



# Highland 2015 Economic Impact Assessment

Report for World Orienteering Championships

September 2015

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## 1. Introduction

This report provides an economic impact assessment of Highland 2015 which comprised the World Orienteering Championships and Scottish 6 Days Orienteering.

### 1.1 Background

The Scottish 6 Days Orienteering Event has been held biennially since 1977. This year the event will take place between the 2<sup>nd</sup> and 8th August. This year the World Orienteering Championships also took place at the same location between the 31<sup>st</sup> July and 7<sup>th</sup> August.

### 1.2 Objectives

The objective of this study is to undertake an economic impact assessment of Highland 2015 at the local (Highland & Moray) and Scotland levels.

### 1.3 Funding

The event received public sector funding of £388,000 from:

- EventScotland - £305,000;
- Highland Council - £60,000;
- Moray Council - £10,000;
- Active Places - £11,000; and
- Forestry Commission Scotland - £2,000.

There was also in-kind support from the military of £45,000 and Marine Harvest of £10,000.

### 1.4 Report Structure

The remainder of the report is structured as follows:

- **Chapter 2:** analysis of the S6D participants survey;
- **Chapter 3:** analysis of the spectator survey;
- **Chapter 4:** economic impact; and
- **Chapter 5:** conclusions.

## 2. S6D Participant Survey

### 2.1 Introduction

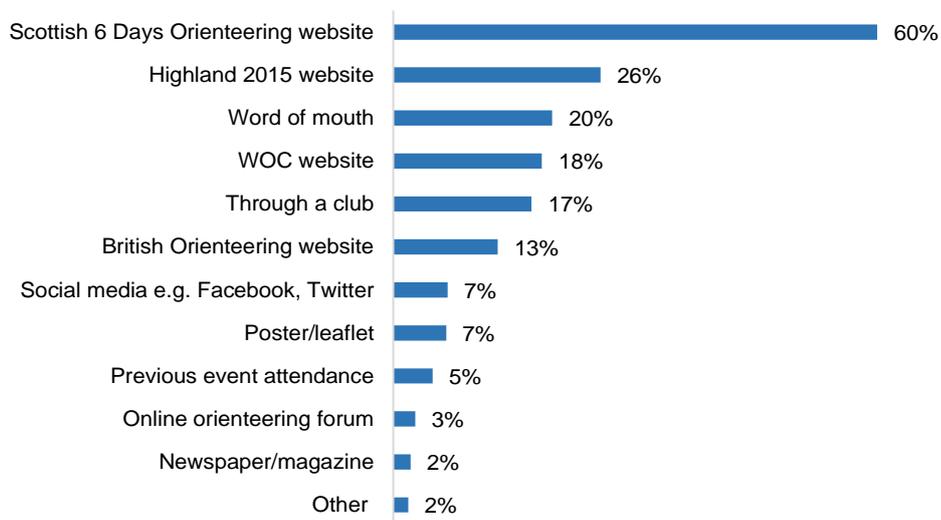
This chapter presents the findings of the survey of participants in the S6D which was conducted online after the event.

A total of 1,031 participant surveys were completed giving a standard error of +/- 2.8% (robust for economic impact purposes).

### 2.2 Awareness of Event

Participants were asked how they had found out about the event, **Figure 2.1** provides details.

**Figure 2.1 Awareness of Event**



N=1,027, Multiple responses possible

A total of 60% of participants found out about the event through the official Scottish 6 Days website, with sizable proportions also becoming aware of the event through the Highland 2015 website (26%), through word of mouth (20%) and the WOC website (18%).

A number of respondents (2%) stated that they found out through ‘other’ means, such as involvement with organisers or through sponsors.

Participants were asked to identify the factors which had influenced their decision to enter the event (**Table 2.1**).

**Table 2.1: Influential factors on decision to enter the event**

|                                       | A lot | A little | Not at all |
|---------------------------------------|-------|----------|------------|
| Enjoyed previous S6D events           | 71%   | 6%       | 23%        |
| Reputation of the event               | 64%   | 25%      | 11%        |
| Wanted to visit Scotland              | 34%   | 32%      | 34%        |
| Recommendation from friends/relatives | 25%   | 25%      | 51%        |
| Other                                 | 22%   | 8%       | 70%        |
| S6D Orienteering website              | 15%   | 43%      | 43%        |
| WOC website                           | 11%   | 22%      | 67%        |
| Wanted to visit friends/relatives     | 8%    | 13%      | 79%        |
| Orienteering forum discussions        | 2%    | 10%      | 88%        |

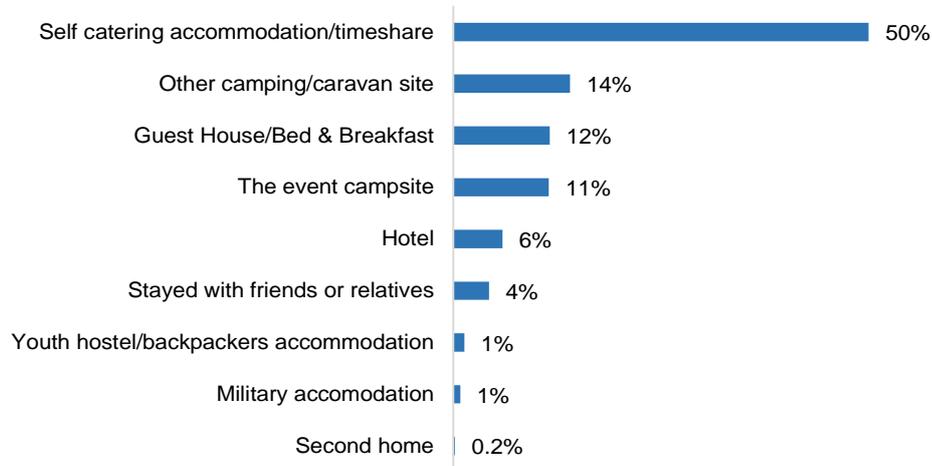
The most influential factor in encouraging participants to attend was that they had enjoyed previous S6D events (71%) and the reputation of the event (64%).

Those participants citing ‘other’ influential factors were asked to identify these, with the most common being spectating at the WOC (9% of total participants).

## 2.3 Accommodation

Those that stayed overnight were asked to provide further information regarding the type of accommodation used during their stay (**Figure 2.2**, over).

**Figure 2.2: Types of accommodation used**

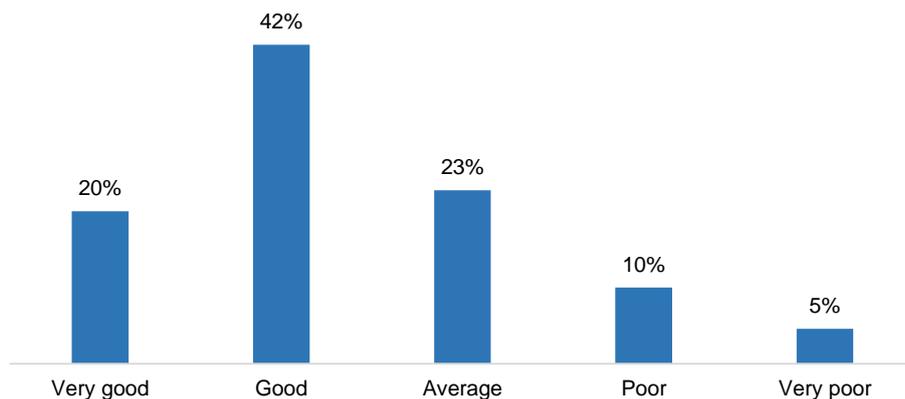


N=983

Half the participants stayed in self-catering accommodation, with a quarter camping either at the event campsite, or another camping/caravan site.

Those who stayed at the event campsite were asked to rate the site with just over three-fifths (62%) rating it as very good/good (**Figure 2.3**). Of those that used the campsite, 30% would not have attended the event if there was not a campsite.

**Figure 2.3: Rating of event campsite**



N=109

## 2.4 Rating of the Event

Participants were invited to rate various aspects of the event, on a scale from very good to very poor. **Table 2.2**, over, details the responses.

**Table 2.2: Rating of event aspects**

|   | Very good | Good | Average | Poor | Very poor |
|---|-----------|------|---------|------|-----------|
| Quality of event areas/maps                   | 49%       | 39%  | 10%     | 2%   | 0%        |
| Facilities available at event areas           | 39%       | 47%  | 11%     | 3%   | 0%        |
| Quality of course planning                    | 37%       | 46%  | 14%     | 3%   | 0%        |
| Information provision – Highland 2015 website | 41%       | 44%  | 13%     | 1%   | 0%        |
| Information provision - S6D website           | 44%       | 44%  | 11%     | 1%   | 0%        |
| Information provision - S6D printed programme | 51%       | 40%  | 8%      | 1%   | 1%        |
| Information provision - WOC website           | 38%       | 46%  | 15%     | 1%   | 1%        |
| Information provision - social media          | 34%       | 41%  | 23%     | 2%   | 0%        |
| Overall experience                            | 42%       | 48%  | 9%      | 1%   | 0%        |

All aspects of the event were rated very good/good by at least 75% of participants, with the quality of printed programme (91%), the overall experience (90%), the quality of the event areas/maps (88%) and the information provision from the S6D website (88%) the highest rated.

Participants were asked to rate the importance of facilities which were available as part of the Event Centre (**Table 2.3**).

**Table 2.3 Importance of 'Event Centre' Facilities**

|                                       | Essential | Useful | Not important | Did not use |
|---------------------------------------|-----------|--------|---------------|-------------|
| Results service                       | 44%       | 26%    | 4%            | 25%         |
| Information point                     | 37%       | 33%    | 2%            | 28%         |
| Catering provision                    | 31%       | 38%    | 4%            | 27%         |
| WiFi connection                       | 26%       | 33%    | 7%            | 35%         |
| Campsite facilities including showers | 23%       | 16%    | 4%            | 57%         |
| Social facilities including bar       | 7%        | 29%    | 15%           | 48%         |

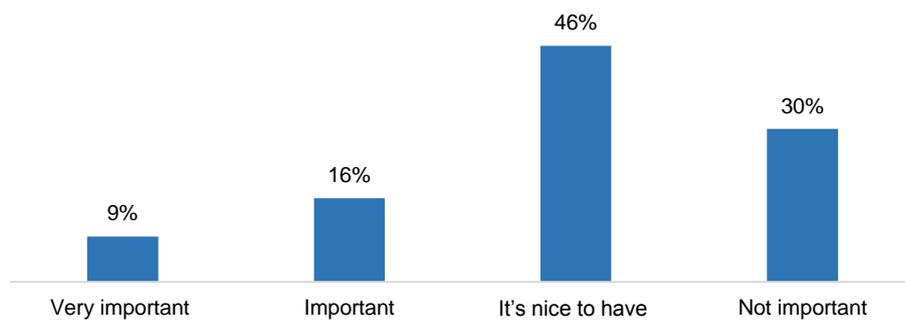
Those with the highest proportions that were considered essential/useful were the results service (71%), the information point (70%) and catering provision (69%).

A total of 15% of participants left further comments on these issues with the most common being:

- poor facilities at campsite, in particular, poor toilet and shower facilities (2%);
- wifi connection was poor (2%);
- lack of water during and at finish of races (1%); and
- lack of food options (1%).

In terms of availability of merchandise, a quarter considered it very important/important and 46% nice to have. (**Figure 2.4**).

**Figure 2.4 Importance of Merchandise Availability**



N=1,027

Opinion was almost evenly split on the issue of parking fees, with 51% preferring it inclusive of the entry fee and 49% preferring it separate.

## 2.5 Rating of Event Enhancements

The event has a number of other aspects that are possible due to funding that has been provided to the event. Participants were asked to rate these and **Table 2.4**, over, provides a breakdown of these ratings.

**Table 2.4: Ratings of event enhancements**

|   | <b>Great idea</b> | <b>Nice to have</b> | <b>Indifferent</b> | <b>Not of interest</b> |
|---|-------------------|---------------------|--------------------|------------------------|
| Big screen (including live filming)       | 65%               | 25%                 | 6%                 | 4%                     |
| Electronic result displays                | 42%               | 36%                 | 15%                | 7%                     |
| Professional commentary                   | 37%               | 40%                 | 15%                | 8%                     |
| Food & drink marquee (selected days)      | 29%               | 46%                 | 15%                | 10%                    |
| Crowd barriers and banners                | 27%               | 47%                 | 20%                | 5%                     |
| Power ring main to reduce generator noise | 27%               | 44%                 | 18%                | 11%                    |
| Campsite marquee                          | 15%               | 29%                 | 21%                | 35%                    |
| Promotional video                         | 12%               | 34%                 | 34%                | 20%                    |

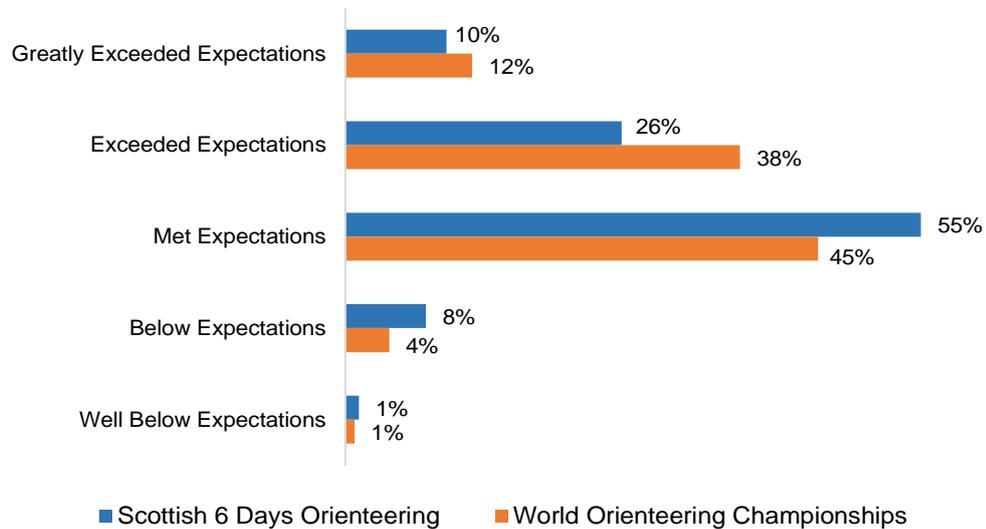
The big screen was rated as the most appealing, with 65% describing it as a great idea. Electronic results display (42%), and professional commentary (37%) were next. The promotional video and the campsite marquee were less important with 54% and 56% not interested/indifferent, respectively.

Participants were invited to comment further on any of these. Comments included:

- commentary poor/too loud (3% of all respondents);
- was not aware of the electronic results service (3%)
- big screen was good, however, many seen it as more important for the WOC than the S6D (2%); and
- the commentary was good (1%).

Respondents were asked to what extent the two events lived up to their expectations (**Figure 2.5**).

**Figure 2.5 Expectations of Event**



Expectations were met or exceeded for more than 90% of respondents for both the S6D and the WOC.

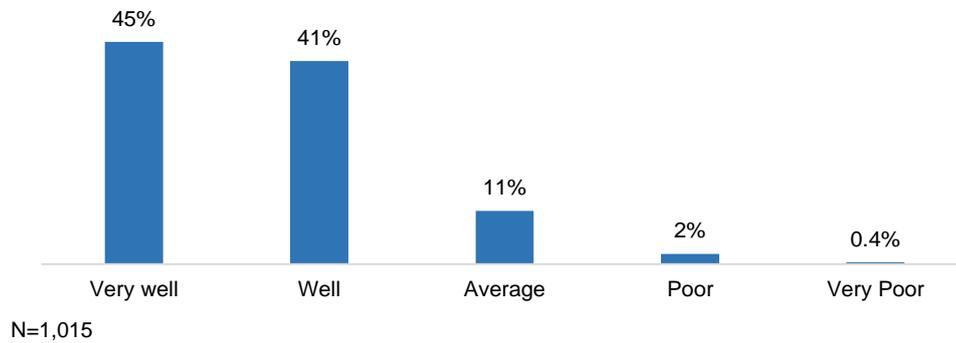
Participants were asked how likely they would be to visit various orienteering events in the future (**Table 2.5**). The most likely event they would return to was the S6D, with a total of 82% saying that they were very likely/likely to return. Participants were more likely to attend a future WOC event if it was held in Scotland (53%) rather than in the UK (48%) or overseas (24%).

**Table 2.5 Likelihood of Return**

|                                    | Very Likely | Likely | Maybe | Unlikely | Very Unlikely |
|------------------------------------|-------------|--------|-------|----------|---------------|
| Scottish 6 Days Orienteering       | 61%         | 21%    | 15%   | 2%       | 1%            |
| WOC (in Scotland)                  | 31%         | 22%    | 27%   | 11%      | 9%            |
| WOC (in UK)                        | 26%         | 22%    | 29%   | 13%      | 10%           |
| WOC (Overseas)                     | 10%         | 14%    | 29%   | 24%      | 24%           |
| Other orienteering spectator races | 14%         | 17%    | 32%   | 18%      | 20%           |

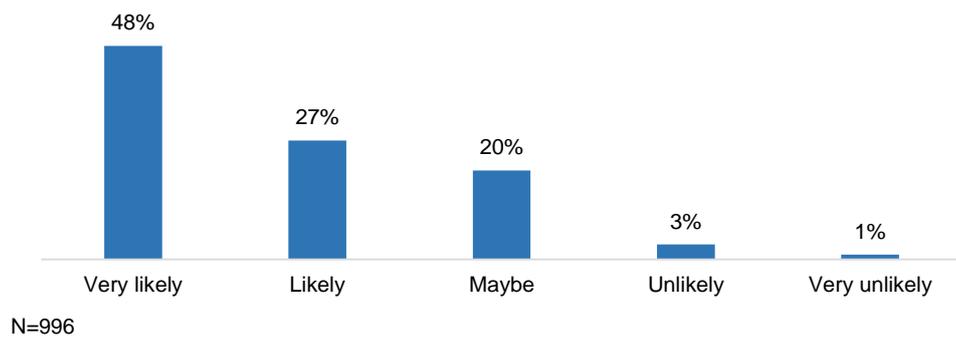
The majority of participants (86%) felt that the Highland 2015 event had showcased the sport of orienteering very well/well (**Figure 2.6**).

**Figure 2.6 How well Highland 2015 has showcased orienteering**



Three quarters of participants are very likely/likely to return to Scotland on holiday after having visited Highland 2015 (**Figure 2.7**).

**Figure 2.7 Likelihood of returning to Scotland on holiday**

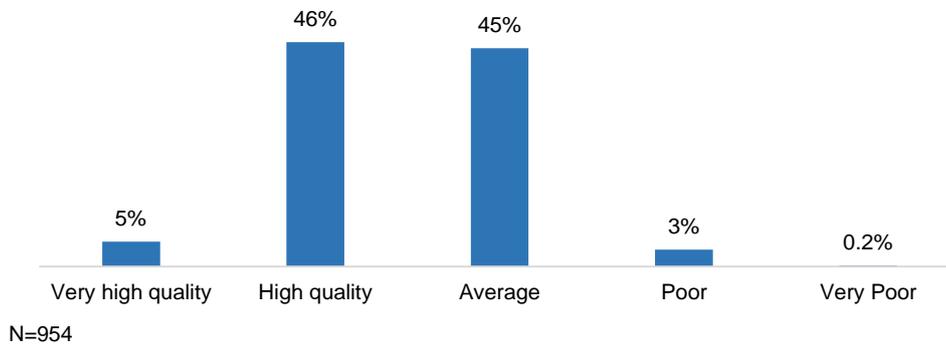


The main reasons given for those that were unlikely/very unlikely to return were:

- too far from home (1.3% of all participants);
- the weather is poor (0.7%);
- only travel for orienteering events (0.6%); and
- like to visit a variety of places (0.5%)

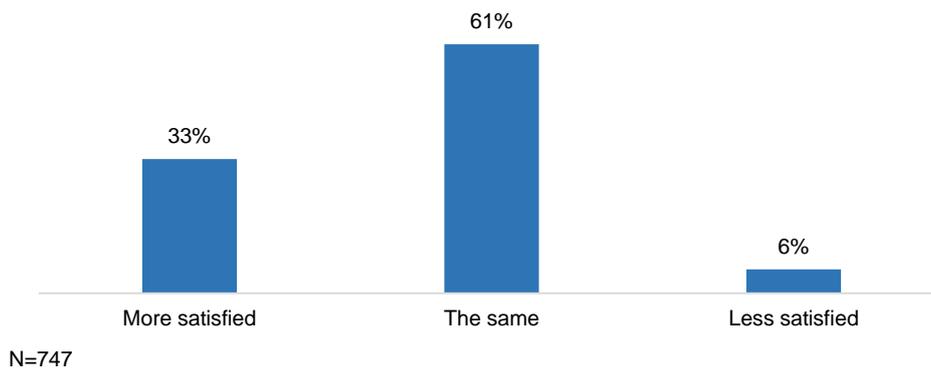
Just over half (51%) of participants rated the food & drink at the event as very high quality/high quality, with 45% rating it as average (**Figure 2.8**).

**Figure 2.8 Quality of Food & Drink**



A total of 79% of participants had previously attended a S6D or WOC event, and a third of those were more satisfied with the food & drink than at previous events, but most (61%) found it the same (**Figure 2.9**).

**Figure 2.9 Quality of Food & Drink Compared to Previous Events**



Participants were asked how much they had spent on food and drink at the event (**Table 2.6**).

**Table 2.6: Spend on Food and Drink**

| Amount        | %    |
|---------------|------|
| £0-10         | 87%  |
| £11-20        | 9%   |
| £21-30        | 3%   |
| £31-40        | <1%  |
| More than £40 | <1%  |
| Total         | 100% |

## 2.6 Other Comments

Participants were invited to offer any additional comments which they had on the event. The most commonly stated comments included:

- car parking was poor (8% of all respondents), with many complaining about long queues into and out of the car parks (3%);
- problems with Day 5 (8%) including:
  - poor terrain (4%), with 1% describing it as dangerous
  - course was too long (2%)
  - poor map (2%);
- the event was enjoyable (4%); and
- too crowded due to having both S6D and WOC at the same time (3%).

## 3. Spectator Survey

### 3.1 Introduction

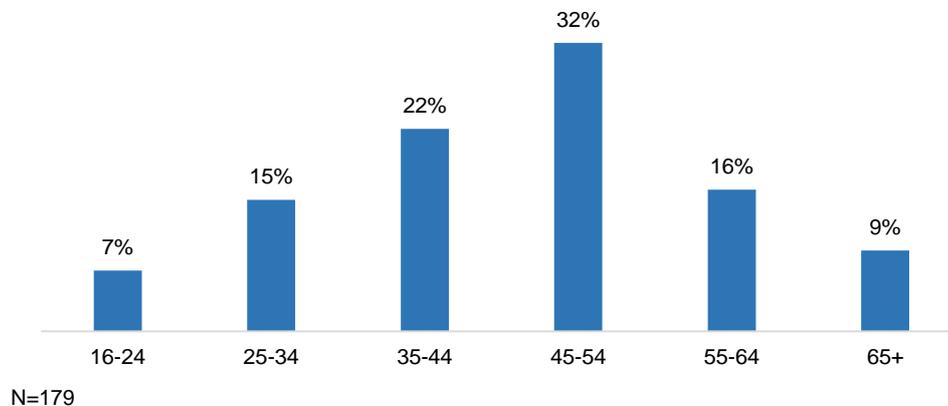
This chapter presents the findings of the spectator survey which was conducted face to face during the event. A total of 181 Spectator surveys were completed giving a standard error of +/-4.7% (robust for economic impact purposes).

It should be noted that these were spectators that were not a participant in or a friend or relative of someone taking part in the S6D.

### 3.2 Spectator Profile

The spectators were 51% male and 49% female, with the largest age group of adult spectators being aged 45 to 54 (32%) (**Figure 3.1**)

**Figure 3.1 Age of Spectators**

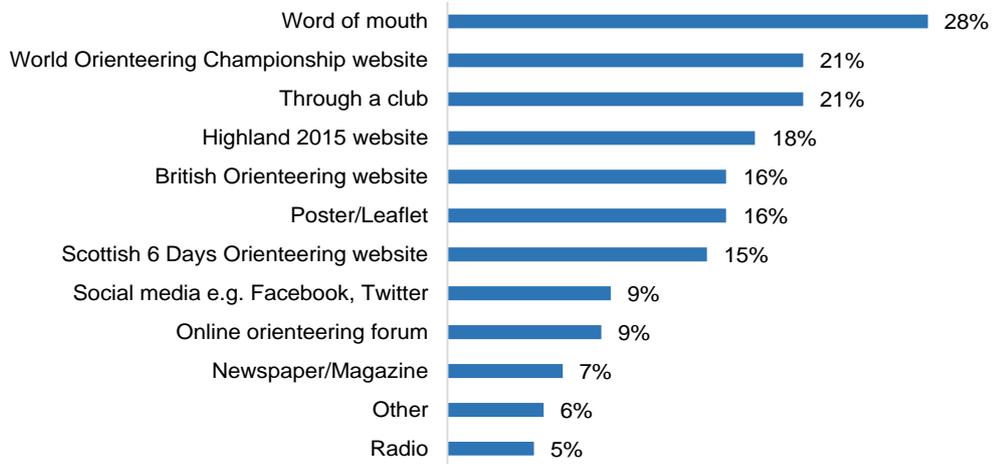


The average group size was four and 39% of groups contained children, with an average of two per group.

### 3.3 Awareness of Event

Spectators were asked how they had found out about the event, **Figure 3.2** provides details.

**Figure 3.2 Awareness of Event**



N=180, Multiple responses possible

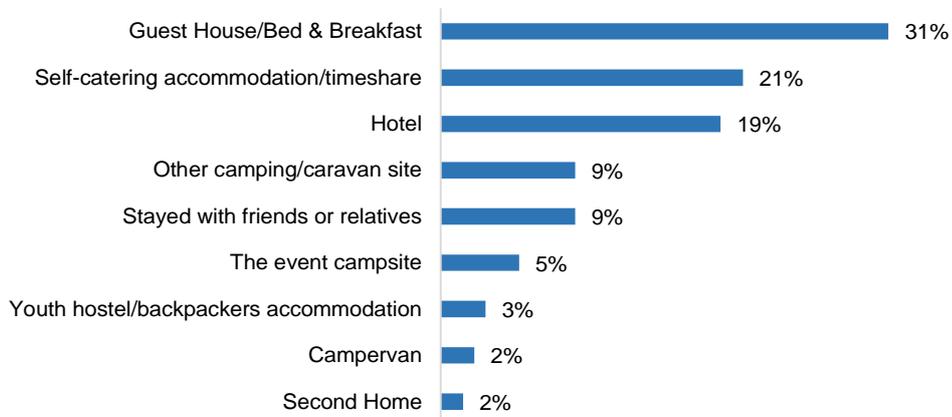
The most common way of finding out about the event was through word of mouth (28%), followed by the WOC website (21%) and through an orienteering club (21%).

A number of respondents (6%) stated that they found out through ‘other’ means, such as foreign media or seen it whilst passing through.

### Accommodation

Those that stayed overnight were asked to provide further information regarding the type of accommodation used during their stay (**Figure 3.3**, over).

**Figure 3.3: Types of Accommodation Used**



N=130

A total of 31% stayed in a guest house/bed and breakfast, with a further 21% in self-catering accommodation. Only 5% of spectators stayed at the event campsite, of which 86% rated it as very good.

### 3.4 Rating of the Event

The spectators were invited to rate various aspects of the event, on a scale from very good to very poor. **Table 3.1** details the responses.

**Table 3.1: Rating of event aspects**

|                          | Very good | Good | Average | Poor | Very poor |
|--------------------------|-----------|------|---------|------|-----------|
| Quality of viewing areas | 77%       | 22%  | 1%      | 0%   | 0%        |
| Parking                  | 56%       | 28%  | 11%     | 4%   | 1%        |
| Overall experience       | 74%       | 25%  | 1%      | 1%   | 0%        |

The quality of the viewing areas (99% very good/good) and the overall experience (98%) were particularly highly rated, with the parking less highly regarded, but still being rated very good/good by 84% of spectators.

Spectators were asked to rate the importance of facilities which were available as part of the Event Centre (**Table 3.2**, over).

**Table 3.2 Importance of 'Event Centre' Facilities**

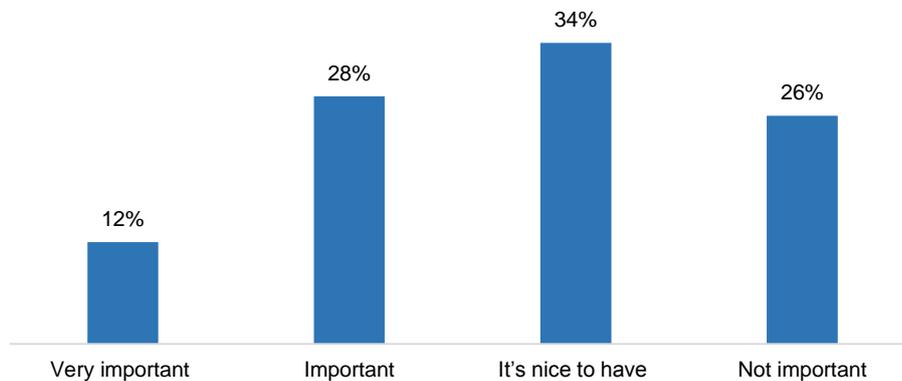
|                                       | Essential | Useful | Not Important |
|---------------------------------------|-----------|--------|---------------|
| Results service                       | 67%       | 31%    | 2%            |
| Catering provision                    | 62%       | 36%    | 2%            |
| Information point                     | 54%       | 44%    | 2%            |
| Campsite facilities including showers | 75%       | 20%    | 5%            |
| WiFi connection                       | 62%       | 28%    | 9%            |
| Social facilities including bar       | 49%       | 37%    | 14%           |

The results service, catering provision and the information point were regarded as essential/useful by almost all spectators (98%).

A total of 6% of respondents left further comments with 5% reporting that the Wifi did not work.

In terms of merchandise at the events, two fifths considered it very important/important and just over one third (34%) as nice to have. (Figure 3.4).

**Figure 3.4 Importance of Event Merchandise Availability**



N=181

### 3.5 Rating of Event Enhancements

The event has a number of other aspects that are possible due to funding that has been provided to the event. Spectators were asked to rate these and **Table 3.3**, over, provides a breakdown of these ratings.

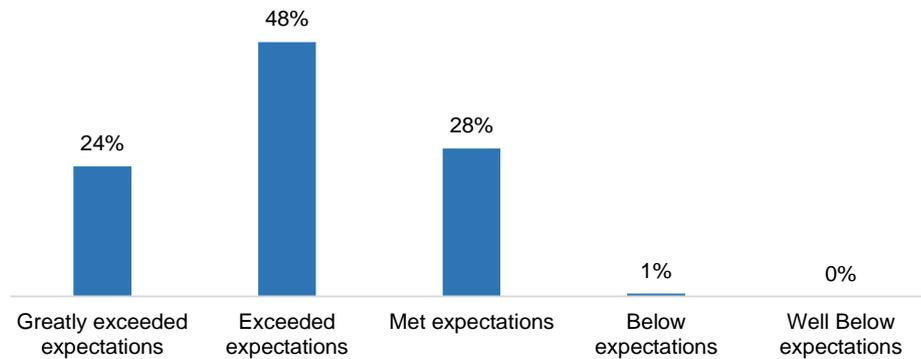
**Table 3.3: Ratings of event enhancements**

|   | Great Idea | Nice to Have | Indifferent | Not of Interest |
|---|------------|--------------|-------------|-----------------|
| Big Screen (Including live filming)       | 89%        | 9%           | 1%          | 1%              |
| Electronic result displays                | 81%        | 17%          | 1%          | 2%              |
| Professional commentary                   | 77%        | 19%          | 3%          | 1%              |
| Food & drink marquee                      | 65%        | 27%          | 3%          | 4%              |
| Crowd barriers and banners                | 52%        | 34%          | 11%         | 3%              |
| Power ring main to reduce generator noise | 43%        | 20%          | 20%         | 17%             |
| Promotional video                         | 38%        | 33%          | 21%         | 9%              |
| Campsite marquee                          | 36%        | 29%          | 21%         | 14%             |

The big screen was rated as the most appealing, with 89% describing it as a great idea. Electronic results display (81%) and professional commentary (77%) were next.

**Figure 3.5** summarises whether the event lived up to spectators expectations. For the majority (72%) their expectations of the event were exceeded.

**Figure 3.5 Expectations of Event**



N=181

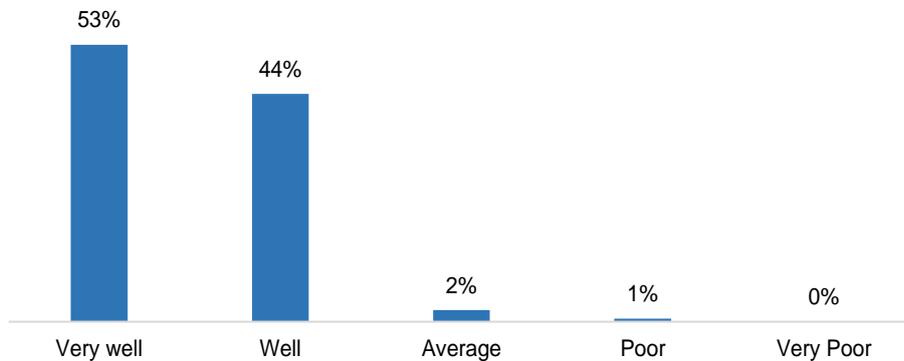
Spectators were asked how likely they would be to visit various orienteering events in the future (**Table 3.4**, over). The most likely event they would return to was the WOC if it was in Scotland (69%), followed by the S6D (63%).

**Table 3.4 Likelihood of Return**

|   | Very Likely | Likely | Maybe | Unlikely | Very Unlikely |
|---|-------------|--------|-------|----------|---------------|
| World Orienteering Championship (in Scotland) | 46%         | 23%    | 20%   | 9%       | 3%            |
| World Orienteering Championship (in UK)       | 37%         | 19%    | 17%   | 19%      | 8%            |
| World Orienteering Championship (Overseas)    | 29%         | 13%    | 19%   | 25%      | 14%           |
| Scottish 6 Days Orienteering                  | 40%         | 23%    | 14%   | 15%      | 7%            |
| Other orienteering spectator races            | 33%         | 27%    | 17%   | 14%      | 9%            |

Spectators were very positive about how well the Highland 2015 event had showcased the sport of orienteering, with 97% reporting that it had done this very well/well (**Figure 3.6**).

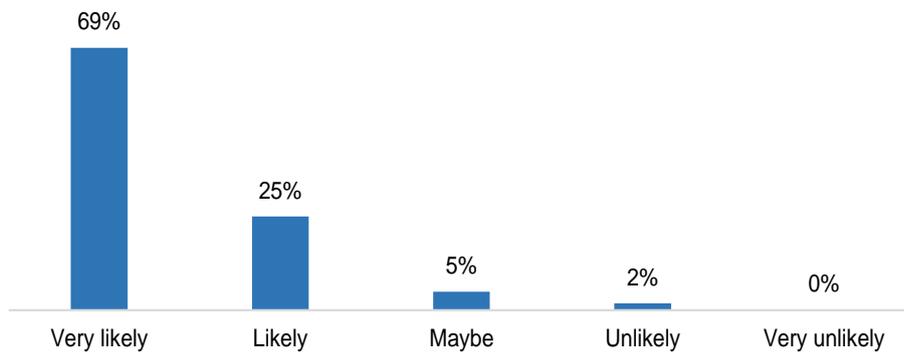
**Figure 3.6 How Well Highland 2015 has Showcased Orienteering**



N=180

A high proportion of spectators (93%) are very likely/likely to return to Scotland on holiday after having visited Highland 2015 (**Figure 3.7**).

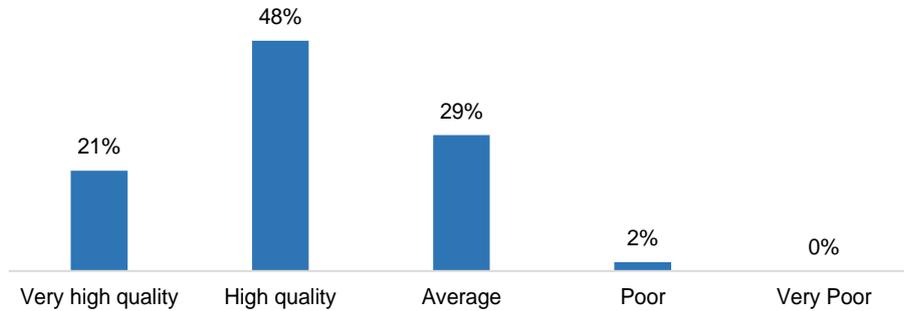
**Figure 3.7 Likelihood of Returning to Scotland on Holiday**



N=157

Spectators were broadly satisfied with the quality of the food & drink at the event with 69% rating it as very high quality/high quality (**Figure 3.8**).

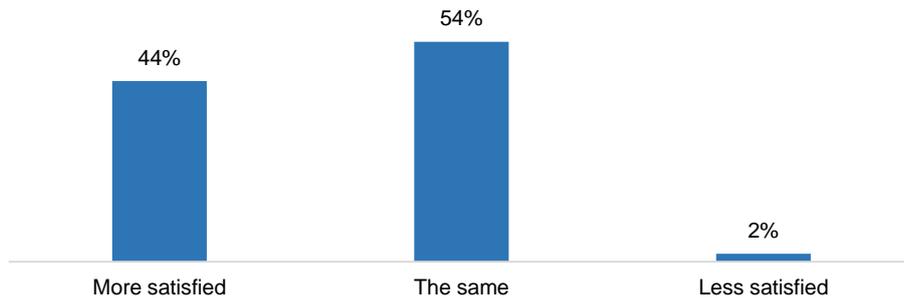
**Figure 3.8 Quality of Food & Drink**



N=181

A total of 29% of spectators had previously attended the WOC, and 44% of those were more satisfied with the food & drink than at previous WOC events and 54% found it to be the same (**Figure 3.9, over**).

**Figure 3.9 Quality of Food Compared to Previous Events**



N=52

Spectators were asked how much they had spent on food and drink at the event (**Table 3.5**).

**Table 3.5: Spend on Food and Drink**

| Amount        | %    |
|---------------|------|
| £0-10         | 63%  |
| £11-20        | 23%  |
| £21-30        | 6%   |
| £31-40        | 4%   |
| More than £40 | 3%   |
| Total         | 100% |

## 3.6 Other Comments

Spectators were invited to offer any additional comments on the event, with the most common being positive comments on how good the event was (11% of all participants).

## 4. Economic Impact

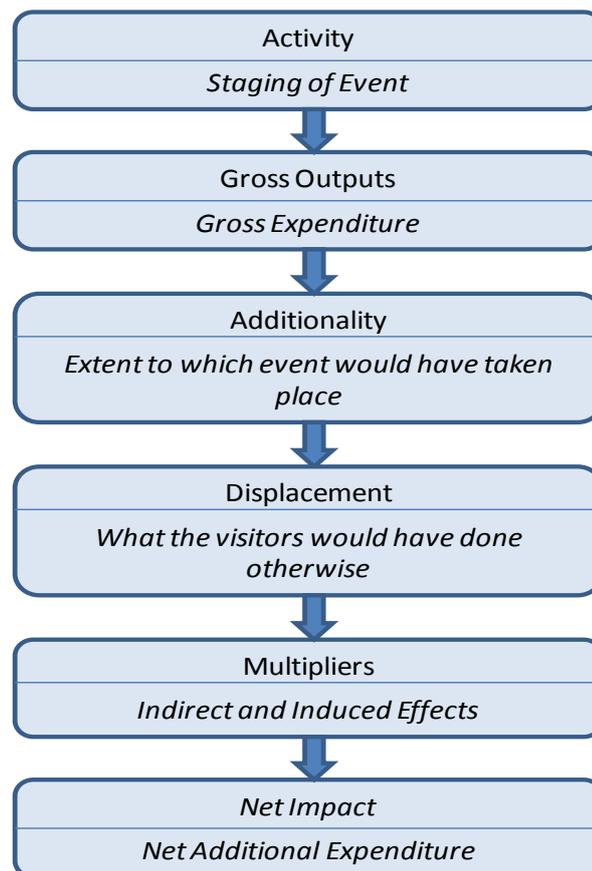
### 4.1 Introduction

This chapter sets out the economic impact assessment at two geographic levels – Highland & Moray and Scotland.

### 4.2 Economic Impact Assessment Method

Our approach to the economic impact assessment is given in **Figure 4.1**.

**Figure 4.1: Economic Impact Assessment Method**



The WOC and S6D are inextricably linked with people moving between one event and the other. For example, a large number of the participants at the S6D will also have been spectators at the WOC. Therefore, the economic impact from the two events is also inextricably linked.

For the purposes of the economic impact assessment we need to separate people into discrete groups so that we do not double-count the impacts. However, this should not be read as being the impact generated by the two separate events because it is not possible to do this.

### 4.3 S6D Participants and Friends/Relatives

### 4.4 Visitors

The total number of visitors to the S6D event was 7,382 (based on participant numbers - 6,258 - provided by the organisers and the number of non-participants estimated through the survey - 1,124<sup>1</sup>).

**Table 4.1** shows visitors, split by day and overnight.

**Table 4.1: Number of Unique Visitors**

|           | Number | %      |
|-----------|--------|--------|
| Day       | 357    | 4.8%   |
| Overnight | 7,024  | 95.2%  |
| Total     | 7,382  | 100.0% |

Overnight accommodation is a significant item of expenditure, therefore, the analysis distinguishes between day visitors and those staying overnight. Also the pattern of visitor behaviour varied by the origin of visitors, therefore these have been analysed separately in order to derive the economic impact. **Table 4.2** gives a breakdown of type of visitor by origin.

**Table 4.2: Visitors by Type and Origin**

|                       | Day  | Overnight |
|-----------------------|------|-----------|
| Highland & Moray      | 4.8% | 1.8%      |
| Elsewhere in Scotland | -    | 6.2%      |
| Elsewhere in UK       | -    | 36.7%     |
| Overseas              | -    | 50.4%     |
| Total                 | 4.8% | 95.2%     |

<sup>1</sup> The number of non-participants as a ratio to participants was estimated at an average of 0.18.

The most common origin for visitors was from Overseas (50.4%). A total of 87% of visitors were people from outside Scotland.

#### 4.4.1 Expenditure

The level of expenditure also varies by origin, and day and overnight visitors. The average daily expenditure for visitors is shown in **Table 4.3**<sup>2</sup>.

**Table 4.3: Average Daily Expenditure**

| Origin                | Day    | Overnight |
|-----------------------|--------|-----------|
| Highland & Moray      | £18.41 | £47.75    |
| Elsewhere in Scotland | -      | £60.28    |
| Elsewhere in UK       | -      | £68.70    |
| Overseas              | -      | £83.93    |

The average length of stay for overnight visitors is given in **Table 4.4**.

**Table 4.4: Average Length of Stay**

| Origin                | Highland & Moray | Scotland |
|-----------------------|------------------|----------|
| Highland & Moray      | 7.6              | 7.6      |
| Elsewhere in Scotland | 7.7              | 7.8      |
| Elsewhere in UK       | 8.1              | 9.7      |
| Overseas              | 8.6              | 10.8     |

Gross expenditure is calculated as follows:

$$GE = dv.ndv + ov.l.nov$$

Where GE gross expenditure  
 dv average daily expenditure of day visitors  
 ndv number of day visitors  
 ov average daily expenditure of overnight visitors  
 l average length of stay  
 nov number of overnight visitors

Applying the formula gives gross expenditure of £4,479,763 at the Highland & Moray level and £5,475,303 at the Scottish level.

<sup>2</sup> Excludes entry fees, merchandise, parking and bus fares as these are captured through the Event Organiser's expenditure.

## 4.4.2 Gross to Net

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

- deadweight;
- leakage;
- displacement; and
- multiplier effects.

### Deadweight

Deadweight is a measure of the extent to which public sector funding was required for the event to take place. In this case, we are assessing the overall impact of the event rather than only that supported by the public sector so deadweight will not be applicable.

### Leakage

Leakage is expenditure that takes place outside the geographic area at which the economic impact is being assessed. This has been based on where the expenditure of visitors and the event organisers has taken place.

### Displacement

Displacement is a measure of the extent to which the event has simply moved expenditure from one part of the economy to another (i.e. removal of casual visitors). Displacement levels have been assessed using information from the survey on:

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

**Table 4.5: Displacement (%)**

| Type by Origin        | Highland & Moray | Scotland |
|-----------------------|------------------|----------|
| <b>Day</b>            |                  |          |
| Highland & Moray      | 89               | 100      |
| <b>Overnight</b>      |                  |          |
| Highland & Moray      | 79               | 93       |
| Elsewhere in Scotland | 2                | 76       |
| Elsewhere in UK       | 1                | 6        |
| Overseas              | 4                | 8        |

Taking account of displacement<sup>3</sup> gives net direct additional expenditure of £4,165,480 at the Highland & Moray level and £4,763,050 at the Scotland level.

## 4.5 WOC Participants

The number of WOC Participants was 430. The Event Organisers have estimated their length of stay at 9.5 nights.

**Table 4.6: WOC Participants by Type and Origin**

|                       | Day | Overnight |
|-----------------------|-----|-----------|
| Highland & Moray      | -   | 0.5%      |
| Elsewhere in Scotland | -   | 0.5%      |
| Elsewhere in UK       | -   | 5.1%      |
| Overseas              | -   | 94.0%     |
| Total                 | -   | 100.0%    |

Following the same processes as set out above gives net additional expenditure of £332,303 at the Highlands & Moray level and £332,950 at the Scotland level.

## 4.6 Other Spectators

The number other spectators e.g. those that were not a friend/relative of someone taking part in the S6D was estimated at 305.

<sup>3</sup> There may be wider economy displacement from those that had intended to stay in the local area but did not as the event was taking place although this may be mitigated by spare capacity, temporal shifts, geographical shifts, expansion of informal. Assessment of the extent to which this wider displacement does or does not exist was beyond the budget and scope of this study.

**Table 4.7: Other Spectators by Type and Origin**

|                       | Day   | Overnight |
|-----------------------|-------|-----------|
| Highland & Moray      | 25.0% | 0.6%      |
| Elsewhere in Scotland | 2.2%  | 10.6%     |
| Elsewhere in UK       | -     | 18.9%     |
| Overseas              | -     | 42.8%     |
| Total                 | 27.2% | 72.8%     |

Following the same processes as set out above gives net additional expenditure of £89,956 at the Highlands & Moray level and £90,093 at the Scotland level.

## 4.7 Guests, Volunteers, Officials, Traders and Media

There will also be some expenditure from guests, volunteers, officials, traders and media. The net direct additional expenditure from this is estimated at £145,676 at the Highland & Moray level and £122,306 at the Scottish level.

## 4.8 Event Organisers Expenditure

The event organiser's expenditure has been assessed on the basis of:

- the total income generated by the event and where it came from;
- where that money was spent geographically; and
- the net effect of that expenditure on the economy.

This is based on data provided by the event organisers. The income for the event was sourced on a geographical basis as follows:

- £105,411 in Highland & Moray;
- £452,409<sup>4</sup> in Scotland; and
- £564,691 outside Scotland

The organiser's expenditure was as follows:

- £596,100 in Highland & Moray;

<sup>4</sup> Includes the income from Highland & Moray.

- £792,100<sup>5</sup> in Scotland; and
- £225,000 outside Scotland.

The net organiser's expenditure is set out in [Table 4.8](#).

**Table 4.8: Event Organiser's Net Expenditure**

| Area             | Expenditure |
|------------------|-------------|
| Highland & Moray | £490,689    |
| Scotland         | £339,691    |

## 4.9 Total Net Additional Direct Expenditure

The total net direct additional expenditure is £5,224,105 at the Highland & Moray level and £5,648,090 at the Scottish level.

**Table 4.9: Total net Additional Direct Expenditure**

|                               | Highland & Moray | Scotland   |
|-------------------------------|------------------|------------|
| S6D Participants & Spectators | £4,165,480       | £4,763,050 |
| WOC Participants              | £332,303         | £332,950   |
| Other Spectators              | £89,956          | £90,093    |
| Guests, volunteers, et al     | £145,676         | £122,306   |
| Event Organisers              | £490,689         | £339,691   |
| Total                         | £5,224,105       | £5,648,090 |

## 4.10 Multipliers

The net direct expenditure will also have had two types of wider impact on the economy:

- supplier effect: an increase in sales in a business will require it to purchase more supplies than it would have otherwise. A proportion of this 'knock-on' effect will benefit suppliers in the local and national economies; and
- income effect: an increase in sales in a business will usually lead to either an increase in employment or an increase in incomes for those already

<sup>5</sup> Includes amount spent in Highland & Moray.

employed. A proportion of these increased incomes will be re-spent in the local and national economies.

The multipliers applied are as follows<sup>6</sup>:

- 1.42 at the local level; and
- 1.68 at the Scottish level.

## 4.11 Total Net Additional Output

Applying the multipliers gives net additional output of £7,418,228 at the Highland & Moray level and £9,488,791 at the Scottish level.

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<sup>6</sup> Derived from the Scottish Input-Output Tables.

## 5. Conclusions

### 5.1 Introduction

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

### 5.2 Participant Profile

Half the participants/spectators at the S6D who required an overnight stay used self-catering accommodation, with a quarter using either the event campsite or another campsite. For spectators (other) the most common was guest house/B&B (31%) followed by self-catering accommodation (21%). Around three fifths (62%) of participants rated the event campsite as very good/good, whilst 84% of spectators that stayed at the event campsite rated it as very good.

The most popular way in which participants found out about the event was through the official Scottish 6 Days website (60%), followed by the Highland 2015 website (26%), word of mouth (20%) and the WOC website (18%). The most influential factor in encouraging participants to attend was having enjoyed a previous 6 Days event (71% influenced a lot), followed by the reputation of the event (64%).

The most popular ways that spectators became aware was word of mouth (28%), the WOC website (21%) and an orienteering club (21%)

### 5.3 Event Rating

The event was rated highly with 90% of participants and 99% of spectators rating their overall experience as very good/good. Various other aspects of the event were rated very good/good by at least 75% of respondents.

The facilities that were most commonly rated as essential/useful for an event centre by participants was a results service (71%), the information point (70%) and catering provision (69%). Spectators agreed that these were the three most important aspects, with 98% rating each of them as essential/useful.

For event enhancements, the big screen was rated as the most appealing, with 65% of participants and 89% of spectators describing it as a great idea, followed by the electronic results display (42% participants, 81% spectators).

There was an even split between having parking fess inclusive of entry (51%) or separate (49%). The main suggested improvements from participants was to address the car parking (8%) and some issues with Day 5 (8%). The main comment from spectators was that the Wifi did not work (5%).

For 91% of participants the S6D had met or exceeded their expectations. For 95% of participants and 99% of spectators the WOC had met or exceeded their expectations.

A majority of participants (82%) indicated that they were very likely/likely to attend the S6D event in future, with less indicating that they were likely to attend the WOC in future if it was in Scotland (53%), the UK (48%) or overseas (24%). The proportion of spectators likely to return to the S6D was 63%, and to a future WOC in Scotland (69%), the UK (56%) or overseas (42%).

A total of 86% of participants and 97% of spectators felt that the Highland 2015 event had showcased the sport of orienteering very well/well. Three quarters of participants and 93% of spectators, were very likely/likely to return to Scotland on holiday after having visited Highland 2015.

## 5.4 Related Activity

A total of 51% of participants and 69% of spectators rated the food & drink at the event as very high quality/high quality. Of those that had visited the event in previous years 94% of participants and 98% of spectators were more satisfied or as satisfied with the food & drink at this year's event.

## 5.5 Economic Impact

There were a total of 8,217 participants and spectators at the Highland 2015 event. The key findings from the economic impact assessment are that 93% of participants and spectators were from outside Highland & Moray and 86% from outside Scotland. A total of 94% stayed overnight. The economic impacts are summarised over ([Table 5.1](#)).

**Table 5.1: Net Additional Impacts**

|                        | <b>Highland &amp; Moray</b> | <b>Scotland</b> |
|------------------------|-----------------------------|-----------------|
| Net Direct Expenditure | £5,224,105                  | £5,648,090      |
| Output                 | £7,418,228                  | £9,488,791      |