

## International Research

# Impact evaluation of the “Points of Entry” campaign 2007

Scotinform Ltd

In 2006 the International and Europe Research Team at the Scottish Executive commissioned Scotinform Ltd to conduct research to assess the impact of the “Points of Entry” campaign since its launch. In April 2007, Scotinform Ltd was commissioned to revisit the research study in the light of changes made to the campaign following the 2006 evaluation.

As a result of the 2006 evaluation recommendations, the campaign became more focussed in the BAA airports, with it being placed in more strategic locations allowing for better reach of arriving passengers. In addition to the change in the location of the campaign in late July/early August 2006 the campaign was revised in BAA airports to feature fewer images and to focus specifically on the “Welcome to Scotland” message and the Saltire. However, the campaign materials in the non-BAA airports remained the same as in 2006.

## Main Findings

- Unprompted recall of posters and banners promoting Scotland in and around airports was greater in 2007 than in 2006 with one quarter (25%) of respondents in the 2007 study recalling posters and banners at the airport at which they were interviewed in comparison to 19% of respondents in 2006.
- Respondents interviewed at BAA airports were more likely than those interviewed at non-BAA airports to have unprompted recall of key elements of the campaign such as the welcome message and the Scottish flag.
- Prompted awareness of the campaign was higher than last year suggesting that the images and locations in which they are situated are successfully reaching key target audiences such as first-time visitors to Scotland, business visitors (UK and overseas), students (UK and overseas), visitors (UK and overseas) and Scottish residents.
- Respondents from all visitor segments, and Scottish residents, agreed that it was important that efforts were made to welcome people to Scotland.
- The findings from the 2007 study reflect those of the previous research and highlight the positive perceptions visitors to Scotland have of the country prior to their arrival and their first impressions on landing at a Scottish airport. Respondents' high levels of satisfaction with their visit to Scotland indicate that initial positive perceptions and first impressions are sustained and realised throughout their time spent in Scotland.

## Introduction

This reports sets out the key findings of the impact evaluation of the "Points of Entry" campaign which was launched in June 2005 by Scotland's International Image Marketing Team to "project a sense of arrival in Scotland as a unique and thriving country, proud of its history and confident of its future".

The "Points of Entry" campaign is one component of the "First Impressions" project of giving visitors a "sense of place" which leaves them with a positive impression of Scotland as they return home.

The campaign, within the three BAA airports (Aberdeen, Edinburgh and Glasgow) features the headline "Welcome to Scotland", with the smaller strapline 'the best small country in the world', the Saltire and images of Scotland. In the non-BAA airports (Dundee, Prestwick and Inverness) the campaign includes a series of visuals presenting modern and traditional Scotland and features the tagline "Welcome to the best small country in the world".

## Study Objectives

The key objectives associated with the study were to:

- establish unprompted and prompted awareness of the promotional materials
- establish the perceptions created by the promotional materials in terms of visitors' first impressions of Scotland
- identify visitors' overall impression of Scotland at the point of departure
- investigate what factors affect visitors' experience of Scotland
- establish people's expectations of their trip to Scotland and the relationship between these and their actual experiences
- explore visitors' likelihood of returning to Scotland and whether they would recommend Scotland to others

In addition, the 2007 evaluation sought to draw comparisons, where appropriate, with the baselines established in the evaluation conducted by Scotinform Ltd in 2006.

## Study Approach

The study included quantitative research conducted at Scotland's 6 airports: Aberdeen, Dundee, Edinburgh, Glasgow, Inverness and Prestwick. 70% of the 609 interviews were conducted at arrivals and 66% of respondents were first-time visitors to Scotland. The sample included tourist visitors (UK and overseas), business visitors (UK and overseas), students (UK and overseas) and a small quota of Scottish residents.

Visitors to Scotland were most likely to be residents of the UK (not Scotland), Spain, USA and Germany.

## Awareness of campaign

The 2007 evaluation concluded that the "Points of Entry" campaign had higher awareness amongst respondents than in 2006.

Unprompted awareness was significantly higher than in 2006 with respondents arriving at BAA airports more likely than respondents arriving at non-BAA airports to recall specific elements of the campaign featured within the airports at which they were interviewed, eg the Saltire and "Welcome to Scotland". The findings suggest that the prominent locations within arrivals at BAA airports as well as the campaign's focus (less imagery and clear messages) has impacted on awareness.

Although prompted awareness of visuals was higher in non-BA airports, respondents arriving in BAA airports were more likely to recall specific elements of the campaign such as the Saltire and "Welcome to Scotland" message when prompted.

Respondents at BAA airports were more likely than respondents at non-BAA airports to agree strongly with a series of attitude statement designed to reflect the aims of the campaign: to make visitors feel welcomed to Scotland, to create a sense of having arrived in Scotland and to show various aspects of life in Scotland. The findings suggest that the campaign materials located within the BAA airports more clearly communicate these aims to respondents than the materials located within the non-BAA airports.

## Saltire recognition

82% of respondents were able to identify the Saltire from a show card also featuring the flags of Wales, New Zealand, Norway, England and Iceland. There were high levels of awareness amongst first-time visitors and overseas visitors.

## Impressions of Scotland and the visitor experience

The findings from the 2007 study mirror those of the 2006 evaluation and highlight the positive perceptions visitors have of Scotland prior to arrival and their first impressions of the country on landing at a Scottish airport. The scenery and people were the elements most likely to be mentioned by respondents when asked what their impressions of Scotland were prior to arrival and on arrival (mentioned by 58% and 41% of respondents respectively).

96% of respondents interviewed as they were leaving Scotland stated that they were satisfied with their visitor experience – three quarters of respondents (74%) were very satisfied with their experience of visiting Scotland. The findings suggest that visitors' positive perceptions and first impressions of Scotland are sustained throughout their time spent in the country.

46% of respondents stated that their arrival at a Scottish airport was better than arriving at other airports. The findings suggest that, as in the 2006 study, the efficiency of moving through an airport on arrival – including baggage collection, time to disembark, journey from plane to terminal – made for a positive experience for visitors and was likely to give a good impression of Scotland at their time of arrival.

Respondents were asked to select three words from a prompted list which they felt described Scotland. The three words most likely to be selected by all respondents were traditional, welcoming and proud – selected by 84%, 71% and 51% of respondents respectively.

## Likelihood of returning to Scotland and recommending Scotland to others

### - Likelihood of returning to Scotland

The majority of visitors to Scotland interviewed at departures stated that they were either very likely or quite likely to visit Scotland again as a tourist suggesting that they had enjoyed a positive visitor experience.

Three quarters of the students interviewed stated that they would consider coming to live and work in Scotland.

### - Recommending Scotland

The questionnaire featured a series of attitude statements to assess whether respondents, on departing Scotland, were

likely to recommend Scotland as a place to visit, live and work, do business and study. The findings indicate that tourists, business visitors and students had had positive visitor experiences in Scotland and would recommend Scotland as a place to visit, live, work, do business and study.

The majority of business visitors stated that they would recommend Scotland as a place to live, work and do business. Two thirds of these respondents also agreed that they would recommend Scotland as a conference/event location.

All students interviewed would recommend the country as a place to study.

The majority of Scottish residents interviewed stated that they would be either very likely or quite likely to recommend Scotland as a place to live and work.

The study findings highlighted that positive visitor experiences create future ambassadors for Scotland who will positively "market" Scotland as a visitor, business or student destination.

## Conclusions and Recommendations

The 2006 study recommended that the "Points of Entry" campaign included fewer images (perhaps one or two) which could be immediately identified as representing Scotland and successfully combine both modern and traditional Scotland. The 2006 evaluation also recommended refining the location of the campaign in BAA airports to allow for better reach of arriving passengers.

The campaign currently featured within BAA airports, which focuses on key messages and features less imagery, appears to clearly communicate a "Welcome to Scotland" and project a sense of having arrived in Scotland in comparison to the previous campaign which is still located within non-BAA airports. This 2007 study recommends that the Scottish Executive considers extending the new campaign materials to all airports in Scotland to ensure that these key messages are clearly communicated to all visitors to Scotland's airports.

The new campaign in BAA airports has featured predominantly in international arrivals. Given that many overseas visitors enter Scotland from another UK airport it may be appropriate for the Scottish Executive to seek key positions within the domestic arrivals at Edinburgh and Glasgow Airports to ensure that a welcome is also extended to these visitors.

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The report, "Impact evaluation of the "Points of Entry" campaign 2007," which is summarised in this research findings is a web only document and is available on the publications pages of the Scottish Executive website at

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