew Origin (%)

	Spectators
Inverclyde	2%
Elsewhere in West of Scotland	-
Elsewhere in Scotland	-
Elsewhere in UK	21%
Overseas	77%
Total	100%

4.5.1 Expenditure

The average daily expenditure is shown in **Table 4.8**.

Table 4.8: Average Daily Expenditure

	Expenditure
Inverclyde	£33.02
Elsewhere in West of Scotland	-
Elsewhere in Scotland	-
Elsewhere in UK	£33.02
Overseas	£30.76

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 at the Inverclyde, West of Scotland and Scotland levels, as detailed in **Table 4.9**¹⁰.

Table 4.9: Crew Gross Expenditure

	Gross Expenditure
Inverclyde	£138,125
West of Scotland	£158,463
Scotland	£180,157

4.6 Gross to Net

4.6.1 Additionality and Displacement

As already established the level of additionality is 100%.

Table 4.10: Displacement Factors (%)

	Inverclyde	West of Scotland	Scotland
Inverclyde	100	100	100
Elsewhere in West of Scotland	-	-	-
Elsewhere in Scotland	-	-	-
Elsewhere in UK	0	0	0
Overseas	0	0	0

¹⁰ Visitors were disaggregated by visitor type before the formula was applied. We have taken account of how much of the expenditure took place with businesses within Inverclyde, West of Scotland and Scotland, respectively.

Taking account of displacement gives net direct additional expenditure of £135,499 at the Inverclyde level, £155,277 at the West of Scotland level and £176,373 at the Scottish level.

The event organisers have estimated that 50% of the crew changed over at Greenock. From the survey we established that 5% stayed overnight in Inverclyde before and/or after leaving their ship. Allowing for Additionality and displacement gives net additional expenditure from these additional stays of £10,984.

4.6.2 Multipliers

Once again we apply the multipliers as set out earlier in Section 4.3.3.

4.7 Net Additional Crew Expenditure

Table 4.11: Net Additional Crew Expenditure

Net Additional Crew Expenditure	
Inverclyde	£213,865
West of Scotland	£254,379
Scotland	£324,128

In addition there is expenditure from media representatives and volunteers at the event. Applying the same process to these groups gives net additional expenditure of £15,789 at the Inverclyde level, £14,815 at the West of Scotland level and £16,868 at the Scotland level.

4.8 Total Net Additional Expenditure

The total net additional expenditure is set out in **Table 4.12**.

Table 4.12: Net Additional Expenditure

	Inverclyde	West of Scotland	Scotland
Spectators	£10,198,835	£8,342,418	£4,844,303
Crew	£213,865	£254,379	£324,128
Media & Volunteers	£15,789	£14,815	£16,868
Total	£10,428,488	£8,611,612	£5,185,299

4.9 Funding

This expenditure is then related back to the funding required to stage the event to provide estimates of the return on investment.

The funding for the event totalled £2,426,000 with a split of:

- Inverclyde Council - £580,000;
- Riverside Inverclyde - £1,200,000;
- EventScotland - £40,000; and
- Private sector - £606,000.

The total expenditure for the event was £2,600,000 leaving a funding gap of £174,000.

4.10 Return on Investment

The level of public sector funding was £1,994,000¹¹. The net additional expenditure totalled £10.4m at the Inverclyde level, £8.6m at the West of Scotland level and £5.2m at the Scottish level. This gives a return on investment of 1:5.2 at the Inverclyde level, 1:4.3 at the West of Scotland level and 1:2.6 at the Scotland level.

¹¹ Figures presented to the Sail Inverclyde Board on 24 August. We have assumed that the funding gap will be met by the public sector.

5. Summary and Conclusions

5.1 Introduction

This Chapter brings together the analysis from the previous chapters to provide a summary and conclusions.

5.2 Spectators

The most common way in which spectators found out about the event was through word of mouth (40%), followed by newspaper/magazine (26%). The common newspapers were the Greenock Telegraph, The Herald and The Times.

The majority of visitors from outwith Scotland (86%) had visited Scotland before attending the event whilst three quarters of those from outwith Inverclyde had visited the area before.

The overall experience was rated highly with 97% rating it very good/good. Specific aspects of the event were also rated highly: the ships (99%), entertainment (91%), and stalls and exhibitions (88%). The lowest proportion was for food and drink (72%). The majority of respondents (92%) enjoyed the ships the most.

The most common suggested improvements were more/better seating (13%), more/better/cleaner toilets (13%), improve the walking surface (13%) and cheaper food and drink (7%).

A total of 90% are very likely/likely to attend the event if it was held in Inverclyde again. The main reason given was that it was a good/enjoyable day out. A very high proportion rated their visitor experience to Inverclyde and Scotland as very good/good (96% and 99%, respectively).

Some 93% of respondents are very likely/likely to visit Inverclyde and Scotland again in the next three years.

5.3 Crew

Only 30% of crew members had visited Scotland prior to taking part in the event and 8% had visited Inverclyde.

A total of 92% of the crew members rated their overall experience of the event as very good/good. Specific aspects that were rated highly (i.e. very good/good) were: entertainment (93%), food and drink (92%) and stalls and exhibitions (92%).

Suggested improvements included better/more/cleaner showers (11%), more toilets (4%), more events/activities for crew (3%) and cleaning up the dock (3%).

A high proportion rated their visitor experience to Inverclyde and Scotland as very good/good (88% and 92%, respectively). The main reasons given for this rating were the nice/friendly people and the beautiful/nice scenery.

Some 77% of respondents are very likely/likely to visit Inverclyde and 87% Scotland again in the next three years.

5.4 Community Involvement and Volunteers

Community engagement was a key aspect of the event. The event organisers developed a programme to ensure direct community involvement in the events through local community groups, schools, etc. A total of 24 community groups with 180 members actually took part in the entertainment programme for the event.

The event also had support from volunteers to help with its delivery. In total there were 200 volunteers of which 150 were from Inverclyde.

5.5 Economic Impact

A total of 53 ships visited Greenock with crew of 1,722. The event attracted a total of 750,000 visitors over the four day period. The key findings from the economic impact assessment were:

- 75% of visitors were from outwith Inverclyde and 30% from outwith the West of Scotland;
- 20% of visitor stayed overnight;
- daily expenditure of £17-24 for day visitors and £37-60 for overnight visitors;
- net additional impacts of:
 - expenditure: £10.4m in Inverclyde, £8.6m in the West of Scotland and £5.2m in Scotland

- Return on investment for the public sector of: £1:£5.2 at the Inverclyde level, £1:£4.3 at the West of Scotland level and £1:£2.6 at the Scotland level.

Appendix 2

Tall Ships Greenock – Crew Questionnaire

Q1

Where do you normally live?

	CODE	ROUTING
Inverclyde	1	Go to Q5
Elsewhere in the West of Scotland	2	Go to Q2a
Elsewhere in Scotland	3	Go to Q2a
Elsewhere in UK	4	Go to Q2b
Overseas	5	Go to Q2b

Q2a

If elsewhere in the West of Scotland/Scotland please state which Local Authority area

Write in

Now go to Q4

Q2b

If from outwith Scotland please state which country

Write in

Now go to Q3

Q3

Have you visited Scotland before?

	CODE	ROUTING
Yes	1	Go to Q4
No	2	Go to Q5

Q4

Have you visited Inverclyde before?

	CODE
Yes	1
No	2

Q5

On which days have/will you be attending the Tall Ships Event in Inverclyde?

	CODE
Sat 9 th Jul	1
Sun 10 th Jul	2
Mon 11 th Jul	3
Tue 12 th Jul	4

Q6 Have you ...?

Travelled to Greenock on a Tall Ship and are sailing on to Lerwick?

Travelled to Greenock on a Tall Ship and are leaving the ship at this point?

Travelled to Greenock to join a Tall Ship to sail to Lerwick?

CODE	Route
1	Go to Q9
2	Go to Q7
3	Go to Q7

Q7

Did you/are you spending any nights in Inverclyde before joining/or after leaving your Tall Ship?

	CODE	Route
Yes	1	Go to Q8
No	2	Go to Q9

Q8

How many nights did/are you spending in Inverclyde before joining/or after leaving your Tall Ship?

Write In

Q9

Are you staying on your Tall Ship tonight?

	CODE	ROUTING
Yes	1	Go to Q12
No	2	Go to Q10

Q10

What type of accommodation are you staying in?

	CODE
Stayed with friends or relatives	1
Hotel	2
Guest House/Bed & Breakfast	3
Camping/caravan site	4
Halls of residence/Youth hostel accommodation	5
Self catering accommodation/timeshare	6
Other (please specify)	7

Q11

How much are/will you be spending on accommodation per night?

	Write In £
Accommodation	
Not spending anything (e.g. staying with friends and relatives)	1

Q12

What is / will be your expenditure today onsite at the Tall Ships event site?

(Interviewer: should not include any expenditure made on behalf of others)

	Write In
	£
Food and drink	
Leisure/entertainment	
Shopping	
Other (please specify)	

Q13

What is/will be your expenditure today in the local area outwith the event site? (note: should not include any expenditure made on behalf of others)

	Write In
	£
Food and drink	
Leisure/entertainment	
Shopping	
Transport (when in Scotland)	
Other (please specify)	

Q14

If you had not taken part in the Tall Ships event what would you most likely have done instead?

Single Code only

	CODE
Stayed at home/gone to work	1
Visited Inverclyde anyway	2
Visited elsewhere in the West of Scotland	3
Visited elsewhere in Scotland	4
Visited somewhere outside Scotland	5

Q15

How would you rate the following aspects of the Tall Ships event in Inverclyde?

	Entertainment	Stalls and Exhibitions	Food and Drink	Overall Experience
Very good				
Good				
Average				
Poor				
Very Poor				

Q16

Are there any ways in which the event could have been improved?

Q17

How would you rate the quality of your visitor experience to Inverclyde/Scotland?

	CODE	
	Inverclyde	Scotland
Very good	1	1
Good	2	2
Average	3	3
Poor	4	4
Very Poor	5	5
I Live here	6	6

Q17a Why do you say this?

Q18

How likely are you to visit Inverclyde/Scotland again in the next three years?

	Inverclyde	Scotland
Very likely	1	1
Likely	2	2
Unlikely	3	3
Very unlikely	4	4
Definitely will not visit	5	5
I live here	6	6

Q19 Any other comments?

Classification

Age

16-24
25-34
35-44
45-54
55-64
65+

1
2
3
4
5
6

Gender

Male
Female

1
2

Working Status

Full-time (30+ hours per week)
Part-time (less than 30 hours per week)
Housewife/Househusband (no paid employment outside home)
Retired
Unemployed
Full time education
Other _____

1
2
3
4
5
6
7

Appendix 3

Tall Ships Greenock – Spectator Questionnaire

Q1		CODE	ROUTING
Where do you normally live?	Inverclyde	1	Go to Q5
	Elsewhere in the West of Scotland	2	Go to Q2a
	Elsewhere in Scotland	3	Go to Q2a
	Elsewhere in UK	4	Go to Q2b
	Overseas	5	Go to Q2b

Q2a
If elsewhere in the West of Scotland/Scotland please state which Local Authority area

Write in

Now go to Q4

Q2b
If from outwith Scotland please state which country

Write in

Now go to Q3

Q3
Have you visited Scotland before?

	CODE	ROUTING
Yes	1	Go to Q4
No	2	Go to Q5

Q4
Have you visited Inverclyde before?

	CODE
Yes	1
No	2

Q5
On which days have/will you be attending the Tall Ships Event?

	CODE
Sat 9 th Jul	1
Sun 10 th Jul	2
Mon 11 th Jul	3
Tue 12 th Jul	4

Q6
How many people, including yourself, are in your immediate party (i.e. your group of friends and/or relatives)?

	Write in
Adults	
Children (under 16)	
Total	

Q7
How did you first find out about the Tall Ships event at Greenock?

	CODE
Tall Ships Races Greenock website	1
Other Website please specify.....	2
Outdoor advertising/Poster/Leaflet	3
Radio which station.....	4
Television which station	5
Newspaper /Magazine which one	6
Social media which one	7
Word of mouth	8
Other please specify	9

Q8
How important was the Tall Ships event in your decision to visit Inverclyde/Scotland?

	Inverclyde	Scotland
Only reason		
Main reason		
One of several reasons		
Not a factor in decision		
Live here		

Q9

Are you spending at least one night away from home as part of your trip to this event?

	CODE	ROUTING
Yes	1	Go to Q10
No	2	Go to Q13

Q10

What type of accommodation are you staying in?

	CODE
Stayed with friends or relatives	1
Hotel	2
Guest House/Bed & Breakfast	3
Camping/caravan site	4
Bunkhouse/Youth hostel accommodation	5
Self catering accommodation/timeshare	6
On a boat/yacht	7
Cruise Ship (relevant for Tuesday only)	8
Other (please specify)	9

Q11

If staying away from home how much money will your immediate party be spending on accommodation per night?

(Interviewer: it should be total for their immediate party including themselves)

	Write In £
Accommodation	
Not spending anything (e.g. staying with friends and relatives)	1

Q12

If staying away from home. How many nights are you staying in each of the following areas?

	Write In
Inverclyde =	
Elsewhere in the West of Scotland =	
Elsewhere in Scotland =	
Total Nights =	

Q13

What is / will be the average daily expenditure of your immediate party today onsite at the Tall Ships event site?

(Interviewer: should be total for immediate party including themselves)

	Write In
	£
Food and drink	
Leisure/entertainment	
Shopping	
Other (please specify)	
.....	

Q14

What is/will be your immediate party's daily expenditure today in the local area outwith the event site? (note: should include total daily expenditure of their immediate party including themselves)

	Write In
	£
Food and drink	
Leisure/entertainment	
Shopping	
Transport (when in Scotland)	
Other (please specify)	
.....	

Q15

If you had not visited the Tall Ships event what would you most likely have done instead?

Single Code only

	CODE
Stayed at home/gone to work	1
Visited elsewhere in Inverclyde	2
Visited elsewhere in the West of Scotland	3
Visited elsewhere in Scotland	4
Visited somewhere outside Scotland	5

Q16

How would you rate the following aspects of the event?

	The Ships	Entertainment	Stalls and Exhibitions	Food & Drink	Overall Experience
Very good					
Good					
Average					
Poor					
Very Poor					

Q17

Which aspect of the event did you enjoy the most?

	CODE
The Ships	1
Entertainment	2
Stalls and Exhibitions	3

Q18

Are there any ways in which the event could have been improved?

Q19

How likely would you be to attend the event if it was held in Inverclyde again?

	CODE
Very likely	1
Likely	2
Neither/nor	3
Unlikely	4
Very unlikely	5
Don't know	6

Q19a Why do you say this?

Q20

How would you rate the quality of your visitor experience to Inverclyde/Scotland?

	CODE	
	Inverclyde	Scotland
Very good	1	1
Good	2	2
Average	3	3
Poor	4	4
Very Poor	5	5
I Live here	6	6

Q20a Why do you say this?

Q21

How likely are you to visit Inverclyde/Scotland again in the next three years?

	Inverclyde	Scotland
Very likely	1	1
Likely	2	2
Unlikely	3	3
Very unlikely	4	4
Definitely will not visit	5	5
I live here	6	6

Q22 Any other comments?

Classification

Age

16-24
25-34
35-44
45-54
55-64
65+

1
2
3
4
5
6

Gender

Male
Female

1
2

Working Status

Full-time (30+ hours per week)
Part-time (less than 30 hours per week)
Housewife/Househusband (no paid employment outside home)
Retired
Unemployed
Full time education
Other _____

1
2
3
4
5
6
7