ROBERT BURNS AND THE SCOTTISH ECONOMY

Final Report
October 2019

Professor Murray Pittock, University of Glasgow

Centre for Robert Burns Studies

With contributions and an appendix on Regional Inclusive Growth from Dr Joel Ambroisine, Research Assistant

Twitter: @BurnsEconomy

CONTENTS

1.0 Executive Summary

1.1. This Report was funded by the Economic Development Directorate of the Scottish Government, following a debate in the Scottish Parliament on a motion put down by Joan McAlpine, S5M-09328, on the Economic Potential of Robert Burns on 17 January 2018.

1.2. It succeeds previous studies of the value of Burns to the Scottish economy carried out by Lesley Campbell for the BBC (2003) and by the Moffat Centre at Glasgow Caledonian University (2005) to evaluate the use of Burns as the cultural keystone to Homecoming 2009. Since these earlier reports, the major Burns attraction of the Birthplace Museum has been completed and the Burns brand has been used to underpin the appeal of the 2009 Homecoming celebrations.

1.3. It differs from these in offering a more comprehensive account of Burns' role in the Scottish economy and in making recommendations designed to build on that role; it is also intended to be able to act as a template for any future study of the impact of cultural figures on the wider economy.

1.4. This Report has an increased and more detailed scope compared to previous studies, including evaluation of the value of Burns to tourism, festivals, produce and retail and research, together with an initial estimate of Burns' brand value in connexion with the Anholt-GfK Roper figures for the value of the Scottish brand and an assessment of the existence value and psychic income deriving from Burns. The health benefits deriving from culture are not valued specifically, but it should be understood that there is a monetary value could be attributed to these.

1.5. The study takes particular account of the contemporary policy context of City Region Deals and the Regional Inclusive Growth (RIG) agenda, particularly in the areas of produce, supply chains, SMEs and connectivity and the future role of Prestwick Airport. There is an appendix on RIG by the project's Research Assistant, Dr Joel Ambroisine.

1.6. The methodology of the Report included bench research on tourism literature, interviews with Burns industry stakeholders, local authorities, those involved in retail, produce and tourism and those involved in policy and governance, an input-output assessment of the value of Burns tourism and festivals (including a consideration of the value of cultural tourism), a formula for assessing the value of Burns the brand to overseas visitors, a size assessment of the value of Burns in produce, retail and research, and an assessment of the significance of Existence Value and Cultural Capital/Psychic Income to assessing the value of Burns. Values are adjusted by the Retail Price Index to match August 2019 prices, unless a different uplift is suggested by our findings, as it is in the case of Burns the brand.

1.7. The project's initial assessments are in tourism, where Ayrshire and Arran, Dumfries and Galloway and Burns tourism elsewhere in Scotland are considered in turn. In Ayrshire and Arran, consideration is given to the latest STEAM data understood in the light of both the 2011 report on visitor attraction to the Ayrshires (which highlights Burns) and the 2016 Visit Scotland visitor survey data, which does not. The high proportion of visits to the Robert Burns Birthplace Museum by Overnight Stay (ONS) visitors is noted and an estimated impact value assigned of **£121M** to Burns as a tourist brand in Ayrshire and Arran. In Dumfries and Galloway, a more limited assessment was carried out, based on the level of Burns appeal in the context of the tourist appeal of visitor and heritage sites more generally, as more detailed data for visitor motivation was not available. This was then cross-checked against comparable Ayrshire data. An estimated value of **£21M** was assigned to Burns as a tourist brand in Dumfries and Galloway, and his disproportionate value to Dumfriesshire was stressed within that total figure.

1.8. A general evaluation was carried out of the value of developing Burns tourism elsewhere in Scotland, and the opportunities that exist for development, with a current valuation estimated at **£12.3M**.

1.9. The Report assessed the value of Burns Festivals throughout Scotland. Reservations were expressed concerning the risk of overstating economic impact arising from Festivals. An estimated value of **£7M** (minimum figure £5.8M) in economic impact was assigned to Burns Festivals throughout Scotland.

1.10 Images of Scotland from the period in which Burns lived and the humanitarian values with which he is associated are central to appreciation of Scotland worldwide. Based on this and on existing brand models of Willingness to Pay (WTP), the Report team devised a brand model based on WTP and Willingness to Donate, which measured the value of Burns the brand to overseas visitors at £138.1M in 2018 prices to Scotland as a whole, rising annually at 0.77%, indicating a 2019 value of **£139.5M**. For comparison, the value of Mozart to Austria has been estimated at $5bn.

1.11 The Report highlights good regional practice in linking food, drink and retail to Burns the brand in Ayrshire and Arran and Dumfries and Galloway, while identifying significant opportunities for improvement for consideration by SOSA and the Ayrshire Regional Economic Partnership. It goes on to estimate the overall size of Burns-related produce and retail at **£20M**, and provides two case studies, Annandale Distillery and Wee Box.

1.12 The Report estimates the impact of the global Burns Supper and its Impact in Scotland, assessing the impact of Burns's alignment with Scotland's perceived core brands on new Scots and others and assessing the contribution of the Robert Burns World Federation (RBWF) to Burns-related economic impact and community awareness. The impact of the Burns movement and supper is assessed at **£11M** in Scotland.

1.13 The scale of education and university research on Burns is estimated in the region of **£500 000** annually.

1.14. The Report concludes its main areas of enquiry by an examination of issues of existence value, cultural capital and psychic income. Research indicates that people are willing to pay more to live in appealing cultural and historic environments, and this is reflected in the conventional economy in higher end local facilities and higher house prices. Such environments are also positive for health and well-being. While there is more to be done on the detailed implications of this for the economy, it is demonstrably the case that areas which are appealing for tourists are appealing for residents also, and that this results in higher economic activity and better facilities. Combining more intensive and well-articulated promotion of the Burns Country with associated produce and retail lines in the context of shorter supply chains where appropriate should boost this effect in Ayrshire and Arran and Dumfriesshire in a manner consonant with RIG and associated policies, and also reinforce community wealth building. Burns' cultural value is estimated at a minimum of **£10M**, and a brief case study of Fresh Ayr, a Burns-linked social enterprise in Ayr, concludes this section.

1.15. The economic, infrastructural and labour market risks of Brexit are assessed, focusing in particular on the threat posed by a No Deal scenario.

1.16. A list of Recommendations follows:
1.16.1: Consideration to be given by the Ayrshire Regional Economic Partnership to recommending the renaming of Prestwick Airport to its new owners

1.16.2: Greater alignment between food, produce and cultural tourism (including Burns tourism) in Ayrshire and Arran and Dumfries and Galloway regional tourism plans

1.16.3: Greater awareness of evidence for higher cultural tourism spend, the further investigation of the effective development of the Mozart brand in Austria and the incorporation of Burns Supper information supplied by the Robert Burns World Federation/Centre for Robert Burns Studies on the Scotland's Winter Festivals website

1.16.4: The closer integration of Burns into the UNESCO Biosphere and Year of Coasts and Waters preparation

1.16.5: A commitment to profile the core appeal of Burns to visitors to Dumfries and Galloway and an updated profile for the Ayrshires, as part of a stronger evidence base for why people visit Ayrshire and Arran and Dumfries and Galloway

1.16.6: Signage and infrastructure to be improved on the M74 to better reflect Burns' appeal and the strong pull of cultural tourism in the Ayrshires and south west

1.16.7: Recognition of the work carried out by the Robert Burns World Federation (RBWF) in supporting Burns in schools and that the local authorities in Ayrshire and Arran and Dumfries and Galloway work more closely with RBWF and that Education Scotland is pro-active in disseminating good quality practice in Burns-related education in schools, with the support of the Centre for Robert Burns Studies

1.16.8: The Scottish Government and its agencies are recommended to continue to develop plans for the promotion of Burns at home and abroad, including exploring synergies with university Burns Suppers and Burns-related research promotion relevant to produce and culture

1.16.9: That the Scottish Government, via the External Affairs directorate, should establish a Burns Humanitarian Ambassadors programme or award to recognize work carried out in Scotland and abroad which supports the values with which Burns and the country are both associated, and that the support and publicity for such an award should form an appropriate part of the SG Hubs calendar for the Burns season

1.16.10: There are a further set of Regional Inclusive Growth suggestions and recommendations in Appendix 2

1.17. The Report concludes with Appendices on economic impact modelling, Regional Inclusive Growth and the Burns the Brand model, as well as a list of persons and organizations included in the consultation leading to this Report.

1.18. The Report assesses the value of Burns to the Scottish economy at c£203M annually and his enduring brand value to the country at an additional c£139.5M annually. Its recommendations are based on the conclusion that scope exists to increase this figure significantly in real terms.

2.0. Report Background

2.1. This Report was commissioned by the Scottish Government (Economic Development Directorate) following a Member's debate initiated by Joan McAlpine MSP on 17 January 2018, S5M-09328, The Economic Potential of Robert Burns, research for which was supported by Murray Pittock, the author and initiator of this report. A Preliminary Report was submitted to the Scottish Government ahead of St Andrew's Day, 2018: this is the Final Report.

2.2. This Report succeeds the evaluation of Burns' contribution to the Scottish economy made by Lesley Campbell for David Stenhouse of the BBC in 2003, and the work carried out by John Lennon at the Moffat Centre in 2005 in evaluating the potential of Homecoming's linkage to Burns.[1] Although it succeeds these Reports, it is unlike them in that it is a comprehensive study of the economic impact of the poet carried out in several ways: by benchmark reading, by tourist-related economic impact analysis; by size analysis; by conversation and unstructured interview, focus meetings and general audience and stakeholder responses; by existence value; and (via questionnaire) by the evaluation of the contribution of the Burns brand and sites to the valuation given to domestic locations by the international market. Economic Impact Assessments of individual writers and cultural figures are a comparative rarity. Accordingly, the Report that follows has been planned in a manner which can act as a template for future studies. It should be noted that the economic impact of Mozart on the Austrian economy has been estimated at $5bn, with 7 million visitors annually coming to his birthplace in Salzburg (3.04 million overnight stays in 2017, with 2.33M non domestic), a city the size of Dundee. The 'Mozart effect' of cognitive/wellbeing benefits is an additional dimension of his appeal, albeit one regarded as controversial by some authorities. Mozart is widely recognized as 'one of the 50 most-recognised brands in the world' and this Report takes the view that Scottish and local government cultural strategy can only benefit from examining which aspects of the well-documented Mozart cultural strategy (for example the establishment of the ARGE Mozart umbrella company and the related MINT Marketing INTelligence System) can be utilized in the promotion of Scottish figures with an international footprint. There should be no distaste for the monetization of culture: Vienna alone had more than 300 Mozart produce, retail and toiletry

[1] *Towards 2009: Robert Burns National Audit and Economic Impact Study*. Glasgow: Moffat Centre, 2005.

lines for sale as long ago as 2006. On a more limited scale, it is estimated that the 500 000 annual visitors to Elvis Presley's house at Graceland have an economic impact of a minimum of $150M on Memphis, Tennessee alone.[2]

2.3. The **scope of this research** is to evaluate the value of Burns to the Scottish economy through tourism, festivals, produce, retail, research, existence value/psychic income and brand value. Its aim is to arrive at an indicative figure for the current range of Burns's value to the Scottish economy, to evaluate the prospects for potential further improvement in this based on extensive consultation and to make recommendations to the Scottish Government, Ayrshire Regional Economic Partnership, South of Scotland Enterprise Agency, local authorities and other organizations as appropriate. It should also contribute to a better understanding of the value of culture in policymaking and in valuing Burns as a cultural icon offers a fresh template for other studies.

2.4. **Previous studies*:*** While the economic and cultural importance of Robert Burns to the Scottish brand, culture and economy has come increasingly into focus in the last twenty years, there has been no comprehensive account of Burns's own impact on the Scottish economy. The 2005 Moffat Centre study extended Campbell's 2003 figures with some detailed modelling based on them, but did not alter their currency values, which placed Burns' impact on the Scottish economy at £157M in both studies. The Moffat Centre modelling identified 66% of that figure dependent on tourism, a majority of that deriving from Ayrshire and Arran. Souvenirs and branded merchandise accounted for £5.5M in the Campbell report figures, of which £1.5M was whisky and haggis: this Report suggests that these latter figures now aggregate to a much higher number. Areas which were not covered in earlier studies include the Burns movement and the value of Burns the brand.

2.5. **Changing Environment**: Since the BBC/Campbell and Moffat Centre studies, a substantial series of changes have taken place in Scottish tourism, visitor strategy, produce promotion and in the recognized importance of Robert Burns. Homecoming 2009 (explicitly based on Burns, on the 250th

---

[2] Eric Martin Usner, '"The Condition of Mozart": Mozart Year 2006 and the New Vienna', *Ethnomusicology Forum* 23 (2011), 413-42 (425-26); https://en.wikipedia.org/wiki/Mozart_effect; Dougal Perman, Tim Wright and Fay Young, *Growing the Value of Music Tourism in Glasgow: Research Report and Promotional Plan* (2017), 35.

anniversary of his birth) and 2014 have taken place since the Moffat Centre report was completed in 2005. Homecoming 2009 in particular was the largest-ever celebration of Burns in Scotland, which was transformative in the influential role it delivered for the poet as a synecdoche for a range of Scottish values. In addition, the Scottish Government now has data which gives far more detail in respect of tourism numbers in Scotland than was the case in 2005, including annual STEAM reports from many local government areas. In this period also, tourist numbers and visitor strategy have been transformed, as has the rising importance of Scottish produce to the Scottish economy, in which the branding of Scottish produce overseas has been much enhanced. The importance of authenticity, locality and provenance is now increasingly apparent in both the produce and heritage sectors of the economy: it is a theme which brings them both together and provides many common links. Reports such as *Tourism in Scotland: The Economic Contribution of the Sector* (2018) evidence increasing focus on the value of tourism (now responsible for 5% of GDP and 8% of employment in Scotland, over 200 000 jobs) to the economy. Other recent figures put the numbers as high as an £11.5bn contribution to GDP and 220 000 jobs.[3]

With regard to Burns infrastructure, the opening of the £23M Robert Burns Birthplace Museum in 2009 has helped to transform the visitor experience in Burns tourism, while better integration in Burns tourism in both Ayrshire and Arran and Dumfries and Galloway, combined with an enduringly higher profile for Burns in the wake of the 2009 celebrations, have all made a significant difference to the nature of Burns tourism compared with the situation of fifteen years ago.

2.6. **Regional Inclusive Growth (RIG)**: The extension of the original City Region Deal concept into the wider Regional growth deals and related Enterprise and Skills developments are increasingly at the heart of current and future planning with regard to Scotland’s economic development. The South of Scotland Economic Partnership (SoSEP) is providing the groundwork for a South of Scotland Enterprise Agency (SOSA), due to be established on 1 April 2020, while a Borderlands Growth Deal has attracted up to £150m on the Scottish side of the border and the Ayrshire Growth Deal has received a

[3] *Skills Investment Plan for Scotland’s Tourism Sector*, 2nd edition, (Glasgow: Skills Development Scotland, 2016), foreword; *Tourism in Scotland: The Economic Contribution of the Sector* (2018); *Making Waves in North Ayrshire: Tourism Action Plan 2018-2022*.

commitment of over £250m of funding from the Scottish and UK governments, alongside the local authorities. The final Heads of Terms of the Ayrshire deal names Robert Burns on its first page: he remains recognisably crucial to the reputation and drawing power of this region. The Ayrshire Regional Economic Partnership, consisting of representatives of all three of Ayrshire's local authorities, plus Visit Scotland, Transport Scotland, Scottish Enterprise, Skills Development Scotland, the private sector (through representative bodies and individual businesses) and the third sector, was set up in April 2019, with the aim of driving Regional Inclusive Growth (RIG) in the Ayrshire economy. A number of Recommendations in this Report are aimed at enhancing the relationship between 'business practice and inclusive growth policy' in the Ayrshire and Arran and SOSA areas.[4]

2.7. **Prestwick Airport and RIG**: Prestwick is potentially an important part of future Ayrshire growth developments, not least through further development of its spaceport capacity as Scotland moves towards its £4bn target for the value of its space industry by 2030. £80M has been committed to Aerospace and Space under the terms of the Regional Growth Deal, where over 4000 people are currently employed in the sector in the Ayrshire region, more than 50% of the 7600 in Scotland as a whole. Glasgow already builds more small satellites than any other city in Europe. Prestwick will benefit from Spaceport infrastructure including an Aerospace and Space Innovation Centre (ASIC) and a Visitor/STEM engagement hub. (**See 4.2.1 and Recommendation 1**).[5]

2.8. **Produce and RIG:** Robert Burns related tourism forms a key part of RIG in both the Ayrshires and Dumfries and Galloway. Burns tourism-and indeed cultural tourism more generally- has obvious links to the increasing focus on local produce and provenance, which not only has the opportunity to create synergies between the tourist-focused promotion of produce and culture, but also can reinforce community wealth by shortening supply chains to create a more integrated tourism experience, which both highlights and supports local producers. In the section of the Report below which deals with Cultural Capital and Psychic Income (10), I explore the extent to which high-value employment is more likely to be retained in and attracted to the Ayrshires and south-west of Scotland by foregrounding the benefits of cultural and produce tourism. This

[4] Mark Hepworth, blog, Scotland's Centre for Regional Inclusive Growth (SCRIG), 2 July 2019.

[5] *Ayrshire Growth Deal: Heads of Terms Agreement*, paras 1, 8-10; https://www.sdi.co.uk/business-in-scotland/key-sectors/aerospace-and-space

is a development which would align with the proposed Food and Drink innovation centre in the Ayrshire Manufacturing Investment Corridor (AMIG) (para 15 of the Regional Deal Heads of Terms). In addition other developments (such as the £13M Irvine Great Harbour redevelopment, para 19) have the capacity to foreground Burns in produce and other contexts, particularly on the £6M Maritime Mile development, which will have a focus on local and artisanal produce. Burns's time in Irvine and its harbour was a crucial part of his development as a poet. A fuller consideration of these issues and how they might be acted on is contained in the RIG Appendix (**See Recommendation 2**).

2.9. **SMEs and RIG**: Given that SMEs are highly active in the Creative and Cultural Industries space (a sector which adds GVA at twice the rate of the average UK business) and that they are also faring best in increasing business turnover and employment in RIG areas, it is clear that improved synergies in these areas would have a role in driving economic benefit and local employment. More detail in these areas can be found in Appendix 2, *Regional Inclusive Growth*, which suggests a number of ways in which produce, tourism and social enterprise can be aligned through kitemarked produce, regionalized supply chains and other means. In terms of tourism development, Burns may not occupy major city sites, but he is an icon of creativity and quality, who infuses the built and natural heritage of the Ayrshires and Dumfries and Galloway, and supports a strong business/leisure tourism mix with many supporting online resources (not least in terms of song recordings). Making Burns tourism transparent, easy and connected both to other forms of tourism and via more ready and comprehensive visibility would further enhance its value and his reach in the RIG context.

2.10. **Connectivity.** The RIG agenda has a significant crossover with issues of Connectivity, but it is worth highlighting these separately. Numerous respondents pointed out poor signage from the M74 as an issue for encouraging visits to Ayrshire and Arran and Dumfries and Galloway, while internal connectivity in West Central Scotland to the South-West and connectivity within the South-West itself have long been recognized as issues deterring greater visitor engagement with Dumfries and Galloway in particular. It is worth noting that issues of connectivity are as critical to tourism as they are to other forms of economic activity, and are recognized as critical in the creation of major destination attractions. In this context, it is important to note that connectivity is a matter of good social media and appealing and relevant activities at the destination as much as a rapid and convenient means of arriving at it. ***Recommendations which involve a Connectivity focus will be highlighted at the end of this Report.***

2.11. **Structure of the Report.** After a brief consideration of methodology, details of the more technical elements of which which is to be found in the relevant appendices, this report begins by considering (4) both the Scotlandwide and regional aspects of Burns tourism with respect to its primary qualities of direct activity identified as relating to Robert Burns and related secondary opportunities (for example in produce, the biosphere and social entrepreneurship) which are able to make use of Burns in the contribution they make to the Scottish economy. It goes on to consider the value of (5) Burns events and Festivals and then (6) the brand value of Burns. It then goes on to assess the scale of (7) the food, drink and retail value of Burns, before considering (8) the economic footprint of the wider Burns movement as one of the key routes through which Scotland is understood overseas. Under (9) it examines the contribution of research to Burns' value and under (10) it examines Existence Value, Cultural Capital and Psychic Income, the longer-term value which Burns as a brand and a visitor attraction delivers back into Scotland's communities, concluding that Burns and Burns related tourism has capacity to support local jobs in tourism and other sectors, promotion health, aspiration and community empowerment, while also diversifying other sectors of the economy. The Report concludes (11) with an assessment of environmental risks (particularly Brexit) and (12) a series of recommendations, followed by three appendices. The support for the recommendations under (12) arises from questionnaires, conversations, unstructured interviews, focus meetings and general audience and stakeholder responses as well as the evidence generated by the study itself. This final report is intended to provide a template for future assessments of the value of single figure cultural tourism and its potential to link to broader themes.

The research underpinning this report has been conducted and published in a manner cognizant of the requirements of the GDPR. It was presented at the Robert Burns World Federation (RBWF) conference in Irvine on 8 September 2018 and as a Crichton Conversation event at Easterbrook Hall, Dumfries on 30 October 2018; it will also be presented in Glasgow and at the annual Burns Conference in Alloway in January 2020.

3.0. Methodology

The methodology for this study has been developed under five headings:

• Bench research comprising a literature review and existing audience research from the Robert Burns Birthplace Museum, including consideration of recent research evidence relating to cultural tourism spend, existence value, cultural capital, psychic income and health and wellbeing. These were considered in the context of Input-Output tourism industry and Festival modeling, based on existing UK, Scottish Government and local authority data and moderated by International Recommendation for Tourism Statistics (IRST) guidance and based on STEAM data modified by other figures (See Appendix 1)
• Questionnaire to the Burns Federation and to Burnsians internationally, individual unstructured interviews, focus group encounters and individual and group responses, together with discussions with Scottish and local government officers and other key stakeholders
• A Size assessment of the Burns Movement and the seasonal Burns industry
• An assessment of Burns' value to Scotland the Brand, based on an online questionnaire with an accompanying model (Appendix 3, Valuing Burns the brand)
• Contextualization of the above data through the Regional Inclusive Growth strategy, in particular the individual deals affecting the Ayrshires and south of Scotland

The approach taken to Tourism in terms of the economic impact of Overseas and Overnight visitors, Day Visitors (DVS) and Staying with Friends (SWF) is congruent with that taken in cognate reports (**See Appendix 1**). The multipliers used (a multiplier of direct spend can incorporate both it and the consequent uplift to the economy: e.g 1.5 means an uplift of 50p in the £ or if less than 1 can reflect that uplift only) reflect those in place for the UK, Scottish and regional tourist industries. Economic impact arising from Burns attraction volunteering has also been discounted to zero. STEAM report data was used where available for sense checking in order to provide a reading of Burns's value to Overnight Stay (ONS) visitors, with this number further discounted to take account of those visiting Ayrshire and Arran and Dumfries and Galloway on business. The overseas element of ONS spend is likely to be present to an extent in the calculation of brand value under (6) and as a consequence a conservative calculation has been applied to the assessment of the value of Burns tourism to minimize any element of double counting.

This study takes the form of an assessment of economic impact with respect to 2018-19 wherever possible, although some earlier statistics are included when no more recent data are available (notably, Dumfries and Galloway did not commission a STEAM report for 2018). Monetary values are expressed in terms of the August 2019 RPI and are adjusted accordingly except where the data indicates a different level of uplift. Data arising from Burns-related Construction costs over time is assessed in line with Scottish Annual Business Statistics (SABS) data, which uses a co-efficient of £125 000 average construction industry turnover per employee (expressed as PYE= Person Year Equivalent) (2016 prices, £138 500 at August 2019).

Other effects included are (under Psychic income) liveability benefits (e.g. effect on house prices in Alloway). Positive social and health effects are considered. Congestion and pollution effects from tourism are taken as negligible in the context of Ayrshire and Dumfries and Galloway visitor patterns. In terms of environmental impact within the Scottish economy as a whole, initiatives such as Creative Carbon Scotland and the Green Arts Initiative have produced a qualitative uplift in positive environmental sustainability since 2010, albeit this is difficult to measure and is hence not attributed.

4.0. Measuring Burns' impact on tourism

The tourism industries are those concerned with accommodation, food, drink and restaurants, transport, travel agencies and tourist-related retail consumption. The UK TSA (Tourism Satellite Account) for 2016 (released 28 November 2018) estimated that inbound tourism expenditure was worth £26bn, with £126bn spent by domestic tourists. In total, some 1.54M UK jobs are in tourism direct employment (TDE) and there are 241 000 tourist-related businesses. Tourism direct gross value added (TDGVA) was £68bn. Tourism is big business. [6]

In a Scottish context, the 2016 Kantar-TNS figures show that the country had 11.5M of Great Britain's 119.5M tourist trips and direct expenditure of £2.9bn, 12.5% of the British total, with 11% of overnight stays and 11% of bed nights. British holiday tourism spend was £13.3bn, with Scotland at £1.7bn, or 13%. The average tourist trip in Scotland lasted 3.38 nights and expenditure was £252, or £279 adjusted for August 2019 prices for domestic and £673 (£746 adjusted) for overseas visits per capita. Almost 60% of tourist trips in Scotland were taken by empty nesters or older independent travellers. Despite outperforming its UK population share, Scotland was in relative deficit in home based domestic tourism, with 38% of Scots trips being to England, while only 8% of English trips were to Scotland, suggesting (as other studies have argued) a degree of displaced spend lost to the Scottish economy through tourism imbalances.[7]

Those visiting Ayrshire and Arran for over three hours were estimated to spend £441M; those visiting Dumfries and Galloway £145M (£488M and £161M at 2019 prices). International tourists were a smaller than average proportion of the total in both areas.[8]

---

[6] See UK TSA 2016 and also Tullio Buccellato, Dominic Webber and Sean White, 'A proposed methodology for nowcasting the demand and supply estimates of tourism activities' , *Economic & Labour Market Review* (2010), 62-73.

[7] *The UK Tourism Satellite Account (UK-TSA): 2016*

[8] *Kantar-TNS GB Day Visitor Annual Report 2017; Tourism in Scotland: The Economic Contribution of the Sector* (2018), 16.

4.1. Cultural Tourism.

Cultural tourism is a major component of tourism in general. There are 71.5 million visits to historic properties in England,[9] and around 24 million visits to cultural and heritage-related sites in Scotland among those properties included in the Moffat Centre's visitor monitor in 2018, with in addition over 1 million visits to distillery visitor centres and experiences (Association for Scottish Visitor Attractions (ASVA) figures are slightly lower at 21 million). In areas which retain the highest benefits from expenditure within their local economy, the level of domestic tourism spending necessary to create jobs has remained relatively constant in major centres in real terms. Tourism Satellite Accounts (TSAs) have tended to bring an uplift to the overall GDP figure attributed to tourism, although it remains the case that economic impact studies tend to be local and measure different things from macro-economic impacts, and that it is difficult to reconcile them in methodological terms. In Scotland, tourism expenditure was £9.7bn in 2016, supporting £4.3bn of GDP on the established multiplier. With supply chain purchases and wages (each £1bn), tourism contributed over £6bn to the Scottish economy, 5% of total GDP, employing 207 000 people. Tourism was estimated in 2017 to contribute £65M in aggregate of GDP per £100M spent by tourists (multiplier 1.65), '*taking into account the direct effects, supply chain effects and re-spending of wages',* building on the initial 1.47 multiplier for direct effects. [10] Scottish tourism employs almost twice as many non UK nationals as a proportion of all employees than does the wider Scottish economy. In 2015, 18% of Scottish employment in tourism was undertaken by migrant workers, rising to 30% in the restaurant and 24% in the hotel industries. In the UK as a whole, industries strongly dependent on tourism, such as the hospitality industry, have an employment profile of over 40% non UK nationals. Both Scotland and the UK thus face serious issues in tourism employment in the context of Brexit (Forth Analytica 2016); see Section 11.[11]

---

[9] R. Lawton et al. *The Economic Value of Heritage: A Benefit Transfer Study.* AHRC-NESTA, 2018.

[10] *Tourism in Scotland: the Economic Contribution of the Sector.* Tourism Leadership Group, 2018.

[11] *Tourism Scotland 2020,* (The Scottish Tourism Alliance, 2012); *Skills Investment Plan for Scotland's Tourism*, 2nd edition, (Glasgow: Skills Development Scotland, 2016), 10.

For the purposes of measuring the economic impact of cultural icons, studies suggest that Cultural Tourism produces higher GVA than tourism in general. The 2013 Centre for Economics and Business Research (CEBR) study on Arts, culture and the national economy identified 32% of all inbound visits to the UK as involving Arts and culture engagement and 42% of all inbound spend (then £7.6 billion). The overall estimate of GVA was 'that for every £1 of GVA generated by the arts and culture industry, an additional £1.43 of GVA is generated by the wider UK economy through indirect and induced multiplier impacts' (multiplier 2.43). Thus aggregate Arts and Culture GVA was £13bn and the aggregate estimate for the impact of the Arts and Culture through tourism was £856M.[12] Likewise, an Oxford Economics study carried out in 2013 estimated the contribution of heritage to UK GDP to be £26.6bn annually (of which £14bn was built and £12.6bn natural heritage), and that built heritage alone supports almost 400 000 jobs. Ecosys estimate arts and culture to support 1% of UK GDP. [13] CEBR valuation of the Edinburgh Fringe, carried out in 2019, estimated that £500M of direct spend created £1.06bn in overall impact in the economy, with Douglas McWilliams, deputy chair of CEBR, being quoted as saying 'its impact is about three times the official estimate'.[14] There are similar findings from other countries. In 2013, for example, culture was the main motivation for c30% of tourism in Andalusia (Council of Tourism and Commerce figures, similar to CEBR's), while 420 000 of Córdoba's visitors were primarily cultural tourists, and the average daily spend for cultural tourists was in the region of €10 higher per head than the average tourist. Although they remained in Andalusia for a shorter time (4.6 to 8.65 days), visits to Córdoba were identical in length (3.85 days) for both groups, underpinning the centrality of cities and their wide range of amenities to all forms of tourism experience: for every additional cultural tourist it attracted, Córdoba gained on average €40 of direct spend per visit per head over non cultural tourists. [15]

---

[12] *The Contribution of the Arts and Culture to the National Economy.* Centre for Economic and Business Research for Arts Council England and the National Museum Directors' Council, 2013.

[13] See *Local Economic Impacts from Cultural Sector Investments*. Ecosys Report for DCMS, 2014, 28, 29, which also lists other studies.

[14] 'Edinburgh's £1bn Fringe benefits', *The Sunday Times*, 4 August 2019, 9.

[15] Pilar Campoy-Munez, M. Alejandro Cardenete and M. Carmen Delgado, 'Assessing the economic impact of a cultural heritage site using social accounting matrices: The case of the Mosque-Cathedral of Cordoba', *Tourism Economics* 23:4 (2017), 874-81.

Tourism to Austria also fits the Cultural Tourism model of extended dwell time and higher expenditure, with an average stay of 3.4 days and over 40% staying in 4 or 5-star accommodation. Tourism is worth €30bn GVA to the Austrian economy in addition to the €40bn of direct spend it generates (multiplier 1.75), with a significant proportion of its value deriving from Mozart. In Vienna alone, 68% of tourists are cultural tourists, tourism contributes almost 5% of gross regional product and tourism and leisure combined are 10% of city region GVA.[16] In this context, it is surprising that *Tourism Scotland 2020* does not identify Cultural Tourism as one of the country's key markets. Its ready alignment with Food and Drink tourism should be noted in marketing which synergizes both areas. The work carried out in the '*Product Origin-Scotland'* report in 2009 made clear the potential for both branding and further research into the cultural effect of local and national Scottish produce labelling. [17] Scotland attracted 10.5% of cultural visits from 10.4% of UK visits in 2017. The leading visitor countries to Scotland by numbers/value were the US, Germany, France, Canada, Australia, Poland and Italy. Older visitors and empty nesters made up 3.5M of Scotland's 5.9M holiday trips: this number is on a rising curve. The most visited cultural tourist sites *associated with an individual figure or figures* for which numbers are available are as follows (2018 Figures, with Burns-related attractions in **bold**):

1. John Muir (birthplace (13000) and country park 490 000 (estimated)
2. **Robert Burns Birthplace Museum 266 000**
3. Wallace Monument 139 000 (2017 figure, not reported in 2018, closure for upgrading)
4. **Writers' Museum (Burns, Scott and Stevenson) 74 000**
5. Abbotsford 61 000 (2017 figure)
6. Scott Monument 58 000
7. **Robert Burns Centre Dumfries 36 000**
8. Mary Queen of Scots Visitor Centre, Jedburgh 32 000
9. Hill House, Helensburgh (Mackintosh) 28 500

---

[16] Madeleine Pillswatch, 'Developing a theoretical model for the functions of cultural anniversary years within city marketing : A grounded theory approach using two case studies from Vienna', unpublished MA thesis (Northumbria University, 2014), 48-9.

[17] *Tourism Scotland 2020*, 13; Alan Lyne et al, *'Product Origin-Scotland': A Review of Industry Practice and Evidence*, Scottish Government Social Research 2009, 56-63 and passim.

10. Queen's Cross Church (Mackintosh) 22 000
11. John Knox House 14 500
12. **Robert Burns House, Dumfries 13 000**
13. House for an Art Lover (Mackintosh) 12 000
14. Hill House (Mackintosh) 12 000 (under renovation)
15. **Burns Monument Centre Kilmarnock 9000 (2017 figures)**
16. **Burns House Museum 4500**
17. Holmwood House (Thomson) 4500
18. **Souter Johnie's Cottage, Kirkoswald 3800**
19. Hugh Miller's Cottage, Cromarty 3745
20. Sir Walter Scott's courtroom, Selkirk 2800
21. Barrie Birthplace Kirriemuir 2200
22. John Paul Jones Birthplace, Dumfries and Galloway 2100 (2017 figures)
23. Leighton Library, Dunblane 1700
24. **Ellisland 1400**
25. **Bachelor's Club, Tarbolton 1300**
26. Fair Maid's House, Perth (Scott) 1300
27. **Burns Monument Edinburgh 900**
28. Carlyle's birthplace 500
29. Robert the Bruce's Cave, by Lockerbie 345

The aggregate visitor numbers for Burns related sites for which figures are available (excluding for example the Mausoleum in Dumfries or the Irvine sites) is c410 500; giving Burns only a one-third share in the Writers' Museum figures would lower this to c361 000. According to The Association for Scottish Visitor Attractions (ASVA), there are 21 million visits to cultural sites annually in Scotland, which gives Burns some 2% of the cultural tourism market in Scotland for permanent attractions.[18] 285 000 visits could be attributed to Burns visitor attractions in Ayrshire and Arran, 26 000 to those Edinburgh (plus Burns Festival related visitors, see (5) below) and just over 50 000 to Dumfries and Galloway.

[18] *2018 ASVA Annual Visitor Trend Report*

4.2. Ayrshire and Arran

The three councils of Ayrshire and Arran are strongly aware of the value of Burns tourism and the nature of what his brand represents in terms of Scottish values and how they are perceived internationally. South Ayrshire Council's Robert Burns Humanitarian Award (https://www.south-ayrshire.gov.uk/burnsaward/) profiles the alignment between Burns and the perceived Scottish national virtues of egalitarianism and humanity in a particularly clear fashion. There is, however, awareness of the challenge in providing focus to the Burns offer:

> The Moffat Centre for Travel and Tourism Business Development estimated in 2005 that the heritage of Robert Burns was worth nearly £160M to the Scottish economy. Of this 66% came from tourism, with the majority of the benefits accruing to Ayrshire. However, the report noted that the problem with the Burns heritage is that is split between Ayrshire, Dumfries & Galloway and Edinburgh. Comparable literary attractions in the UK, such as the Shakespeare County, the Bronte County, Wordsworth's Lake District and Beatrix Potter's Lakeland have been able to sell themselves as an identifiable geographic destination.[19]

Total economic impact including indirects was £484M in Ayrshire and Arran in 2017, with 4.08M visitors, of whom 1.384M were ONS visitors; both economic impact and visitor numbers have continued to rise strongly since 2010. There were some 1.385M visits to Ayrshire and Arran visitor attractions, of which solely Burns themed ones attracted c20%; however, Burns-themed attractions were 65% of Museums and Galleries attractions in Ayrshire and Arran.
Total economic impact including indirects was £220.4M in South Ayrshire on the STEAM 2018 figures, with 1.49M visitors, of whom 700 000 were ONS staying for 2.35M visitor days, with economic impact of £181.5M. DVS impact was just under £39M. South Ayrshire tourism grew strongly on Economic Impact and ONS measures between 2017 and 2018.

In North Ayrshire and Arran, total economic impact was £191M, with 1.52M visitors, of whom 491 000 were ONS staying for just over 2M visitor days, with economic impact of £138.4M. DVS economic impact was £52.6M. North Ayrshire and Arran tourism was largely static between 2017 and 2018, except

[19] *The Visitor Economy of Ayrshire: The Present Profile and Future Opportunities* (2011).

for an uplift in economic impact, where staying in paid accommodation was particularly strong.

In East Ayrshire, total economic impact was £95.6M, with 1.065M visitors, of which 230 000 were ONS, staying for 0.9M visitor days with economic impact of £56.1M. DVS impact was £39.5M. Average Retail spend in Ayrshire and Arran was estimated by the Moffat Centre at £0.75 per person per visit, with a total raw spend of £639 000; average Catering spend was estimated at £1.88, with a total raw spend of £1.3M.

The 2009 Report on the Visitor Economy of Ayrshire contains some of the most recent data as to the motivations for tourist visits to Ayrshire and Arran which includes specific reference to Robert Burns.[20] In that year 45% of tourists visited heritage and collections sites and 62% of visitors and 43% of tourists identified Robert Burns as the strongest association of Ayrshire and Arran, compared to 35% and 38% respectively for golf. More recent evidence from the 2015 Scotland Visitor Survey carried out by Jump Research (2016) indicates that 27% of tourists were attracted to come to Ayrshire and Arran by its history and culture, while 54% visited a historic house, castle or stately home, 40% a country park or garden and 30% a visitor or heritage centre. Taken together, this evidence is broadly in line with the 2009 figures, although the possibility exists that as this was the year of the 250th anniversary of Burns' birth and also of his association with Homecoming, it was also a peak year for brand recognition. **(Recommendation 5**).

The evidence from the project survey (admittedly based on a limited response, but consistent with visible Burns-rated activity, and see (6) below) is that the average Burns enthusiast is male, over 55, highly educated and financially well off. There are of course challenges related to extending and expanding this core Burns audience, but its alignment with high-end cultural tourism spend is worth noting.

Taking ONS numbers for tourist numbers and categorizing DVS as visitors, discounted by the 4.5% of visits to the Ayrshires that were for business purposes in the years 2015-17 (the most recent available data), would indicate

---

[20] *The Visitor Economy of Ayrshire: Present Profile and Future Opportunities* (2011), based on 2009 figures. This study does not appear to have been updated; such an update is recommended by the Report's author as part of the development of the Ayrshire Regional Deal (See **Recommendation 3**, Cultural Tourism).

a broad figure of £239M for the economic impact in Ayrshire and Arran deriving in part or whole from Burns in 2018, of which £101.3M would be in South Ayrshire, which should be uplifted to **£247.5M and £105M respectively at August 2019 prices**. Visitor numbers, days and economic impact have all risen over the last ten years. Given inflation and on costs, the number of jobs supported by tourism is broadly static.

This headline figure requires to be raised given the generally longer stays and higher spend of cultural tourists, noted under 4.1 above. However it also needs to be lowered. First, motivation of visitors is mixed, and there are normally multiple reasons for visiting a location; secondly, the most popular Burns visitor attractions are located in South Ayrshire, and almost 60% of ONS tourism impact in Ayrshire and Arran occurs elsewhere. This would indicate a figure of **£140M** allowing for cultural tourist uplift to the South Ayrshire figure only.

This can be compared to the £100M (at 2005 prices, some **£152M at 2019** figures) estimated as the aggregate value of all Burns tourism by the Moffat Centre in 2005, of which a majority was attributed to Ayrshire and Arran. It should be noted, however, that the Moffat figures did not include the uplift for cultural tourism posited by the latest research. In the circumstances, despite the appeal of the Burns brand across Ayrshire and Arran tourism as a whole on the 2009 figures, a conservative approach would be to focus on the impacts on South Ayrshire alone enhanced by the higher proportion of overseas visitors to Burns cultural attractions as against the Ayrshire average (19% higher at the Birthplace museum) and to subsume the premium spend of cultural tourism into the valuation of Burns the brand, under (6) below, which estimates the value of Burns the Brand as £139.5M for EU and overseas ONS visitors across Scotland. This would give us a figure of £105M + 8.4% OS visitor uplift, giving a total of £113.8M for the value of Burns to tourism in Ayrshire and Arran based on the South Ayrshire figures. Some allowance should be made for Burns-related visits in North and East Ayrshire. With around 5% of the Burns-related visits of South Ayrshire, that would suggest a figure of £7M, giving a total figure of **£121M**. **This would link the maintenance of some 2370 FTE jobs in Ayrshire and Arran to Robert Burns.**

The National Trust for Scotland have approaching 300 000 visitors at their Burns sites in Ayrshire and Arran: the Robert Burns Birthplace Museum (RBBM), Souter Johnie's Cottage and the Bachelors' Club at Tarbolton. The vast majority of these come to RBBM, where the proportion of Overnight and Day Visitors (based on NTS data) is as follows:

- Overnight 56%
- Day Visitors 44%

Thus almost a quarter of overnight visitors to South Ayrshire visit RBBM, a figure consonant with the 43% of tourists for whom Burns is a pull to Ayrshire and Arran and the 30% visiting a heritage centre in the 2016 VisitScotland figures (it is noteworthy that the figures for the Burns Birthplace Museum used to include an estimate for the park visitors (a higher percentage in the VisitScotland figures), but this is no longer the case). The 19% higher proportion of overseas tourists than among the tourist numbers as a whole indicates that Burns is a net draw and offers additional value, suggesting that many ONS tourists might otherwise be lost to the region and underpinning the high ranking of Burns as a motivator for visiting Ayrshire and Arran.

4.2.1. Ayrshire and Arran: other factors. The construction of the Robert Burns Birthplace Museum in 2008-9 brought a capital development with a value of £23M to Alloway (almost £29M at 2019 prices) which, in its turn, triggered further developments, and brought a benefit of c200-210 Person Year Equivalent FTE posts to the area, which itself may have created between £500 000 and £600 000 impact in the Ayrshire economy annually, **some £695 000 at 2019 prices**. These sites support £800k in salaries, the equivalent of 28 FTE including oncosts at national average salaries, and these salaries in turn support economic impact in the local economy of some £400 000 annually. Maintenance expenditure is £76 000. On average, 64 cars and coaches are in the RBBM car park throughout its seven day opening week, suggesting fairly low environmental impact.

Burns has a strong national footprint, not only in the number of sites associated with him, but also in the Burns Scotland partnership (www.burnsscotland.com) which includes ten sites in Ayrshire and Arran , nine in Dumfries and Galloway, as well as five partners in Edinburgh (the Grand Lodge Scotland, National Library of Scotland, National Museums of Scotland and Scottish National Portrait Gallery) and two in Glasgow (the Centre for Robert Burns Studies and Mitchell Library). The new £68M secondary school at Cumnock will be branded the Robert Burns Academy, which is a welcome recognition of the importance of branded space in the Ayrshires. There is a possibility that the Burns Scotland partnership could further monetize its holdings, and this is referred to it for consideration **(Recommendation 3).**

Prestwick Airport (**see 2.7 above**) is in the heart of Burns Country, and is also both Scotland's best connected airport by public transport (30% of its passengers arrive by rail) and the airport with the clearest skies on most days in Scotland and the longest cargo runway. It currently employs 320 directly, supporting an additional 1700 jobs through its supplier network and 4500 locally. Its passenger numbers are in the region of 600 000 annually. Its current title, 'Glasgow Prestwick', is arguably not in keeping with Scottish Government RIG strategy, and the putative position of Ayrshire as 'Glasgow's coast' is recognized by fewer than 30% of tourists and 20% of locals, on the latest available 2009 data. The renaming of Prestwick Airport to mark the connexion of Robert Burns to the area has been a longstanding goal of the Robert Burns World Federation (RBWF). It was the subject of a 2014 petition, PE 1506, to the Scottish Parliament, and has previously received support from a number of MSPs. The extensive branding of airports across the world to recognize national or regional icons (W.A. Mozart, George Best, Robin Hood, John Lennon, John Wayne) has so far been resisted in Scotland without good supporting evidence. The recent extensive rebranding of Dunkeld with multiple plaques and the campaign for a Niel Gow statue there appears to be associated with significant economic uplift in the town: lending place significance through branding is a critically recognized function of culture and history across the world, and is increasingly prevalent in the food and drink market, from the 'Glasgow Girls' stills at the Hillington Glasgow Distillery to Annandale Distillery's Outlaw King whisky. [21] The renaming of Prestwick should be reconsidered in discussion between the Ayrshire REG partnership and the airport's new owners, either in the context of the airport as a whole or the new space facilities (**Recommendation 1**).

The £13M Irvine Great Harbour redevelopment has the capacity to foreground Burns in produce and other contexts, particularly on the Maritime Mile, which will have a focus on local and artisanal produce. Burns's time in Irvine and its harbour was a crucial part of his development as a poet. The food and drink

[21] E.g. Madeleine Pillwatch, 'Developing a theoretical model for the functions of cultural anniversary years within city marketing. A grounded approach using two case studies from Vienna', MA dissertation (Northumbria); Eric Martin Usner, '"The Condition of Mozart": Mozart Year 2006 and the New Vienna', *Ethnomusicology Forum* 20:3 (2011), 413-42. See also *The National*, 9 August 2019, 3, 19.

offer is central to tourism strategy in the Ayrshires and is easily aligned with Burns tourism. Moreover, the strongly coastal nature of North Ayrshire tourism (over 80% of international visits) could also profitably deploy Burns as a subsidiary theme in Irvine, especially if the poet is linked to the Biosphere. Greater footfall in North Ayrshire from the expanded cruise terminal capacity at Greenock would bring additional benefit and an offer which was both focused and diversified-and which included Burns-might be a key route to achieving this (**See 2.8, Recommendation 2, 4**).

4.3. Dumfries and Galloway

The 2009-17 Dumfries and Galloway STEAM final Trend Report indicated that in 2017 (the latest date for which figures were available, there were:

- 2.571M visitors to D & G, with a total of 5.15M visitor days
- 23.9% (615000) who stayed in serviced accommodation for an average of 1.67 days, generating £123.40 per visitor day in economic impact and supporting 2868 FTE jobs in aggregate
- 15.8% (406000) who stayed in non-serviced, for an average of 5.61 days, generating £52.69 per visitor day and supporting 1862 FTE jobs in aggregate
- 7.2% (186000) who stayed with friends and relations, for an average of 4.55 days, generating £21.42 per visitor day and supporting 211 FTE in aggregate
- 53.1% (1.365M) day visitors, generating £48.53 per visitor and supporting 779 FTE.

The aggregate economic impact of tourism was £331M. The general trend in visitor numbers and their spend year on year was down, with increasing numbers of day visitors with increased spending levels the main positive indicator. The 2018 Moffat Centre figures gives 1.914M as the number of visits to visitor attractions in Dumfries and Galloway, of which Burns-themed attractions drew just under 3%. This rises to 5% in Dumfriesshire (or 13% excluding Gretna Green), as there are no Burns-related tourist sites in Galloway. Dumfriesshire represented 63.5% of all visits in Dumfries and Galloway. Burns-related sites were 24% of recorded Museum and Gallery visits in Dumfries and Galloway, with closer to 50% share in Dumfriesshire. Average retail spend in Dumfries and Galloway was estimated by the Moffat Centre at £1.07 per person per visit, with a total raw spend of £225 000; average Catering spend was estimated at £1.88, with a total raw spend of £244 000. Visitor numbers are down 11% since 2009, with visitor days down 6% and tourist-supported jobs down 8%, although the overall impact of visitor spend has increased in this period. This is due to positive trends in visitor numbers, days and impact in serviced accommodation, which has seen a 6% increase in visitor days in the same period. Non-serviced visitor days are unchanged, but there is an 11% increase in visitor numbers. The main issue has been a heavy decline in day visitor numbers and days, down almost 25% in the same period. Visitor numbers have shown the biggest declines in the shoulder months. The Dumfries and Galloway Regional Tourism Strategy for 2016-20 notes the need to strengthen the higher end market in '*accommodation and food and beverage businesses*' and identifies challenges in securing returning visitors. The Strategy targets 2.6M visitors supporting 7300 jobs by 2020, so while visitor numbers are close to this level, the employment supported by their spend is not. Providing Authentic Experiences is one of the core three elements of the Strategy, and here of course Burns-related tourism has a significant role to play, one which might be more strongly linked to food and drink. Burns is not mentioned in the Strategy document explicitly however, and that is equally true of other figures with a strong connexion with the region. This is an approach which stands in contrast with that of Ayrshire and Arran (**Recommendation 2, 5).**

The 2016 VisitScotland Scotland Visitor Survey indicated that 35% of tourists were attracted to visit Dumfries and Galloway because of its history and culture, with 48% visiting a historic/stately home or castle during their visit and 35% a visitor/heritage centre. In 2018, there were just over 50-52000 visits to Burns-related attractions in the Dumfries area (some, like the Mausoleum, are not measured, and while the official visitor numbers to Ellisland are 1400, a history of not recording children admitted free from families or school trips means that the property's own estimate of visitor numbers is in the 3000 range). The overall number of paid attraction visits in Dumfries and Galloway are some 266 500, of which Burns constitutes no more than 1%, and of free attractions 1.55M, of which Burns constitutes some 3.5%. 27% of Dumfries and Galloway visitors are local, 26% from elsewhere in Scotland, 37% from the rest of the UK and 10% from overseas. Almost 70% of all visits are to Gretna Green Blacksmith's Shop, Galloway Forest Park and Threave Castle and Gardens, so Burns is disproportionately important in Dumfriesshire, where he represents some 20% of visits to visitor attractions. It is thus very likely that Burns is an important reason for visiting the Dumfries area, but there are no figures which clearly identify tourist motivation and association available. The magnet effect that major cultural figures and the facilities associated with them offer an area does not at present seem to be clearly identified. The plan to raise Ellisland (Robert Burns' farm near Dumfries with extensive holdings relating to the poet) visitor numbers from the current underperforming 1400 to a more realistic figure would alone do much to increase Burns visitor concentration in the Dumfries area.

An estimate based visitor/heritage centre motivation to visit Dumfries and Galloway, adjusted to exclude Galloway and for home and overseas spend, would suggest a figure in the region of on number of attraction visits would be in the region of £14.7M, which with a cultural tourism spend uplift would reach £19.5M, some **£21M** at 2019 prices. There is certainly scope both to measure this figure more precisely, and to improve on it. The overall suggested impact of Burns tourism in the Ayrshires is very close in money values to the Moffat Centre 2005 figures for the aggregate value of all Burns tourism, assessed at a time before the growth of a Burns tourism market in Edinburgh.

4.3.1 Major Burns Attractions: Dumfries and Galloway

Burns is in almost a unique position for a major writer of the Romantic era, in that at least five of the houses in which he lived survive. Four of these (plus the room he stayed in at The Globe Inn) are in the Dumfries area, but this is not fully reflected in current marketing and signage. The best visited site, the Burns Centre, has annual visitor numbers of 36 000 in 2018, but is not particularly well signposted within Dumfries itself, particularly for those arriving by car. Given the resources available at the site, the visitor numbers are healthy and the creation of a town centre cinema on the premises has clearly been a positive move, which will be further supported by a £59 000 gallery refurbishment grant from Museums Galleries Scotland (MGS). The Burns House in Dumfries, with visitor numbers of over 13 000 annually, has a number of Burns artifacts and proves reasonably attractive to visitors; the Mausoleum does not currently have a reliable way of recording visitor numbers comprehensively. The Burns trail in Dumfries is now well developed, although linking produce and selected retail or accommodation recommendations to the named sites would be a beneficial development, and as at 2017 there was no current mention of the three sites closely associated with the poet just outside Dumfries: Ellisland, Friar's Carse and Isle Tower. Dumfries can however with some conviction be presented as the Burns Town as much as Ayr. The recent takeover of the Globe Inn by Annandale Distillery, a company with a longstanding sensitivity to Scottish culture, will lead to a stronger focus on the commercial potential of the Globe (e.g. as a site for promotions, traditional music, sleeping where Burns slept and so on) and provide the potential for the development of a number of produce-led partnerships and events linked to other Burns sites. Professor David Thomson, CEO of Annandale Distillery, has major plans in this area, which will foreground The Globe as a meeting place of Burns-related produce and cultural memory in a more focused and attractive way.[22]

The plan to increase Ellisland's current visitor numbers (28 000 has been mentioned, but this is now under review) has the capacity to be transformative in attracting cultural tourists to the area. Ellisland is currently developing a plan supported by £40 000 in Resilient Heritage Funding from the National Lottery Heritage Fund, aiming to lead the site towards a major redevelopment to enhance its currently seriously sub optimal visitor numbers. In addition, £15

[22] See *The Scotsman,* 30 August 2019.

000 has been secured from Foundation Scotland and the Holywood Trust for a 'Trails and Tales' initiative, which will work with a local storyteller to interpret the site for younger audiences, working with Dumfries College. With 320 objects or MSS belonging to or associated with Burns (over 40 being of star quality), as well as ownership of almost 60 hectares of historic farmland, including the location of Burns' '*Wounded Hare'* poem, Ellisland's official total of 1400 recorded visitors annually represents a considerable shortfall on the site's potential. There are obvious improvements that could be made such as the provision of catering, the location and clarity of the external signage and a slicker visitor experience. Certain areas of the property (e.g. the Orchard) currently have more of the appearance of an agricultural museum than a literary one. Given the site's proximity to the Nith and Burns's lifelong interest in plants, flowers, animals and opposition to blood sports, Ellisland could be a key site to be promoted both in terms of the South Ayrshire/Dumfries and Galloway UNESCO Biosphere, and for the 2020 Year of Coasts and Waters, stressing the ecological nature of Burns's own life and sympathies (**Recommendation 4, 6**).

Ellisland could be integrated into a revised Dumfries Burns trail, as could mention of Friar's Carse Country House Hotel and Isle Tower, the 1587 tower in which Burns stayed while Ellisland was being built, which is now an antiques centre. This would have the additional benefit of driving Burns-related tourism towards the support of commercial premises in Dumfries itself and its environs. Indeed, a welcome focus on cultural tourism more generally appears to be under way in Dumfries and Galloway with the opening of the new Barrie experience at Moat Brae and other developments (**Recommendation 3, 5**). [23]

[23] Giancarlo Rinaldi, 'Robert the Bruce, J.M. Barrie and Robert Burns "targeted to boost tourism"', BBC South Scotland 26 January 2019.

Isle Tower

Despite the promise of the Homecoming 2014 leaflet, *Burns and the South-West*, the unified promotion of Burns across Ayrshire and Arran and Dumfries and Galloway is still a work in progress. Homecoming's Following Burns recommended tour was designed to keep visitors in the area for three days, and further refinements of this (with for example recommended accommodation, catering and produce outlets) are worthy of consideration. The accompanying two-day Naturally Burns tour in the Homecoming promotional material might also be repurposed for the integration of Burns into Green Tourism (see above) (**Recommendation 3, 5**).

4.4. Burns Tourism elsewhere in Scotland

Glasgow's role as UNESCO World City of Music has been associated with some promotion of Burns songs through Celtic Connections/Traditional Music and Song Association, but Burns remains largely marginal to Edinburgh as UNESCO City of Literature. However there are signs that the profile of Burns-related tourism in Edinburgh is changing, and that new initiatives are beginning to bring Burns tourism to the capital (see below). At the same time, the seasonal celebration of Burns (see below) remains nationwide. There are further opportunities which could develop Burns both as a joint Edinburgh-Glasgow figure at the heart and the characteristic anchor of both Scottish writing and song, and as a figure of environmental integrity, civic locality and rooted produce in the Ayrshires and Dumfries and Galloway. The use of Burns as a national brand and resource, pioneered in Homecoming 2009, is addressed in further detail below.

Burns tourism outside Ayrshire and Arran and Dumfries and Galloway is currently underdeveloped, though Visit Scotland has recently put significant effort into developing the capital as a Burns location. At least three possibilities exist: Edinburgh, the Borders and the Highland Tour area of Burns' own tours of which maps exist, and Glasgow, where the city's status as a major home of traditional music holds out additional possibility.

Visit Scotland's establishment of the *Burns and Beyond* Festival and the development of an Edinburgh Burns trail have both served to intensify the promotion of Burns in Edinburgh. The 2019 event took place from 22-27 January 2019. The support offered from Johnnie Walker offers a clear linkage to the further development of whisky tourism, seen most ambitiously in Diageo's plans for a £150M major makeover of Glenkinchie, Caol Ila, Clynelish and Cardhu distilleries into a 'Johnnie Walker tour' capped by a 'global flagship' visitor experience on the site of the former Fraser's department store on Princes Street: there are obvious crossovers with Burns here.[24] There is also an opportunity for a more permanently established themed Burns trail with Scottish produce links: Burns' 'To a Haggis' was first printed in *The Caledonian Mercury* in Edinburgh on 19 December 1786. Sites associated with the poet include Baxter's Close (near where Lady Stair's Close now is, where he lodged

[24] 'Diageo has whisky galore plan', *The I*, 13 February 2019, 19; 'Boost for Scotch whisky tourism', *The National*, 9 August 2019, 29.

with Mrs Carfrae), Canongate Kirkyard where he campaigned for Fergusson's grave to be marked with a tombstone, Anchor Close, where the Crochallan Fencibles met, Potterrow, where Agnes McLehose lodged in the old General's Entry, and the old 2 St James's Square, where Burns rented a room in October 1787, and where he wrote 'A Rosebud by my early morning walk' to his landlord's daughter. Canongate Kilwinning no. 2 in St John Street and Sciennes Hill House, owned by Adam Ferguson, where Burns met Scott are other obvious sites, while Burns's printer Creech lived at Creech's land in the old Luckenbooths by St Giles, demolished in 1817.

In 2018, Sheilagh Tennant's *Burns Unbroke* ran in Edinburgh from 25 January to 10 March, foregrounding the work of over 30 visual artists, with Burns as an underpinning theme. It took place across eleven galleries, with an Alternative Burns night, a Flyting competition, a series of Whisky Masterclasses generously supported by Arran Whisky, a tailor-made programme of music plus children's performance and workshops. Tennant takes the view that Edinburgh has the capacity to 'consider a different approach to the Burns season… Surely there has to be a strong argument in support of the proposal to create a new large scale Edinburgh cultural festival around Burns night – a new Arts Festival, showcasing contemporary interpretations across several disciplines'. As with other responses (most typically those from the Burns Federation), Tennant supports the importance of schools engagement in any winter festival linked to a Burns-centred contemporary arts environment.

The Writers' Museum does not currently collect origin data for its visitors, though research is in process in Edinburgh in 2019-20 to provide greater detail concerning visitor background in visits to city attractions. The average staying visitor spent £346 in 2017. A one-third share of Writers Museum visitor numbers would give Burns a share of around 0.5% in Edinburgh visitor trips, which would be £4M in GVA or £11.5M including initial spend, some **£12.3M** at 2019 prices. This is probably the highest figure that should be attributed to Burns tourism in Edinburgh, and-discounting Festival contributions including Burns Festivals and Burns-themed events in the main Festival, including the Book Festival-it is used as the benchmark for the impact of Burns in Edinburgh, taking both spend and subsequent economic impact into account.[25]

[25] *Edinburgh 2020 Tourism Strategy: Performance Monitoring Report for 2017*

Both the Highland Tour (https://burnsc21.glasgow.ac.uk/highland-tour-2-2/) and the Border Tour (https://burnsc21.glasgow.ac.uk/borders-tour/) are available on the University of Glasgow's Centre for Robert Burns' Studies Editing Robert Burns for the 21st Century website in interactive form, and have sufficient detail to be aligned with food, drink and accommodation opportunities in their environs. The Border Tour is currently being utilized in an award from Midlothian and Borders Tourism Action Group to the Allan Ramsay Hotel in Carlops near Penicuik aimed at establishing the hotel as 'Scotland's Literary Pub' and towards developing a literary Borders tour incorporating Ramsay, Burns and Scott.

Glasgow's music spending is some 35% of the Scottish total, with economic impact of around £160M from live music. It is the most significant city for live music in the UK outside London. The Burns element of this is estimated under (5) below in terms of Celtic Connections only, but future development of Glasgow's music tourism potential (as recommended in the recent Penman, Wright and Young report) has the capacity to engage significantly with Burns, who is a figure of global significance in the promotion of Scotland's native music tradition.[26]

It is difficult to quantify tourism outwith the Ayrshires and Dumfries and Galloway. If it were discounted altogether except for visitor numbers to Burns attractions in Edinburgh based on a central point between ONS home and overseas half daily spend on an EIA basis could place it at around **£12.3M.** To interpret this figure conservatively, it is used to stand for the entire value of Burns-related tourism outside the south west. This would leave a figure for the total impact of Burns tourism **of some £154M at 2019 prices,** of which Ayrshire and Arran would contribute over 80% (compare the £100M Moffat Centre figure from 2005).

[26] Perman, Wright and Young (2017).

5.0. Festivals

Event and Festival Tourism is becoming increasingly popular globally in the context of engaging and revitalising local economies. It is highly visible, as are its concentrated groups of visitors and participants. Scotland's Events Strategy is posited on the fact that 'the Events and Festivals sector is a major contributor to the Scottish economy locally and internationally' and a key part of the process whereby 'we catalyse investment and revenue'. Scotland's events industry is seen as a significant economic contributor. Since 2008, £21M has been channelled through EXPO Scotland to support the role of Festivals in developing infrastructure, reputation and the visitor economy.[27]

At the same time, there are serious challenges and limitations to the economic role Festivals can play in boosting the economy. While the fixed length of festivals encourages attendance and visibility, it lessens the likelihood (except at the very largest festivals) of extensive engagement by the high spending overseas and longer stay domestic market. Most festivals attract a disproportionately high number of day visitors (DVS), whose spend is lower and more likely to represent displaced expenditure which would have taken place anyway, even if elsewhere in the region in question or at another time. The opportunity of reaching an untapped market which festivals have been held to represent is often thus arguably illusory in terms of adding value, even though it may boost the area holding the Festival in comparison with other locations or in terms of morale. These are some of the reasons why Scotland's Events Strategy focuses on the need for 'significant impacts' which create a 'lasting legacy', and support the cultural capital and 'psychic income' of the Festival locale in the longer term (see section 10 below). [28]

[27] *Scotland: The Perfect Stage: Scotland's Event Strategy 2015-2025,* 5, 10, 18.

[28] Ben Janeczko, Trevor Mules and Brent Ritchie, *Estimating the Economic Impact of Festivals and Events: A Research Guide.* CRC Tourism, 2002; *Scotland: The Perfect Stage*, 20.

Festivals which bring high-spending tourists over a lengthy period of time to a highly developed economic area with multiple spending opportunities (e.g. the Edinburgh Festival) are more successful at driving economic benefit than those intended to act as revitalizing local morale boosters. Yet even the BOP Edinburgh Festival Impact study, following Treasury Green Book methodology, discounts the economic impact provided by home day visitors to only 3% of their spend, although the CEBR figures quoted above suggest that this may be overly conservative with regards to the impact of this uniquely intense and long-lived summer event (Lonely Planet recently named the Fringe the UK's no.1 star attraction).[29] Festivals have similar levels of displacement to museum visits within Scotland: in calculating economic impact in Glasgow, 95% of day visitor spend is deemed to be displaced for example. The environmental costs incurred by short distance visits are also not insubstantial.

Festivals and events linked to non-day visitors in particular can have a greater economic impact. The Input-Output (I-O) study of Homecoming 2014 estimated that Homecoming enjoyed a net impact of £278M in Scottish sales revenue arising from a spend of £360M (multiplier 1.77) after allowing for 12% leakage into non local taxation, 7% into imports and 3.5% to event ticket promoters, while the 2015 Edinburgh Festival figures suggested it was responsible for £312.6M of new output and 6000 FTE jobs across Scotland, the vast majority being in Edinburgh (BOP 2016). Major Festivals elsewhere can also create major impact: room revenues in Vienna rose 9.5% in the Klimt Year of 2012 to €540M. [30]

There are a significant number of additional Festivals and one-off major celebratory events linked to Burns in the annual Scotland's Winter Festivals programme, which focuses on a strong promotional campaign and specific one-off events. These include Burns and Beyond in Edinburgh with the new Burns Cultural Trail (22-27.1.19), The Burns Hame Toun event in Alloway (23.1.19-27.1.19), The Big Burns Supper, Dumfries (24.1-3.2.19), The Scottish Storytelling Centre event (24.1-25.1.19), Burns Night at An Lanntair, Stornoway (25-26.1.19), Perth Riverside Night Lights (26.1-27.1.19), Night at the Museum

---

[29] Geoffrey Crossick and Patrycja Kaszynska, *Understanding the value of arts & culture: The AHRC Cultural Value Project.*; 'Lonely Planet top 500: Edinburgh Fringe is UK's star attraction', *The Herald*, 13 August 2019.

[30] *Economic Evaluation of Homecoming Scotland 2014 (Moffat Centre, 2015);* Crossick and Kaszynska; Pillswatch, 32.

(The Hunterian, University of Glasgow, 27.1.19), Burns Birthday in Mauchline (27.1.19, 600 attendees, 80% from East Ayrshire) and associated web-based Burns resources, such as 'How to hold your own Burns Supper'. The aim of these is to link tourism, business, brand, identity and reputation in an integrated way consonant with the Events Strategy. The focus on Burns in Edinburgh is notable, as is the reinforcement of off-season tourism in the Ayrshires and south-west. The Events Strategy notes that improving infrastructure (including accommodation) and innovative synergies (such as 'the integration of transport into event ticketing' as was practised during the 2014 Glasgow Commonwealth Games) are both necessary to make tourism both more appealing and more inclusive, and the Winter Burns Festivals are part of the support structure for these developments (**Recommendation 3**).[31]

Festivals have established value to both community development and civic pride (psychic income), but their more immediate quantitative effects are typically significantly weaker than their perceived impact. There can thus be a bias towards them in policy terms because of their immediacy which must be carefully justified by evidence of their attractiveness to overnight visitors. For this set of reasons, Dumfries and Galloway Council have in more recent years turned to supporting headline Festivals which have a secure repeat market (e.g. the Wigtown Book Festival). There is some evidence that the Big Burns Supper (which contributed **£500 000** to the local economy in 2018) is beginning to belong to this category, as of course does Celtic Connections, the January Festival in Glasgow which takes about £2M in ticket sales annually. The figure of course would be higher for the overall economic impact of Celtic Connections, which is in the region of £11M: attributing 10% of this to the influence of the Burns canon and repertoire on the international reputation of Scottish folk music does not seem unreasonable given his vast presence in film and significant online viewing figures, and would indicate a figure of **£1.1M**. [32]

The 2005 Moffat Centre reports on the '*Burns and a' That*' Festival (founded in 2002) noted that while in the region of 50 000, attend its events, only 17- 25 000 of these are 'real' visitors coming from outwith the area. Typically the Festival generated approximately £1.25-£1.5M of advertising equivalence press coverage and local direct expenditure of £1-1.2M, with around three-fifths of the attendance being day visitors, spending an average £20. The

---

[31] *Scotland: The Perfect Stage*, 18, 21, 35-36

[32] BBC South Scotland, 26 January 2019; Perman, Wright and Young (2017), 37.

website had 60 000 visitors, and generated 3.3 million hits. While 44% of local businesses reported increases in sales revenue in the Festival period, the net impact on employment was 637 staff hours, approximately 1 FTE over 16 weeks, or 0.3 FTE on an annualized basis, although 17 FTE over the core Festival period. To secure these economic outcomes, £598 000 of public sector funding was committed, together with £15 000 of commercial sponsorship and £48 000 of ticket sales. The £1.17M expenditure total was derived from the number of additional visitors (24 000), multiplied average visitor spend of £48.55. Given low Festival multipliers (even Edinburgh, with its high overseas visitor numbers, ranks only at 1.24), it seems likely that at least 40p of public money supported each £1 of sales plus economic impact once leakages and so forth had been allowed for. Modelling suggests a figure for direct effects of £300 000 for day visitors, with £1.1M for overnight visitors plus indirect and induced effects amounting to a further £1.5M, suggesting an impact of just under £3M at 2005 prices, £4.5M at 2019 prices. '*Burns and a'That'* has tended to have slightly smaller visitor numbers in subsequent years, but its funding mix has changed: its overall impact thus remains estimated at **£4.5M**. The total economic impact of the Burns Festivals examined above is thus upwards of **£6.1M** at 2019 prices: a figure of **£7M** is estimated for all Burns Festival activity**.**[33]

[33] Four years later, the 2009 '*Burns and a'That'* led to an estimated £150 000 only in additional income for the Ayrshire Economy (*Ayrshire and Arran 2009 Tourism Report*), as only 4 700 of the 22 400 attending the Festival came from outwith Ayrshire and of these only 2 400 stayed overnight. Although the Festival was cited as the main reason for their visit to Ayrshire by majority of respondents, day visitors spent on average around £20 per head as opposed to the £300 per head spent by overnight visitors, who were only 11% of the total. The majority of new visitors were over 45, and thus belong to the typical demographic for expanded tourism numbers in Scotland. Larger-scale festivals can have a stronger long term impact on infrastructure and thus on raising the attractiveness and long-term sustainability of a destination. The Glasgow 1999 UK City of Architecture and Design events took place in the context of increasing overseas interest in Mackintosh and the emergence of 'Greek' Thomson as borne witness to in the National Trust for Scotland development at Holmwood House. Festival of Architecture events had 31% non local visitors, and 33% of these cited the Architecture events as the sole or main reason for visiting the city. Yet there is still plenty of room for doubt. Aftermath studies of the impact of the Olympic Games on Sydney indicate that tourism in New South Wales grew by 2.2pc less than the Australian average in the four years after the Olympics. A study in Victoria by Applied Economics likewise came to the conclusion that there was '*no evidence of any ongoing visitor impacts from the holding of one-off events'*. Cost benefit analyses, when carried out, do not tend to show that public support for Festivals and one-off events are '*good for the economy'* unless all expenditure at the Festivals is treated as a free good, and

6.0. Burns the Brand

Scotland's position of around 15th in the Anholt-GfK Roper national brand study of 50 countries carried out annually since 2008 represents a position of relative strength underpinned by a very strong set of primarily cultural images. These clearly align international views of Scotland with both the period in which Burns lived and the values he is seen as representing, which contribute substantially to the way in which Scotland is perceived internationally. In 2018, Scotland was ranked 12th for Tourism out of 50 countries, and while it was ranked only 23rd for Creativity and 25th for Science (both figures at odds with the data, as Scotland is a world leader in scientific citation and achievement per capita), it ranked 12th for Cultural Heritage. The country was highly rated for its past: 'Museums' and 'Music' were seen as its two leading features, while its people were seen as 'Friendly', 'Honest', 'Hard-Working' and 'Romantic', all values found in abundance as positives in Burns's poetry:

For thus the royal mandate ran,
When first the human race began;
"The social, friendly, honest man,
Whate'er he be-
'Tis he fulfils great Nature's plan,
And none but he."- 'Epistle to John Lapraik'

As a co-author of the *Scots Musical Museum*, the canonical collection of Scottish song and the country's most famous song-writer, Burns sits at the heart of Scottish music, cultural heritage and the core values ascribed to Scotland's people throughout the world. [34]It is particularly noteworthy that much of the image of Scotland abroad is reflective of a national reputation which was created in the period from 1740-1860. Within this set of parameters, Burns is a central figure who is often taken as typical of Scotland

---

not attributed to the displaced expenditure that the evidence suggests much of it is (Peter Abelson, '*Evaluating Major Events and Avoiding the Mercantilist Fallacy*', *Economic Papers* 30:1 (2011), 48-59).

[34] *The Anholt-GfK Roper Nation Brands Index: 2018 Report for Scotland: Scottish Government Strategic Analysis*, 2019, 18, 20, 24-27; Murray Pittock, 'Culture and National Brand: Selling Ourselves as Others See Us', presentation to Scottish Government External Affairs directorate awayday, 5 June 2018.

in his egalitarianism and humanitarianism. The strong identification of Scotland the Brand with Music, Agriculture and Food and Heritage all reinforce the centrality of Burns as a cultural icon (Anholt-GfK Roper). Burns is Scotland's second most translated author, with 3100 translations of his work in the Bibliography of Scottish Literature in Translation (NLS-BOSLIT database).

We set out to make an indicative measure of the value of the Burns Brand, utilizing a questionnaire based on MRS Guidelines to establish the additional perceived value in Burns branding by those resident in or furth of Scotland, who might or might not be tourists visiting the Burns Country on an overnight stay (ONS) basis.[35] Dr Joel Ambroisine modelled the questionnaire to ascertain the value of Burns the Brand to overseas visitors for this Report, based on previous research on establishing brand value linked to Willingness to Pay (WTP) a premium over unbranded products.[36]

Based on WTP and WTD (Willingness to Donate) to Burns-related facilities and infrastructure, it estimates the value of Burns the Brand to Scotland nationally as £138.1M in 2018, rising at 0.77% per annum in cash terms, some **£139.5M** at 2019 prices, presuming a sub-RPI uplift as indicated by the data.
This indicates substantial retained and continuing value in Burns the brand after almost a quarter of a millenium, but with a longer-term figure for annual uplift which currently falls short of inflation: so to that extent, indications are that Burns is in real terms (and accepting that this is a brief snapshot in time) a slowly wasting asset without further development and investment. The equations underpinning this model (controls for limited sample size having been applied) can be found in Appendix 3, Valuing Burns the Brand.

[35] *MRS Evidence Matters: MRS Guidelines for Questionnaire Design, 2014 (2011).*

[36] E.g. Romualdas Ginevicius and Darius Gudaciauskas, 'Brand valuation model', *Journal of Business Economics and Management 5:*3 (2004), 143-53.

7.0. Food, Drink and Retail

The core Burns tourism areas in Ayrshire and the southwest are both strong in the distinctive range of well-provenanced produce they offer (e.g. bacon, cheese, whisky), while Burns himself is of course strongly linked to both whisky and haggis. Many pubs, restaurants and butchers already use Burns to promote their brands. The opportunity exists for the Burns Country to participate fully in the development of the kind of 'regional showcase events for connecting suppliers with buyers' envisaged in the *Ambition 2030: A growth strategy for farming, fishing, food and drink*, while Burns could be readily integrated-perhaps more than any other Scottish figure-in the development of the national Food Tourism Action Plan arising from the strategy set out in *Food Tourism Scotland*. Visitors already spend £1bn pa on food and drink in Scotland. Burns-rooted as he is in strong local food and whisky producing areas in the Ayrshires and the south-west with quality products and experiences (Pillar 1 and 2 of the Plan)-offers a strong storyline as being a national poet deeply engaged with national produce in Scotland. The engagement of Graeme Littlejohn, deputy director of the Scotch Whisky Association and James MacSween of MacSween's Haggis in the Winter Festival podcasts of the #TaetheBard programme in 2018-19 show that the sector is already very much engaged with these possibilities. MacSween spoke of 'a global renaissance' for haggis, and that is borne out by some of the numbers below.

More locally, the attached Regional Inclusive Growth appendix (Appendix 2) gives some suggestions as to how the Ayrshires' and Dumfries and Galloway's reputation for produce could be enhanced by more local responsiveness to the importance of Burns. Currently many major hotels, festival promotions and businesses make no mention of Burns. Speciality grocers have no Burns Supper offer, and the Burns visitor trails are (see (4) above) frequently disconnected both from each other and from the promotion of local produce (**Recommendation 2**).

These gaps in provision exist in a context where there is a significant amount of evidence that Scottish and local/Scottish branded products (adopted by 84% of suppliers in the 2009 *'Product Origin-Scotland'* study) have a positive effect on sales, with many reporting that the 'product attracts a higher sale price/value', that it gives it an advantage over products from elsewhere in the UK and that it 'helps to identify the product for target consumer groups'. The *'Product Origin-Scotland'* report identified Scottish and a combination of local/Scottish produce as conferring a business advantage in whisky (this probably extends now to the more recent craft gin market), bakery, confectionery, dairy, seafood, fruit, vegetables and meat. Prepared foods branded as Scottish could achieve higher prices. Moreover, there is a clear impact of the presence of provenanced produce within Scottish supply chains on the ONS tourist market, as 60% of UK visitors would highly recommend Scottish food and 30% thought it 'better than other destinations'.[37] There are a number of goals in the *Building a Sustainable Social Enterprise Sector in Scotland Action Plan* which could be sustained and developed by an increasing confluence between Burns and produce-related tourism in the core Burns visitor areas, including Supplier Development, Sustainable Procurement, Promoting Local Goods and Services and the Development of Retail Supply Chains. These feed into the Regional Inclusive Growth agenda. The support of local supply chains can hold back urban flight and-sufficiently supported by infrastructure and connectivity-boost local economic activity. In the Ayrshire Regional Economic Partnership and South of Scotland Enterprise Agency (SOSA) areas, Burns is a key brand that can hold together produce and visitor attractions. Retail spend at visitor attractions in Ayrshire and Arran is currently only 75p per head (Moffat VAM 2018), the lowest on mainland Scotland, while the Burns Birthplace Museum audience research indicates a greater need for Burns-branded and Burns-related retail stock, even though RBBM itself is among the strongest users of local supply chains. Revenue from catering at £1.88 per capita is much healthier. The respective figures for Dumfries and Galloway are £1.07 and £1.88. An opportunity clearly exists for the National Trust for Scotland, as the leading Burns heritage provider in the area, to engage with local businesses and entrepreneurs in a constructive manner, spreading good practice in working in partnership with local suppliers.

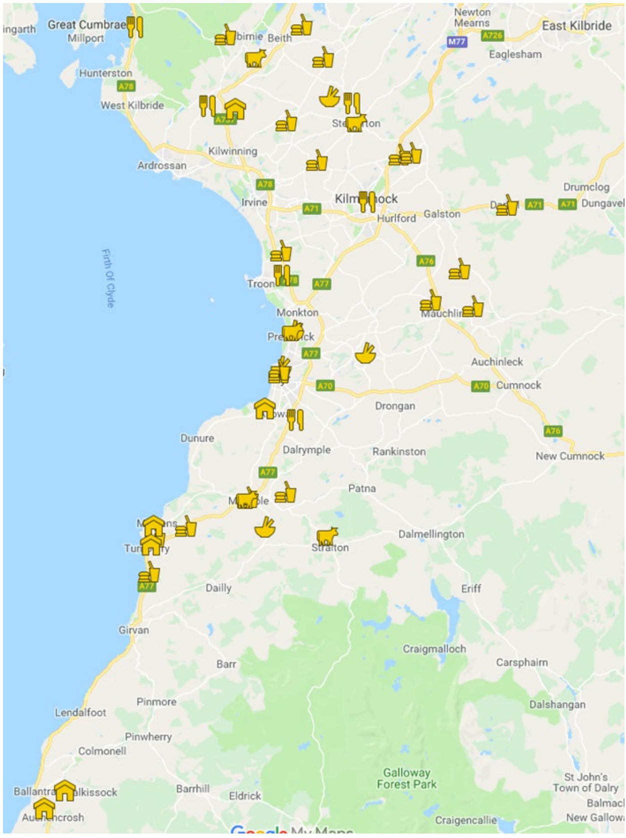
---

[37]*Food Tourism Scotland* (Scottish Government, Scotland of Food & Drink, Scottish Tourism Alliance) , 3, 7, 11; *#TaetheBard,* (London/Glasgow/Edinburgh/Aberdeen: 3x1 Group, 2019); '*Product Origin-Scotland'*, 37-42, 61.

The Burns Birthplace Museum has already been a pioneer in acting as a platform for food and drink themed events and is very popular location. An example of how changes here could be built into Regional Inclusive Growth is below.

Ayrshire and Dumfries and Galloway Produce Scheme

Many producers in the local economy use the figure of Burns to promote produces and commodities. Based on our Brand research under (6) above, using the figure of the poet could impact the promotion and the price of produce. A Burns added value to a Tourism strategy based on Terroir will lead consequently to the development of the supply chain and local products



One example is the Ayrshire Food Network launched in November 2002. The project comprises 35 Ayrshire based food and drink producers and providers, along with 40 associated B&Bs working together to promote the produce, culinary and food tourism delights of the area. (Ayrshire Food Network, 2019). However, further development is needed to coordinate how to use Burns Heritage as part of a Common produce scheme and Tourism strategy.

Local entrepreneurs do not always make proficient use of the Burns Heritage in their communication. Some will choose to build their marketing strategy on different incentives (UNESCO Biosphere, Food and Drink Awards like Michelin Starred restaurant, Christmas, Father's Day, Vegan Themed products and packages, local festivals). This can of course be effective; but few of these stress local heritage and provenance. Compared to 'Patrimoine' marketing and events in France they could be underselling the reasons to come to Ayrshire and Arran or Dumfries and Galloway.

The example of Ayrshire Food Network proves that further development should improve the impact of Burns on local economy. Burns could be positioned and utilised within a common strategy based on two approaches[38]: a Taste of Place strategy based on memorable eating and drinking experiences that bring to life the story behind the food of a specific geographic area; and a Foodways strategy based on the history, heritage and culture behind what is grown, harvested, prepared and consumed in a particular area. Burns is linked to both Ayrshire and Dumfries and Galloway, and his profile could be instrumentalized further in favour of the region's Cultural and Food and Drink Tourism.

A wider awareness of Scotland's historic food and drink can also lead to the revitalization of old recipes and a deepening encounter with the historic richness of Scotland's produce. Some companies-e.g. Stuart McLuckie's Luckie Ales in Fife-have already benefited from historic recipes, and further development of this area through university research, studentships and internships could all serve to render it less niche, and grow Scotland's position for world leading research in food and drink. Everyone is interested in produce, and Scotland's expertise in this area remains significantly underacknowledged; further development is possible here in tourism, policy and education, where despite the popularity of food and history of food programmes, the history of food remains marginal in university teaching and research agendas, although initiatives are afoot to work towards changing that. [39]

[38] Scotland Food and Drink, *Food Tourism Scotland,* 2018, 9-10

[39] *Building a Sustainable Social Enterprise Sector in Scotland Action Plan 2017-20,* 7, 9, 20, 22, 25.

The intersection between the health and wellbeing effects of culture and those deriving from nutritious and strongly provenanced food and drink are also potentially reinforcing, while shorter supply chains offer clear environmental benefits, thus creating a virtuous circle for a themed and focused food and drink offer. The combination of culture and produce creates the framework for many distinctive, personalized and simultaneously strongly branded experiences. The well-established national Scottish reputation for '*provenance and quality'* can be mutually reinforcing for '*customers and decision-makers at home and abroad'* in these two strongly related areas (*Ambition 2030*). The positive association of Scotland the Brand with agriculture and food in the Anholt-GfK Roper research (see (6)) is also important in underpinning a further shift towards the better integration of provenance and culture in local marketing of Burns and possibly other cultural brands (see **Recommendation 3**).

The retail effects of the Burns season can offer a seasonal boost to the Scottish economy. In 2019, Burns Night was one of two key factors identified as responsible for a significant recovery in food sales, up 4.9%,[40] while a 65% uplift in drink sales was reported on themed Burns nights in bars in 2014. Haggis ready meal producers such as Strathmore Foods more than double their sales in January, shifting 360 000 of their 1.8M annual sales in that month. MacSween's turnover £2M of their £6M annual haggis-related business in January alone, while Howie's sell over 60% of their annual £7M haggis turnover in January. James MacSween's view is that there would be very little in the way of haggis sales at any time without their central and continuing use in the Burns Supper, and MacSween exports to France, Singapore, Germany and Canada as well as the creation of domestic haggis variants by Canadian, Polish and Icelandic producers among others, all reflect the dependence of this business on the Burns Supper market. The 'Burns effect' January haggis market from these major suppliers is thus worth some £6.6M of £16M annual turnover. It would also seem reasonable to ascribe at least half of the value of non January sold haggis to the role of Burns in popularizing the dish.

[40] 'Scottish retail sales recover after poor December', BBC, 13 February 2019

Taking this-perhaps slightly conservatively-at 50%, gives a Burns derived market of **£9.9M annually for haggis, say £11M including all smaller producers,** again a conservative figure based on spend alone, as full data modelling for Economic Impact lies beyond the funded scope of this study. [41]

Burns-related drink sales are clearly influenced by the Burns season and the Burns Supper, but there are also Burns-specific brands to consider, such as those produced by Arran Distillery (see below, about £2.5M annually), Belhaven Breweries (Burns Brown Ale) Rock Rose Gin (Lassies Toast, some £50 000 annually), House of MacDuff (Burns Nectar Single Malt, £30 000 annually), Douglas Laing (Timorous Beastie) and Cutty Sark (Tam o'Shanter). Drinks companies can see Burns-specific brands as a USP at a weak time in the business year (January/February). As part of a £4.7bn export market, direct Burns-related whisky brands and malts might have a turnover value of £3M, but the value of the Burns Supper internationally to the industry far exceeds this. To take only one example, if only 50% of those who attend Burns Suppers every year drank one 25 ml shot of malt whisky at the Supper they attended, that alone would have a retail value of £6M, with a sale value on the night considerably ahead of this and multiple indirect effects. It would not be unreasonable place Burns' value to the whisky industry conservatively at this figure, **£6M,** which is around twice the retail sale value of those brands and malts currently named for the poet,and represents 0.125% of annual Scotch whisky sales.

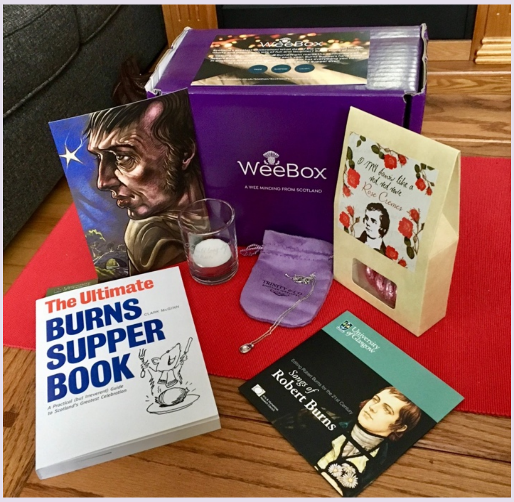
There are also markets for Burns-related produce including plaques, coasters and placemats, such as those from Steven Brown Art. Wordsworth Edition sales of Burns' poems have totalled 12 296 over the ten years 2009-18 in total, averaging 1223 per annum: some £4900 at full retail price, while at the other end of the market, Oxford University Press lifetime sales of the Kinsley edition and its paperback sibling amount to £121400, or between £250000 and £500000 at 2019 prices. it is noteworthy that in 2009 there were 23 separate editions of Burns' poetry on sale, and that the current figures for Amazon UK show over 50 editions of his works in print or on Kindle, including one appearance in the top 40 Kindle section sales. Given this level of current sales, and given that the Burns Birthplace Museum retail sales are typically below £300 000 pa, a figure for Burns-related retail and seasonal kilt hire (again,

[41] Neil MacRae, Sales Manager, Strathmore Foods, email to project team, 12 December 2018.

exact figures proved hard to source), is likely to be in at least in the £1M-£2M region by turnover, and possibly significantly higher. It was not possible to recover a separate value for CD/download sales, but these are unlikely to move this number to a different order of figure. In total, Food, Drink and Retail are estimated to have a scale of around **£20M** in size terms: the Report does not have data in the detail required to measure their economic impact.

7.1. Example Studies

Arran Distillery produces both a Burns Malt and blend. They partner with a number of external bodies including RBWF, Publishing Scotland, the London and Frankfurt Book Fairs and the Burns Unbroke Festival to promote their Burns branded whiskies. The Burns Malt is about 1.7% of their sales from their distillery shop but they export 2748 cases (8.4 litres/case) to EU and overseas markets and 308 to UK markets. France is the largest Burns Malt export market. The Burns blend sells 5330 cases outwith the UK and 126 in the UK. Arran Distillery won the Association of Scottish Visitor Awards 'Best Visitor Experience' in 2018.



Wee Box is a micro business which has become one of Scotland's leading theme gift box companies. Burns season Burns boxes and Burns Event boxes sales totalled 1600 in 2019: bringing in £56000 revenue for export with £21000 induced effects in the Scottish supply chain. A total of 2 FTE posts are supported by business, of which 0.17 can be attributed to Burns. Wee Boxes are supplied to twelve countries, with some 75-80% of customers based in North America.

8.0. The Burns Movement and the Burns Supper

Specific Burns-related festivals and events normally take place in the Burns season between January and March, and are often crossover events between literary festivals and platforms for the promotion of food and drink. The central such event is the Burns Supper.

The Burns Supper is only one event that makes Burns a global brand, but it is the most important one. The World Famous Grouse Burns Supper map of 2009 (a Homecoming 2009 initiative) listed 3673 global celebrations (and of course there are many more which are missed or too small, informal or non corporate to be noticed), and 9 million joined in the Burns celebrations of that year; current estimates are in the region of 9.5 million attendees at Suppers annually.[42]

Many of these major events take place in Scotland. In 2019, major Burns Suppers or Burns related events were scheduled at Dumfries (Big Burns Supper, 24 January- 3 February) and at the Marriott, Radisson, Hilton, Thistle, Crerar, Park and Hallmark hotel chains in Scotland, at Prestonfield House, Loch Fyne Oyster Bars, Buzzworks, Oran Mor, The Dome, the Assembly Rooms, SimpsInns, SECC, Edinburgh Conference Centre, Murrayfield and many major football stadia. Events were held at the Scottish Parliament, Glasgow City Chambers, Glasgow Trades Hall, and in many racecourses, social clubs and Labour and Scottish National Party branches. Burns for Beginners is held at Edinburgh Castle on 27-30 January, while there is also a Burns Supper at Stirling Castle on 24 January. Historic Environment Scotland expects some £73 000 in alcohol sales in January.[43]

Seasonal dramas and Burns shows are also a major feature, with *The ghosting of Rabbie Burns* performed in the Eastwood Park Theatre, the Gilded Balloon, Edinburgh, Motherwell Concert Hall, Rutherglen Town Hall and the Harbour Arts Centre in Irvine.

Burns Suppers in Scotland remain a major source of economic and cultural activity. The Robert Burns World Federation (RBWF), the major global Burns social and cultural organization in Scotland, estimates that there may be some

[42] Clark McGinn, *The Burns Supper: A Comprehensive History*, (Edinburgh: Luath Press, 2018).

[43] Email of Bill Nolan, President of RBWF, to Project Team, 10.1.19: Gayle Shankley, HeS Merchandising Manager (Retail) to the Project Team, 9.1.19.

2300 Burns Suppers in the country annually (this would be roughly 25% of the estimated global total, though this could be undercounted: evidence from the profiling of international Burns Suppers in the nineteenth century suggests it may be (McGinn (2018)).

Questionnaires distributed for the Report at the 2018 RBWF conference in Irvine revealed Burns Supper attendance averaging 100-150 per responding Club with income averaging some £3000 per event and frequent use of local butchers and suppliers (with haggis orders ranging up to £6000). To take Falkirk Burns Club as one example, ticket sales are £4500 and total value of sales on the night between £9500 and £15 000, with £800-£1000 going to charity (Brian Goldie to Project Team, 20.12.18). Estimating Scottish Burns suppers at the Club average by income per event would give a figure of some £7M for Burns Supper related economic activity in Scotland, although this may be too high, as there are many smaller formal suppers, as well as a few larger ones. Major events like the Treetops corporate supper in 2017 might be expected to produce venue/catering income of £50 000, but these are exceptional. An estimate of half the average Club income produces a figure of £3.5M for Burns Suppers in Scotland annually. There is a case for regarding some of this as non displaced income, as Burns events are by their distinctive nature unlikely to replace other activity, although at least some of their effects on produce sales would be displaced; on the other hand, they draw on national suppliers and boost their sales through supermarkets and other outlets. A low multiplier of 1.2 would give a figure of £4.2M. The project has also received an estimate of £65 a head for drinks and ticket sales at Scotland's 647 Masonic Lodges, with ticket sales averaging 100: if this is correct, the scale of economic activity would be in the region of £4.2M less an allowance for whisky under (7) above, leading to a figure of £3.9M for Masonic suppers alone, which would suggest a higher number for all Burns Suppers in Scotland.[44] If these were all on this scale, the aggregate income deriving from Burns Suppers would be £16.7M. The Report suggests a figure of about half this as a reasonable measure, some £8M, or **£10M** in total economic impact, allowing for an uplift to 2019 RPI. There are however other longer-term economic and social benefits to Burns Suppers which could be measured, but lie outside the scope of the current report.

[44] Brian Goldie to Joel Ambroisine, email of 11 December 2018.

The RBWF annual conference typically brings some £25 000 in direct expenditure into its location annually. More than half of Clubs held other Burns related events throughout the year with an average income figure of £2000 quoted, including one which held monthly events. Reported charitable giving activity was widespread, including £3500 to charity in Dumbarton, £1000 for schools, £1000 for Action Medical Research, £350 for Jean Armour Homes and other donations. It is worth noting that major corporate Burns Suppers earn much more than this for charity, with figures of up to £35 000 reported by RBWF. There is also extensive charitable giving in non Federation suppers, e.g. at the King Robert Hotel's Burns Supper in Stirling or the BAE Systems Supper in Ayr, which was reported as raising £24 000 in 2018. In Glasgow, the Lord Provost's Robert Burns Guild of Speakers raised £40 000 for charity, while the Robert Burns International Federation's Burns Supper in Budapest also raised £40 000 for charity in 2018. The value of Burns Suppers and RBWF activity combined to the Scottish Economy is estimated at **c£11M.**

RBWF is increasingly turning to a recognition of the brand importance of Burns, and are considering measures to introduce a Supper Package and other developments, in which there is a significant degree of market interest: 60% of respondents in the recent RBWF survey suggested they would be willing to pay for a '*how to'* Burns Supper package, although it should be noted that there is a VisitScotland free web resource, 'How to hold your own Burns Supper', which operates along the same lines, and there are many existing books on the subject. RBWF are keen to work further and more closely with the Scottish Government on the development of 'Burns the brand'.[45] They are also interested in developing events marketing in symbiosis with local and national government planning. One possibility here is a calendar of Burns Suppers by locality as part of Scotland's Winter Festivals programme, currently advised by the Centre for Robert Burns Studies, which already leads-through Dr Pauline Mackay-the podcasting for Winter Festivals (**Recommendation 3**).

Burns has a global value as a brand, and in turn can be held to influence the international perception of what constitutes the Scottish brand, through the Anholt-GfK Roper index. Burns suppers and statuary are spread throughout the world (famously Burns has more statues worldwide than any secular figures saving Queen Victoria and Christopher Columbus), and the use of Burns' name by brands such as Coca-Cola (2009), Riviera Travel (2017) and Norwegian

[45] *RBWF Profile into the Next Decade*, 2018

Airlines (2018) indicate its levels of recognition and perceived transferable global value.

Burns as a Norwegian Airlines 'Tail Fin Hero'

In parts of the United States such as Atlanta, where membership of the Burns Club of Atlanta in a reconstructed Burns Cottage is limited to 100, Burns has become part of the business networking of a major commercial centre. In Frankfurt, the British Chambers of Commerce Germany Burns Supper in the old Masonic Hall by the European Central Bank, is likewise a major commercial and business networking event and opportunity, while in Vancouver Gung Haggis Fat Choy fuses the interest and engagement of Chinese and Scottish diasporic communities round a joint Burns-Chinese New Year celebration. Burns is influential in cultural practice and charitable giving across the world, from the Singapore Boys' Brigade performance at Burns Suppers, to the $25 000 raised for healthcare by the Accra Burns Supper in Ghana in 2014.[46]

[46] See https://www.youtube.com/watch?v=mKdyEhMTu70 (Gung Haggis Fat Choy Seattle); https://www.youtube.com/watch?v=2Wv-ZDH4E2I ('O Canada', 16th Gung Haggis Fat Choy, Vancouver); https://www.youtube.com/watch?v=1GhdOAJuoTw (Burns Supper Frankfurt 2018); https://www.youtube.com/watch?v=wv5er4Cdv90 (Burns Supper recital, St Petersburg); https://www.youtube.com/watch?v=dmEytTsSol0 (Burns Night, Beijing); https://www.youtube.com/watch?v=aiC09IaE8GU (Burns Night, Belgrade); https://www.youtube.com/watch?v=X5_Tio7Lmhk (Burns Night, Paris); https://www.youtube.com/watch?v=QZKev-vM7KU (New York) and many more.

Regensburg Burns Supper

One facet of Burns's value is that he is represented by or associated with a large collection of objects, and this has been the case since the nineteenth century.

The Distributed National Burns Collection (http://www.burnsscotland.com/) contains over 36 000 objects in 25 locations (most significantly in the core areas of Edinburgh and South Ayrshire), many of which are not currently digitized. Many people in Scotland also own Burns memorabilia dating back to the 19th century, and occasional ventures into Burns Antique Roadshows and the like have proved popular at NTS properties.

The Burns industry takes place in a range of other contexts. As the Hong Kong Creativity Index study of 2004 noted, creative outcomes, institutional capital, human and social capital combine to form cultural capital. Cultural capital resides in both objects and people, and has been argued to be '*created in the encounter between a person and an object'*. It has been argued that it is composed of six kinds of cultural value: aesthetic, spiritual, social, historic, symbolic and authentic. Unquestionably Burns - whose reputation, reach and significance crosses almost all of these categories - is a major part of Scotland's cultural capital, and underpins the perceived national brand values (for example good governance and humanitarianism) in ways which are difficult to measure, together with the soft power, global status and trade links of Scotland and its produce. The Burns brand often exists in diluted form and as such is utilized by many products, experiences and visitor attractions in Scotland and elsewhere, such as the Cronies Bar in The Golden Lion in Stirling or the Burns branding at the Mercure Hotel in Inverness. Of particular note here is the extent to which Burns Suppers and similar events across the world display fusion cuisine or modes of celebration. MacSween's in Edinburgh themselves supply Moroccan spiced vegetarian haggis, and haggis pakora, haggis lasagne and many other varieties are consumed.

It is also more than arguable that the international Burns movement generates extensive social capital, in the shape of trust, reciprocity, co-operation and social networks. The measurement of Burns' influence on these areas is beyond the scope of this study, but it is undoubtedly considerable. The frequency and intensity of Burns celebration alone has a major contribution to make, as frequent and intensive engagement is often used as a measure of creative value.

The 2005 Moffat Centre report recommended utilizing the Global Scot network (https://www.globalscot.com) of several hundred senior business people abroad, to promote Scottish produce and activities through the countries and via the British Chamber of Commerce or Embassy in their country of sojourn. It is clear that potential remains here, not least because some senior global Scots are themselves enthusiastic Burnsians. In addition, any new Burns policy or series of recommendations can be networked through overseas organizations such as the Ulster Scots agency (http://www.ulsterscotsagency.com) and Caledonian societies and Pipe band organizations in Canada, Norway, Switzerland, the US and elsewhere, which have memberships and network reach well into six figures on the latest information available. Many of these organizations (for example the Caledonian Societies of Arizona and Baton Rouge, with an estimated membership/mailing list of 25 000) hold their own Burns suppers as a regular event in any case. The International Burns Federation (which includes major US clubs such as the Robert Burns Club of Milwaukee) has offered to support the development of Robert Burns and the Scottish economy in this context. In this context, the increasing incorporation of Burns Supper and similar events into the calendars of the Scottish Government's hubs and offices (in Beijing, Berlin, Brussels, Dublin, London, Ottawa, Paris, Toronto and Washington) is a welcome development which might profitably be further enhanced with the engagement of local partners and other Burns supper events with high quality Scottish produce).[47] (**Recommendation 8**).

---

[47] Events are so far clearly emplaced in the Hubs Brussels, Dublin and London, with Scottish produce (e.g. House of Elrick amd Dunnet Bay gin, Crucial Drinks Lost Distillery whisky) and

Burns is also useful to the integration of New Scots individuals, communities and families within Scotland. To take only one example of the value of Burns the brand in this context, the BEMIS (Black and Ethnic Minority Infrastructure Support) programme's Burns dimension receives many applications during the Winter Festivals period, and in 2018, 13 Burns events were held, engaging between 2 and 3000 new Scots in events such as Glasgow Afghan United, Rainbow Muslim Women's Group, the Milan Lunch and Social Club, African and Caribbean Women's Association, the Scottish Israeli Cultural Association, Aberdeen Multicultural Centre, The Alwaleed Centre Taste of Scottish Islam and the Bangla Centre. Across the board BEMIS was engaged with the injection of c£17 500 into the Scottish economy, but arguably the longer term benefits of its work are more significant. BEMIS see Burns as emblematic of their mission to see us all as '*Combined by our Humanity, Embraced by our Diversity*', and a figure who represents the values of equality, recognition and reconciliation which Anholt-GfK Roper identifies as central to the national brand. Burns gives a voice to the confidence, motivation and active citizenship that comes from inclusion, though at the same time BEMIS responses note that many arts bodies and cultural agencies do not register the importance of Burns in these terms, and that perhaps he is not widely studied enough at school.

Given BEMIS' responses, it might be useful to reflect on John O'Hagan's 2016 findings. O'Hagan, a pioneer of the Creative City agenda in Dublin, notes that

> international recognition and prestige are often posited as a benefit of the arts that is related to national identity and social cohesion, and is public in nature…nations are like individuals; they can derive standing and prestige from having a vibrant arts sector collectively owned. What Irish person for example does not get some pride from knowing that Beckett, a graduate of Trinity College Dublin, won the Nobel Prize in Literature even if they would never attend any of his plays? Who does not get some pride from knowing that James Joyce is so highly regarded world-wide even if they cannot get past the first paragraph of his most famous novel, Ulysses?

O'Hagan concludes that 'a rich, vibrant and enduring culture' and an 'an inclusive society in terms of involvement with the arts' help to support innovation, tourism and foreign direct investment, as well as high level of local

events (e.g. Year of Young People 2018) to the fore. There is strong engagement from the diplomatic corps of other EU countries in particular.

engagement spanning a wide range of activities, ‘including the production and consumption of cultural items and goods and services, and participation in cultural activities’, as well as the psychological benefits of ‘common culture and heritage’, which in Burns’s case is both diverse and global. This in turn promotes a strong sense of social cohesion which ‘addresses the issue of social connectedness, including the role that participation in arts, culture and heritage events and activities play in those connections’. These processes in turn form a virtuous economic circle. They do depend, however, on a high level of perception of the value of a cultural asset in the home society, as is the case in the Republic of Ireland. Repeatedly, concern was expressed by respondents in Scotland that Burns’ value was not transmitted strongly enough in education and society.

Thus although there is strong cultural identification with Burns (voted the greatest ever Scot in a 2009 public poll) and witnesses such as BEMIS testify to his role in building social cohesion and embracing diversity, it remains the case that the economic development his reputation and memory have the potential to generate are limited by a lack of awareness in the domestic engagement with and pride in Scottish culture. These responses came through strongly also from the Robert Burns World Federation and from former tourist board members and local government respondents across the political spectrum. While Scottish Studies in schools has been a relative success, the embedding of Scotland’s most important cultural figures in the curriculum appears to be more uneven, even though RBWF activity indicates a significant appetite for it in the case of Burns. Cultural familiarization is an important prelude to cultural ownership.

Scottish Studies aggregate entries at all SCQF levels	**2013-14**	**2014-15**	**2015-16**	**2016-17**	**2017-18**
Total	**706**	**1 352**	**1 645**	**2 612**	**2 020**

The RBWF hosts a number of Burns Suppers and other activities in and outwith Scotland and supports both a schools competition and extensive schools outreach: the Irvine Burns Club alone reaches some 750 senior primary school pupils a year during the Burns season through programmes run from their Wellwood Centre, while there are over 100 entries a year in the Burns secondary school competition run by the Federation, involving significant travel and subsistence expenditure. Burns schools' competitions attract 80,000 children in Scotland, the USA, Canada, Russia, Australia, New Zealand and around the Pacific Rim.

Although not strictly linked to the Scottish Economy, Burns Clubs elsewhere in the world offer a ready route for External Affairs in the Scottish Government to encounter the diaspora, as well as providing platforms for Scottish Development International and Scottish produce internationally (SDI are traditionally represented at the Frankfurt British Chambers of Commerce Germany Burns Supper, though most of the sponsorship comes from the malt multinationals). The peak supper from Canada reported via the RBWF questionnaires grossed C$110 000, with 550 people present. Burns Suppers are increasingly popular in England, and not only in London. In 2018, 23 were listed in Hampshire and Surrey, while the January 2018 *Shropshire Star* listing gave 17 major suppers for its readers to choose from. Visit Bristol listed nine as did Watford; Manchester listed twelve, Newcastle ten, Gloucestershire eight, Sussex six, Cambridge and Lincolnshire four apiece and the *Birmingham Mail* fifteen. In Leicestershire, Wetherspoons outlets alone hosted ten events as part of a nationwide named Burns week, while there were also seven listed in Wales. In London, *Tatler* listed a top six Burns season suppers. This kind of footprint reproduced globally (Washington DC listed seven open to the public, besides corporate and alumni events, while Toronto listed ten), remains a major asset to the visibility and reputation of Scotland as a national brand. The 9.5 million attending Burns Suppers worldwide and the current estimate of 9000 official suppers (publicly open, advertised or sponsored) indicates the scale of Burns's influence, which no other Scottish cultural event - barring viewing figures for Scottish sporting teams or athletes - can match. Scottish produce is found throughout the Burns Supper market (for example Belhaven beer in Worcester, Caledonian Edinburgh Castle and MacSween's haggis at Wetherspoons) and is frequently sold at these events which it is unlikely would be ordered otherwise, but which may produce knock-on repeat orders in the hosting venues.

Burns's global reach remains considerable. The 2017-18 Scottish Government Winter Festival Burns Night PR campaign (2018-19 figures awaited) reached 7.8 million, with press reach of 5.6 million, 834 000 partner posts on Twitter, 48 000 Facebook video views and 452 stakeholders reached for every £1 spent. St Andrew's Societies in Cyprus, Lisbon, Ottawa, Peru and St Louis were all engaged.

Recordings of Burns songs have a huge worldwide reach, led by 'Auld Lang Syne', with over 50 million YouTube views of its various recordings, and a ranking in the top three songs in English worldwide, with '*Happy Birthday*' and '*He's a Jolly Good Fellow*'. Many Burns songs have over 1M views ('Ae Fond Kiss' is between 2 and 2.5M, 'Red Red Rose' over 3.5M, 'Scots Wha Hae' over 2.25M, while 'Flow Gently Sweet Afton' tops 1M) while the most popular Burns translation on YouTube is '*Trotz Alledem*' ('*For a' that*') the German political anthem, with almost 1M views in its various versions, as against some 1.7M for Burns's original. Social media presence for Burns-related sites is generally significant, but few exceed 10 000 followers.

9.0. University Research

The Centre for Robert Burns Studies (CRBS) at the University of Glasgow is the premier location worldwide for the study of Robert Burns, with income exceeding £3.75M since 2009 (£2.3M for Burns specific projects) from its two major grant earners, and responsible for current FTE employment of 2.4 staff, in line with its average since 2009, suggesting an economic impact iro £120 000 annually. Its website has attracted over 100 000 visitors and its recorded Burns music section has in the region of 40 000 downloads (**https://burnsc21.glasgow.ac.uk/list-of-songs/**), while its annual income from online fees is £7500 with a greater amount from charitable donations. Its peak online audience for its free Burns internet course exceeds 10 000. In addition, it has income of some £10 000 a year from postgraduate study dedicated to Burns and not accounted for from other sources. Two of its projects (the AHRC Global Burns Network and AHRC Robert Burns Beyond Text) were assessed by Cambridge Economics for the Arts and Humanities Research Council (AHRC) in 2016 as among the five AHRC-funded projects with the highest economic impact in Scotland, with a gross impact of 17.57 FTE jobs and a peak leverage of £4.34 of additional income for every £1 spent by the AHRC, with a GVA multiplier of up to 1.8. CRBS is the largest centre connected to the study of Robert Burns in Scotland: the total size value of Burns in university research is thus approximated as **£500 000** pa. In overall educational terms this is a major underestimate of the value of Burns, who is also extensively utilized in teaching, corporate events and building cohesion in university communities.

10.0. Existence Value, Cultural Capital and Psychic Income

Major cultural assets can be held to have an 'existence' value, that is their worth to their users, one which reflects the value of their wider cultural or societal impacts. Recent research increasingly shows that 'social and cultural amenities…friendliness, and…natural and physical beauty' are among the most 'highly valued attributes' of urban environments. A study of this kind carried out in Bolton, Lancashire, arrived at a figure of £10.4M for the local community's view of the value of the town's library services, which comfortably exceeded the public expenditure required for their provision (GVA multiplier 1.6). Interestingly, more expensive one-off events and Festivals do not do well in terms of existence value. The intangible benefits brought to London by the 2012 Olympics were valued at £2bn by the UK population, a figure dwarfed by the eventual cost of the Games. More recent existence value studies have focused on the value attributable to Facebook ($42 a month) and smartphone photography, which has increased the number of photographs taken 20 fold since 2000, when $40bn was spent directly on camera and processing fees that is now –on a much larger scale- outwith GDP data. This is still a controversial area, but the existence value placed on data holdings is potentially colossal (Google's is estimated at $48bn, Amazon's at $125bn) if difficult to attribute with accuracy. Existence value deriving from data or mobile phone use thus has an economic value, but it is sometimes difficult to convert such a value into any measure of productivity: indeed, there are fears that its influence may work in the opposite direction, as with the controversy over mobile phone use in offices.[48]

Cultural facilities have an ongoing use value deriving from their existence, as 'historic buildings form an important part of how people perceive and value their local area', and there are increasing amounts of data on this. The AHRC-NESTA Willingness to Pay (WTP) research indicates that the visitor use value of a historic city is on average £9.63 per head and that of a cathedral £7.42 per visitor. Museums are typically valued at £6-£8 by residents and visitors (users) and £3-£4 by non users. Hence having a museum or equivalent offering as part of local cultural assets has a value to those who live in the area even if they do not visit it: this has, as we shall see below, an effect on house prices. On

[48] Crossick and Kaszynska; Gillian Tett, 'How much GDP does your smartphone generate?', *Financial Times Magazine*, 24/25 November 2018, 46; the controversy surrounding the use of mobile phones in offices was reported by BBC Scotland GMS on 4 July 2019.

average the AHRC-NESTA study suggested that non users would pay £6 on average for conservation and to prevent environmental damage to a historic city, and under £4 for a cathedral (2018 prices). A figure **of over £10M** might be attributed to Burns Country visitor attractions in Ayrshire and Arran and Dumfries and Galloway on this basis, but this should be regarded as an optimal figure.[49]

Existence value is one way of measuring the cost-benefit analysis of heritage projects, not only for the '*psychic income'* they produce for the community with an increased sense of well-being and positive engagement with their surroundings, but in their contribution to the increase in the community's long-term attractiveness to business and visitors. House prices are only one aspect of the '*hedonic pricing'* which culturally and aesthetically attractive communities can command, and long term economic benefits can defray the original cost of investment. CEBR identified an average £26 817 uplift in house prices for houses in areas with twice the average level of cultural density. Given an average house price of £226 000 in 2013, that suggests a rise of 12% in house prices for every doubling of cultural density. The AHRC-NESTA (2018) study found an even stronger connexion:

> Houses sold within protected historic landscapes were worth 27.9% more than similar houses not located in such designated areas. In addition, each additional listed heritage building within a 50-m radius raised house prices by 0.28%.

The reasons for this may be manifold; but the centrality of heritage and cultural locations to this phenomenon is borne out by the view that '76-77% of respondents agreed or strongly agreed that visiting heritage sites increases one's wellbeing'.

Although everybody is aware that period houses in English cathedral cities sell for far more per square metre than those with equally good schooling and facilities in other cities, the evaluation of house prices locally seldom incorporates cultural factors. The Robert Burns Birthplace Museum postcode has house prices twice as high as the south Ayrshire average. Although this study does not have figures per square metre and average housing is larger in this postcode, a strong uplift-as one would expect- can be seen in house prices in an area of intense cultural resource and appeal. The attractions that draw

[49] R. Lawton et al, *The Economic Value of Heritage: a Benefit Transfer Study*. London, NESTA, 2018.

visitors are also those which sustain local markets. To be appealing to tourists is almost always to be desirable for residents, and a virtuous circle of high quality (if sometimes overcrowded) facilities and leisure ensues. [50]

Cultural tourism contributes to the maintenance and development of local facilities and to the morale of the area. The OECD notes that

> Tourism, when built upon broad stakeholder engagement and sustainable development principles, can contribute to more inclusive growth through the provision of employment and economic development opportunities in both urban and rural areas, and promote social integration. Tourism can also raise awareness of cultural and environmental values, and help finance the protection and management of protected areas, and the preservation of biological diversity.[51]

Tourism also helps keep facilities open in more remote areas: golf courses and swimming pools in remoter areas are between three and four times as likely to be used by tourists as those in urban areas (System Three 1998), thus maintaining a higher level of local facility at a lower cost than would otherwise be possible.

Cultural tourism also appears to have a significant effect on health and wellbeing from the evidence available. The English Tourism Council 2000 Survey surveyed GPs with 2 million patients registered: 25% identified holidaying as reducing patient visits and 22% identified holidays as reducing the need for patient medication. More detailed arts and health studies such as those of Matarasso (1997) or Bygren et al (2009) advance impressive figures. Matarasso’s report indicated that 84% said the arts increased confidence, while 73% reported increases in happiness and 52% in health; 40% said that it made them more positive about where they lived. The Bygren longitudinal study of 9000 in Sweden showed even more impressive long term results of freedom from mortal illness.[52] Education and special interest holidays (including cultural tourism) and sporting/family seaside holidays (all prime

---

[50] *Housing Market Intelligence Report: Research Report to South Ayrshire Council.* Savills, 2016, 10

[51] *Policy Statement-Tourism Policies for Sustainable and Inclusive Growth*, (OECD: Paris, 2017), 2.

[52] Helen Chatterjee and Guy Noble, *Museums, Health and Well-Being*, (Farnham: Ashgate, 2013), 10, 14, also provides many other substantiating details.

reasons for visits to Ayrshire and Arran) were regarded as having the highest health benefits. Greater connectivity between the findings of an increasing quantity and quality of wellbeing research and culture and heritage policy more generally is becoming increasingly important. RBWF members report very strong identification with Burns across Scottish society: this study has received anecdotes of commitment to Burns as a writer from labourers (for one of whom his Burns Federation award was the only qualification he received at school), joiners, cleaners, bricklayers and the construction industry. There exists a wide audience open to benefiting from Burns's profile in Scottish society, and receptive to contributing to any psychic income this would generate. Ownership, endorsement and visibility of cultural icons are all central to the development of cultural capital: value is endorsed by valency deriving from authority. The presence of Burns in public policy and education is important to increase the ownership and value attributed to him in wider society, one already endorsed by tourism and the global Burns Supper phenomenon.

Burns-linked infrastructure supportive of such wellbeing continues to be created. The recent Òran Mór Burns art commission in Glasgow (January 2019) created £100 000 of direct spend in the Scottish economy, besides the further benefits that are expected to accrue to the business. These are areas which are critical to supporting the context in which Regional Inclusive Growth can operate successfully. Health is a driver and an outcome of inclusion,[53] while increased ONS tourist numbers have an impact on the demand for recreational infrastructure throughout the Ayrshires and south-west, while tourism and produce business support local employment and consequently intensify local economic impact, as the indirect effects of tourism spend no longer leak to the same extent to the broader economy outwith the region. If this is combined with any increase in the localization of supply chains, the overall effect-and benefit-is magnified. The OECD notes that 'moving towards coherent and comprehensive approaches to tourism policy making, will help countries to reframe tourism growth to better spread the benefits, address inequalities and improve the resilience of economies'. It sees the key drivers here as quality experiences, increased sector productivity, led by SMEs, protecting, managing and enhancing natural and cultural resources (links to produce and biosphere tourism offer interesting dimensions here) and improving the competitiveness

[53] Ayrshire Inclusive Growth Diagnostic, 2017.

of the offer. Win-win solutions with local and regional engagement are seen as central. [54]

The below average levels of job density in the Ayrshires as a whole and the existence of local slack in the labour market, with 'over 20% of those who are economically inactive wanting to work', are indications that further developments in produce or cultural tourism (or synergies between the two) could offer significant benefit to the local economy.[55] At the same time, the retention of greater numbers of ONS tourists should serve to offer spend both supportive of local infrastructure and likely to lead to psychic income and cultural capital benefits for residents of the Ayrshires and Dumfries and Galloway. The Scottish Government's RIG Diagnostic points to Food and Drink, Tourism and the Creative and Cultural Industries (CCIs) all representing significant opportunities for the South of Scotland economy, where currently GDP per capita is only 79% of the Scottish average in Dumfries and Galloway and 73% in the Borders. The' variations in quality' in the accommodation, food and drink, connectivity and travel infrastructure noted by Tourism Scotland 2020 can be found in some of these areas, and an opportunity exists to use Burns (for example) as a kitemark brand to drive quality and as an indicator of local sourcing.[56]

Tourism is sometimes held to give rise only to low-value employment, but like other industries, this is much less true as it matures. In 2015, 16% of tourism employment was at manager/official level and another 16% was skilled, but between 2012 and 2022 as a whole it is estimated that 44% of vacancies will be in these categories. 26% of those employed in tourism have SCQF Level 7 or above, as opposed to 37% in the wider economy, but 73% have Level 5 or above, as opposed to 75% in the wider economy. Tourism is thus a relatively skilled sector: and moreover 17% of employers in the industry report a skills gap.[57]

---

[54] OECD (2017), 2-3

[55] Ayrshire Inclusive Growth Diagnostic, 2017

[56] Draft South of Scotland Inclusive Growth Diagnostic, 2017; Tourism Scotland 2020, 9

[57] *Skills Investment Plan for Scotland's Tourism Sector*, 2nd ed., (Glasgow: Skills Development Scotland, 2016), 10, 12, 13.

The people-centred approach which lies at the core of Community wealth building links greater ownership of local assets and identity to the redirection wealth back into the local economy. The greater ownership of Burns throughout the local economy in the Ayrshires and Dumfriesshire, working through produce, cultural tourism and integrated trails designed to appeal to longer-stay cultural visitors should be a significant benefit to the region's prosperity, appeal and sense of wellbeing, especially when reinforced through more local supply chains.

The calculation of the potential health benefits of Burns lies outside this study, but it is clear that the Cultural Value of the poet well **exceeds £10M**, entered here as base figure.

10.1. Case Study: FreshAyr, A Psychic Income project

FRESH AYR

'Fresh Ayr' is an Ayr based grassroots social enterprise developed by Robert Singer, and involved in creative regeneration projects that promotes the circular economy based on community engagement and cultural ownership. It seeks to create new employment opportunities from relatively low skill to high end aspirational. It aims to revive and give creative purpose to the centre of Ayr by empowering individuals and communities. Fresh Ayr pop up events began in November 2016 and continued with a three day Festival of Creative Diversity in Ayr Townhouse and contributions to Burnsfest in May 2017 and a Food Festival at the Burns Birthplace Museum in July 2017. With support from a Place Partnership, Fresh Ayr has been successful in beginning to develop new premises at Queen's Court with the aim of turning them into a unified social enterprise and creativity space. Although FreshAyr can be characterized more as a Burns related than as a Burns-centred business, its commitment to using the creative arts and cultural tourism to revitalize Ayr is an interesting example of how the spirit or brand value of Burns can energize contemporary developments. FreshAyr's focus on the individual experience and the personalized nature of creativity is also highly contemporary, and a reflection of the value Burns placed on a strongly individuated temperament, while their insistence on the interpenetration of produce and culture is very much in keeping with the increasingly recognized importance of monetizing culture through intensifying and diversifying the local appeal of experiences. A number of catering and hospitality outlets in Ayr have hosted FreshAyr cultural events to enhance and personalize their offer.

Fresh Ayr operates at a Community level via different projects including the Bread Art Laboratory and a project with primary school pupils from deprived areas. The project has had support from Creative Scotland's Place Partnership administered by South Ayrshire Council Cultural Development Office with help in kind from Ayr Renaissance.

As an active stakeholder in South Ayrshire, this social enterprise encourages Art, Culture and Tourism as routes towards economic regeneration, encouraging local communities to participate in town centre activities. While retail will always be a part of town centres, there is a growing interest in cultural activities that give people reasons to be socially interactive. Fresh Ayr is an example of the circular economy, sustainable and inclusive of natural, cultural, social and economic capital that avoids the depletion of natural resources by minimising waste, while regenerating creative employment through growing, up-cycling, making food and drinks from scratch with surplus profits funding creative projects.

11.0. Brexit

Benefits arising for Burns-related tourism, festivals and retail business from Brexit are centred on the increased attractiveness of Scotland and Scottish produce arising from any continued decline in the value of sterling, and on the more welcoming reputation of Scotland within the UK family of nations given the stance of the Scottish Government towards EU nationals since 2016. This may be responsible for the rise in EU tourist visits to Scotland in 2017-18 by comparison with the rest of the UK. EU visitors rose 29% to Scotland as opposed to a fall of 2% for the UK as a whole in Q2 2017 to Q1 2018.[58]

There are also a significant number of core Brexit risks. First is the effect of Brexit on the Scottish (and UK) economy generally and therefore on the level of available discretionary spend and the likelihood of rising unemployment, with 135 000 Scottish jobs tied to EU demand, 51 000 of which are in services or produce. In Scotland, No Deal would lead to an economic contraction of up to 8.5% (before mitigations), while a Brexit deal short of EEA membership could result in a contraction worse than for the UK as a whole. The population of EU nationals (currently 230 000) might shrink, putting pressure on the population and the tax base. The risk to house prices would put further pressure on discretionary spend as homeowners in work would feel less wealthy, and negative equity would rise. Scotland as a whole is currently 2nd in the UK for international investment, but might well lose in future investment both in relative and absolute terms.[59]

In more Burns industry specific terms, the disruption of supply chains would endanger Scotland's food and drink exports, as would the loss of Protected Geographical Indicators, or the introduction of a replacement UK wide scheme which damaged the link to locality. This point is strongly supported by the existing evidence and has been repeatedly made by Ruth Watson of KeepScotlandtheBrand and other campaigners. A higher proportion of EU nationals than average (18%) work in the tourist industry with peaks of 25-30% in the hospitality sector, and thus there could be labour shortages: while these

---

[58] https://www.visitscotland.org/news/2018/office-for-national-statistics-overseas-travel-tourism

[59] Prof Graeme Roy, speaking for the Fraser of Allander Institute, Glasgow State of the City Economy conference, 7 December 2018.

might be less pronounced in numerical terms than in England, it is likely that staff would be more difficult to replace, particularly in remote locations.

Tourist infrastructure would be affected by Brexit's consequences for the construction industry, where over 30% of the construction site workforce UK wide are EU nationals (and the situation in major projects in the west of Scotland can be little different). The significant presence of EU supplied materials in this area of the economy would also tend to see supply chain disruption and possible tariff or devaluation-driven inflationary pressures, which, combined with shortage of labour, would push up costs and make construction projects increasingly unaffordable. Short-term uncertainty would also disrupt spend on cultural tourism, food and drink. In specific geographic terms, Brexit provides-as in other areas-a major threat to the economic well-being of the Ayrshires and Dumfries and Galloway. This is particularly noteworthy in the South of Scotland generally, through the loss of agricultural and fishing subsidy.

12.0. Recommendations

It is clear that Robert Burns remains a high value addition to the Scottish economy, and is also, in ways which are harder to measure, central to Scotland's reputation and image globally. In these terms, the value of the brand is unquestionably higher than its economic value and impact.

The 2005 Moffat Centre report concluded that Burns' tourist appeal was diluted by being spread over three places, Ayrshire and Arran, Dumfries and Galloway and Edinburgh, in comparison with Shakespeare or Bronte related tourism. The diffusion of Burns tourism remains a risk: however, there are a number of ways of addressing this issue, including well defined and intersecting '*Burns trails'* and the provision of joint or multiple ticketing, the '*Burns Pass'* covering multiple sites and providers, as well as clearer articulation between Burns trails and sites and local produce, accommodation or restaurants. Such an approach would possibly serve to prolong visits to these areas and to promote local businesses. It is noteworthy that existing Burns trails do not tend to cross-reference to local hotels, restaurants, pubs or other leisure activities.

While the full value of the Burns Unbroke Festival has yet to be measured, it is clear that opportunity exists to emphasize Burns's Edinburgh connexion more clearly than hitherto. Glasgow's role as UNESCO World City of Music has been associated with some promotion of Burns songs through Celtic Connections/ Traditional Music and Song Association, but Burns remains largely marginal (excepting the Writer's Museum) to Edinburgh as UNESCO City of Literature.

Examining comparator tourist industries round iconic cultural figures provides a useful perspective on how the brand might be further enhanced. The 1842 Salzburg Mozart Festival - like the 1844 Burns Festival - established the idea of Salzburg as the City of Mozart. Today, Salzburg's airport and conservatoire are both named for Mozart, while produce relating to the composer (in particular the marzipan and chocolate '*Mozart balls'*, which are all but ubiquitous) continually reinforce through low level financial transactions the cultural tourism and public memory linking the city of his birth with the composer, and this is also true of Vienna, with some 300 Mozart-related produce lines. Some 259 000 visit the Salzburg music Festival every year, with a direct spend of €27M.

The Recommendations that follow are made with the following priorities in mind: Economic, Commercial and Tourist priorities in the context of Regional Inclusive Growth; higher visitor numbers, spend, positive impact on demand for labour, improved facilities and infrastructure, increased awareness and knowledge, increased attractiveness and accessibility. This study estimates the value of Robert Burns to the Scottish Economy as c£201.5M on a mixture of economic impact and size value, with a tentative attribution of £139.5M of attributed annual brand value. The headline figure is thus a value of just over £200M to the Scottish economy, with embedded brand value of £139.5M.

1 **1.Prestwick Airport** is in the heart of Burns Country, and is also both Scotland's best connected airport by public transport (30% of its passengers arrive by rail) and the airport with the clearest skies on most days in Scotland. It currently employs 320 directly, supporting an additional 1700 jobs through its supplier network and 4500 locally.

Its passenger numbers are in the region of 600 000 annually. The Robert Burns World Federation (RBWF) and a wide range of other respondents strongly favoured renaming the airport, with '*Robert Burns International*' a favoured title. An alternative from Salzburg ('*Salzburg Airport W.A. Mozart*') is to subtitle the airport. Renaming Prestwick had strong support among respondents who felt able to express an opinion. Anchor institutions of various kinds throughout the world are repeatedly named for famous cultural figures, and Burns' international reach and endurance is hardly likely to fall short of that of other figures chosen in this way, such as John Lennon and George Best.

The development of Prestwick as a Spaceport and Aerospace and Space Innovation site under the terms of the Ayrshire Regional Growth Deal offers the opportunity to name these new developments for Robert Burns. Given the relative lack of recognition of Scotland's leading role in STEM internationally compared with the country's cultural heritage, this could beneficially link Scotland's recognized traditional brand with leading-edge research and facilities. The first Burns supper in the stratosphere was held on a 1965 BOAC flight at 11 000 metres, and this and similar events could provide additional dimensions of appeal and justification to this branding.

Recommended that Regional Economic Partnership Board consider giving serious consideration to recommending the renaming of Prestwick Airport to any new owner, either as a whole or with regard to its Spaceport developments.

**Connectivity Focus*

2 **Food Tourism** linked to Burns and Scottish culture (not simply haggis) continues to have potential to support the industry and boost profits. The more explicit linkage of farmers' markets and local produce events to the Burns-related calendar should be considered where appropriate, as could the linkage of produce or selected retail or accommodation recommendations in the context of visiting 'Burns Country' or via the longer dwell time implied by trails like the South West 300, recently profiled as one of the best road trips in the UK by *Autocar*.

Distilleries provide an example of this for ONS visitors. The Arran Distillery's recognition of the cultural aspects of produce in its Burns whisky branding provides a useful amplifier to the established Taste of Arran scheme (https://www.taste-of-arran.co.uk/), where it is one of the ten '*food heroes'* in the scheme, which has been successful in placing the produce of an island with a small population on the menu of international brand leaders such as Gleneagles.

The Report's findings indicate that while Burns is widely used in branding and product and Infrastructure branding, there are many inconsistencies in the approach to this in both Ayrshire and Arran and Dumfries and Galloway. An opportunity exists for the Burns Country to participate fully in the development of the kind of 'regional showcase events for connecting suppliers with buyers' envisaged in the *Ambition 2030: A growth strategy for farming, fishing, food and drink*, while Burns could be readily integrated-perhaps more than any other

Scottish figure-in the development of the national Food Tourism Action Plan arising from the strategy set out in *Food Tourism Scotland.* Burns could be incorporated into elements of the *Ambition 2030* programme as appropriate in this context, and the development of a specific workstream identifying produce and culture overlaps within the context of the realization of both the *Cultural Strategy* and *Ambition 2030* is recommended. In addition, there is the potential for the revival of historic produce recipes. Such developments would align with the proposed Food and Drink innovation centre in the Ayrshire Manufacturing Investment Corridor (AMIG). In addition other developments (such as the £13M Irvine Great Harbour redevelopment) have the capacity to foreground Burns in produce and related contexts, particularly on the £6M Maritime Mile development, which will have a focus on local and artisanal food and drink.

Recommended that the relevant local authorities and regional growth partnerships/agencies consider opportunities to align Burns-branded produce with Burns Country trails and tourist routes both in and out of the Burns season, and that the increasing importance of slow, artisanal and local foods and the increased dwell time of cultural tourists is considered holistically, so that both these elements (produce and culture) are aligned in regional tourism plans. It is also recommended that *Ambition 2030* considers the symbiosis between produce and cultural tourism more explicitly than hitherto.

**Connectivity Focus*

3 **Cultural Tourism**: In further developing cultural tourism in Scotland, it would be beneficial to adopt more transparent and consistent measures for the proportion of tourism that is primarily culturally motivated, as CEBR and other figures suggest that such visitors bring more income, even when they do not stay longer. Joint ticketing across Burns attractions in both Ayrshire and Arran and Dumfries and Galloway was mentioned by some respondents: the idea of a 7-day Burns Pass or similar (possibly in combination with other promotions, such as lunch discounts at Burns related pubs or a Naturally Burns 48-hour tour) for visitor attractions in Ayrshire and Arran and Dumfries and Galloway, to increase traffic to small and less visited Burns sites) was seen as beneficial to widening the spread of visitors from major attractions such as the Birthplace Museum to some of the adjacent but much less

visited attractions. It should be noted that there is existing good practice in this area already.

The example of Mozart and the high-level national strategy pursue to develop his brand value in the recent past is a major example of best practice in cultural tourism linked to an individual figure.

It is *recommended*

(i) That the example of Mozart, and the work of Vienna, Salzburg and the Austrian Government in developing him into a multi-billion dollar industry should be investigated in greater depth by or on behalf of the Scottish Government's Culture, Tourism and Major Events directorate, with a view to spreading best practice with Respect to Burns and other Scottish cultural figures vital to tourism, e.g. Mackintosh.

(ii) The Scottish Winter Festivals website provides a list of links to or details of Burns Suppers (supplied by the Centre for Robert Burns Studies and the Robert Burns World Federation) which would welcome January visitors to Scotland and the Burns Scotland partnership consider further ways in which their wide range of Significant Burns-related collections could be monetized.

**Connectivity Focus*

4 **UNESCO Biosphere/Year of Coasts and Waters 2020**: as both South Ayrshire and Galloway lie within a UNESCO Biosphere and as Burns is a Romantic poet of unspoilt nature - or of the threat of its spoliation as in '*To a Mouse*' or '*To a Mountain Daisy*' - it is *recommended* that

i) Further steps are taken to promote the UNESCO Biosphere, and that the MAB (UNESCO Man and the Biosphere) programme should incorporate Burns as a key global poet of the relationship of humankind to the biosphere, in areas ranging from his opposition to blood sports and complex plant symbolism to his understanding of the '*social union*' between humankind and nature.

ii) In addition, possibilities exist for the further integration of Burns into both Edinburgh and Glasgow UNESCO City of Literature/Music.

iii)Consideration should be given to integrating Burns tourism (Burns at Ellisland, in Irvine, Burns the Exciseman, Burns the poet of rivers and waterways) to the Year of Coast and Waters in 2020 under a highlight for Round 44 funding, closing 7 February 2020, for events from August 2020 onwards. Burns can easily be linked to nature and food and drink related tourism.

iv) It is *recommended* that the local authorities in Ayrshire and Arran and Dumfries and Galloway working with the Ayrshire Regional Economic Partnership, the South of Scotland Development Agency and the team administering Year of Coasts and Waters give consideration to embedding the story of Robert Burns and the visitor attractions associated with him more closely into the environmental/biosphere branding of the Ayrshires and Dumfries and Galloway.

5 **Profiling core appeal in Ayrshire and Arran and Dumfries and Galloway:** The data for the strongest associations visitors have towards Ayrshire and Arran (where Burns came top across all visitors) is now nearly ten years old and comparable work does not appear to have been carried out for Dumfries and Galloway. Burns trails, while often excellent, do not link easily to high quality local produce, accommodation and retail and catering outlets, while the current very good Dumfries Burns trail does not include reference to Burns sites in the environs of Dumfries. Ellisland in particular is a site with significant potential. The development of a more integrated Burns trail across **all** the areas covered by the Ayrshire Growth Deal and SOSA was strongly supported by a range of respondents. It was

recognized that information respecting Burns and Burns-related sites should be integrated into information relevant to other areas, e.g. Ayr town centre redevelopment or a Greenock-Irvine John Galt related walkway and cycle path. The extent to which Burns is a motivation or point of recognition drawing visitors to the Ayrshires and Dumfries and Galloway should be undertaken as part of the Tourism dimension of Regional Deal development.

It *is recommended* that Ayrshire Regional Economic Partnership and the South of Scotland Enterprise Agency (SOSA)

i. Work together with local government to obtain up-to-date figures for the Burns-Related motivation for both visits in general and ONS visits to in line with the 2011 *Visitor Economy of Ayrshire* study, and applying both to Ayrshire and Arran and Dumfries and Galloway.
ii. Pursue an integrated approach to Burns trails, retail, catering and local produce in collaboration with local authorities, aiming to develop a unified Burns trail for the whole Burns Country of the Ayrshires and Dumfriesshire, promoting Catering, produce and accommodation outlets along the way in the pursuit of widening The circle of business-led inclusive job growth.

**Connectivity Focus*

6 **Signage and Infrastructure**: The Robert Burns World Federation and SoSEP both noted that improved signage off the M74 would be positive for a wide range of visitor attractions in Ayrshire and the South West, and that Burns was one of these. There are visitor numbers requirements for additional brown signage, but Burns attractions in Dumfries and environs are already over 50 000 visitors in aggregate. In the SOSA area, early closure of catering facilities and patchy provision of quality accommodation were both identified as barriers for overnight or long distance tourism.

Burns signage was repeatedly mentioned by a wide range of correspondents as it was strongly felt that the existing exit signage to Dumfries and Ayr does not promote tourism sufficiently.

In addition, Dumfries and Galloway respondents focused on a particular lack of Burns signage in their area, and there are individual areas of repeated concern, such as the signage at Ellisland, which is both unclear as to the focus and purpose of the visitor attraction, and does not give time for cars to slow and turn in to the exit off the A76. Improvements here would fulfil the focus on digital and infrastructure connectivity in the May 2018 meeting of the National Economic Forum.

It *is recommended* that Ayrshire Regional Economic Partnership and SOSA work together with local government to plan how improved signage and the highlighting of high quality infrastructure could support increased visitor numbers with longer dwell times.

**Connectivity Focus*

7 **School curriculum:** there was a widespread view (ranging from RBWF to BEMIS) that Burns was not - as other national poets might be - recognized and emphasized sufficiently in the school curriculum, and that this had the effect of diluting cultural ownership of Burns among younger demographics. Cultural ownership-as in the case of Mozart-is vital to the sustainability of cultural brands: we are the best salespeople for our own culture. RBWF members expressed interest in working with the Scottish Government on this, as they already carry out significant work in this area. In addition the Centre for Robert Burns Studies, University of Glasgow, indicated a willingness to consider the adaptation of their MOOC (massive open-access online course), which can exceed 10 000 registrations, to support Burns in schools (https://www.futurelearn.com/courses/robert-burns). While this Report recognizes that teacher discretion in pre S3 schooling makes specific recommendations challenging to implement, it nonetheless notes that RBWF volunteers

are undertaking extensive teaching on a voluntary basis outside the school sector and *recommends*

- That Education Scotland and local authorities spread examples of good practice in teaching Burns at the pre S3 stage
- That particularly in the core areas of Ayrshire and Arran and Dumfriesshire, local authorities continue to develop close links with RBWF

**Connectivity Focus*

8 **Burns as a Scottish icon** characteristic of the country's perceived character should continue to be promoted in books, images and merchandise, and via Scottish produce in events held through Scottish Government hubs abroad and in British Council offices as appropriate, and that plans should continue to be developed for the use of Burns to brand elements of External Affairs activity in the areas of culture, tourism and trade. It is noteworthy that Burns tourist site feedback includes persistent requests for more Burns-related stock and Burns mementoes. There is also an opportunity to develop synergy between international research and alumni events relating to Burns from the HE sector and the promotion of Scottish trade, produce and culture internationally by the External Affairs directorate, Scottish Government.

It is *recommended* that synergy of the above kind should be explored by the Scottish Government, working together with business, Universities Scotland and institutions hosting major Development and Alumni directorates at Scottish universities.

Other details *for noting by:* British Council, National Trust for Scotland Board, Burns Scotland and

External Affairs, Scottish Government.

**Connectivity Focus*

9 **The institution of a national programme/award** of '*Burns Humanitarian Ambassadors*' or similar for those engaged in leading in charitable and humanitarian work at home or overseas, to take further advantage of the relationship between the values expressed by the poet and those held to by symbolic of Scottish culture more generally in e.g. the Anholt-GfK Roper survey.

It is *recommended* that the Scottish Government gives consideration to marking Burns in this way as symbolic of the country's perceived values, working through the External Affairs directorate for the nomination and recognition of such an award, honouring Scotland's commitment to humanitarian values.

10 **Regional Inclusive Growth:** A number of other recommendations regarding RIG are attached in Appendix 2 below.

LIST OF PERSONS AND ORGANIZATIONS CONSULTED

Catherine Adair, East Ayrshire Council
Danny Anderson, Director, Zisys Events
Amazon
Lesley Annan, Economic Development Officer, Dumfries and Galloway Council
Annandale Distillery
Arran Distillery
Barwheys Dairy, Cheesemaker, Ayrshire
Belhaven Brewery
Shelley Bell, Economic Development Officer, Dumfries and Galloway Council
Black Bull - Kailyard Restaurant, Restaurant
Dr Valentina Bold, U. Stirling
Danny Boyle, BEMIS Scotland
Shalane Breen, Marketing Officer,Costley and Costley Hotel
Dr Rhona Brown, U. Glasgow
Eilidh Buchanan, Celtic Connections
Professor Trevor Buck, Adam Smith Business School, University of Glasgow
Burns Scotland.
The Robert Burns World Federation
Burns and the South-West. Homecoming Scotland, 2014.
Steve Callaghan, MD Eglingtoun Consulting
Professor Gerard Carruthers FRSE, Chair Burns Scotland and Co-director, Centre for Robert Burns Studies
James Chadwick, Partner, Grant Thornton
Clynelish Distillery
Jonathan Coburn, Director / Founder, Social Value Lab
Abigail Coia, Tourism Development for Ayrshire & Arran – Economic Development
Jessica Colman, Communications Manager, Penguin
Professor Calum Colvin OBE, University of Dundee
Juliette Cook, Team Leader, Dumfries and Galloway-Economic Development
Emily Copland, Tesco Customer Service
Allison Craig, Ayrshire Regional Growth Partnership
Bryce Cunningham, Farmer, Mossgiel Family Farm
Professor Michael Danson FRSE AcSS, Heriot-Watt University
Bill Dawson, Editor, *Burns Chronicle*
Karen Dick, Partnerships and Communities Officer, Creative Scotland
John Dobbie, Director and Founder Threepwood Fayre Ltd
Alastair Dobson, Managing Director, Taste of Arran
Fraser Dryburgh, Food & Drink, Scottish Government

Claire Earley, Communications Manager, Waitrose
Fairburn Hotel
Lisa Feige, Regensburg Whisky Now! Burns Suppers
Karin Finlay, Head of International Marketing, Scottish Government
Jim Galloway, Head of Enterprise and Innovation, City of Edinburgh Council
Amy Garbutt, Head of Consumer Media Relations, Asda
Chloe Gibbs, Head of Trade and Tourism, Office of National Statistics
MSP Kenneth Gibson, Member of Scottish Parliament, Scottish National Party
Brian Goldie, Senior Vice-President, RBWF, 2018-19
Stuart Graham, Hirewear Manager, Slater's Formal Hire
Professor Russel Griggs OBE, Chair, SoSEP/SoSA
Fiona Hain, Branch Manager, McCall's Dundee
Moira Hansen, U. Glasgow
Kieran Healey-Ryder, Whyte & Mackay
Natalie Hemmings, Regional Economic Data, Scottish Government
Helen Henderson, Membership Manager, ASVA
Eileen Howat, Chief Executive, South Ayrshire Council
Simon Howie, Howie's
Fiona Hutchison, Interface UK
Dr David Hopes, Head of Collections, National Trust for Scotland
Dr Atsuko Ichijo, Reader in Politics, Kingston University
Martina Jamnig, Director at ANTO Austrian National Tourism Office Tourism, Austrian Government UK Office
Jim Johnstone, Service Lead-Economic Development, South Ayrshire Council
Thomas Keith
Dame Barbara Kelly, South of Scotland Economic Partnership
Andrew Kerr, CEO, City of Edinburgh Council
Laura Kerr, Cultural Planning coordinator, South Ayrshire
Douglas Laing, Douglas Laing Whisky
Lee Landenberger, President, Burns Club of Atlanta
Fiona Lees, CEO, East Ayrshire Council
Professor John Lennon, Assistant Principal (Business Development), Glasgow Caledonian University; Director, Moffat Centre
Nicolai Løken, Secretary, The Caledonian Society of Norway
Professor Kirsteen McCue, Co-Director, Centre for Robert Burns Studies, U. Glasgow
Amy McCusker, Owner, WeeBox
Jane V. MacDuff, House of MacDuff
Professor Alan MacGregor, U. Glasgow and Ayrshire Growth Deal REP

Linda Currie McGuire, Secretary, Caledonian Society of Arizona
MacGregor & MacDuff Kiltmakers
Ian Macintyre, President, Robert Burns World Federation, 2017-18
Gordon Macintyre-Kemp, Business for Scotland
Karen McKay, Carluke
Dr Pauline Mackay, Lecturer in Robert Burns Studies, University of Glasgow
Jaclyn McKie, Marketing Manager, Arran Distillery
Margaret McNeil, Director ETAG, Edinburgh Tourism Action Group
Alex McPhee, CFO and Depute CEO, Economy and Skills, East Ayrshire Council
Neil MacRae, Sales Manager, Strathmore Foods
James Macsween, Managing Director, Macsween's
Laura McVie, Museums and Galleries, Culture Service, City of Edinburgh
Graham Main
Marina Martinolli, Research Project Manager, Moffat Centre, Glasgow Caledonian University
Craig Miller, Commercial & Visitor Services Manager, Edinburgh Museums and Galleries
Ken Montgomery, President, Robert Burns Association of North America
Gordon Morrison, CEO ASVA
Murdo Morrison, Robert Burns World Federation
Diana Morton, Access Manager, Edinburgh Museums and Galleries
Thomas Mungall, Caledonian Society of Baton Rouge
Martin Murray, Rock Rose Gin
Ncn'ean Distillery
Fiona Nicholson, Tourism Development Officer, East Ayrshire Council -Planning & Economic Development
Bill Nolan, President, Robert Burns World Federation, 2018-19
Ronnie O'Byrne, Director, RBWF Canada
Ann O'Lone, Visitor Centor Manager, Torabhaig Distillery, Skye
James Park, Head of Economics, Scotch Whisky Association
Milana Petrovic, Oxford University Press
Pollok Williamson Butchers, Butchers
Donald Reid Editor at The List – Lecturer in Gastronomy at Queen Margaret University
Gillian Richardson, Co-ordinator, Edinburgh Tourism Action Group
Fiona Richmond, Scotland Food and Drink
Jacqueline (Jakki) Ross, Economic Development-Tourism, Events & Marketing, South Ayrshire
Aleksander Sarac, Dewars Whisky

Patrick Scott, Emeritus Professor, University of South Carolina
Gayle Shankey, Visitor Centre Manager, Dallas Dhu
Frank Shaw, Chief of the name of Shaw in the USA, editor, *Robert Burns Lives!*
Hugh Sheridan, Research Assistant, Moffat Centre for Travel and Tourism Business Development
Marc Sherland, Junior Vice-President RBWF, 2018-19
Ian Sirrell, Scottish Government
Emily Smith, Singer -Composer
Robert Singer, Creative Director, Fresh Ayr CIC
Ian Sirrell, Scotland's Winter Festivals, Scottish Govt
Gavin Stevenson, Chief Executive, Dumfries and Galloway - Economic Plan
Leslie A. Strachan, Director, RBWF USA
Susan Tackenberg, Media Consultant, Frankfurt
Christopher Tait, Robert Burns Live
Sheilagh Tennant, Burns Unbroke
Christopher Thomson, Scottish Government
Leon Thompson, Visit Scotland
Beverley Thomson, Office Manager, RBWF
Professor David Thomson, CEO Annandale Distillery
Guillame Tiberghien, Lecturer in Tourism, University of Glasgow
Professor David Thomson, MD, Annandale Distillery
Martina C. Trummer, Press and PR Manager, Austrian National Tourism Office
Salzburg Information
Vittoria Group
Mags Watson, Team Leader – Business Support, East Ayrshire Council - Economic Development Service
Amanda Watt, Corporate Buying UK, Aldi
Adam Wilkinson, Director, Edinburgh World Heritage
Howard Wilkinson, Chair, Ayrshire Food Network
Peter Wilson, CEO Great Scot International, North Carolina
Brian Wilton MBE, Managing and Tartan Design Director, Tartan Ambassador, Perth
James Withers, CEO, Scotland Food & Drink
Derek Wright, Director, Wordsworth Editions
Jo Wright, Marketing/Sales, Oran Mor
Nichol Wheatley, Artist – Painter
Karen Yeomans, Executive Director for Economy and Communities, North Ayrshire
Dr Ronnie Young, University of Glasgow.

Appendix 1: Input-Output Tourism modeling

With regard to assessing the economic impact of Tourism, the standard methodology consists of an evaluation of the effects of direct expenditure, multiplied by a factor which reflects the indirect effects of such expenditure (for example via the supply chain in goods and services) and their induced effects (the spending of income from jobs generated by direct and indirect effects, and the effects of economic activity arising from these). Against these factors must be set leakage outside the economy of the area (by tax, staff spend and so on), the displacement of other expenditure into tourism, and the related allowance for 'deadweight' expenditure which would have been unnecessary to achieve the measured impacts. Opportunity costs are also important, including such factors as land occupied by tourist centres or car parks and environmental costs arising from (for example) pollution, congestion and intrusion, especially when seasonally intense. There are however also longer-term benefits to consider, such as arise from the presence of a wider range of local facilities and services than might otherwise exist, which can come under the heading of 'additionality', the extent to which a benefit occurs as a result of an intervention or investment that would not have occurred otherwise. Such benefits can include long term benefit to the housing market in terms of both desirability and price, such as has occurred in and around Alloway. This phenomenon is sometimes described as 'hedonic pricing'. A distinction should also be made between temporary effects relating to specific investment (for example employment in construction) and longer term additional expenditure.

While Tourism Satellite Accounts (TSAs), the World Trade Organization international standard for the national accounting of tourism, have tended to bring and uplift to the overall GDP figure attributed to tourism (from 2.5 to 4.1 per cent in the case of Canada for example), it remains the case that economic impact studies tend to be local and measure different things from macro-economic impacts, and that it is difficult to reconcile them in methodological terms. In more recent years, this has contributed to the adoption of more conservative multipliers and the attribution of a greater percentage of leakage and displacement spend in local goods and services and domestic visitor expenditure. There is an argument that the attribution of 100% or close to 100% displacement for day visitor spend is too conservative, since repeated surveys have shown that consumers spend more in holiday mode, but a conservative approach is certainly warranted. In terms of public investment, proving additional benefits which transcend these- additionality-remains a vexed question. Combined multipliers deriving from the tourist industry are generally higher: up to 1.42 in localities, or 1.68 in Scotland as a whole. Even higher multipliers are sometimes used: for example 1.8 by Myerscough in Glasgow cultural spend and sometimes figures above 2.0 for capital expenditure.

Tourism multipliers are used to indicate the amount of change in an economic benefit variable (typically output, income or employment) generated by a given amount of tourism expenditure in an area. These may however indicate many more than two rounds of economic turnover, due to leakage. The input-output model continues to be the dominant means of assessing the economic effects of tourism income, though it lacks elements of dynamic responsiveness in a number of areas. The main multipliers used in economic impact assessments are the output, employment and value-added or income multipliers. The output multiplier measures the increase in level of economic activity in the region as a result of direct tourist expenditure. The employment multiplier is the ratio of the direct and secondary employment created by extra tourist expenditure. While the value-added or income multiplier measures the total amount of income left after leakages (such as savings, imported goods and services, taxes etc) have been accounted for. This is the most accurate level as it measures the income left in the region after the increase in economic activity due to tourist expenditure.

The overall outcome usually presents economic impact as a multiplier of initial direct spend; this might provide an uplift of 1.73 (multiplier 2.73) in a UK context, but only 0.2-0.5 (multiplier 1.2 to 1.5) in a local context, for reasons including the leakage of indirect and dispersal of induced effects. It has been long established that large and diverse cities, regions and countries have higher multipliers as the larger the area in terms of size, population and economic heft, the smaller the leakage outside it. Large diverse economies producing a variety of goods and services themselves will retain more benefit from tourist spend as what it purchases can be produced within the area under study. City and county multipliers range from 1.19 to 1.44 in the UK. As might be expected, more isolated cities appear to have a regional level effect in their multipliers.

The International Recommendation for Tourism Statistics (IRTS) identifies three methods used to estimate the total economic impact of events. Input Output (IO) modelling and Computable General Equilibrium (CGE) models are two of these. The aim of both is to calculate multipliers. The value of the multiplier informs what the total economic impact (i.e. direct, indirect and induced effects) is given a £1 increase in visitor spend.

The final method stated in the IRTS involves using previously calculated multipliers from relevant studies. It has become regular practice for regions to use previously calculated multipliers to evaluate events in their economies. This is mainly due to the complexities and heavy data requirements of the both IO and CGE approaches. However, there are risks involved with this method which can seriously undermine the accuracy of the economic impacts calculated. For instance, there could be differences in the sizes of the regions in question. Applying a Scottish multiplier to an English county, such as Cornwall, is likely to produce erroneous results. The Cornish economy, being smaller, is more likely than Scotland is to import goods and services from other regions. Therefore, any expenditure by visitors in Cornwall is more likely to leak out of the economy, than would occur with spending in Scotland (assuming Scotland imports less as a proportion of its GDP). Hence the Cornish multiplier, if calculable, would be smaller than the Scottish one. If this is the case, then using a Scottish multiplier in the Cornish region will overestimate the economic impact of increased spending.

Similarly, even if the regions are similar in size, they are likely to be different in structure. One regional economy may produce tourism goods that tend to use domestically produced inputs in their production, while another might produce tourism goods that predominantly use imported goods in its production. The difference will lead to a multiplier for tourism goods which will be higher in the former. Therefore, proper examination of the structural composition of the economies in questions should be undertaken before performing this type of analysis.

Finally, the case can arise where a study makes use of a multiplier calculated many years before the current period. This can cause numerous issues, and will tend to reduce the accuracy of the estimates produced as the time period between the IO tables being produced and the analysis being conducted increases. The reason is that economies are constantly evolving over time. Technology improves, prices fluctuate and demands change. This means that the supply-side links that determine the indirect impact are likely to change from year-to-year.

With regard to the current study, it should be noted that Input-Output (IO) models are often deemed to be effective only for the study of areas above a certain population or level of employment: a figure used in Australia is a total employed number of over 10 000. Therefore individual figures from smaller Festivals or events may diverge considerably.

1.1. A Note on Economic Impact Studies in general

Economic impact studies are commonly used across sectors to evaluate (or justify) spending on particular investments. However, there are a number of problems and limitations with commonly employed approaches.

Economic impact studies have been challenged on many fronts, including their element of advocacy: the move of the San Francisco Giants baseball franchise to a new stadium in the 1990s was famously estimated to have a value of between $3M and $150M in the 1990s, depending on who was doing the (ac)counting. One of the most important elements to identify is that of displaced spend, and this is highest with day visitors. Estimating the economic impact on the basis of equality in visitor spend and not factoring in displacement spend are two of the major elements leading to unduly optimistic impact figures. Input-Output models can assume that resources, such as labour, land and capital, flow freely to the tourism and related industries. These resources are effectively assumed not to depress output elsewhere. Input–Output (IO) and multiplier techniques are therefore frequently identified as counting the positive influences on economic activity, but ignoring the negative influences. These negative influences are held by some to on occasion even outweigh any positive effects. As a result of this and other identified limitations to IO models, other models such MGM2 (Number of visitsxSpending per visitxEconomic Multipliers), Computer Generated Equilibrium (CGE) and Social Accounting Matrices (SAM) have all been developed, though both of these can be too data hungry to be practicable, although they may give superior results if the model accesses comprehensive information. The STEAM model is a simplified form of IO which has a claimed confidence margin of 10% in terms of annual data and 5% in terms of trend data. Data from both IO and STEAM reports is used in this Report: awareness of a number of areas in risk in IO data will also be utilized in order to provide a fairly conservative reading of Burns’s value.

In terms of minimizing risk to IO models, the following are important:

- Exclusion of local residents from EIA calculations
- Excluding those for whom spend on the visit is a displacement
- Careful interpretation of employment measures
- Awareness of characteristics, size and nature of area to be measured, in order to better measure leakage and out of area supply chain effects in connexion with induced effects in subsequent rounds of expenditure
- Opportunity costs (e.g. land use for visitor centres, car parks)
- Investment activity arising from CAPEX expenditure on new facilities
- Environmental impacts
- Increasing the range of local facilities and services which would not otherwise exist

Location Quotients (LQs) are also important. Thus if a region devotes 20% of its employment to an industry, but the nation devotes 25% of its employment to that industry, the LQ would be 0.8, meaning that the region was only 80% of self sufficiency in the output of that industry and would have to import 20% of its requirements of the output of that industry. The import propensity would be 0.2 for that industry.

This study has borne these issues in mind, and rectified them through allowances in the broad measures used where possible, recognizing in particular the issues an IO study must always have with larger scale corporate displacement and the 'negative effects of decreased output in other industries, due to the scarcity of resources inherent in an economy. An output increase in one industry invariably draws resources away from other sectors, reducing their output' (ONS). Consumption is also diverted from other industries, including industries which may have a higher GVA than the tourism industry. Among lesser factors is the minor impact of large numbers of overseas visitors on the exchange rate, which may affect export industries at the margin. It is therefore important to present every model with a degree of caveat. Earlier figures suggest that every £1000 spent by UK resident tourists in Scotland generated £346 in income to the local economy and £127 to the rest of Scotland (Scottish national multiplier 1.47, locally 1.35).

Appendix 2: Regional Inclusive Growth

POLICIES & STRATEGIC OBJECTIVES

This document provides an overview of how to evaluate the impact of Robert Burns in the Regional Inclusive Growth and its relevance within Economic Regional Partnership for Ayrshire and for Dumfries and Galloway. This research should produce a *baseline* that can be used to :

- *Assess the impact of Robert Burns in both regions* – through the collation of data and interviews with wider stakeholders.
- *Develop a measurement framework* to monitor the impact of Robert Burns over the long-term.

The Scottish Government plan for Regional Economic Partnerships aims to facilitate Regional Inclusive growth and to create a sustainable, productive, and competitive economy. (Scotland's Economic Strategy, 2015). East, North and South Ayrshire Councils, and Dumfries and Galloway council all recognise the importance of an Growth Deal[60] or Regional Economic partnership[61] , anchored in a commitment to :

- Attracting and developing more innovative companies with higher levels of productivity
- Developing key infrastructure and supporting Supply chain
- Positioning the regions as the 'go-to' region for Investment and smart manufacturing;
- Improving key elements of digital infrastructure;
- Empowering communities to raise job opportunities and to improve skills

This report puts the hypothesis that Robert Burns can be a driver for both Ayrshire's and Dumfries and Galloway's Regional Economic plan; especially in terms of positioning the regions, developing Key infrastructure and creating opportunities in the communities. This can be operated within the parameters of a Tourism framework (Cultural and Historical Heritage, Food and Drink Tourism).

[60]North Ayrshire Council (7 November 2018) The Ayrshire Growth Deal

[61] Dumfries and Galloway, Regional Economic Strategy 2016-2020

DIAGNOSTIC & CHALLENGES

The impact of Robert Burns in Ayrshire and Dumfries and Galloway

The connection of Burns with Ayrshire and D&G is strongly promoted to a national and International audience and is to lever maximum benefit to the inclusive growth of the region. These areas are dimensions in which Burns-related projects, companies or organizations can be developed in a three key challenges:

1. Community outreach
2. Retail and Produce scheme
3. Burns Food Tourism Scheme.

As a matter of fact, in a 2015 Scotland Visitor Survey (carried by Jump Research for Visit Scotland), the reasons to come and the activities undertaken in Ayrshire and the Isle of Arran shows a high score for value for money of eating out and availability of local produce: **Food and Drink, and Culture and heritage product are a key driver of the tourism offering**. Robert Burns is already widely featured in tourism and event activity across the local authority areas: Burns Fest and Big Burns Supper. Burns as an attraction to Ayrshire and D&G is a key element of regeneration activity throughout the area and it is difficult to envisage incremental activities which could significantly increase revenue streams that have not already been realised (Alex McPhee, Interview 2019).

Productivity and Market Trends

Taking into consideration the different objectives planned in the Regional Economic Partnership for a regional Deal, a Burns based strategy can be implemented within the parameter of a Touristic framework. However, in regards with the evolution of the Tourism Market as enhanced by Visit Scotland Insight Department, a Burns project has to adapt the recent trends in terms of Touristic experience. The main difficulty is to adapt a 18th century figure to a 21st century market.

Visit Scotland's Insight Department shows that the Wellness Tourism, Educative and Immersive Experiential Tourism[62], Craftsmanship, Artisanal

[62] The Burns Cottage is a good example, as the experience in the Burns Cottage is not developed enough in terms of Experiential tourism. Experiential tourism is an outgrowth of

products are booming and more embedded within consumer expectation. These trends point towards the direction to what extend a Burns Inclusive strategy should be elaborated: finding partners, suppliers and stakeholder that could aid the Burns strategy to achieve these new requirements.

VISION & OUTCOME: NETWORK AND COMMUNITY OUTREACH

Burns Community as a Dynamic Channel to promote Burns

Part of the impact of Burns relies on the relation between different groups connected more or less with Burns : the Burnsian Community.

Based on our survey 'Robert Burns in the Scottish Economy'[63], the profile of a Burnsian is mostly male (59%), aged above 45 (22.87% between 45-54, 22.87% between 55-64, and 37.23% above 65 +) with a Higher Academic Background (36.36% have Higher Degrees include Doctorate and 27.27% are Postgraduate), and Academic or Educational occupation with a gross weekly full time income around more than £700 for 19.79% between £ 500 – 599 for 10.16%). They are for a large part members of Scottish Cultural or Historical association (30.97% members of NTS), or Burns related (52.905 members of Burns Club and 25.81% members of Robert Burns World Federation); and are more likely to have experienced any Burns related events (Conference 40.78%, Burns supper 93.30%).

The Burnsian Community is more likely to be main driver of Burns Inclusive strategy: Burns clubs members, Burns related product consumers, Burns attractions Visitors, Founder of Burns' project or sponsors and donators.

---

a global movement toward experiential learning, whereby people create meaning through direct experience. This conveys the idea of greater immersion, for a more local experience or a more "authentic" one (with comedians, participation from the public). The goal is to more deepen the travel destination's culture, people and history, not only by visiting it, but by connecting it with locals (partners, entrepreneurs) who impact on Experiential immersives (see Scottish National Heritage Partnership Report (2019): https://www.gla.ac.uk/schools/humanities/research/informationstudiesresearch/researchprojects/scottishnationalheritage/, pdf downloadable from the site.

[63] The survey 'Robert Burns in the Scottish Economy' aimed to measure the brand value of Robert Burns in the Scottish Economy. It has been designed by Dr Joel Ambroisine for the current project.

A Burns Inclusive Strategy should use the Burns Community as a dynamic channel and promotional instrument: Website, Social media, Networks, Local events.

Burns Institution as an Instrument to reach Communities and to provide a wide range of services

Burns related projects benefit wider communities. In the larger extent, the vicinity of Burns Institutions also benefits from the exposure and the investment.

As an example of good practice, the **Robert Burns Birthplace Museum** provides quality learning experiences (School visits or Conferences, Workshops, talks at the RBBM), the **Burns Cottage** offers experiential visits, and the **Robert Burns Centre** in Dumfries hosts a wide range of events. Burns institutions aim to connect with large diverse audience of all ages and abilities reaching out across social, cultural, financial and physical barriers, in order to create meaningful engagement. For instance, RBBM supports a diverse range of programmes. The RBBM develops programmes in partnership with charities, NGOs and education establishments, supported by the Scottish Government and Scottish Natural Heritage

Burns institutions should be encouraged to reach out to communities, to provide services, to create new partnership, and to host local events

VISION & OUTCOME : PRODUCE SCHEME AND BURNS TERROIR

Burns's institutions are local economic drivers and Robert Burns an asset for Local Suppliers, producers, artisans, Craftsmanship and Creative industries. There are many examples of product from the area and other part of Scotland using the figure of Robert Burns.

A good example of Business Model is Robert Burns Birthplace Museum that attracts different suppliers and offers a large range of products from local suppliers and crafters: Threepwood Fayre Ltd who supplies RBBM with a wide range of confectionery, jewellery by local crafter Anne McFarlane[64], from Maidens; framed art by southbeach designs and handmade items by Fiona Rogers based in Troon; the Café 'Bard's bakery' also works with local suppliers. Local suppliers identifies the RBBM as a significant source of revenue.
In the same way, Burns-themed Artwork is also a relevant material for partnership with the creative industries (e.g. work such as Calum Colvin's *Burnsiana*[65], Steven Brown's *Rabbie Burns*[66] and Nichol Wheatley 10 mural Tam O'Shanter paintings commissioned by Oran Mor for the Burns Supper)

Burns institutions could be at the centre of a Burns Network that enlists local suppliers and promotes more opportunities for local produce and Burns themed products to be sold or placed within the premises (Shops, Bakeries, Art Galleries, Exhibitions, Craftsmanship and Workshop). See Recommendations 2 and 3, Main Report.

Examples of further development include Burns related education and Art project with School and College (e.g. Ayr College), organising local sponsorship for Burns events, using a Burns Heritage Kitemark to promote new artists and projects, and improving Burns product placement through specific artefacts and produce

A review of promotional material from 35 Ayrshire based entrepreneurs along with 40 associated B&Bs[67] demonstrates that future development and more

[64] http://www.finelinearts.co.uk/page3.htm

[65] http://www.calumcolvin.com/Burnsiana.html

[66] https://www.stevenbrownart.co.uk/search?q=rabbie&type=product
[67] Ayrshire Food Network launched in November 2002, has increased to 35 Ayrshire based food and drink producers and providers, along with 40 associated B&Bs *working together to promote the produce, culinary and food tourism delights of the area.*

investment can be made in the value of Burns. Very few members promote Burns for attractions to visit or function hiring or use the Burns brand in their speciality offers and products. Instead, local entrepreneurs use other incentives to attract customers and visitors, and the image of Burns is relegated behind other trademarks such as Biosphere or events: Food and Drink award, Tourism and Nature awards, Golf tour and so on

Local entrepreneurs should be encouraged to use their own platform to promote Burns events (Calendars of Burns Festival) and attractions (Burns place to visit) in the area. A more efficient use of Robert Burns Heritage should be encouraged in their offers and packages.
These Burns themed produces can be promoted within the framework of Food and Drink Festival, Food and Drink or Tourism forums, e.g. BBC food show, Scottish Speciality Food Show, Royal Highland show, Tourism International symposium, Creative industries Forum, etc.
These are positive platform for business development around Burns through the supply and usage of locally sourced.

VISION & OUTCOME - BURNS --TOURISTIC SCHEME

Reviews of recent projects demonstrates that a Tourism Food and Drink Scheme is the best way to convey these approaches. Example of projects such as the Robert Burns Trail (Ayrshire and Arran Tourism) or Robert Burns Food and Drink trail (The List Ayrshire Larder Food Maps) demonstrate a common strategy to promote local suppliers, producers and entrepreneurs related to Burns. However, key elements that construct the Route scenario are underexploited. Only 10 key elements are comprised on the Burns Food Route. Different examples of route show good practices and how to develop the Burns Route.

PROMOTE AND COMMUNICATE TO A 21ST AUDIENCE - THE CASE OF THE COIG

The Còig is an on-going tourism route initiative[68] (which develops five routes), and it is an opportunity for entrepreneurs to gain promotion, and to develop their businesses. Scottish National Party MSP for Cunninghame North Kenneth Wilson advised that '*the Còig—the Five—is expected to attract an additional*

[68] https://thecoig.com/

80,000 visitors to North Ayrshire next year, supporting 168 jobs and allowing for an extra £4.5 million of economic impact'[69].

How to extend the impact Visitors attraction number: The Case of SouthWest Coastal 300

The **South West Coastal 300** route in South West Scotland is a drive of 300 Miles that includes a multitude of interesting towns and villages. The connection between South West Coast to Burns themed Heritage in Dumfries and Galloway and Ayrshires should be to the benefit of local suppliers and entrepreneurs located on the extended Route.

HOW TO BUILD A STRONG MARKETING STRATEGY : THE CASE OF THE NORTH COAST 500-

The NC 500 Route had a significant image and economic impact on the North Highland[70]. Evidence estimated a 10%-20% increase in trade among North Highlands tourism business. Marketing strategy has been built towards specific segments e.g 'Food-loving Culturalists', along with the improvement of Road Infrastructure that facilitates traffic.

Existing Burns tourist highways should be designed to connect to more local enterprises to provide more business and employment opportunities, to access different market niches and to attract more investment.
Further development could increase the list of Key elements; increase access to Burns institutions (extension of opening hours, extension of Burns season, transport, shuttle, etc); extend from the route from Ayrshire to Dumfries; diversifying the range of partners to open to new and innovative projects; using a visible common platform: Social media, Mobile Application, Burns experiential Historical / Food immersion

[69] Kenneth Gibson [18 June 2019] in COIG Tourist Trail in the Scottish Parliament, Transcript in https://www.theyworkforyou.com/sp/?id=2019-06-18.13.0 [accessed 26/06/2019]

[70] Mc Tier A., MacDougall L., Sutherland V. (March 2017), North Coast 500 Baseline Study, Final Report, Training and Employment Research Unit, University of Glasgow, Glasgow

SUSTAINABILITY OF THE BURNS BRAND IN THE CONTEXT OF TOURISM AND RETAIL

The durability of Burns Brand Equity in Scotland's reputation

The main promotional driver of a Robert Burns Brand is the Burns Supper around the world, its potential can decrease alongside with the decline of Burns clubs or Scottish Cultural association (such as Caledonian societies, St Andrew's association). The change in the demand for Robert Burns Brand is also subject to its competitiveness compared to its competitors.

The viability of a Burns Brand in the context of Retail and Tourism

Tourism and food and drink are two of the three largest industries in Scotland & reflect a highly visible national Scottish brand in the global marketplace. Cultural tourism in particular is highly beneficial to maximise its leading international position. Scotland possesses numerous powerful images, symbols and other stimuli which consumers may respond to in different ways, so the figure of Robert Burns will certainly have a relevant impact on the consumer's behaviour. However, few entrepreneurs have an effective use of Burns image or Heritage, and use other trademark. Furthermore, the image of Burns can also be diluted due to the various aspects of his life (from Farmer to exciseman, Poet and Humanist). Adding that Scotland is always represented with specific image such as Tartan, the Local Supply chain needs to be supported and promoted with new derivatives.

The construction of a Burns assets or Burns Brand equity is at the very centre of historical, cultural, Economical and geographical perspective. A coordinated and monitored use of Burns should strengthen the connection between the supply chain. Burns can only be part of the evolving Economic development only if it embraces the recent trends.

Although a strong emphasis on Scottish product, Traditional cultural figures, Tartan, etc might not be an effective promotional material for entrepreneurs and producers, it has a positive impact on the consumers. An emphasis on the connection with Burns should appeal to consumers and visitors.

Forecast: Tourism, Retail and Food Drinks are key sectors in terms of employment

Part of future investments should be concentrated on how to implement Burns related product and services into a Ayrshires and Dumfries and Galloway Tourism/Produce scheme. Forecast from Skills Development Scotland shows that Retail, Food and drink and Tourism are key sectors.

The implementation of Burns in a touristic and Produce scheme (Terroir) would facilitate emergence of stakeholders and local actors. In fact, the major strategy for the Ayrshires and D&G to develop their own Regional Economic and Inclusive plan could be designed as a produce-scheme.

ROBERT BURNS INCLUSIVE STRATEGY -KEY RECOMMENDATIONS –

Policies & Objectives	Diagnostics and Challenges	Vision - Dimensions	Key Priorities	Monitoring Key Actors & **operational measures**
Developing key infrastructure and supporting Supply chain	Low interaction within the supply chain. Community mapping shows an inequality of opportunity to benefit from Burns Historical Landmark and Burns related investment	Retail and Produce scheme	Burns' institution should be at the centre of a Burns Network that enlists local suppliers and promote more opportunities for local producers and Burns themed product to be sold or within the premises (Shops, Bakeries, Art Galleries, Exhibitions, Craftsmanship and Workshop).	Burns Institutions Burns Federation and Clubs Local Authorities **Mapping & Cataloguing the network by:** **Sectors (Art, Tourism, Food, Retail, Craftmanship, Education, etc)**
Empowering communities to raise job opportunities and to improve skills	Lack of opportunities (Skills, Training, Jobs, Projects) Community mapping shows an inequality of opportunity to benefit from Burns Historical Landmark and Burns related investment	Community outreach Retail and Produce scheme	Further development should be: • to pursue Burns related education and Art • project with School and College (e.g. Ayr College), • to organise Local sponsorship for Burns events	Burns Institutions Burns clubs Educational Institution Artists Creative industries platform (Fresh'Ayr) **Workshop in Burns Premises or in Education institution**

			• to use Burns Heritage Landmark to promote new artists and projects • to improve Burns product placement by kitemarking specific artefacts and products	**Conference Burns themed School project (involving NTIC and Social Media)** **Art Exhibition Burns themed or Other Local Artefacts produce placement**
Attracting and developing more innovative companies with higher levels of productivity Positioning the regions as the 'go-to' region for Investment and smart manufacturing	Poor use of Burns equity / Burns asset in the development of local products, produces and services	Community outreach Retail and Produce scheme	Local entrepreneurs should be encouraged to use their own platform to promote Burns events (Calendars of Burns Festival) and attractions (Burns place to visit) in the area. A more efficient use of Robert Burns Heritage should be encouraged in their offers and packages (Burns packages that include local produce (Ayrshires potatoes,	Local Burns clubs RBWF Local authorities Local suppliers network (Chamber of commerce, Ayrshire Food network) **Coordination of Burns marketing material: Burns Logo** **Coordination of suppliers based on packages and offers (e.g. Distilleries + Local Potatoes producers + Local Butchers**

			Haggis from local butchery, Whisky from local distilleries Annandale, Arran, etc, function hiring for Burns supper).	**= Burns Supper package) Proposition of Burns themed product Publicity on Suppliers platforms and social media**
Positioning the regions as the 'go-to' region for Investment and smart manufacturing	Poor use of Burns equity / Burns asset in the development of local products, produces and services	Community outreach Burns Food & Tourism Scheme	These Burns themed produces can be promoted within the framework of Food and Drink Festival, Food and Drink or Tourism forums, e.g.BBC food show, Scottish Speciality Food Show, Royal Highland show, Tourism International symposium, Creative industries Forum, Etc	Burns Institutions Local Authorities **Burns themed products to present in national events and forums (Tourism forums, Food Festival, etc)** **National Tourism, Food and Drink events to be organised in Burns Premises (e.g. RBBM or RB centre in Dumfries, Ellisland Farm)**
Developing key infrastructure and supporting Supply chain	Community mapping shows an inequality of opportunity to benefit from Burns Historical	Community outreach Retail and Produce scheme	Food network, Farmers market, Hospitality and Hotels industry etc. are positive platform to	Burns Institutions Local Suppliers **Coordination of suppliers**

Positioning the regions as the 'go-to' region for Investment and smart manufacturing	Landmark and Burns related investment		encourage positive business development and usage of locally sourced food and drink	**based on packages and offers** **Local Tourism, Food and Drink events (Farmers Market, etc) to be organised in Burns Premises (e.g. RBBM or RB centre in Dumfries, Ellisland Farm)**
Attracting and developing more innovative companies with higher levels of productivity Empowering communities to raise job opportunities and to improve skills	Reasons to come and the activities undertaken in Ayrshires and the Isle of Arran shows that a low score of range of activities in the touristic offering in the region	Retail and Produce scheme Burns Food & Tourism Scheme	Existing Burns tourist highways should be extended and connected to wider spectrum of Local trades in order • to provide more business opportunities, • to access different market niches and to attract more investment.	Local Authorities Scotland Food and Drink Tourism Editor e.g. The Larder Visit Scotland **Coordination of partners, suppliers and stakeholder that could aid the Burns strategy to achieve these new requirements (diversify the range of sectors involved in Trail: e.g.**

				Green and Environmental Industries, Biosphere, Innovative Start-up, experiential tourism) Extension of Burns Trail to SW 300 (connection Ayrshire / Arran/ Dumfries and Galloway)
Attracting and developing more innovative companies with higher levels of productivity Improving key elements of digital infrastructure Empowering communities to raise job opportunities and to improve skills	Burns project has to adapt the recent trends in terms of Touristic experience. The main difficulty is to adapt a 18th century figure to a 21st century market.	Burns Food & Tourism Scheme	• To include more local trades to the route, • to increase access to Burns institutions (extension of opening hours, extension of • Burns season, transport, shuttle, etc); • to extend the route from Ayrshire to Dumfries; • to diversify the range of partners • to open to new and innovative projects;	Local Authorities Scotland Food and Drink Tourism Editor e.g. The Larder Visit Scotland **Coordination of partners, suppliers and stakeholder that could aid the Burns strategy to achieve these new requirements.** **Extension of Burns Trail to SW 300 (connection**

			• to use a visible common platform:	**Ayrshire / Arran/ Dumfries and Galloway)**
Positioning the regions as the 'go-to' region for Investment and smart manufacturing Empowering communities to raise job opportunities and to improve skills		Burns Food & Tourism Scheme	Produce scheme should be associate to Touristic Route (Terroir) as the major strategy for the Ayrshires and D&G	Visit Scotland Local Authorities **Ayrshires and D&G Food and Drink scheme (trail or Produce scheme) with various theme e.g. Taste of Arran and "Burns' Land"**

Appendix 3: The Value of Burns the Brand

Branding 'Robert Burns'

An Economic model to value Robert Burns as a Brand

Introduction

Valuing Robert Burns as Brand Model requires two analytical approaches: to evaluate Burns as a set of assets and to define Burns as a Brand Equity. The purpose of this dichotomy is to determine the evolution of the commercial value (the Burns brand Equity) that derives from consumers perception of the Burns brand name for particular products, services, facilities and infrastructures (the Burns Brand Assets). The model evaluates the consumer perception in terms of their "willingness to pay" or more concretely how they perceive the cost of various Burns branded goods; and how much consumers will donate for a series of Scottish Heritage Landmarks related to the figure of the poet.

The hypothesis of the model is that Burns is strongly connected to Scotland's image and reputation abroad. The model mostly relies on the perception of overseas consumers; almost 15M overseas visitors have visited Scotland in 2018 (MOFFAT, 2019). This model is essential as it extrapolates the impact of overseas tourism on the Tourism and Retail economies in regions where the figure of the bard is strongly associated (300 706 overseas visitors have visited Arran and the Ayrshire and 77 495 Dumfries and Galloway) (MOFFAT, 2019). The large number of Burns attractions made these regions a relevant variable to adjust the model and to extrapolate the consumer's economic behaviour to the rest of Scotland's Tourism economy.

The model evaluates the Burns Brand to £139.1 M (at 2019 prices) with a progressive yearly value of 0.77%. It is safe to say that the impact of the Brand 'Burns' is as significant as any other Scottish imagery such as the Tartan and the Thistle. The Burns added value is sufficiently reliable to involve repetitive buying behaviours and overseas visitors' loyalty. However, the model implies that these behaviour and loyalty will certainly depends on the consistency of Burns related events such as the Burns supper, as they are intertwined with experiences related to Burns overseas. In fact the model used the way individuals experienced Burns as a determinant of their buying behaviour and their loyalty to the Brand. For instance, this model confirms that individuals who have attended a Burns Supper; or members involved in Scottish Cultural associations are more likely to buy Burns branded commodities. Thereby, the evolution of the demand for Robert Burns Brand is strongly connected to the way it is used as a promotional material for Scotland's reputation and offer. However, although the model is testing the effect of Burns experience on overseas loyalty, it did not interrogate the impact of Burns branded cultural goods (such as Burns related videos on Youtube, or other Burns cultural material) on the perception of the consumers abroad. In fact, based on survey's responses, it is also possible that viewing videos related to Burns on Youtube, or listening to Auld Lang syne can be as a powerful driver in the Overseas consumer's loyalty than attending a Burns Supper.

The 2018 Anholt-Gfk Roper national brand study has ranked Scotland in 16th position. The brand study shows that most of Scotland's reputation and image is reflective of a national reputation which was created in the period from 1740-1860. Within this framework, the National Bard Robert Burns has a global value as a brand, and this has a strong impact on Scotland's reputation and image within UK and overseas. Burns is believed to be an essential part of Scotland's reputation and a significant driver in the promotion of Scotland's image and economy.

Tasks of the study

The investigation is based on a series of two surveys; several meetings with stakeholders and professionals; interviews. It also relies on the review of several resources and papers on different approach of Branding evaluation techniques and models. These references go beyond the spectrum of the Economic approach, as it reviews Cultural Economics, Geographic, Business and Marketing, Management, etc.

The creation of this model is built upon different stages:

- Defining the different principles that define Burns Brand Asset and Equity
- Approaching the Burns' Community to understand how Burns is perceived
- Mapping the impact of Burns in terms of industries, Economic sectors, Market segmentation, etc (from the Food Industry to the Art, from Hospitality to Literature, from Local areas to overseas, etc.)
- Building a questionnaire that will provide evaluation instruments to measure the Brand Value (Multipliers, WTP coefficient, Brand Value coefficient)
- Analysis of methodologies to measure the Brand value

- Development of measurement model for Burns Brand Economic value in the Scottish environment / economy in order to :
    - Define earning generated by intangible and tangible assets
    - Define a brand value coefficient and/or review Existing Multipliers
    - Evaluate the progression of the Brand within a period of time

Model hypothesis

The purpose of this model is twofold:

(1) It identifies the impact of Robert Burns as a Brand on the Scottish economy. This dimension attempt to evaluate the tangible and intangible assets of a Brand Robert Burns **{BUR_{ASSET}}**, identifying what constitutes the value of these assets.

(2) It forecasts the potential value and the sustainability of the Robert Burns Brand Equity **{BUR_{EQUITY} }** in future development. This model tests the magnitude of interests and the elasticity of a Robert Burns Brand

Hypothesis (1) – The Burns Brand value is disseminated through several sectors of the economy (Retail, Tourism, Cultural and Heritage capital). The Robert Burns Brand like any other brand is subject to certain competitiveness. The Brand Robert Burns can be an incentive favourable to Scotland's Economy, due to an effective market share, and subject to relative price and good reputation. To measure the impact of the Brand Robert Burns, it is essential to evaluate how much it worth, thereby how much individuals are willing to pay for a Burns branded commodities.

Hypothesis (2) – The durability and sustainability of Robert Burns Brand equity is intertwined with the perception of Scotland (nationwide and overseas) and the reputation of the National Bard, also depending on the Robert Burns Community longevity. The change in the demand for Robert Burns Brand is subject to its fitness as a promotional material for Scotland's reputation and conditioned to the Burns experience worldwide. As long as the Burns brand provides a valid experience and remains deeply linked to Scotland's identity, the value (tangible or intangible) of the brand can be as significant as any related image such as the Tartan, the Thistle, etc.

The value of Robert Burns Brand BUR_{brand} comprises:

$$\mathbf{BUR_{brand} = \mathit{f}\,(BUR_{ASSET}, BUR_{EQUITY})}$$

BUR_{ASSET}

$$\Sigma \{ (\frac{RETAIL_{AY,DG}}{RETAIL_{TOTAL1}} * \frac{RETAIL_{HH,MAG,HC,OHP}}{RETAIL_{TOTAL2}} * RETAIL_{\ TOTAL1}) * WTP_{\ I,\ EU} * (V_{OS} \frac{V_{BUR}}{V_{TOTAL}} * \frac{V_{OS}}{V_{TOTAL}}) * (V_{BURSURVEY} \frac{V_{I,EU}}{V_{TOTSURVEY}}) * \chi_{WTP}$$

$$+$$

$$(\frac{ADMIS_{AY,DG}}{ADMIS_{TOTAL1}}, * \frac{ADMIS_{HH,MAG,HC,OHP}}{ADMIS_{TOTAL2}} * \frac{FREE_{AY,DG}}{FREE_{TOTAL}} * ADMIS_{\ TOTAL1}) * NTS_{\ HER} * WTD_{\ I,\ EU} * (V_{OS} \frac{V_{BUR}}{V_{TOTAL}}) * (V_{BURSURVEY} \frac{V_{I,EU}}{V_{TOTSURVEY}}) * \chi_{WTD} \}$$

BUR_{EQUITY}

$$BUR_{ASSET} * \varepsilon$$

$$\left(\frac{BUR_{ASSET} * \varepsilon}{BUR_{ASSET}} \right) * 100$$

$$\text{With } \varepsilon = \frac{BEV_{EU,I}}{BEV} * \frac{ANH_{SCO2018} - ANH_{SCO2016}}{ANH_{SCO2016}}$$

List of determinants and variables

Revenue from Retail (source- MOFFAT VAM)

$RETAIL_{AY, DG}$ Revenue from Retail In Ayrshires, Arran and Dumfries and Galloway
$RETAIL_{HH,MAG,HC,OHP}$ is Revenue Retail for categories (Historic House/Museums/Heritage Centre/Other historic place)
$RETAIL_{TOTAL1}$ Total Revenue from retail for all regions
$RETAIL_{TOTAL2}$ Total Revenue from retail for all types of activities

Revenue from Admission (source – MOFFAT VAM)

$ADMIS_{AY, DG}$ Revenue from Admission in Ayrshires and Arran, Dumfries and Galloway
$ADMIS_{TOTAL1}$ Total Revenue from retail for all regions
$ADMIS_{HH,MAG,HC,OHP}$ is Revenue from Admissions for the following Institutions (Historic House/Museums/Heritage Centre/Other historic place)
$ADMIS_{TOTAL2}$ Total Revenue from retail for all types of activities
$FREE_{AY, DG}$ Free Admission in Ayrshires and Arran, Dumfries and Galloway
$FREE_{TOTAL}$ Free admissions for all regions

Historical Heritage - Ownership (source- MOFFAT VAM)

NTS_{HER} Percentage of Attractions owned by National Trust for Scotland

Visitors (source -MOFFAT VAM; Survey)

V_{BUR} Total Visitor of Burns Institutions
V_{OS} Total Visitor Over Night Stay Overseas
V_{I} Visitor residing Overseas (Survey)
V_{EU} Visitor residing in EU (Survey)
$V_{TOTSURVEY}$ Total visitor/ respondents
$V_{BURSURVEY}$ Highest value for proportion of respondents resident (out of UK) who have visited at least one Burns Landmarks (average EU and International)

WTP and WTD Coefficient – Control variable (source Survey Robert Burns in the Scottish Economy)

$WTP_{EU, I}$ Coefficient Willing-to-pay for EU resident and Overseas Resident
With χ_{WTP} -p-value as control variable for validity for WTP

$WTD_{EU, I}$ Coefficient Willing-to-donate for EU resident and Overseas Resident

With χ_{WTD} p-value as control variable for validity for WTD

Elasticity (Source Survey / Anholt GfK Roper NBI™

With $\varepsilon = \frac{\mathbf{BEV_{EU,\mathit{I}}}}{\mathrm{BEV}} * \frac{\mathbf{ANH_{SCO2018} - ANH_{SCO2016}}}{\mathbf{ANH_{SCO2016}}}$

BUR_{ASSET} -EQUATION EXPLAINED:

$$\frac{RETAIL_{AY,DG}}{RETAIL_{TOTAL1}} * \frac{RETAIL_{HH,MAG,HC,OHP}}{RETAIL_{TOTAL2}} * RETAIL_{TOTAL1}$$

includes

$$\frac{RETAIL_{AY,DG}}{RETAIL_{TOTAL1}}$$

Proportion of Revenue from Retail in Ayrshires and Arran, and Dumfries and Galloway out of total Revenue from Retail for all regions

Ayrshires and Dumfries and Dumfries and Galloway are historically strongly connected to the Figure of Robert Burns. Due a higher number of Burns related attractions (Robert Burns Birthplace Museum, Burns House, Burns Cottage, Burns Centre, Ellisland Farm, etc.). The figure of Robert Burns is more likely to be a driver in Touristic attraction.

$$\frac{RETAIL_{HH,MAG,HC,OHP}}{RETAIL_{TOTAL2}}$$

Proportion of Revenue from Retail from different categories of Burns Attractions out of total Revenue from Retail from all categories of attractions

Based on MOFFAT VMA 2018 categories of attractions, the model has narrowed the sample to the categories that are hosting Burns Activity: Museums, Heritage Centre, Historical House, Other Historic Properties (such as Burns Landmarks, Burns statues)

$$RETAIL_{TOTAL1}$$

The model put in relation the proportion of Attraction by **REGIONS** and by **CATEGORIES** to the total of Revenue from Retail. This relation uplifts specific regional and categories determinants to the total.

$$WTP_{I,\ EU}$$

Part of the model is based on contingent valuation using a Willingness-to-pay coefficient to value the psychic cost or revenue of Robert Burns Brand. The mean of Willing-to-Pay coefficient for overseas visitors (International, EU) is put in relation with the previous determinants (Retails data).

By this, the equation tends to calculate the increase of revenue impacted by a potential Burns Brand. The Coefficient is basically the ratio between Price Individual are willing to pay over Announced Retailer price. The WTP is based on a survey where Respondents were announced the “Retailer” price.

$$WTP = \frac{Price\ Individual\ are\ willing\ to\ pay}{Retailer\ Price}.$$

$$V_{OS} \frac{V_{BUR}}{V_{TOTAL}} * \frac{V_{OS}}{V_{TOTAL}}) * (V_{BURSURVEY} \frac{V_{I,EU}}{V_{TOTSURVEY}}$$

includes

$$\frac{V_{BUR}}{V_{TOTAL}}$$

Proportion of Burns visitors out of total visitor

The model use uplift modelling to neutralise the Burns effect and to predict the impact of it on Visitor attraction, Therefore, the equation compares the proportion of Burns visitors with Total Visitors.

$$\frac{V_{OS}}{V_{TOTAL}}$$

Proportion of Visitors from Overseas (Source VMA MOFFAT) out of the overall Tourism Visitor Attraction monitor.

$$V_{OS}$$

The model put in relation the proportion of BURNS and OVERSEAS visitors uplift to the overall overseas visitors. The Burns Brand is more likely to be targeting overseas visitors.

$$V_{BURSURVEY}$$

The baseline for the uplift model of BURNS and OVERSEAS visitors is put in relation with Respondents from the survey. The sample of visitors extracted from the survey are the determinants to measure the coefficient Willing-to-pay.

$$\frac{V_{I,EU}}{V_{TOTSURVEY}}$$

Proportion of respondents (residents in EU and Overseas) out of total Respondents

---

$$* \chi_{WTP}$$

The model considers to input variable to control errors. It is based on a Chi square test P- VALUE applied to WTP

$$\frac{ADMIS_{AY,DG}}{ADMIS_{TOTAL1}}, * \frac{ADMIS_{HH,MAG,HC,OHP}}{ADMIS_{TOTAL2}} * \frac{FREE_{AY,DG}}{FREE_{TOTAL}} * ADMIS_{\ TOTAL1}) * NTS_{\ HER}$$

Includes

$$\frac{ADMIS_{AY,DG}}{ADMIS_{TOTAL1}},$$

Proportion of Revenue from Admissions charges for paid attraction in Ayrshires and Arran, and Dumfries and Galloway out of total Revenue from Admissions charge for all regions

Ayrshires and Dumfries and Dumfries and Galloway are historically strongly connected to the Figure of Robert Burns. Due a higher number of Burns related attractions (Robert Burns Birthplace Museum, Burns House, Burns Cottage, Burns Centre, Ellisland Farm, etc.). The figure of Robert Burns is more likely to be a driver in Touristic attraction.

$$\frac{ADMIS_{HH,MAG,HC,OHP}}{ADMIS_{TOTAL2}}$$

Proportion of Revenue from Admissions charge for different Paid categories of Burns Attractions out of total Admissions Charges for all categories of paid attractions

Based on MOFFAT VMA 2018 categories of attractions, the model has narrowed the sample to the categories that are hosting Burns Activity: Museums, Heritage Centre, Historical House, Other Historic Properties (such as Burns Landmarks, Burns statues)

$$\frac{FREE_{AY,DG}}{FREE_{TOTAL}}$$

Proportion of Free attractions in Ayrshires, Arran, Dumfries and Galloway out of Total

The model use Admissions Charge as a substitute or Price Determinant for Free attractions. This part of the model tends to use contingent valuation Willingness-to-donate. Therefore, this WTD coefficient is applied to Free attractions.

$$NTS_{\ HER}$$

Proportion of Attractions owned by National Trust for Scotland

The survey asked the respondents how much they were willing to donate in order for National Trust for Scotland to renovate building. Thereby, the model uplifts the proportion of FREE and PAID attractions in Ayrshires and DumGal to attractions owned by NTS. This is also due to the fact that large part of Burns visitors are members of National Trust for Scotland, Scottish Association, Caledonian Club, Burns club, etc.

$ADMIS_{TOTAL1}$

The relation between FREE/PAID attractions uplift to NTS Owned attractions is put in relation to the overall admissions

---

$WTD_{I, EU}$

Part of the model is based on contingent valuation using a Willingness-to-donate coefficient to value the psychic cost or revenue of Robert Burns Brand. The mean of Willing-to-donate coefficient for out of Scotland's individuals (International, EU) is put in relation with the previous determinants (Admissions Free and Paid data).

By this, the equation tends to calculate the increase of revenue impacted by a potential Burns Brand. There is no announced estimate prior to the answer. Therefore, the model assumes that the estimation is based on experience of other paid attractions or on connection with Burns.

$$V_{OS}\frac{V_{BUR}}{V_{TOTAL}} * \frac{V_{OS}}{V_{TOTAL}}) * (V_{BURSURVEY}\ \frac{V_{I,EU}}{V_{TOTSURVEY}}$$

includes

$$\frac{V_{BUR}}{V_{TOTAL}}$$

Proportion of Burns visitors out of total visitor

The model use uplift modelling to neutralise the Burns effect and to predict the impact of it on Visitor attraction, Therefore, the equation compares the proportion of Burns visitors with Total Visitors.

$$\frac{V_{OS}}{V_{TOTAL}}$$

Proportion of Visitors from Overseas (Source VMA MOFFAT) out of the overall Tourism Visitor Attraction monitor.

V_{OS}

The model put in relation the proportion of BURNS and OVERSEAS visitors uplift to the overall overseas visitors. The Burns Brand is more likely to be targeting overseas visitors.

$V_{BURSURVEY}$

The baseline for the uplift model of BURNS and OVERSEAS visitors is put in relation with Respondents from the survey. The sample of visitors extracted from the survey are the determinants to measure the coefficient Willing-to-pay.

$$\frac{V_{I,EU}}{V_{TOTSURVEY}}$$

Proportion of respondents (residents in EU and Overseas) out of total Respondents

---

χ_{WPD}

The model considers to input variable to control errors. It is based on a Chi square test P- VALUE applied to WTD

BUR_{EQUITY} – EQUATION EXPLAINED

The Burns Brand Equity determines the commercial value that derives from consumer perception of the Burns brand name for particular product or service, rather than from the product or service itself. It describes the value of having a well-known brand name, based on the idea that the owner of a well-known brand name can generate more revenue simply from brand recognition.
The model use Scotland's reputation (Anholt GfK Roper NBI^{TM} as a non price determinant).

$$\left(\frac{BUR_{ASSET} * \varepsilon}{BUR_{ASSET}}\right)*100$$

$$\text{With } \varepsilon = \frac{BEV_{EU,I}}{BEV} * \frac{ANH_{SCO2018} - ANH_{SCO2016}}{ANH_{SCO2016}}$$

Includes

BUR_{ASSET}

Previous equation measuring the value of Burns Assets - BUR_{ASSET}

$$\frac{BEV_{EU,I}}{BEV}$$

The model uses EU and OVERSEAS residents' responses to "How important Burns is for Scotland's reputation internationally" to narrow the impact of Burns as a Brand.

$$\frac{ANH_{SCO2018} - ANH_{SCO2016}}{ANH_{SCO2016}}$$

The model uplifts the score of Burns to Scotland's Reputation using Anholt GfK Roper National Brand Indicator to track the overall attitude of consumer towards Scotland's reputation (Anholt GfK Roper, 2018). The rank and scores together provide an overall indication of a country's reputation. Indeed, scores are useful indicators of how individuals can respond to different messages related to Scotland's reputation.
In this case, the model uses the score for Scotland's reputation ANH_{SCO} as a reliable indicator of a country's reputation over time (2016 to 2018) (No data available for 2017)
The ANH_{SCO} could be used as a dummy variable like a 'proxy' variables for qualitative facts in this model. In fact, the model considers that dependent variables are influenced by qualitative variables (attitudes toward Scotland).

Data extracted from sources and data analysis

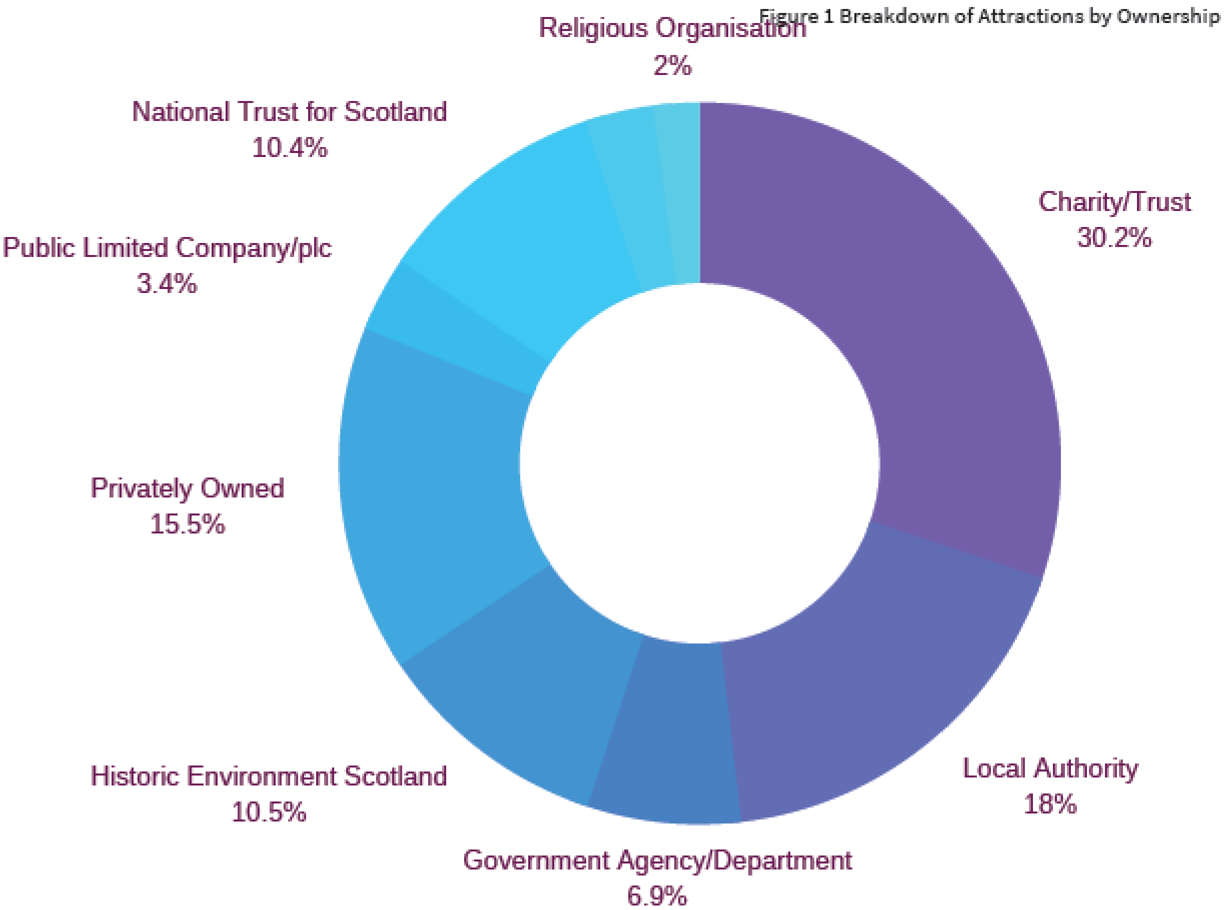
Type	Code	Value
Average Revenue from Retail In Ayrshires, Arran and Dumfries and Galloway	RETAIL $_{AY,\ DG}$	£ 104 874.14
Total Average Revenue from retail for all regions	RETAIL $_{TOTAL1}$	£ 1 322 513.82588
Revenue Average Retail for categories (Historic House/Museums/Heritage Centre/Other historic place	RETAIL $_{HH,MAG,HC,OHP}$	£ 532 092.98
Total Average Revenue from retail for all types of activities	RETAIL $_{TOTAL2}$	£ 1 870 455.72
Coefficient Willing-to-pay for EU resident and Overseas Resident	WTP $_{I,\ EU}$	2.233
Total Visitor Overseas	V_{OS}	14 820 928
% Total visitor overseas		23.9%
Total Visitor of Burns Institutions	V_{BUR}	401 425
Total Visitors (MOFFAT VMA)	V_{TOTAL}	62 012 252
Total Visitors Dumfries and Galloway		635204
Visitors overseas Dumfries and Galloway		77 495
% Visitors overseas Dumfries and Galloway		12.2
Total Visitor Arran and Ayrshires		1 324 698
Visitor Overseas Arran and Ayrshires		300 706
% Visitor Overseas Arran and Ayrshires		22.7
Highest value for proportion of respondents resident (out of UK) who have visited at least one Burns Landmarks (average EU and International)	$V_{BURSURVEY}$	50% (0.5)

Visitor residing in Overseas and EU (Survey)	$V_{I,EU}$	63
Total visitor/ respondents	$V_{TOTSURVEY}$	188
P-value as control variable for validity for WTP	χ_{WTP}	0.5068
Revenue from Admission in Ayrshires and Arran, Dumfries and Galloway	$ADMIS_{AY, DG}$	£ 169 527.07
Total Revenue from retail for all regions	$ADMIS_{TOTAL1}$	£ 2 220 931.54
Revenue from Admissions for Historic House/Museums/Heritage Centre/Other historic place	$ADMIS_{HH,MAG,HC,OHP}$	£ 794 909.34
Total Revenue from retail for all types of activities	$ADMIS_{TOTAL2}$	£ 2 538 233.52
Number of Attractions Free Admission in Ayrshires and Arran, Dumfries and Galloway	$FREE_{AY, DG}$	32
Total number of Free attractions for all regions	$FREE_{TOTAL}$	321
% NTS Owned building	NTS_{HER}	10.4
Coefficient Willing-to-donate for EU resident and Overseas Resident	$WTD_{I, EU}$	6.07
p-value as control variable for validity for WTD	χ_{WTD}	0.6057
Score EU and Overseas respondents to How Important Burns is for Scotland's reputation internationally	$\mathbf{BEV_{EU, I}}$	5.5
Total Score to How Important Burns is for Scotland's reputation internationally	**BEV**	5.74
Anholt GfK Roper Scotland Score 2018	$\mathbf{ANH_{sco\ 2018}}$	62.7%
Anholt GfK Roper Scotland Score 2016	$\mathbf{ANH_{sco\ 2016}}$	62.2%

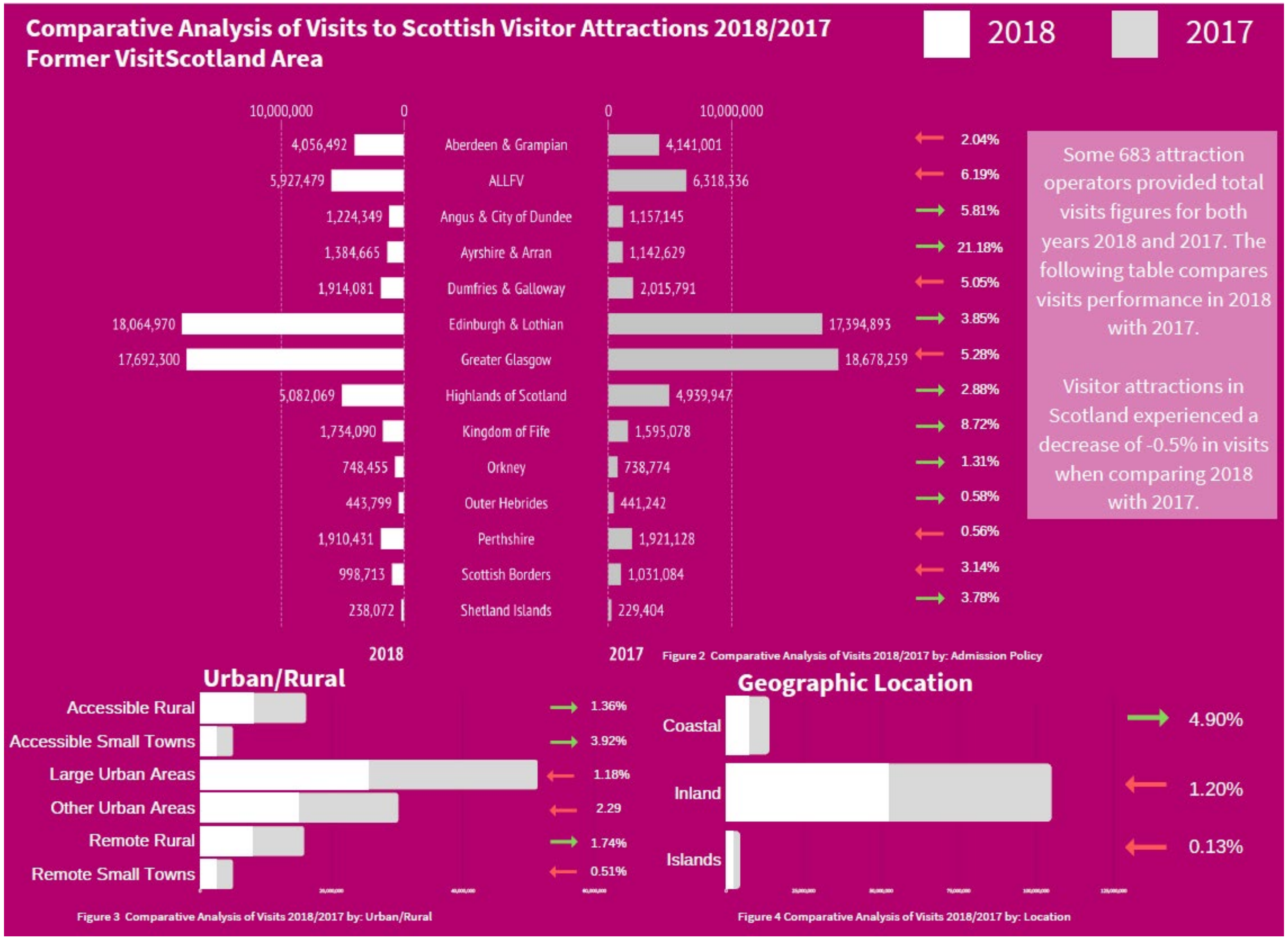
Burns Asset is estimated at £ 138 130 259.374 **BUR$_{ASSET}$** = 130 299 178.026 + 7 831 081.348 = <u>£ 138 130 259.374</u>
Burns Equity is estimated at £ 1 058 630.3078 from 2016 to 2018 with a progression rate of + 0.77%

APPENDIX

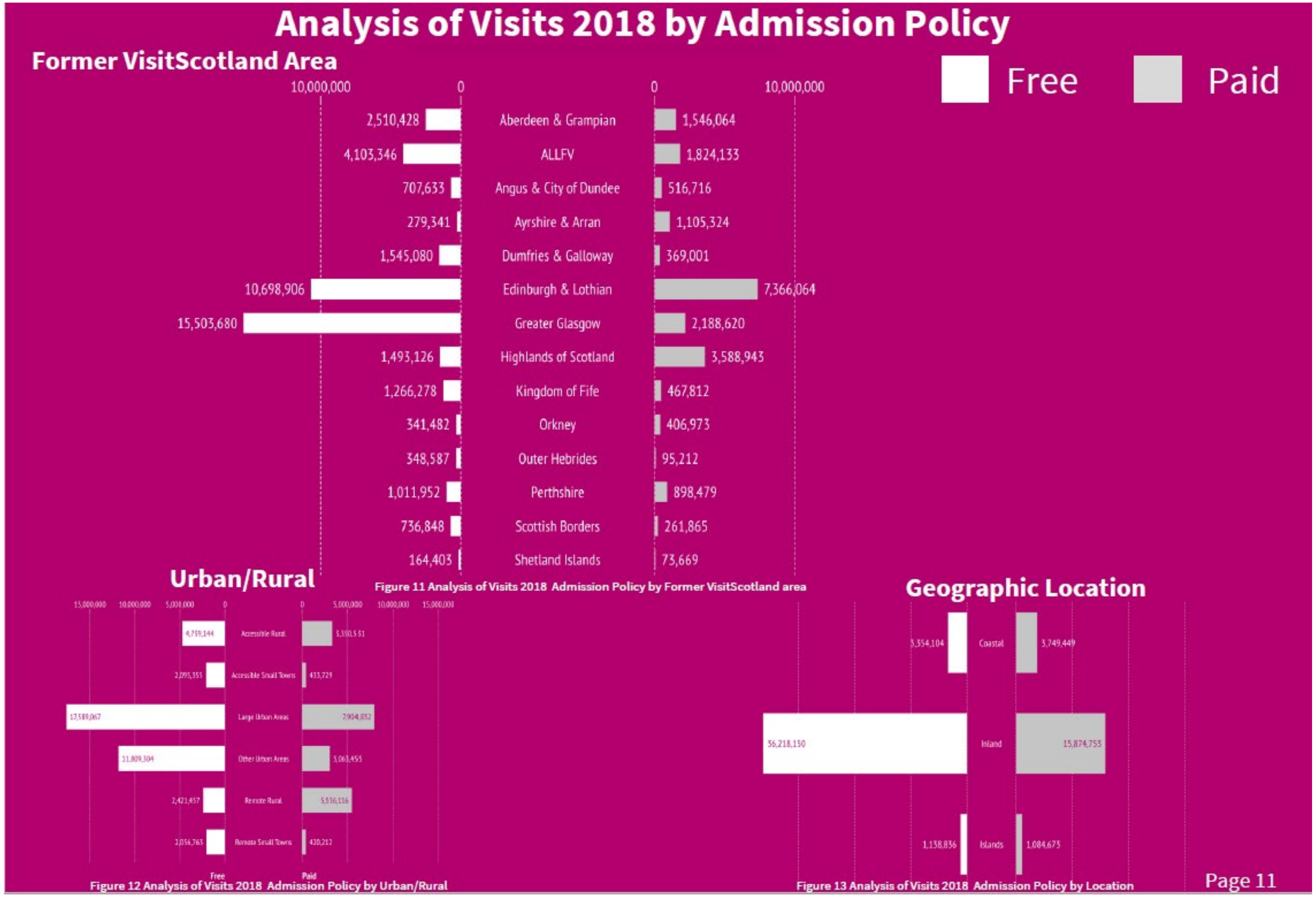
ATTRACTIONS OWNERSHIP



Source: MOFFAT Centre for Travel and Tourism Business Development – Glasgow Caledonian University, Visitor Attraction Monitor 2018, 2019



Source: MOFFAT Centre for Travel and Tourism Business Development – Glasgow Caledonian University, Visitor Attraction Monitor 2018, 2019



Source: MOFFAT Centre for Travel and Tourism Business Development – Glasgow Caledonian University, Visitor Attraction Monitor 2018, 2019

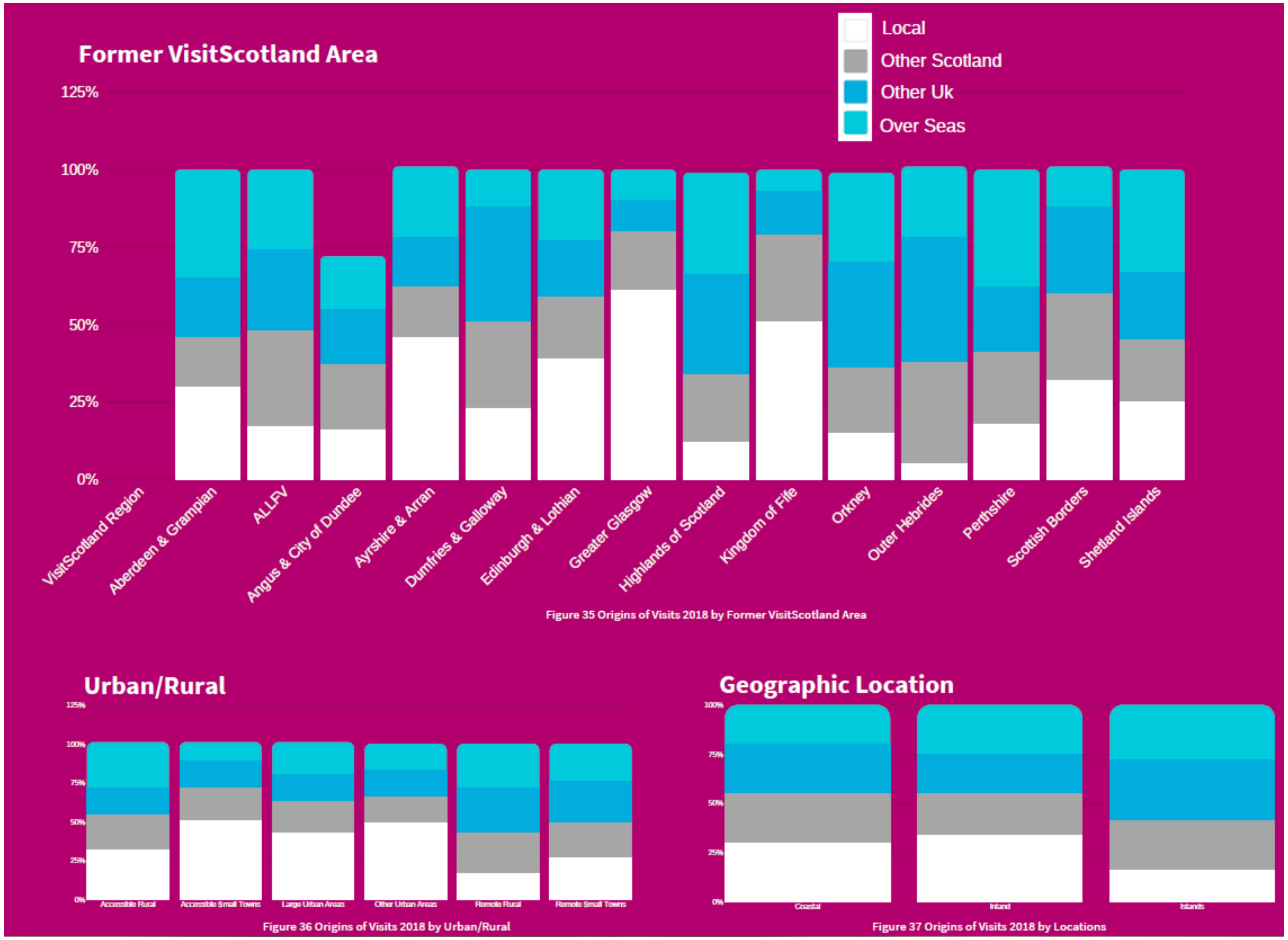


Figure 35 Origins of Visits 2018 by Former VisitScotland Area

Figure 36 Origins of Visits 2018 by Urban/Rural

Figure 37 Origins of Visits 2018 by Locations

Source: MOFFAT Centre for Travel and Tourism Business Development – Glasgow Caledonian University, Visitor Attraction Monitor 2018, 2019

Revenue from Retail

Category	Sample	Avg Total Retail (£)	Total Visits 2018	Total spend (£)	Avg. Retail spend per Visit (£)
Castles/Forts	11	111,899.36	3,158,439	1,230,893.00	0.39
Distilleries/Breweries/Wineries	7	774,246.57	228,729	5,419,726.00	23.69
Gardens	13	129,772.92	1,187,109	1,687,048.00	1.42
Heritage Centre	8	233,413.25	537,761	1,867,306.00	3.47
Historic Houses/Palaces	22	146,738.82	1,040,822	3,228,254.00	3.10
Industrial/Workplaces	3	5,830.67	10,799	17,492.00	1.62
Museums/Art Galleries	46	25,293.91	1,635,993	1,163,520.00	0.71
Other Historic Properties	9	126,947.00	517,158	1,142,523.00	2.21
Outdoors/Nature Attractions	7	118,635.00	1,255,045	830,445.00	0.66
Places of Worship/Spiritual Attra	2	6,250.00	120,335	12,500.00	0.10
Wildlife/Animal Attractions	9	191,728.22	607,876	1,725,554.00	2.84

Table 8 Average Visitor Spend on Retail by Category

Source: MOFFAT Centre for Travel and Tourism Business Development – Glasgow Caledonian University, Visitor Attraction Monitor 2018, 2019

VisitScotland Region	Sample	Avg Total Retail (£)	Total Visits 2018	Total spend (£)	Avg. Retail spend per Visit (£)
Aberdeen & Grampian	18	41,319.33	826,834	743,748.00	0.90
ALLFV	13	122,246.31	1,159,290	1,589,202.00	1.37
Angus & City of Dundee	11	26,400.18	242,378	290,402.00	1.20
Ayrshire & Arran	8	79,828.25	847,440	638,626.00	0.75
Dumfries & Galloway	9	25,045.89	211,139	225,413.00	1.07
Edinburgh & Lothian	13	279,390.08	3,623,674	3,632,071.00	1.00
Greater Glasgow	12	106,416.42	994,781	1,276,997.00	1.28
Highlands of Scotland	21	381,983.76	1,633,690	8,021,659.00	4.91
Kingdom of Fife	8	97,268.00	218,801	778,144.00	3.56
Orkney	6	53,237.00	76,898	319,422.00	4.15
Outer Hebrides	1	206.00	941	206.00	0.22
Perthshire	7	95,529.43	349,810	668,706.00	1.91
Scottish Borders	8	14,175.88	105,702	113,407.00	1.07
Shetland Islands	2	13,629.00	8,688	27,258.00	3.14

Table 10 Average Visitor Spend on Retail by Former VisitScotland Region

Source: MOFFAT Centre for Travel and Tourism Business Development – Glasgow Caledonian University, Visitor Attraction Monitor 2018, 2019

Revenue from Admissions Average Visitor Spend 2018

Category	Sample	Avg Total Admissions (£)	Total Visits 2018	Total spend (£)	Avg. Admissions spend per Visit (£)
Castles/Forts	12	168,238.33	3,158,439	2,018,860.00	0.64
Distilleries/Breweries/Wineries	6	251,400.17	203,729	1,508,401.00	7.4
Gardens	17	76,917.59	1,254,375	1,307,599.00	1.04
Heritage Centre	6	279,549.50	525,720	1,677,297.00	3.19
Historic Houses/Palaces	22	378,346.23	1,038,937	8,323,617.00	8.01
Industrial/Workplaces	3	2,036.00	10,799	6,108.00	0.57
Museums/Art Galleries	23	61,178.43	775,421	1,407,104.00	1.81
Other Historic Properties	11	75,835.18	514,039	834,187.00	1.62
Outdoors/Nature Attractions	15	33,721.53	1,564,790	505,823.00	0.32
Wildlife/Animal Attractions	9	1,211,010.56	1,113,142	10,899,095.00	9.79

Table 3 Average Visitor Spend on Admission by Category

Source: MOFFAT Centre for Travel and Tourism Business Development – Glasgow Caledonian University, Visitor Attraction Monitor 2018, 2019

VisitScotland Region	Sample	Avg Total Admissions (£)	Total Visits 2018	Total spend (£)	Avg. Admissions spend per Visit (£)
Aberdeen & Grampian	15	69,182.07	803,686	1,037,731.00	1.29
ALLFV	15	126,382.53	448,606	1,895,738.00	4.23
Angus & City of Dundee	9	94,527.78	222,525	850,750.00	3.82
Ayrshire & Arran	5	141,522.40	753,431	707,612.00	0.94
Dumfries & Galloway	6	28,004.67	193,238	168,028.00	0.87
Edinburgh & Lothian	14	972,389.43	4,689,176	13,613,452.00	2.9
Greater Glasgow	9	70,295.44	397,977	632,659.00	1.59
Highlands of Scotland	22	326,449.82	1,710,891	7,181,896.00	4.2
Kingdom of Fife	7	125,847.57	211,790	880,933.00	4.16
Orkney	3	47,937.33	24,439	143,812.00	5.88
Outer Hebrides	3	27,745.00	10,061	83,235.00	8.27
Perthshire	7	163,923.00	588,372	1,147,461.00	1.95
Scottish Borders	6	21,536.83	98,155	129,221.00	1.32
Shetland Islands	3	5,187.67	7,044	15,563.00	2.21

Table 5 Average Visitor Spend on Admission by Former VisitScotland Region

Source: MOFFAT Centre for Travel and Tourism Business Development – Glasgow Caledonian University, Visitor Attraction Monitor 2018, 2019

Visitors Overseas

Admission	Sample	Visits 2018	Visits 2017	% 18/17	Diff (18-17)
Free	324	41,303,377	42,208,184	-2.1	-907,807
Paid	359	20,708,875	20,140,137	2.8	568,738
Total	683	62,012,252	62,348,321	-0.5	-336,069

Origin of Visitors 2018 by: Overview

	Sample	% Locals	% Scotland	% Other UK	% Overseas
Scotland	133	30.9	22.4	22.8	23.9

Source: MOFFAT Centre for Travel and Tourism Business Development – Glasgow Caledonian University, Visitor Attraction Monitor Extract – Origin of Visitors 2018, 2019

Willingness to Pay {WTP}

Source Survey Robert Burns in the Scottish Economy, 2019 – 188 respondents

NATIONALS

Profile	Column 2	Expected price	EU nationals			Overeseas Nationals			Scottish Nationals			Rest of UK Nationals		
Respondents			12			45			109			22		
% Respondents			6.3830			23.9362			57.9787			11.7021		
Is your occupation related to Robert Burns? (% respondents)			50.00%			9.00%			6.40%			36.00%		
	Item		Weighted Average	Difference	Coefficient EU	Weighted Average	Difference	Coefficient Int	Weighted Average	Difference	Coefficient Scot	Weighted Average	Difference	Coefficient RoUK
WTP	Tee shirt	£1.99	£5.88	3.885	2.9522613	£4.90	2.91	2.4623116	£7.80	5.81	3.919598	£7.07	5.08	3.5527638
	Mug	£6.99	£5.88	-1.115	0.8404864	£8.40	1.41	1.2017167	£7.67	0.68	1.0972818	£6.25	-0.74	0.8941345
	Notebook	£2.69	£4.38	1.685	1.6263941	£5.55	2.86	2.063197	£4.65	1.96	1.7286245	£4.31	1.62	1.6022305
	Tea towell	£2.69	£2.85	0.16	1.0594796	£5.90	3.21	2.1933086	£6.38	3.69	2.3717472	£5.53	2.84	2.0557621
	Haggis	£3.20	£3.88	0.675	1.2109375	£6.13	2.925	1.9140625	£5.53	2.33	1.728125	£3.38	0.175	1.0546875

RESIDENTS

Profile		EU (Resident)			Overseas (Resident)			Scotland (Resident)			Rest of UK (Resident)			Column 10
Respondents		13			50			119			5			
% Respondents		6.9			26.6			63.3			2.75			
Is your occupation related to Robert Burns? (% respondents)		38.46%			8.00%			18.33%			20.00%			
	Item	Weighted Average	Difference	Coeff EU -r	Weighted Average	Difference	Coeff Int -r	Weighted Average	Difference	Coeff Scot -r	Weighted Average	Difference	Coeff RoUK - R	Total
WTP	Tee shirt	£8.90	6.91	4.4724	£8.16	6.17	4.1005	£6.77	4.78	3.4020	£15.00	13.01	7.5377	
	Mug	£6.66	-0.33	0.9528	£7.76	0.77	1.1102	£6.68	-0.31	0.9557	£8.00	1.01	1.1445	
	Notebook	£3.55	0.86	1.3197	£5.25	2.56	1.9517	£4.58	1.89	1.7026	£5.00	2.31	1.8587	
	Tea towell	£6.38	3.69	2.3717	£5.93	3.24	2.2045	£5.85	3.16	2.1747	£15.00	12.31	5.5762	
	Haggis	£5.40	2.2	1.6875	£6.91	3.71	2.1594	£4.46	1.26	1.39375	£8.00	4.8	2.5	
Total				2.1608			2.3052			1.9257			3.7234	

Willingness to donate {WTD}

(Source Survey Robert Burns in the Scottish Economy, 2019 – 188 respondents)

	Willing to donate										
Profile	Column2	EU nationals	Overeseas Nationals	Scottish Nationals	RoUK Nationals	Total	EU (Resident)	Overseas (Resident)	Scotland (Resident)	RoUK (Resident)	Total
	Total respondents	12	45	109	22		13	50	119	5	
	% Respondents	6.3830	23.9362	57.9787	11.7021		6.9149	26.5957	63.2979	2.6596	
Is your occupation related to Robert Burns?		50.00%	9.00%	6.40%	36.00%		38.46%	8.00%	18.33%	20.00%	
	Item	Weighted Average	Weighted Average	Weighted Average	Weighted Average		Weighted Average	Weighted Average	Weighted Average	Weighted Average	
WTD	Robert Burns Monument in Stirling	5.83	6.53	6.32	2	5.17	5.65	5.95	9.33	n/a	6.9767
	Dumfries town centre statue	3	5.57	7.28	7.31	5.79	7.14	5.7	6.16	n/a	6.3333
	Burns Monument, Edinburgh	7	7.23	6.76	3.75	6.185	10.625	6.17	6.33	n/a	7.7083
	Statue of Burns in Statue Square in Ayr	7.85	9.86	8.93	6.36	8.25	8.88	7.91	7.38	n/a	8.0857
	Dumfries – mausoleum at burial site in St Michael's Churchyard	3	7.35	9.26	8.75	7.09	2.14	7.82	7.29	n/a	5.75
	Glasgow – statue in George Square	5.71	7.71	6.8	3.63	5.9625	5	7.26	6.31	n/a	6.19
	Robert Burns Bronze statue in the Visitor centre in Eglinton Country Park	5.83	5.52	5.9	3	50625	5	5	5.7	n/a	5.2333

	Robert Burns statue on Irvine Moor in Irvine	5.83	3.33	7.04	2	4.55	5	2	6.14	n/a	4.38
Total		5.506	6.6375	7.2863	4.6		6.1794	5.9763	6.83		

WTP Coefficient {r}– P-value and Transfer Error {TE}

(Source University of Glasgow)

Respondents	item	OBSERVED	EXPECTED	CHI-SQUARE P- VALUE	Transfer error value test
12	EU				
	T shirt	5.875	6.86	0.840678518	16.76595745
	Mug	5.875	7.52	0.877828478	28
	Notebook	4.375	4.78	0.947284137	9.257142857
	Tea towel	2.85	5.9	0.650590958	107.0175439
	Haggis	3.875	5.28	0.751025628	36.25806452
45	OS				
	T shirt	4.9	6.86	0.840678518	40
	Mug	8.4	7.52	0.877828478	-10.47619048
	Notebook	5.55	4.78	0.947284137	-13.87387387
	Tea towel	5.9	5.9	0.650590958	0
	Haggis	6.125	5.28	0.751025628	-13.79591837
109	SCOT				
	T shirt	7.8	6.86	0.840678518	-12.05128205
	Mug	7.67	7.52	0.877828478	-1.955671447
	Notebook	4.65	4.78	0.947284137	2.795698925
	Tea towel	6.38	5.9	0.650590958	-7.523510972
	Haggis	5.53	5.28	0.751025628	-4.52079566
22	RUK				
	T shirt	7.07	6.86	0.840678518	-2.97029703
	Mug	6.25	7.52	0.877828478	20.32
	Notebook	4.31	4.78	0.947284137	10.90487239
	Tea towel	5.53	5.9	0.650590958	6.690777577
	Haggis	3.375	5.28	0.751025628	56.44444444
13	EU-R				
	T shirt	8.9	7.51	0.049072453	-15.61797753
	Mug	6.66	7	0.967988121	5.105105105
	Notebook	3.55	4.7	0.946779213	32.3943662
	Tea towel	6.38	6.15		-3.605015674
	Haggis	5.4	5.28		-2.222222222
50	OS-R				
	T shirt	8.16	7.51	0.049072453	-7.965686275
	Mug	7.76	7	0.967988121	-9.793814433
	Notebook	5.25	4.7	0.946779213	-10.47619048
	Tea towel	5.93	6.15	0.00516983	3.70994941
	Haggis	6.91	5.28		-23.58900145
119	SCOT-R				

	T shirt	6.77	7.51	0.049072453	10.93057607
	Mug	6.68	7	0.967988121	4.790419162
	Notebook	4.58	4.7	0.946779213	2.620087336
	Tea towel	5.85	6.15	0.00516983	5.128205128
	Haggis	4.46	5.28		18.38565022
5	RUK-R				
	T shirt	15	7.51	0.049072453	-49.93333333
	Mug	8	7	0.967988121	-12.5
	Notebook	5	4.7	0.946779213	-6
	Tea towel	15	6.15	0.00516983	-59
	Haggis	8	5.28		-34

Chi Test WTP Nationals

CHI TEST WTP NATIONALS			
Column1	**Column2**	**Column3**	**TE**
T shirt	5.875	6.86	16.76595745
T shirt	4.9	6.86	40
T shirt	7.8	6.86	-12.05128205
T shirt	7.07	6.86	-2.97029703
PVALUE	0.840678518	AVERAGE TE	10.44
Column1	**Column2**	**Column3**	**TE**
Mug	5.875	7.52	28
Mug	8.4	7.52	-10.47619048
Mug	7.67	7.52	-1.955671447
Mug	6.25	7.52	20.32
P-VALUE	0.877828478	AVERAGE TE	8.97
Column1	**Column2**	**Column3**	**Column4**
Notebook	4.375	4.78	9.257142857
Notebook	4.65	4.78	2.795698925
Notebook	4.31	4.78	10.90487239
Notebook	3.55	4.7	32.3943662
P-VALUE	0.947284137	AVERAGE TE	13.84
Column1	**Column2**	**Column3**	**Column4**
Tea towel	2.85	5.9	107.0175439
Tea towel	5.9	5.9	0
Tea towel	6.38	5.9	-7.5235109
Tea towel	5.53	5.9	6.690777577
P-VALUE	0.650590958	AVERAGE TE	26.55
Column1	**Column2**	**Column3**	**Column4**
Haggis	3.875	5.28	36.25806452
Haggis	6.125	5.28	13.79591837
Haggis	5.53	5.28	-4.52079566
Haggis	3.375	5.28	56.44444444
P-VALUE	0.751025628	AVERAGE TE	18.59

Items	AVERAGE CHI TEST P VALUE
Tee shirt	0.840678518
Mug	0.877828478
Notebook	0.947284137
Tea towel	0.650590958
Haggis	0.751025628
Average	0.8134

Chi Test WTP Resident

CHI TEST WTP RESIDENT			
Column1	**Column2**	**Column3**	**TE**
T shirt	8.9	7.51	-15.618
T shirt	8.16	7.51	-7.96569
T shirt	6.77	7.51	10.93058
T shirt	15	7.51	-49.9333
P-VALUE	0.049072453	AVERAGE TE	-15.64
Column1	**Column2**	**Column3**	**TE**
Mug	6.66	7	5.105105
Mug	7.76	7	-9.79381
Mug	6.68	7	4.790419
Mug	8	7	-12.5
P-VALUE	0.967988121	AVERAGE TE	-3.099
Column1	**Column2**	**Column3**	**TE**
Notebook	3.55	4.7	32.39437
Notebook	5.25	4.7	-10.4762
Notebook	4.58	4.7	2.620087
Notebook	5	4.7	-6
P-VALUE	0.946779213	AVERAGE	4.63
Column1	**Column2**	**Column3**	**TE**
Tea towel	6.38	6.15	-3.60502
Tea towel	5.93	6.15	3.709949
Tea towel	5.85	6.15	5.128205
Tea towel	15	6.15	-59
P-VALUE	0.00516983	AVERAGE TE	-13.44
Column1	**Column2**	**Column3**	**TE**
Haggis	5.4	5.28	-2.22222
Haggis	6.91	5.28	-23.589
Haggis	4.46	5.28	18.38565
Haggis	8	5.28	-34
P-VALUE	0.565279405	AVERAGE TE	-10.36
Items	**AVERAGE CHI TEST P-VALUE**		
Tee shirt	0.049072453		
Mug	0.967988121		
Notebook	0.946779213		
Tea towell	0.00516983		
Haggis	0.565279405		
	0.5068		

Chi Test WTD Nationals

CHI TEST WTD NATIONALS			
Column1	**Column2**	**Column3**	**Column4**
Robert Burns Monument in Stirling	5.83	5.8	-0.51457976
Robert Burns Monument in Stirling	6.53	5.8	-11.17917305
Robert Burns Monument in Stirling	6.32	5.8	-8.227848101
Robert Burns Monument in Stirling	2	5.8	190
P VALUE	0.45254798	TE AVERAGE	42.15
Column1	**Column2**	**Column3**	**Column4**
Dumfries town centre statue	3	6.57	119
Dumfries town centre statue	5.57	6.57	17.95332136
Dumfries town centre statue	7.28	6.57	-9.752747253
Dumfries town centre statue	7.31	6.57	-10.12311902
P VALUE	0.521750374	TE AVERAGE	29.27
Column1	**Column2**	**Column3**	**Column4**
Burns Monument, Edinburgh	7	6.5	-7.142857143
Burns Monument, Edinburgh	7.23	6.5	-10.09681881
Burns Monument, Edinburgh	6.76	6.5	-3.846153846
Burns Monument, Edinburgh	3.75	6.5	73.33333333
P VALUE	0.730485213	TE AVERAGE	13.06
Column1	**Column2**	**Column3**	**Column4**
Statue of Burns in Statue Square in Ayr	7.85	8.74	11.33757962
Statue of Burns in Statue Square in Ayr	9.86	8.74	-11.35902637
Statue of Burns in Statue Square in Ayr	8.93	8.74	-2.127659574
Statue of Burns in Statue Square in Ayr	6.36	8.74	37.42138365
P VALUE	0.828712252	TE AVERAGE	8.82
Column1	**Column2**	**Column3**	**Column4**
Dumfries – mausoleum at burial site in St Michael's Churchyard	3	8.32	177.3333333
Dumfries – mausoleum at burial site in St Michael's Churchyard	7.35	8.32	13.19727891
Dumfries – mausoleum at burial site in St Michael's Churchyard	9.26	8.32	-10.1511879

Dumfries – mausoleum at burial site in St Michael's Churchyard	8.75	8.32	-4.914285714
P VALUE	0.302653371	TE AVERAGE	43.87
Column1	**Column2**	**Column3**	**Column4**
Glasgow – statue in George Square	5.71	6.54	14.53590193
Glasgow – statue in George Square	7.71	6.54	-15.17509728
Glasgow – statue in George Square	6.8	6.54	-3.823529412
Glasgow – statue in George Square	3.63	6.54	80.16528926
P VALUE	0.654908406	TE AVERAGE	18.93
Column1	**Column2**	**Column3**	**Column4**
Robert Burns Bronze statue in the Visitor centre in Eglinton Country Park	5.83	5.43	-6.861063465
Robert Burns Bronze statue in the Visitor centre in Eglinton Country Park	5.52	5.43	-1.630434783
Robert Burns Bronze statue in the Visitor centre in Eglinton Country Park	5.9	5.43	-7.966101695
Robert Burns Bronze statue in the Visitor centre in Eglinton Country Park	3	5.43	81
P VALUE	0.762830165	TE AVERAGE	16.14
Column1	**Column2**	**Column3**	**Column4**
Robert Burns statue on Irvine Moor in Irvine	5.83	5.46	-6.346483705
Robert Burns statue on Irvine Moor in Irvine	3.33	5.46	63.96396396
Robert Burns statue on Irvine Moor in Irvine	7.04	5.46	-22.44318182
Robert Burns statue on Irvine Moor in Irvine	2	5.46	173
P VALUE	0.32000753	TE AVERAGE	52.04

Monument	**Average CHI TEST WTD**	
Robert Burns Monument in Stirling	0.45254798	
Dumfries town centre statue	0.521750374	
Burns Monument, Edinburgh	0.730485213	

Statue of Burns in Statue Square in Ayr	0.828712252	
Dumfries – mausoleum at burial site in St Michael's Churchyard	0.302653371	
Glasgow – statue in George Square	0.654908406	
Robert Burns Bronze statue in the Visitor centre in Eglinton Country Park	0.762830165	
Robert Burns statue on Irvine Moor in Irvine	0.32000753	
	0.5717	

Chi Test WTD Resident

CHI TEST WTD RESIDENT			
Column1	**Column2**	**Column3**	**Column4**
Robert Burns Monument in Stirling	5.65	8.13	43.89381
Robert Burns Monument in Stirling	5.95	8.13	36.63866
Robert Burns Monument in Stirling	9.33	8.13	-12.8617
P VALUE	0.468092295		22.56
Column1	**Column2**	**Column3**	**Column4**
Dumfries town centre statue	7.14	6.1	-14.5658
Dumfries town centre statue	5.7	6.1	7.017544
Dumfries town centre statue	6.16	6.1	-0.97403
P VALUE	0.902970339	TE AVERAGE	-2.84
Column1	**Column2**	**Column3**	**Column4**
Burns Monument, Edinburgh	10.625	6.59	-37.9765
Burns Monument, Edinburgh	6.17	6.59	6.807131
Burns Monument, Edinburgh	6.33	6.59	4.107425
P VALUE	0.285415091	TE AVERAGE	-9.02
Column1	**Column2**	**Column3**	**Column4**
Statue of Burns in Statue Square in Ayr	8.88	7.63	-14.0766
Statue of Burns in Statue Square in Ayr	7.91	7.63	-3.53982
Statue of Burns in Statue Square in Ayr	7.38	7.63	3.387534
P VALUE	0.89437944	TE AVERAGE	-4.74
Column1	**Column2**	**Column3**	**Column4**
Dumfries – mausoleum at burial site in St Michael's Churchyard	2.14	7.07	230.3738
Dumfries – mausoleum at burial site in St Michael's Churchyard	7.82	7.07	-9.59079
Dumfries – mausoleum at burial site in St Michael's Churchyard	7.29	7.07	-3.01783
P VALUE	0.171687518	TE AVERAGE	72.59
Column1	**Column2**	**Column3**	**Column4**
Glasgow – statue in George Square	5	6.48	548
Glasgow – statue in George Square	7.26	6.48	548
Glasgow – statue in George Square	6.31	6.48	548

P VALUE	0.803975303	TE AVERAGE	548

Column1	Column2	Column3	Column4
Robert Burns Bronze statue in the Visitor centre in Eglinton Country Park	5	5.45	9
Robert Burns Bronze statue in the Visitor centre in Eglinton Country Park	5	5.45	9
Robert Burns Bronze statue in the Visitor centre in Eglinton Country Park	5.7	5.45	-4.38596
P VALUE	0.958016854	TE AVERAGE	4.54
Column1	**Column2**	**Column3**	**Column4**
Robert Burns statue on Irvine Moor in Irvine	5	4.92	-1.6
Robert Burns statue on Irvine Moor in Irvine	2	4.92	146
Robert Burns statue on Irvine Moor in Irvine	6.14	4.92	-19.8697
P VALUE	0.361167068	TE AVERAGE	41.51
Monument	**Average CHI TEST WTD**		
Robert Burns Monument in Stirling	0.468092295		
Dumfries town centre statue	0.902970339		
Burns Monument, Edinburgh	0.285415091		
Statue of Burns in Statue Square in Ayr	0.89437944		
Dumfries – mausoleum at burial site in St Michael's Churchyard	0.171687518		
Glasgow – statue in George Square	0.803975303		
Robert Burns Bronze statue in the Visitor centre in Eglinton Country Park	0.958016854		
Robert Burns statue on Irvine Moor in Irvine	0.361167068		
	0.6057		

Anholt GfK Roper NBI^{SM} – Coefficient

Source Scottish Government, Anholt GfK Roper NBI^{SM} (2017, 2019)

Nation Brand Index 2018								
Column1	2014	2016	2018	Scotland Visitor 2016	Scotland -Non visitor 2016	Scottish Website Viewers 2016	Non Scottish Website viewers 2016	Scotland seeing itself 2016
Scotland overall score	61.8 %	62.2%	62.7%	12	15	14	14	
Exports	55.9 %	57.0%	57.1%	69.8 %	61.0%	69.7%	60.6%	63.7%
Governance	62.2 %	62.4%	63.0%					67.5%
People	65.1 %	65.0%	66.1%					71.3%
Culture	59.1 %	60.1%	60.0%					64.6%
Tourism	68.6 %	68.7%	69.4%					73.3%
Immigration and Investment	59.9 %	60.2%	60.9%					66.6%
Familiarity with Scotland		63.0%	61.0%					
Favourability towards Scotland								
Products and Services Score 1-7		4.5	4.5					5.0
Cultural Heritage 1-7		5.0	5.0					5.3
Contemporary Culture 1-7		4.6	4.6					4.8
Historic Building and Monument 1-7		5.0	5.1					5.4
Vibrant cities and Urban Attractions 1-7		4.8	4.8					5.1
Business to Invest In 1-7		4.2	4.8					4.4

REFERENCES / RESOURCES

Academic Publications

Lawton, R., Fujiwara, D., Mourato, S., Bakhshi, H., Lagarde, A., Davies, J. (2018), *The Economic Value of Heritage: A Benefit Transfer Study*, Nesta, Simetrica Arts and Research Council

Ginevičius R., Gudačiauskas D (2004) Brand valuation model, Journal of Business Economics and Management, 5:3, 143-153

Report

Scottish Government (Ed.), Anholt GfK Roper National Brands Index TM (2019), The Anholt GfK Roper National Brands Index SM 2018 Report for Scotland: Scottish Government Strategic Analysis, Edinburgh

Scottish Government (Ed.), Anholt GfK Roper National Brands Index TM (2017), The Anholt GfK Roper National Brands Index SM 2018 Report for Scotland: Scottish Government Strategic Analysis, Edinburgh

MOFFAT Centre for Tourism and Business Development (2019) Visitor Attraction Monitor 2018, , Glasgow Caledonian University

MOFFAT Centre for Tourism and Business Development (2019), Extract – Origins of visitors, Visitor Attraction Monitor 2018 , , Glasgow Caledonian University

MOFFAT Centre for Tourism and Business Development (2019) Extract - Comparative Analysis of Visits 2018/2017 by: Robert Burns in the Scottish Economy Attractions, Visitor Attraction Monitor 2018, , Glasgow Caledonian University

Data

Murray Pittock, *Robert Burns and the Scottish Economy* (2019)

Survey Monkey – 'Survey Robert Burns in the Scottish Economy' (2019)