



SCOTTISH EXECUTIVE

Scottish Executive

An Analysis of Minority Indigenous Sports in Scotland

March 2007

The views expressed in the report are those of the author(s) and do not necessarily reflect those of the Scottish Executive or any other organisation(s) by which the author(s) is/are employed.

The Scottish Executive is making this research report available online in order to provide access to its contents for those interested in the subject.

The Executive commissioned the research but has not exercised editorial control over the report.

This report is published by Information and Analytical Services Division, Scottish Executive Education Department, Victoria Quay, Edinburgh, EH6 6QQ. If you have any enquiries about this report please contact the Dissemination Officer on 0131-244-0894.

The report was published in April 2007 as a web only document.



Fabian Zuleeg & Russell Whyte
DTZ Consulting & Research
One Edinburgh Quay
133 Fountainbridge
Edinburgh
EH3 9QG

Contents

	Page	
1	Introduction	1
1.1	Study approach	1
2	Defining Indigenous Scottish Sports	3
2.1	Recognised definitions	3
2.2	Studies focussed upon Scottish indigenous sport	5
2.3	Sports included in this study and organisational structures	6
3	Highland Games	8
3.1	Organisation and Competition Structure	9
3.2	Key Issues and Barriers	11
3.3	Highlands & Islands Local Perspective	15
3.4	Financing Highland Games	16
3.5	Economic Impact of Highland Games	19
3.6	Recommended Interventions for Highland Games	21
4	Back-hold wrestling	23
4.1	Structure and participation	23
4.2	International appeal	23
4.3	Financing the sport	24
4.4	Recommendations	24
5	Quoiting	25
5.1	Overview and structure	25
5.2	Issues and barriers	25
5.3	Development	26
5.4	Recommendations	26
6	Policy Environment	27
6.1	Sport	27
6.2	Tourism	30
6.3	Scotland's Culture	32
6.4	Other key policy areas	33
7	Conclusions and Recommendations	35

Appendices

- Appendix A – Bibliography
- Appendix B – List of 2006 Highland Games

Quality Assurance Record	
Checked By:	Russell Whyte
Date:	30 March 2007
Authorised By:	Fabian Zuleeg
Date:	30 March 2007
Ref: 05/11709-5	

Research Findings

This study was commissioned to assess the current contribution, impact and future potential of Scottish indigenous sports that currently have no established regime or existing public sector funding, and have relatively low participation.

These criteria led to the exclusion of a range of acknowledged Scottish indigenous sports (such as curling, golf and bowls), and, through a combination of desk research and consultations with key stakeholders, led to the focus of this study being on the following sports, approved by the research steering group:

- Highland Games– combining heavy events and light athletic competitions with other non-sporting elements such as piping and storytelling;
- Back-hold wrestling – a technique in which opponents stand chest-to-chest, chins on each others right shoulder and attempt to throw each other; and
- Quoiting – tossing of a weighted hoop towards a marker stake (or hob).

Perhaps due to their minority nature and informal organisational structures, there is very little published research relating to indigenous sports. Furthermore, their minority nature means that there are no directly comparable and robust participation statistics available through official sources such as SportScotland. Quantifiable data presented in this report is therefore largely based on the evidence from consultations, validated where possible with additional sources such as promotional brochures, newspapers and bespoke public sector reports. These estimates should thus be seen as broadly indicative rather than definitive, precise figures.

Overarching findings

By definition, minority sports are limited in what they can contribute towards the objectives of individual public sector bodies, and thus have “fallen between chairs” when looking to access support, given that they do not meet the full requirements of either body. However, they do demonstrate a noticeable impact on a number of policy areas, which can be encouraged and sustained.

All of the assessed sports shared a common desire for official accreditation and recognition as a serious individual sport, rather than merely a component of Scotland’s wider cultural offering. SportScotland recognises quoiting and back-hold wrestling (through affiliation with the Scottish Wrestling Association), but this is currently not an active relationship, with two-way communication between an established governing body and the public sector. This does not mean a funding relationship, as a number of governing bodies recognised by SportScotland are not receiving finance, but rather a means by which to access central advice and expertise on organisational issues.

Currently, these sports lack the type of central governing body, which can act as the correct vehicle with which to approach the public sector for funding. In each case, there is a need to build a stronger structure, bringing together the locally run events and clubs. One core barrier to financing is that “*organisers (are) facing difficulties because they fall in between the requirements for many funding bodies*”, (Scottish Games Association, 17/07/2006). These indigenous sports can contribute benefits to a range of cross-cutting policy

objectives, for example in areas such as sport, health, culture, community development and tourism, but are not exclusively associated with any of these areas.

Each of the researched indigenous sports are managed and delivered by volunteers. This gives rise to issues of sustainability and can also increase financial risk when it is borne by individuals, rather than established bodies with liability insurance. Furthermore, there is an increasing tendency for sports to be managed in a professional manner, and more support for those volunteers engaged in managing these sports might be appropriate.

Highland Games

The focus of this report is indigenous sports. There are a number of non-sporting elements of Highland Games, such as piping and story telling which do not meet this criterion. However, there is no reliable way of disaggregating the components of the events when calculating impacts, given that they are (by definition) a package of activities, the removal of any of the core components resulting in the loss of all activity.

The additional economic impact of the Highland Games, based on the expenditure of spectators and the costs of running the Games, is prudently estimated to be within the range of £10 to £16 million to the Scottish economy, depending on the size of crowd achieved. Attendance at the Games can be highly sensitive to weather conditions, and thus high and low estimates have been presented, based on illustrative costs and revenues for average events provided by the Scottish Games Association. It should also be recognised that many of the smaller games, which predominantly have a local audience, contribute significantly to community cohesion.

In addition to the direct expenditure impact on Scotland, it is likely that there will be an additional impact related to the international promotion and presence of these activities, attracting visitors to the country. It is unrealistic to put a figure on the value of this marketing, given the low quality of the available data. However, a press search of all major newspapers from January to July 2006 recovers 445 entries for Highland Games in the international media. In addition there is anecdotal evidence of television coverage in Japan and Europe for some events. While there are obviously differing degrees of coverage and levels of association with Scotland, estimates for the G8 conference impact in 2005 published by the Executive suggest that the 4,371 broadcast and media pieces would have cost £66m to purchase, and could generated £618m worth of additional tourism expenditure to Scotland per annum. Upcoming major international events – the World Highland Games in 2007 and Year of Homecoming in 2009 – offer significant opportunities to market Highland Games to overseas markets. It is recommended that Visit Scotland take a central role in the management of this approach, at minimum offering advice to the responsible organisations.

There is a degree of coordination between those Highland Games events affiliated with the Scottish Games Association, but in general these indigenous sports are organised by local committees and clubs in relative isolation. These local organisers can potentially lack the expertise in management, administration, marketing and promotion to ensure efficiency in operating costs and optimum realisable spectator numbers, which might reduce their overall impact. Individual Highland Games can vary between profit and loss between years depending on the crowd size. As the Games are largely funded through the contributions of individuals, this offers a significant hurdle to sustainability. Costs are incurred prior to the event days, while revenues are only received following on-day ticket sales. Thus, the risk to individuals and local organisation committees is significant, especially as they may

require significant collateral for bank borrowing. There is potentially an information failure here, given that events insurance may be available to compensate individual organising bodies for lost ticket sales in the event of poor weather. A closer relationship with public sector organisations that have experience of event insurance to share experience of known insurance schemes may offer a straightforward solution to this market failure.

Back-hold wrestling

Back-hold wrestling is primarily a demonstration event, which currently forms a component at some international and domestic gatherings of cultural events and sports. The technique is recognised to be distinctively Scottish and involves the competitors wearing kilts to participate. Registered membership is relatively low (150), though the competitors tend to be members of mainstream wrestling clubs, also practicing other techniques. While the bouts are highly competitive for the participants, there is no formal competitive structure. Demonstrations are open, allowing crowd participation, and thus offer a direct and easy access point to sport, generally unavailable through other sports with professional leagues.

Official recognition as an individual sport could promote participation amongst young people in wrestling clubs. This could be facilitated through some LA support. Back-hold wrestling is recognised as a sport by SportScotland through affiliation with the Scottish Wrestling Association, but there is not an active relationship with two-way communication between an established governing body and the public sector (again, this refers to access to expertise and advice, rather than direct financial assistance).

There is also scope for a closer relationship with Visit Scotland in order to maximise the promotional opportunities associated with participation at international cultural events. This could take the form of marketing and coordination expertise, with minimal funding requirements. This could also lead to enhanced opportunities for demonstration of the sport, forming a component of other Visit Scotland events.

Quoiting

Quoiting (pronounced 'Kiting') has its origins in Ancient Rome, with the distinctively Scottish form involving heavier hoops and a longer pitch than other regional variations. Active participation is currently low. While there are around 1000 registered club members, the vast majority of these are non-playing social members. Regularly playing, active membership is estimated at around 150. There is a competitive tournament structure coordinated informally by a maximum of 12 clubs at their AGM, however a number of the competitors find it financially difficult to travel between events. Members are predominantly retired and there appears little or no interest from young people, despite attempted marketing events. Sustainability is therefore a core issue.

Quoiting offers an opportunity for elderly participants to remain active. As with wrestling, building on official recognition of quoits through the establishment of two-way communication with SportScotland could enhance funding opportunities and LA support, helping to promote sustainability. An informational website, containing details of the rules and equipment purchase, could be targeted towards pub and hotel landlords, thus offering a low cost route to sustainability that is driven by demand as a pub game. Again, rather than financial support, this offers a low cost intervention to promote sustainability.

Conclusions

There are significant data limitations when establishing participation, costs and benefits of indigenous sports. Official statistics are not available, and much of this research relies on the data provided by local organising committees, supplemented with secondary data sources to verify anecdotal evidence.

Indigenous sports are relatively limited, due to their low participation figures, in what they can contribute to the Executive's TCS (Tourism, Culture and Sport) sport objectives of participation and excellence. Despite these restrictions, the research has demonstrated that there are benefits of indigenous sports which span a number of policy areas, such as sport, tourism and culture, as well as health and community development. In addition, it has been shown that the Highland Games have a real impact on the economy, albeit in light of the very limited data, it is difficult to be definitive about the exact figures.

Direct financial support is not recommended for indigenous sports at this stage. However, access to central expertises such as management and marketing, as well as recognition, could promote sustainability of these sports at a relatively low cost.

1 Introduction

The rationale for this study stems from the concerns of minority sports bodies that they are unable to access funding, support and recognition. This led to the need for an objective review of the costs associated with organising these sports, and the benefits that they can accrue to Scotland's people and economy through the channels of tourism, culture and sport.

This report was commissioned to assess the current contribution of these sports, their growth potential and the value-for-money of providing future support to them.

1.1 Study approach

DTZ's approach to this study has been twofold. Firstly, a review of the available literature on indigenous sports to determine the definition to be used, those sports which should be included, and background information on these selected sports. The background research and selection of sports for inclusion in the study was informed by Professor Grant Jarvie, Head of the Department of Sports Studies at Stirling University, a recognised expert in the field¹, then advised and approved by the steering group. This research was complemented with a programme of consultations with relevant stakeholders and informed by the Scottish Executive steering group, which included representatives from the tourism, culture and sport policy areas.

There were a number of issues to note with regard to this approach:

- There is a limited literature on indigenous sports due to their informal, low participation nature and reliance on community organisation, rather than the formation of formal governing institutions. Given that the selected sports have no approved centrally coordinating body, this led to issues with the selection of suitable consultees. Therefore, the consultations were largely decided through the expertise and contacts of the steering group and Professor Jarvie. These initially identified contacts were then used to recommend further appropriate experts in order to offer a more comprehensive approach.
- The low participation nature of the researched sports means that they are excluded from formal data sources such as SportScotland's survey of participation in sport, due to insufficient sample sizes. There was therefore no comprehensive source for comparison between the sports.
- Given that the sports are largely informally organised, without the assistance of a recognised governing body, there was a shortage of robust data relating to participation, financing and funding for the individual sports. Where possible, validated data has been presented. However, many of the statistics in this report have therefore been based on the

¹ Professor Jarvie is a past President of the British Society of Sports History and is a recognized authority on Scottish sport having published *Highland Games the Making of the Myth* (1991); *Scottish Sport in the Making of the Nation* with Walker, G (1994); *Sport in the Making of Celtic Cultures* (1999); *Sport, Scotland and the Scots* with Burnett, J (2000); *The Encyclopaedia of British Sport* with Vamplew, W and Cox R (2000) and more recently *Sport, Culture and Society: Can Sport Change the World?* (2006). His research into indigenous sports and the part that sports plays in the community has given rise to invitations to address the European Traditional Games and Sports Association (2003); The Federation of Indigenous Scottish Sports and Games (2003); The European Cultural Commission (2005); and The Scottish Association of Local Sports Councils (2006) to whom he is an international advisor.

anecdotal evidence provided by the expert consultees, or representative averages used to aggregate across multiple events.

Despite these restrictions, a sufficient range of sources (including newspaper reports, published public sector research and produced promotional material for events) were available to offer an indication of the scale, impacts and key issues for the selected sports, thus allowing conclusions to be drawn and recommendations being made.

Core consultations were conducted face-to-face, while supplementary stakeholders were interviewed by phone. Representatives from the following associations were consulted over the course of the study:

- The Federation of Indigenous Scottish Sports and Games (FISSG);
- The Scottish Games Association (SGA) – formerly the Highland Games Association;
- The International Federation of Heavyweight Athletes (also the organiser of the World Highland Games Championships);
- The Scottish Quoiting Association (SQA);
- The Scottish Wrestling Bond;
- The International Federation of Celtic Wrestling;
- The Camanachd Association - Shinty (also the marketing director for Caledonian Macbrayne);
- SportScotland;
- Visit Scotland;
- Highlands & Islands Enterprise (tourism and sports departments);
- BBC Scotland;
- Individuals with an interest in indigenous sports, including an MSP.

Throughout this report, direct quotations have been taken from this consultation process to give context to the findings, especially in cases where no formal data or research exists.

DTZ would like to thank each of the consultees for both their time committed and enthusiasm for the study.

2 Defining Indigenous Scottish Sports

There is a limited existing literature on indigenous sport and definitions are fluid. The policy approach taken to indigenous sport in different parts of the world differs depending upon a number of factors including: the importance of indigenous sport to the country; the approach to indigenous sport in terms of policy; the participation base associated with indigenous sports; the extent to which indigenous sports are afforded mainstream funding and the source of this mainstream funding.

This study is to focus on the literature as it relates to those indigenous sports in Scotland that do not currently have access to mainstream sports funding. The research specification details a number of sports to be included in the study. Core sports to be covered by the study include (amongst others) indigenous forms of Wrestling (e.g. back-hold); Quoiting; and Highland Games.

The term indigenous is often, perhaps mistakenly, used interchangeably with other terms such as traditional.

2.1 Recognised definitions

There are a number of definitional issues relating to the overarching criteria for the sports and the components to be included. It is apparent that there is a limited literature available on indigenous sports², perhaps due to their informal community organisation element, rather than a reliance on the formally coordinated governing structures.

A common cross-disciplinary definition of indigenous sport does not exist. However, the term indigenous when used by the Centre for World Indigenous Studies (CWIS); The World Council of Indigenous Peoples and the United Nations International Decade of the World Indigenous People, (1995-2004) tends to involve three aspects:

- (i) A **territorial dimension** relating to a particular region or place;
- (ii) A **temporal dimension** relating to points of origin or roots or tradition and
- (iii) An **identity related dimension** relating to recognition of who we are.

Jaouen (2004) defines traditional games as “*a set of playful or sporting activities that belong to the tradition (local or regional), and which in general do not require an institutional character. These games constitute a universal fund that crosses places and centuries*”.

The United Nations Educational, Scientific and Cultural Organisation (UNESCO) have formed a scientific committee of world experts with the specific objective of promoting traditional games. The committee of researchers will promote traditional and indigenous sports and games as part of the 2008 European Year of Intercultural Dialogue. 10 million euros will be made available through this programme.

Levinson and Christensen (1996) survey of world sport reviews the different traditional sports associated with Africa, Asia, Europe, North and South America and Oceania. The 1996 survey associates particular sports with Scotland and these are a particular version of

² A full list of references consulted is included as an appendix to this report.

bowls, curling, golf, Highland Games and shinty. This initial survey was extended and repeated in 2005 Levinson and Christensen (2005) and supports the findings of Jarvie and Burnett (2000) who also suggest that bowls, curling, golf, Highland games and shinty are internationally recognized as ‘Scotland’s cultural property’.

A core point to assert at the outset of this study is the distinction that we have focused on “minority sports” in the sense of low participation, rather than relating to any specific communities or groups. For example, much of the available research on indigenous sports relates to what could be termed “indigenous people sports”, which, while low participation in absolute terms, are significant within their own community. Two international examples of these “indigenous people’s sports” are illustrated below, together with findings that can be more generally applied to low participation sports in general.

Australia

The Indigenous Sport and Recreation Unit in Australia evolved from the Royal Commission into Aboriginal Deaths in Custody, which emphasised the importance of access to sport and recreation as an aid to discouraging anti-social and criminal behaviours as well as developing and sustaining community cohesiveness. The indigenous Sports Programme is administered by the Australian Sports Commission through a memorandum of understanding with the Department of Communication, Information Technology and the Arts (DCTIA). The Indigenous Sport Programme recognizes the role of sport and recreation in developing the health and well being of Indigenous people and their communities in developing all programmes.

The aims of the Indigenous Sport Programme are to: encourage active participation and skill development of indigenous people in sport; promote and provide support for development opportunities and pathways for elite indigenous sportspeople and to deliver flexible, effective sport programmes that are focused on the whole- government outcomes. Moreover, it is asserted that Indigenous Traditional Games provide the opportunity to learn about, appreciate and experience aspects of Aboriginal culture. They also provide essential training in social interaction.

Whitford, Bell and Watkins (2001) refer to indigenous sport in their qualitative study, which reviews 25 years of indigenous tourism policy in Australia. The study examines federal and Queensland State governments ATSI tourism policies during the period 1975-1999. The three main findings from the study were that:

- i. ATSI tourism policies are published in an ad hoc manner and appear to be related to a reactive approach by governments to broader ATSI social and economic issues;
- ii. Economic concerns dominate ATSI tourism policies and emphasise the commoditisation of indigenous tourism; and
- iii. Policies are strongly reflective of economic rationalist ideology. The study concludes by emphasizing that while economic rationalism may assist Australian tourism enterprises to be internationally competitive they may create undesirable consequences for indigenous tourism stakeholders.

Canada

Harvey (2002) offers a detailed social–historical study of the place of sport in promoting citizenship and cultural rights in Canada. The study provides evidence of programmes that

have recognized the cultural rights of minority groups to indigenous sports as a valued and respected facet of cultural diversity in Canada. Based on their findings the study supports the notion that sporting initiatives in favour of First Nation peoples offers a degree of access to sports and promotes the identities, beliefs and pride of belonging to First Nation communities - particularly among young people. Participation in North American Indigenous Games is part of a strategy used to counter idleness among youths in such communities. Similar conclusions are drawn from a series of studies by Paraschak (2000; 2001; 2002)

2.2 Studies focussed upon Scottish indigenous sport

Scotland

Baxter's (2004) report on traditional sports in Scotland in the 21st century consists of a collection of reports into specific sports notably: Competitive Piping, Highland Games, Quoits, Shinty, and Celtic Wrestling. These reports are not systematic studies of the respective sports but rather overviews of the social, cultural and in some places economic importance of the sports. The following participation figures are noted in the reports:

- The majority of Highland Gatherings average between 3,000-8,000 in attendance, while specific events such as Braemar will attract in excess of 25,000. Dunoon's Cowal Highland Games (emphasis on piping) will attract 30,000 over three days of events (Campbell 2004);
- Cameron's (2004) account of shinty as a cultural sport refers to the existence of 59 shinty clubs involving 2790 male and 416 female players. In addition a total of 320 youth teams involved in first shinty, primary school, U14 and U16 shinty six-a-sides. Geographically shinty is played in Aberdeen, Perth, St Andrews, Edinburgh and Glasgow but its strength is located in the local communities of the Highlands and Islands notably, Inverness (5 clubs); Badenoch (3 clubs) Lochaber (5 clubs), Oban (2 clubs), Mid-Argyll (2 clubs), and Cowal and Bute (3 clubs).

Although not specifically about indigenous sport Beattie, Westbrook, Anderson and Bell's 2004 Social and Economic Impact Study of the Arts in the Western Isles makes several references to the role of sport in relation to tourism and culture. There is little robust evidence to support the economic impact of indigenous sport in the Western Isles but sports such golf, Highland Games, shinty and football are concluded to assist with the overall economic impact of cultural tourism.

The social impacts of indigenous sport to the Western Isles may not be to dissimilar to those referred to in relation to the Arts in the 2004 survey of the arts in the Western Isles. The stated benefits to individuals and communities included opportunities for people of all ages to participate in or attend stimulating activities, enhanced community identity and confidence, a role in improving health and wellbeing, maintenance of Gaelic language, social interaction within and between communities and population retention.

Highland Games in the USA/Canada

Webster's (2004) account of Highland Games in different parts of the world records 79 Scottish Highland Games taking place in the United States of America during the year 2000; a further 67 different Highland Games taking place during 2001 and 2002 and a

further 55 Scottish Highland Games having taken place in Canada during 2003. In addition reference is made to the World Highland Games Championships having taken place in the USA, Australia, Nigeria, New Zealand, Finland, Canada and Scotland between 1981 and 2003.

The importance of Highland Games in Canada and the United States of America is recognized in a number of anthropological and historical studies. Hague's (2000) geographical survey of Highland Games in America contribute to the other studies by the same author which chart the contemporary experience of the Scottish diaspora in America (Hague, 2000;2002). Furthermore, research by Ray (2001; 2005) adds to our understanding of the importance of the North American Scottish Highland Games in the lives of American-Scots, particularly those living in the American South. Ray (2001) maps out the utility of annual events as a means of celebrating Americans affiliation to Scottish heritage. The importance of North Carolina's Scottish Games and Gatherings as a means of sustaining a sense of community amongst American-Scots is recognized. In his critique of Scottish-American links Hunter (2000; 1996; 1994), however, reminds us that celebrating North American Scottish-Highland culture is not the same as celebrating a Scottish or Highland culture because the contexts are entirely different and should not be confused.

2.3 Sports included in this study and organisational structures

The scope of this study was agreed with the research steering group to cover only those low participation, low profile, and currently unsupported sports without established structures. It is acknowledged there are other sports considered to be inherently Scottish (including bowls, curling and golf), but these sports already operate in supported regimes and lie outwith the scope of this study.

The working definition for study was therefore agreed to include:

- Sports constituting elements of the Highland Games – combining heavy events and light athletic competitions (alongside other non-sporting elements such as piping and storytelling);
- Back-hold wrestling – a technique in which opponents stand chest-to-chest, chins on each others right shoulder and attempt to throw each other; and
- Quoiting – tossing of a weighted hoop towards a marker stake (or hob).

Shinty is no longer considered a low participation unfunded indigenous sport. However, the governing body (the Camanachd Association) has only recently modernised their practices, and received investment from the public sector for aspects which meet SportScotland objectives. An assessment of shinty has also therefore been included in this report (as an appendix) for illustrative benchmarking purposes.

The sports included in this study are covered by the Federation of Indigenous Scottish Sports and Games (FISSG), which is an affiliation based membership group for a number of events that at present receive no public sector recognition or funding. These include:

- The Scottish Quoiting Association;

- The International Federation of Celtic Wrestling;
- The International Federation of Heavyweight Athletes (Highland Games).

These indigenous sports tend to be unable to meet the requirements of SportScotland in terms of either participation or medals, given that they are mainly demonstration sports without a competitive league structure. Funding is mostly through individual contributions and FISSG is concerned that local authorities will not fund discreet applications from individual sports without the validation of active Scottish Executive (or SportScotland) recognition and affiliation.

FISSG was set up “*to have an agglomerated official approach to the public sector for non-Olympic disciplines*”, thus targeting projects with the highest opportunity of success. The process is however “*difficult to manage with the current staff complement of volunteers*”.

The FISSG does not have the capacity to distribute funds, but can act as a central hub for the coordination and promotion of activities across the member indigenous sports. There is therefore potentially an enhanced role for the FISSG, acting as the liaison between these sports and Visit Scotland, building a relationship to make the tourist boards aware of the nature of events taking place, and offering expertise in their advertising approach.

In addition to FISSG, the Scottish Games Association (SGA) acts as a kind of governing body for traditional Highland Games, to maintain standards, promote good practice and governance across affiliated member events. The SGA is a limited liability company, run by volunteers, and consisting of its member local Games organisers – all run as not-for-profit activities.

Each of the sports covered in this study is now addressed in turn.

3 Highland Games

Highland Games are defined as a mixture of events including traditional heavy athletic events, Highland piping and dancing competitions³. It is also now increasingly common to incorporate new attractions, particularly for children, such as welly tossing and novelty races. In total, there are some 100 recognised events around Scotland taking place in 2006, as recorded by the 2006 Scottish Highland Games Website.

The focus of this report is indigenous sports. There are a number of non-sporting elements within Highland Games, such as piping and story telling which do not meet this criterion. However, there is no reliable way of disaggregating the components of the events when calculating impacts, given that they are (by definition) a package of activities, the removal of any of the core components resulting in the loss of all activity.

In terms of sports, the traditional heavy events, participated in by “the Heavies”, are recognised as:

- Tossing the caber;
- Putting the stone;
- Throwing the hammer;
- Throwing the 56lb weight over the bar; and
- Throwing the 56lb weight for distance.

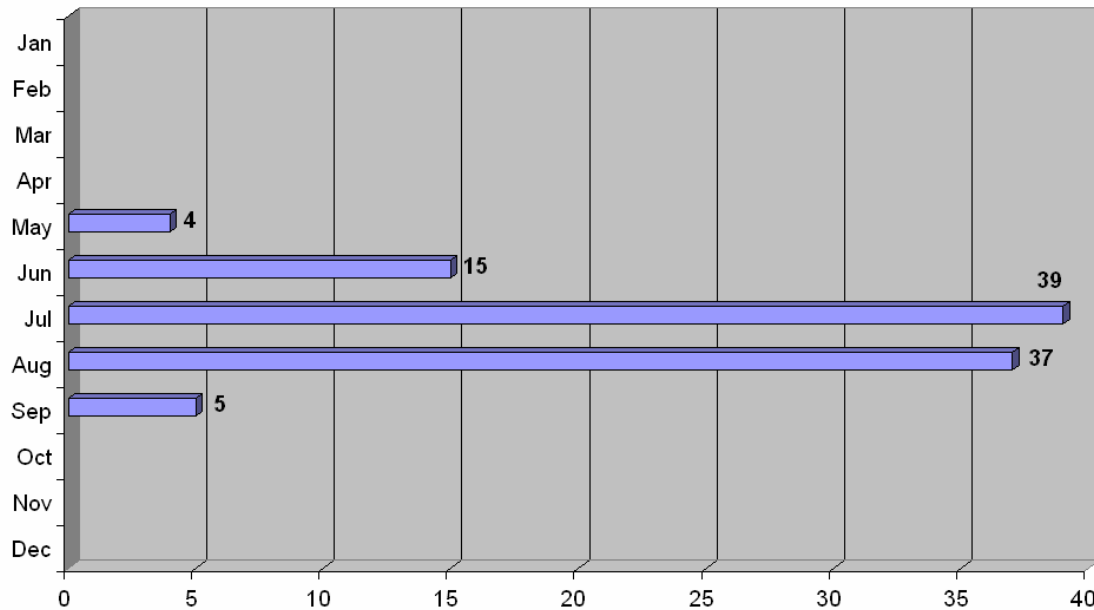
Combined with these core iconic events can be any combination of other sports, likely to include:

- Tug-o-war;
- Back-hold wrestling (discussed in more detail in section 4);
- Racing events over different distances (particularly the traditional hill race);
- Light athletics events (high jump, long jump); and
- Highland dancing.

The Games are highly seasonal, largely taking place over the summer, as demonstrated by the monthly breakdown of events presented below:

³ Dancing was not considered as part of this study.

Number of Highland Games Events per month, 2006



Source: 2006 Scottish Highland Games website: www.albagames.co.uk

There are 3 main types of Highland Games events, defined for this report according to the level of spectator interest – village Games, local town Games and major Games. The following table provides a breakdown of the number of each type of Highland Games, together with broad estimates for crowd attendance, based on gate receipts received at representative events.

Number of Highland Games by type and anticipated crowd size, 2006			
	Number per annum	Low crowd estimate	High crowd estimate
Village Games	33	500	1,000
Local town Games	62	2,000	3,000
Major Games*	5	15,000	25,000

*these Games are persistently successful and recognised and include Breamar (attended by the Queen), Perth, Loch Lomond, Inverness and Callendar on the popular tourist routes
 Source: the Scottish Highland Games Website lists a total of 100 events, while consultation with the Scottish Games Association provided the relative split by size.

It should be noted that the name “Highland Games” does not mean that the events are exclusively hosted within the Highland region. On the contrary, Highland Games take place throughout Scotland, in every local authority area and overseas. The complete list of local Games locations is reproduced from the Scottish Highland Games website in appendix B.

3.1 Organisation and Competition Structure

Highland Games have no formally accredited governing body. However, the Scottish Games Association (SGA) was established 60 years ago as (essentially) the governing body for traditional Highland Games, to maintain standards, promote good practice and governance across all affiliated member events. An SGA representative attends all

affiliated Games. The non-affiliated Games are run by local organising committees, with supplementary support from recognised experts on the circuit.

SGA is a limited liability company, run by volunteers, and consisting of its member local Games organisers – all run as not-for-profit activities. Elections to the board are held regionally to keep accountability across the group of Games. There are 67 member Games registered with the SGA, representing the vast majority of Scotland's total Games (67%) and including all of the most recognised major events.

Each Highland Games is still organised by a local committee, however membership with the SGA (£50 per annum) ensures coordination between the events - member Games are organised into competitive leagues to ensure continuity between events and to provide a better structure for competing athletes. This system allows athletes to tour a circuit of competitive Games and build up points in the league over the season to win a title.

Affiliation of all major Games allows SGA to allocate one annual world championship for each event e.g. World Caber Championship to increase tourist appeal for local Games, and provide consistency in marketing. This also gives increased scope for attracting private sponsorship for these higher appeal events.

Local committees run non-member Games, but SGA asserts that: *“a number of promoted Games are not truly traditional, and involve other activities such as football. SGA events are genuine!”*

Games tend to be run in two parts, with events for local participants from 10am till 1pm (for registered athletes within the local town / postcode district), followed by the open Games for international athletes at a higher standard. The sporting events run concurrently with the other activities, such as piping and storytelling. Thus, a strong local community element is maintained, as well as offering international appeal for competitors.

The focus of SGA events is on competition, offering a spectacle for the crowd, rather than involving the crowd directly, as is the case in a number of the smaller, non-affiliated Games run by individual committees.

The SGA also has affiliated international Games in Canada, Australia, USA and a number of other locations worldwide, providing advice and accreditation to ex-pat communities. They also have links with Scottish Associations world wide, claiming: *“we give credence to international events so that they are properly run and vetted”*.

Participation figures

The circuit structure arranged by the SGA allows athletes to register for on-going competition. SGA has c. 500 registered sporting members (SGA estimate), with around 100 more participants who register separately on the day of events. Athletes are registered and officially handicapped to maintain the level of competition at the various Games, given that prize money is significant for most events (£1,000 is not unusual as a prize fund for Heavies, with a total prize fund of £3,000). SGA registered athletes include:

- 179 light athletes (running and jumping events)
- 130 youth runners
- 20 heavies
- 6 tug-o-war teams

For those events which are not registered with the SGA, Heavies can also be booked via the International Federation of Heavyweight Athletes to ensure participation and the required visitor spectacle.

3.2 Key Issues and Barriers

Organisation

Local Games are run on a traditional, community basis through the efforts of volunteers. The SGA asserts: *“these are well known and grounded events, but increasingly struggling to find sufficient volunteers”*. Furthermore, local Games are facing a “crisis of PR” given that volunteers do not understand the commitment required prior to Event days, perceiving them as simply tourist oddities, and underestimating the business and organisational elements and expertise required.

To address this problem, the Games organisers need support and training in business-style disciplines, such as successful strategies for recruitment and retention of volunteers, rather than direct financial support. SGA suspect that one possible angle would be to attract business and management students into volunteering by more effectively marketing the organisational experience that is available, rather than the current perception of standing in a field with a measuring tape.

This represents a significant opportunity for Highland Games development in partnership with colleges or universities (particularly UHI) offering the twin benefits of valued work experience for students in disciplines such as business studies and accountancy, while the Highland Games could benefit from free expertise.

In general, the Games have a support network of “community funding” (volunteers) but not a system of public funding to support this. SGA assert: *“the structure isn’t there for cash support. The offer (from the public sector) needs to be for PR and organisational type things, not cash”*. The organisation is unable to deliver if given money, because the required mechanisms, structures and expertises are not in place – most notably, there are no paid or permanent staff.

Financial

Local Games tend to be financed through the voluntary donations of organisers, who recover costs when gate receipts are received. This initial outlay can be very risky for individuals, given that many will have trouble borrowing from banks without collateral. This represents a major barrier to the long-term sustainability of Highland Games. Given that ticket sales revenue will be highly dependant on weather conditions, Games tend to alternate between profit and loss between years. If Games have a bad year they may not be able to finance subsequent years, as will not have any retained funds in the bank. If the games make a loss, the individual volunteer organisers will be liable.

Event insurance is available which can compensate for the loss of anticipated crowds due to adverse weather conditions. Given that the Games alternate between profit and loss depending on the revenues from ticket sales, this can mitigate the risk of unsustainable one-off losses. This is unlikely to pose a threat to the well established, large scale Games, but will be a significant extra cost for the smaller, more localised events. Therefore, a coordination role may exist for the public sector, ensuring that the events are given

information on, and access to, this type of service. Moreover, coordination of the many discreet events across the season may reduce this cost – it is recommended that a joint approach to event insurance could be investigated by the public sector to aid sustainability of the many events.

There are a number of regulatory burdens placed on Games that increase the costs of organisation and thus exacerbate financial risk. For example:

- Local events cannot provide personal injury insurance for athletes and spectators due to prohibitive costs – the SGA take athlete responsibility for member Games through their limited liability company status in order to ensure wide participation and mitigate threat of legal action. However, the non-member Games cannot mitigate this risk;
- All organisers need to produce risk assessments for Local Authorities before conducting Games – in general, the local volunteer organisers lack the expertise to complete this, and so professional assistance must be sought;
- Many Councils now charge the organisers for any damage to public areas caused by the events e.g. churning up the turf. Anecdotally the SGA noted that the Cowall Games received a bill for thousands for re-laying grass in a public area.

Again, cost avoidance could be more effective than actual cash support here, as it reduces personal risk and the total financial requirement for Games organisers. Benefits could be accrued and sustainability promoted if central support were offered to help to minimise or mitigate these costs e.g. the production and distribution of a standard template and guidance to aid with local council risk assessments. As was the case with the weather, better coordination of event insurance could help to avoid significant unexpected costs relating to the damage of public ground – again, this could be investigated and coordinated by the Executive.

SGA estimate that an average small town Games will receive about 2-3,000 local spectators, assuming no major influx of tourists. This represents a minimum threshold - the Games become unviable to run if smaller numbers appear due to the scale of funding required. Ticket prices therefore have to be kept low enough to attract guaranteed numbers (c. £3-5). The smaller village Games incur lower set up costs, and thus are relatively better protected against a loss of tourist spectators, relying instead more on local community attendance.

In general, these components are contributing to fragility in the Highland Games structure, threatening sustainability. In particular, a number of the community events which attract fewer tourists are in jeopardy – there have been only 3 start-ups in the last 10 years, but more than a dozen closures, including high profile Games in Edinburgh and Galashiels due to “*a lack of volunteer support and risk around financing*” (SGA comment).

The ability to attract sponsorship is important to the sustainability of the Games, as it helps to mitigate this individual risk. From the individual Games organisers’ websites, there is evidence of a range of corporate sponsorship in place, usually with local companies, while there is little apparent evidence of coordination between Games, or central organisation and management of the sponsorship process. One exception is the Perthshire Highland Games Authority, which manages 14 events in the region and has single sponsorship for the Heavy Events across the area. Accounts for a representative small town Games provided by the SGA suggest that local sponsorship only covers a proportion of total costs

(in this case £850, some 6% of the total running costs). However, website evidence suggests that this varies significantly between events.

For non-SGA affiliated Games, the lure of prize money is usually sufficient to guarantee participation in the light athletic events, however “the Heavies” tend to be paid for their attendance, given that there is a limited pool to draw upon and conflicting demands on their time. As with the other costs, the appearance money for the Heavies is paid prior to the event, while revenues are accrued after it has taken place. This forms an increased risk to the sustainability of the events, given that “the Heavies” are an iconic and therefore core element of the spectator appeal.

Advertising and promotion

At present, advertising for local Games is discreet i.e. poster printing, programme production and flyers, with each of the 100 events doing this in a different way, uncoordinated. SGA have struggled to get Visit Scotland or local tourist board support for general promotion and feel they need assistance on the promotional side. Again, this relates to expertise, not necessarily large financial backing, for example recommendation of best promotional techniques and joint marketing for Games.

The SGA have attempted to jointly promote their events, pursuing an opportunity to publish a pullout fact sheet in the Scotsman. This opportunity was however lost, as the volunteer staff didn't have the time and resources to deliver the sheet and chase up the required department at the newspaper. SGA felt that “*minimal inputs from Visit Scotland could have made a big difference*”, for example, access to their (or the Executive's) media coordinator.

Highlands and Islands Enterprise (in conjunction with Visit Scotland and SNH) published research in 2004 measuring the economic impact and development opportunities for outdoor culture and heritage tourism in the area, as part of a wider study into niche tourism opportunities. The following key findings were relevant to Highland Games based on local and international visitor surveys:

- The overall market for outdoor culture and tourism is fairly static, and recent years have seen a decline in general overseas visitors to the area. However, within this market “*Games ... seem to be attracting higher numbers of visitors, due partly to better marketing and availability and partly to increased levels of interest in sports and active pursuits generally*”.
- Two-thirds (66%) of visitors to outdoor culture and heritage events in the Highlands were from outside Scotland - of which 28% rest of UK and 38% overseas.
- Locals from the Highlands & Islands and overseas visitors were more likely to attend Highland Games as the purpose of their visit than visitors from the rest of Scotland and the UK. Locals and overseas tourists were also more likely to attend Games rather than other outdoor cultural activities such as church/monument visits.
- Attendees at Games were more likely than other visitors to be between 35 and 54, with children in the party and day-trippers, rather than over-night tourists.
- Almost half of visitors to the Highlands took part in some form of outdoor cultural activity, but only 2% stated it was their main reason for visiting – this indicates considerable

crossover with other activities, and points to a joint marketing approach to take advantage of people's general interests in niche markets (including water sports and snow sports). This intuition was supported by the opinion of local suppliers to the industry.

- The survey also finds that *“the factors that would persuade current visitors to return more frequently are not related to the provision of additional or better cultural heritage products, but improved ancillary services such as food, accommodation and transport”*. This suggests that the key issue for maintaining tourist interest in Highland Games is not financing the Games to improve, but sustaining the current offering, ensuring that they do not go into decline, thus reducing the overseas market potential.

Key opportunities in the outdoor culture and heritage tourism market included *“the effective marketing and promotion of Games, ceilidhs and festivals as a key attraction for some market segments”*, particularly overseas visitors. Recommendations were made to take advantage of the uniqueness of individual attractions through positive promotion, with tourism bodies to be alerted to interest generated by such events. Highland Games promotion should also capitalise on the current interest in sport and health activity.

While representatives of Visit Scotland stated they are keen to “escape the tartan & shortbread image”, HIE are of the opinion that: *“traditional elements are still important in tourist markets, although may not attract the city break type of visitors targeted by visit Scotland”*. They are *“certainly not less important for the social fabric of remote rural areas and island communities”*. Again, this points towards a need for improved coordination and communication between the national authority and the Games organisers. This best practice example could be investigated further in other countries (such as the USA and Canada) where Games are popular.

Furthermore, based on the success of foreign hosted Highland Games, it appears there is scope for introduction of centrally coordinated major events in Scotland's cities, where local organisers have not taken a lead e.g. Edinburgh.

There is also evidence of wide International promotion of Highland Games, an international press recovering literally thousands of entries relating to events around the UK, Europe, the USA and Canada (445 non-UK examples from January to July 2006). One example highlighted by the SGA was the Dutch Games Authority, which coordinates 15 events, who actively promote *“visiting the home of Highland Games”* and coordinate with the SGA to combine this with lectures on the history of Games and other cultural events.

In addition to the expenditure impact on Scotland, it is likely that there will be an additional impact related to the international promotion and presence of these activities, attracting visitors to the country. It is unrealistic to put a figure on the value of this marketing, given the low quality of the available data. However, a press search of all major newspapers from January to July 2006 recovers 445 entries for Highland Games in the international media. In addition there is anecdotal evidence of television coverage in Japan and Europe for some events. Estimates for the G8 conference impact in 2005 published by the Executive suggest that the 4,371 broadcast and media pieces would have cost £66million to purchase, and could generated £618m worth of additional tourism expenditure to Scotland per annum.

Development of the Games

The appeal of Highland Games lies in its accessibility, given that it is “*skills, rather than endurance-based*”, as stated by the Federation of Indigenous Scottish Sports and Games. At youth level, there is anecdotal evidence from the SGA that some Local Authorities have run mini Highland Games for school children, which are considered a success. SGA have been invited to coordinate these events, but are usually unable to attend and support as they operate on a voluntary basis and do not have the staff to resource this.

The SGA are currently negotiating with Scottish Athletics for a degree of joint promotion. The light athletic and running events on the SGA circuit of Highland Games are often used as a proving ground by Scottish Athletics for registering runners who are not at the top level of competition, but still want to take part in a competitive league of runners. This partnership seems to be encouraging from both points-of-view, as it boosts participation at Highland Games and offers a route to non-sponsored competitive participation for athletes. Scottish Athletics also want athletes to compete in front of crowds, so Games seem to offer a suitable vehicle.

3.3 Highlands & Islands Local Perspective

Consultations with HIE drew a clear distinction between the types of Games and target audience between the mainland Games and the more remote events as follows:

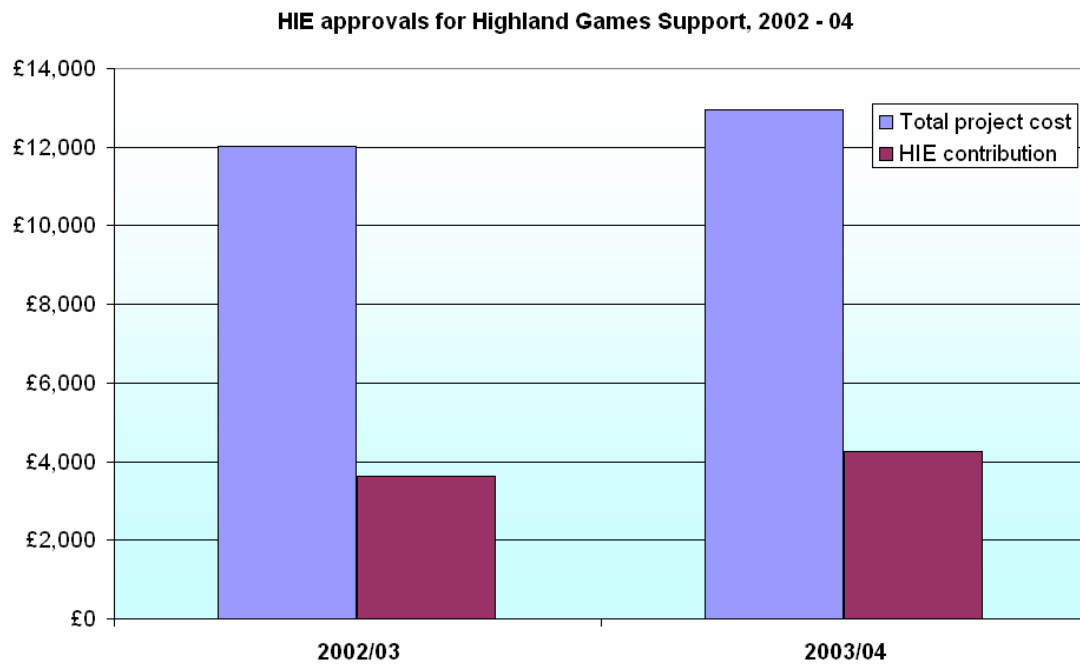
- **Islands** – more remote areas have Games which are a major annual focal point for communities. “*These are occasions when the entire island gets together and the diaspora from the island all return to spend time there*”. They do not have any sort of support mechanisms in place, as have traditionally relied on volunteer community effort. “*It strengthens community identity in island communities*”.
- **Highlands** – Games are of a very different nature, essentially tourist events. Large visitor numbers are attracted as well as the local communities. These Highland Games are thought to do less to sustain traditional sports (the Heavies), as emphasis is on a wider variety of activities (football etc) rather than demonstration events. However, the dancing circuit is felt to be sustained at these events, as it forms a staple of the competitive schedule.
- Games in the more accessible parts of the Highlands tend to require more support, while Western Isles games and those in more remote parts of the Highlands are largely self-sustaining, relying on community volunteer effort rather than funding.

In 2007, Inverness is hosting the World Highland Games championships as part of the year of Highland Culture. This is supported financially through the Highland 2007 organisation which is 1/3 funded by the LECs, HIE and the Scottish Executive with responsibility for staging events through the year. The World Highland Games is focal point, thought to offer significant potential to attract the American diaspora and prove a major event – “*nothing else in the Highlands can attract comparable visitor numbers*” (up to 20,000 have been attracted in previous years).

Related to this, 2009 is set to be the “Year of Homecoming”. The core aim is to attract back the Scottish diaspora from around the world and, while the focus is in Ayrshire /

Burns, HIE are looking to identify alternative local opportunities – Highland Games are considered a suitable mechanism for attracting back the Highland diaspora.

While Highland Games are largely financed through volunteer donations, with occasional corporate sponsorship contributions, HIE have offered discreet payments for a number of individual events in recent years, primarily in the Caithness & Sutherland region. A breakdown of these payments is illustrated below:



Professional organisations and associations increasingly manage sports, so community volunteers at Highland Games are perhaps beginning to feel entitled to reimbursement for their efforts. HIE offered one example of this – the Gallic Arts Tuition Festivals - with a similar structure to that for the Highland Games. HIE support an umbrella body which feeds local arts festivals. This finance is then cascaded down to local federations to take forward development, whereby local volunteers are reimbursed to an extent with travel costs etc. Thus, the funding is sustaining these festivals on a semi-volunteer basis. A similar mechanism doesn't exist for indigenous sports, but increasingly one may be needed in order to access the volunteers sustaining the Games. This is in accordance with the comments received from SGA.

3.4 Financing Highland Games

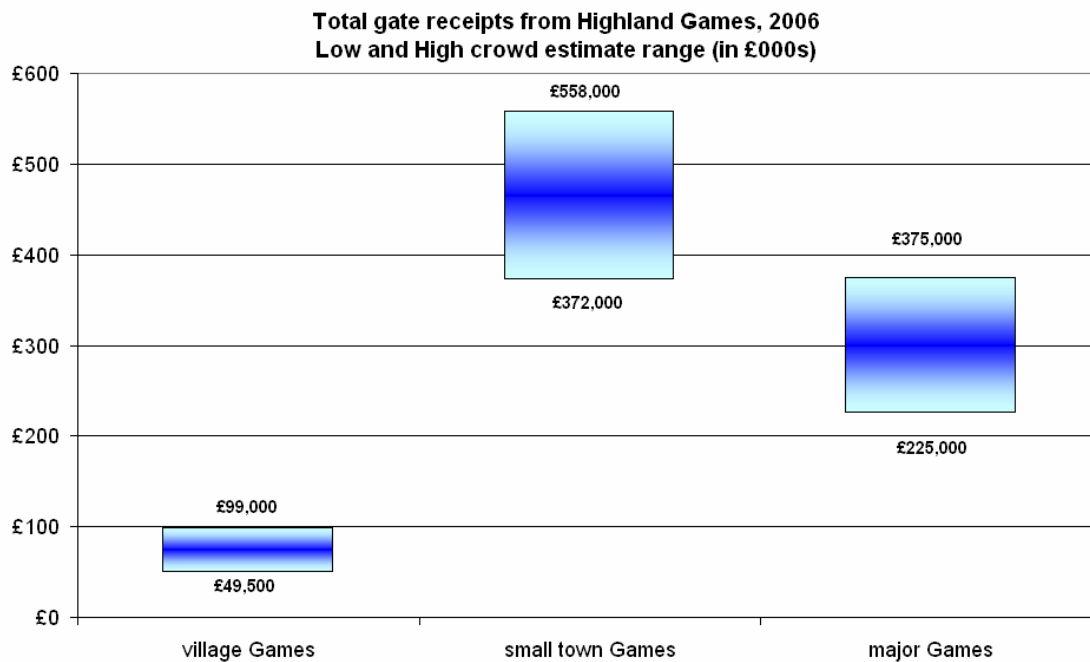
Robust figures for running costs, revenues and gate receipts are not available across the full complement of Highland Games events. However, the SGA have provided illustrative cost figures for representative events at local town and major event level, allowing us to provide an estimate for the cost at the national level.

In addition, there is no recorded evidence of spectator attendance at the vast majority of these events. However, based on the total gate revenues for the indicative events provided by the SGA, an average ticket price can be assumed, and therefore an attendance estimate calculated. The size of the crowd is known to be extremely volatile, and sensitive to

weather conditions, and thus high and low crowd estimates have been made, giving a range in which revenues are expected to lie, rather than an absolute value.

The following table/chart provides a breakdown of the estimated value of gate receipts received across the 100 Highland Games events. Figures are based on the estimated attendance and an average entry price of £3. (It should be noted that ticket prices vary between Games, some up to £5, while others offer free entry to children).

Estimated crowds and gate receipts at all Highland Games, 2006				
	Total spectators		Total value of ticket sales	
	Low crowd est.	High crowd est.	Low crowd est.	High crowd est.
Village Games	16,500	33,000	£49,500	£99,000
Town Games	124,000	186,00	£372,000	£558,000
Major Games	75,000	125,000	£225,000	£375,000
Total	215,500	344,000	£646,500	£1,032,000



In addition to the ticket sales, the Games' organisers receive other revenues from sponsorship, programme sales, car parking and on-site traders. Again, based on the SGA average for representative events, these receipts account for some 40% of the value of total ticket sales.

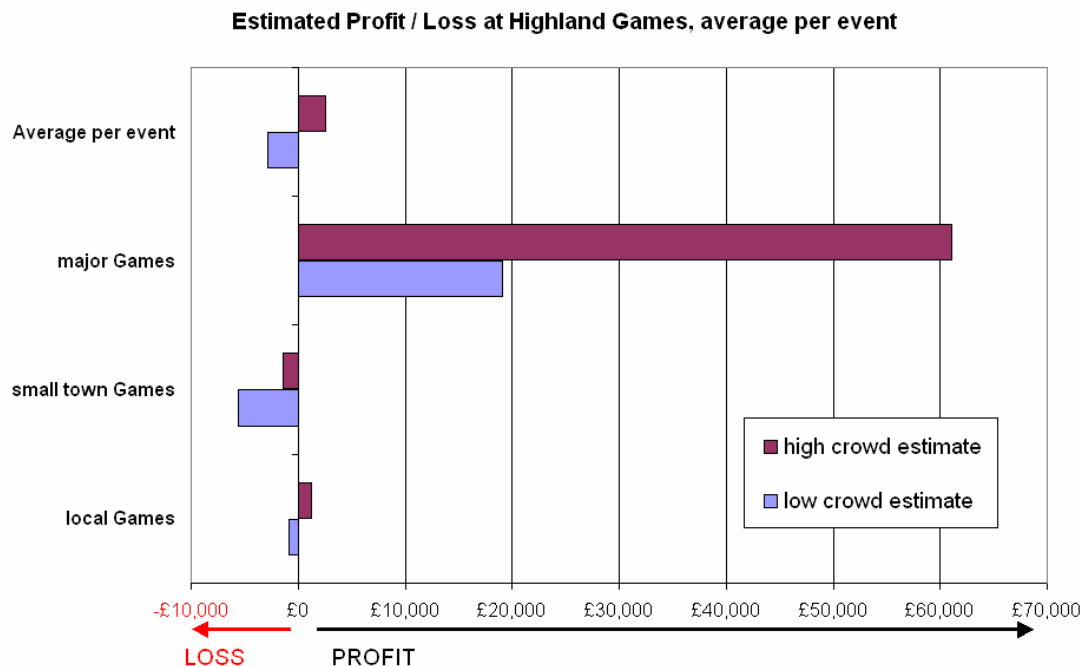
Operating costs for the Games are variable, the major Games costing significantly more to organise. The main cost components for the Games tend to be the prize money (required to guarantee athlete attendance), advertising, programme production, marquee hire and legislative requirements, such as a public entertainment licence. Unlike the revenues, the costs will not vary with the level of crowd attendance.

Running Costs for Representative Games	
Type of Games	Total Cost per Games
Village Games	£3,000
Town Games	£14,000
Major Games	£44,000
Source: Town Games and Major Games are based on representative balance sheets provided by the SGA. Village Games costs have been estimated to cover costs if crowds are at their high level (given that they are usually run as not-for-profit)	

Total revenues and costs are illustrated below:

Estimated total revenues and costs for all Highland Games in Scotland, 2006			
	Total revenues		Total costs
	Low crowd est.	High crowd est.	
Village Games	£69,300	£138,600	£99,000
Town Games	£520,800	£781,200	£865,700
Major Games	£315,000	£525,000	£219,700
Total	£905,100	£1,444,800	£1,184,400

Based on these figures, and by the chart illustrated below, it can be seen that the financial sustainability of the Games is heavily dependant on the crowd attendance, and thus the weather. This is particularly the case with the smaller, localised events, while the major events are consistently more likely to cover their costs.



Overall, Scotland's combined Highland Games organisers are expected to make a profit of £260,400 if crowds are at the high estimate, but a loss of £279,300 if crowds are at the low estimates caused by poor weather conditions. Anecdotally, the SGA believe that the

majority of Games vary between profit and loss between years, and that a sustained loss for consecutive years will result in discontinuance.

While the Games seem to be broadly self-financing under high crowd estimates, the problem of sustainability arises as the revenues are all received after the event has taken place, while the costs are incurred before hand. This means that the individual organisers are running a significant financial risk, bridging the cost until the tickets are sold. As previously highlighted, this represents a significant risk, given that the Games organisers are largely volunteers and may not have access to sufficient personal finance or insurance.

3.5 Economic Impact of Highland Games

In this section, two approaches have been made to assess the value of the Highland Games. This twin-tracked method has been adopted to improve the robustness of impacts and validate results, given that there is a shortage of recorded evidence for individual events and that the available data sources may be prone to significant sampling errors.

Firstly, the impact of Games on the Highlands & Islands economy has been assessed through revision of published HIE figures for outdoor and cultural tourism figures. Then, a Scotland-wide estimate has been derived based on the crowd and expenditure figures provided by the SGA, supplemented with robust national data sources, such as the Executive's 2002 Input-Output tables.

3.5.1 Impact in the Highlands & Islands

Research published by HIE in 2004 quantified the total impacts associated with outdoor culture and heritage tourism in the area. The aggregated expenditure figure presented included the impact of attendance at outdoor festivals, which was broadly defined as Highland Games by George Street Research and Jones Economics who conducted the survey.

While the HIE 2004 report did not explicitly state the impact associated with Highland Games, for illustrative purposes, we have derived a pro-rated figure based on the level of attendance at the Games. In this case, some 3.3% of total respondents to the HIE survey had stated that Games were their main reason for being in the area. This percentage has been applied to the aggregated figure for all outdoor culture and heritage tourism. Based on this method, **the net impact of Highland Games in the Highlands & Islands is £6.7 million.** This figure is merely indicative however, and should be treated with caution, given that the sample size on which it is based was very small. The table below illustrates headline results for the area:

The impact of outdoor culture and heritage tourism in the Highlands & Islands, 2004		
	Highlands & Islands Impact	
Indicator	Total for outdoor culture and heritage tourism*	Contribution of Highland Games (estimated**)
Gross expenditure	£368.3m	£12.2m
Associated direct income	£47.9m	£1.6m
Associated direct FTEs	4,308	143
Net expenditure impact	£201.9m	£6.7m
* Source: HIE, 2004 – Economic impact and development opportunities for outdoor and environment related recreation in the Highlands & Islands		
** Estimated by DTZ based on pro-rated HIE published figures in above report		

3.5.2 Scotland-wide impact of Highland Games

The financial impact of the Highland Games around Scotland is determined through two core channels – the expenditure associated with visitors to the event and the costs associated with hosting and organising the Games. Combined, these two streams give the direct impact of the Games.

From HIE's Outdoor Culture and Heritage Tourism survey 2003 we know that the average spend per day for visitors to Highland Games (recorded as attendance at an outdoor cultural day) is £42⁴. This is marginally lower than the daily expenditure for other cultural tourism, for example visiting castles and monuments (£57), but is broadly in line with the average day visitor spend in Visit Scotland's Tourism in Scotland 2005 survey.

Applying the average expenditure figure to the low and high spectator estimates gives a range of gross spectator expenditure from £9.0 to £14.4 million. The cost associated with hosting the 100 events is the same, regardless of the weather, at £1.18 million (as derived in section 3.4). Adding these expenditures gives a **direct impact of £10.2 to £15.6 million**.

Further indirect effects will occur in the Scottish economy as the companies in the supply chain to the Games organisers and spectators spend more with their respective suppliers. For instance, the majority of spectator expenditure will be in the hotel and catering industry. These sectors in turn will have to purchase more from their suppliers (e.g. farmers, food suppliers) to meet the increased demand. Induced effect will then occur as those receiving incomes from direct and indirect expenditure, spend in the economy.

The extent of these indirect and induced expenditure effects is calculated using multipliers from the Executives 2002 (most recent available) Input-Output tables. A sufficient breakdown of direct expenditures is not available to offer a detailed analysis, so multipliers have been derived for the Scottish tourism industry to use as the best proxy. These were calculated as 1.28 for indirect effects (including direct) and 1.58 for induced (including direct and indirect).

Combining the direct, indirect and induced expenditure effects gives the Scottish Highland Games a **total gross expenditure impact in the range of £16.2 to £24.7 million**, again depending on crowd sizes. This represents 0.4% to 0.6% of Scotland's total tourism expenditure in 2005 (£4.3 Bn).

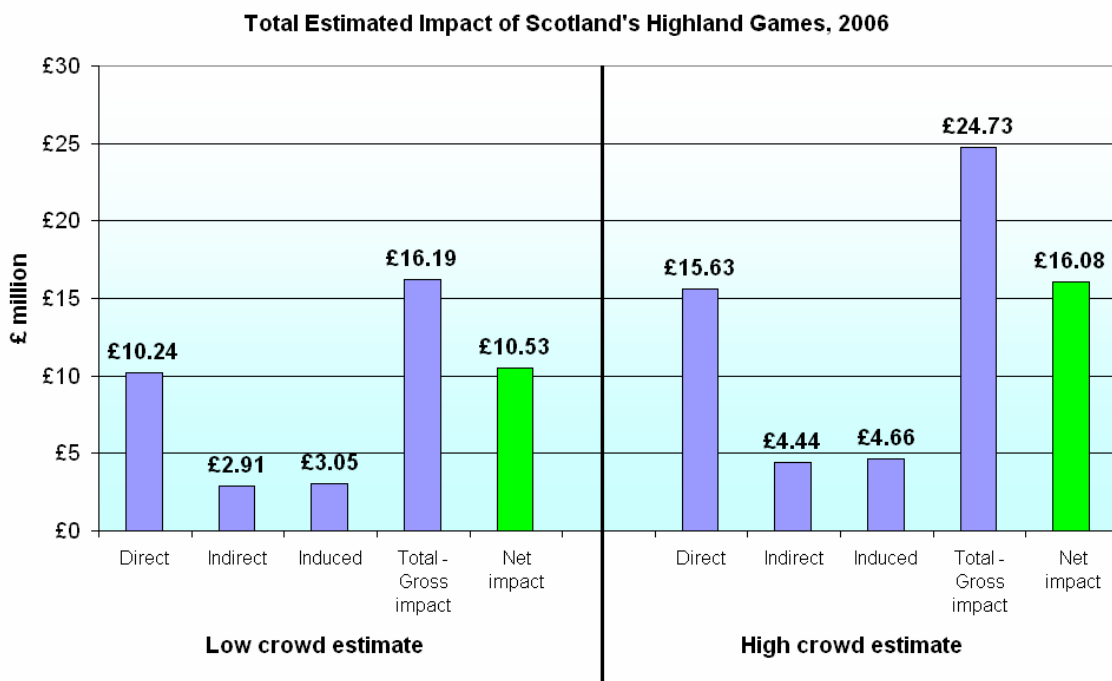
This gross figure has to be adjusted according to the extent to which this expenditure would have occurred in Scotland in the absence of the Games (additionality) and the extent to which the Games have diverted expenditure away from other Scottish-based industries and activities (displacement).

Again, without bespoke primary research it is difficult to attribute an exact value for additionality and displacement. From the 2003 HIE survey of outdoor culture and heritage tourists, we know that Games are proportionately more likely to attract non-Scottish visitors than other tourist activities, and thus will have a relatively higher rate of additionality. From the same survey, we also know the extent to which tourists have come

⁴ Includes accommodation, food & drink, transport within the area, shopping, entertainment and miscellaneous.

to Scotland stating Highland Games as their main activity for at least a day, albeit based on a very limited sample. In the absence of more suitable data for comparison, we have therefore applied the same rate of additionality and displacement as were used in the 2003 HIE study i.e. 65%.

Applying this rate of additionality to the gross expenditure figure gives a **net expenditure impact of £10.5 to £16.1 million** for Scotland's Highland Games. The components of this final net impact figure are illustrated in the following chart:



It should be noted that this refers to the impact of the Highland Games in their totality. While the sporting events form one component of the Games, the loss of any element from the Games would reduce the overall appeal, making them less viable as an attraction. Based on the quality of data available, it is not reasonable to complete a separate analysis of the sporting elements within the Games, and so prudent estimates have been made for the overall Event.

3.6 Recommended Interventions for Highland Games

This section outlines interventions in essence designed to increase the sustainability of Highland Games as a whole, not merely the sporting elements. Recommendations relate to the totality of the Games given that it would be unrealistic to assume that the Games could continue in the same form in the absence of one of the core elements, combined with the lack of robust data available for making estimates.

Requirements all point towards Enterprise Networks' style interventions for support, rather than direct financial support as the organisation is on a voluntary basis, so organisers do not have the resources or expertise to follow through on a number of opportunities relating to development and marketing. The following recommendations relate to more specific examples of intervention (some of which may have links with the Enterprise Networks):

- Marketing and management expertise – a central information point is needed and access to recommended suppliers. Also, coordination by a central body could standardise advertising and sponsorship, leading to both more efficient promotion and efficiency savings.
- Any financial support needs to sustain the effort of volunteers with reimbursements for travel costs incurred etc, enhancing the community elements of the Games and self-sufficiency of the events, rather than building formal management institutions.
- Formal acknowledgement of the sports, for example on an affiliated basis to SportScotland, would not commit central government to funding, but would validate discreet claims by local Games to their local authorities, opening new funding streams to them.
- Given that Highland Games are generally low participation events with no recognised regular international competitions, they are unlikely to meet the funding requirements of SportScotland. However, they do undoubtedly make a contribution to Scotland's economy through the tourist market and attraction of overseas visitors. This suggests that a coordination and management support role should be taken by Visit Scotland.
- Major international events – the World Highland Games in 2007 and Year of Homecoming in 2009 – offer significant opportunities to market Highland Games to overseas markets. It is recommended that Visit Scotland take a central role in the management of this approach, at minimum offering advice to the responsible organisations.
- The Scottish Games association stated in a BBC news article (Highland Games youth support call, 17/7/2006): *“there has been a massive shortage of youngsters taking part. One solution suggested is to establish training camps and to consult with overseas competitors to find out how things are run in their countries”*. Support and promotion of this type of youth training should be premised by an assessment of demand, given the lack of robust evidence to date on youth participation.

4 Back-hold wrestling

4.1 Structure and participation

Back-hold wrestling is a technique thought to be uniquely Scottish, which involves the wrestlers standing chest to chest, each placing their chin on their opponent's right shoulder and grasping them round the body, each placing their left arm above the right arm of their opponent (see picture right).



In terms of participation, there are 140 wrestlers registered with the Scottish Wrestling Association, and in the technique of back-hold, while there is evidence that a number of mainstream wrestling clubs, in Glasgow and Greenock particularly, include back-hold as a part of their training sessions. While a skilled set of wrestlers compete at the Highland Games as a demonstration, the sport encourages crowd participation, welcoming challengers to the official athletes – at the Cowall Games 2005, the World Judo champion was defeated in a bout!

Consultations suggest that back-hold wrestling does not thrive as a sport in its own right, as indicated by the absence of competitive league structures and comparatively low participation figures. Rather, it is more of a demonstration event for established wrestling clubs. The demonstrations themselves are highly competitive for the wrestlers involved, but there is an absence of an overall competitive league structure. Back-hold is practiced at 15 Highland Games in Scotland, with an indication from the FISSG (Federation of Indigenous Scottish Sports and Games) that demand is high from a number of other Highland Games events, but that this can't be met due to the availability of competitors driven by their amateur status.

4.2 International appeal

There is a range of evidence to suggest that the sport is highly popular as a demonstration event at Highland Games and at other International Cultural Festivals worldwide. Demonstrated examples of the international appeal of the event include brochures, published press articles and programmes for invitation events in:

- **Barcelona:** invitation for the event to be demonstrated at the 2004 Saint-Hernin festival. This involved the coordination of a range of Scottish cultural activities, including music from Simple Minds, traditional stick fighting, piping and story telling;
- **Germany:** 2005 1st International Highland Games festival in Saalestadt;
- **Japan:** televised demonstration bout in 2004 between a back-hold champion and a former sumo wrestling champion;
- **Italy:** European Traditional Sports and Games festival, 2004 (again, televised locally); and
- **USA:** Caledonian Club of San Francisco, 1999 Scottish Gathering and Games.

A representative of the Scottish Wrestling Bond suggest that the sports popularity in these international locations is driven by the fact that it is “*fulfilling the romantic image of Scotland that foreigners have, of kilts and spectacular scenery*”. They also state the “*importance of the incalculable goodwill generated by these international demonstrations*”.

4.3 Financing the sport

Despite previous funding applications, back-hold is unable to meet the requirements of SportScotland in terms of either participation or medals, given that it is a demonstration sport, rather than operating a competitive league season. Funding is entirely by the individuals involved at this stage, as FISSG assert that local authorities will not fund discreet applications from individual sports without the validation of active Scottish Executive (or SportScotland) recognition and affiliation.

That said, the wrestlers are recruited from recognised mainstream wrestling clubs, and therefore potentially have access to SportScotland funding through this affiliated channel. Financial requirements for the competitors in back-hold do not relate to sustaining the individuals who participate, but offering compensation for their travel expenses etc for demonstration events. Maintaining the enthusiasm of the participants is key to the sustainability of the sport.

Funding requirements are modest, and the FISSG are of the opinion that sponsorship should not be “*put towards a general kitty, but targeted towards development and international promotion*”, including funding trips to European festivals for the top performing Scottish participants. From this point of view, tourism and culture departments appear to me more appropriate financiers than SportScotland or local council sports departments. Financial requirements are marginal, less than for Highland Games, and the focus of support needs to be administrative, clerical and general management expertises.

4.4 Recommendations

Back-hold wrestling is a demonstration event, showcasing Scotland’s unique technique and kilt image, which appears to have an impact on international promotion. Again, this is based on anecdotal evidence from consultations, combined with published press reports to validate claims of international popularity. While the sport is not necessarily an individual attraction, it can form an integral component of festival-style events, such as Highland Games, aimed at demonstrating Scotland’s diversity and as such could benefit from the same joint marketing support and resources made available to Highland Games. Again, it is recommended that Visit Scotland forms a closer relationship with the FISSG to relay and promote information on these events and to coordinate them more efficiently.

Funding requirements are likely to be minimal, and relate to the travel expenses of athletes to these international demonstrations. In terms of sustaining the athletes themselves, funding is already potentially available through affiliation with the Scottish Wrestling Association, accredited by SportScotland. While central funding may not be achievable, promotion of this relationship should strengthen discreet applications made to local authorities, which usually require the validation of SportScotland when supporting athletes.

5 Quoiting

5.1 Overview and structure

“The game’s historians are convinced that quoiting was one of the original sports played at the inaugural Olympiad, and that the Greeks inherited quoits, originally a weapon of war, from the Romans, who also brought the game to Britain.”⁵

Although the sport (also described as a pub game by the Scottish, English and Welsh Quoiting Associations) has its origins ancient Rome, its Scottish indigenous nature stems from its popularity in mining communities through the 19th Century, with the Scots adopting a heavier hoop and longer pitch than the other competing countries. The coordinating body is the Scottish Quoiting Association, a formal collaboration between the remaining clubs where a committee is appointed from the members at an AGM, then the competition structure arranged by telephone.

The sport is in rapid decline – from memory, the members of the SQA noted that the game used to receive considerable coverage of the leagues in the Sunday times. There are now just 12 clubs affiliated with the SQA, and a season that lasts just 13 competitions. There is no league structure. The SQA note: *“the biggest problem for the game is the lack of young blood, the majority of members being over retired age”*.

Total club membership is estimated by the SQA at around 1000, though the majority of these are social, non-playing elderly members maintaining their involvement in the local community. Regular participation numbers for competitions are around 40 to 50 entrants.

Geographically, the clubs are very much concentrated in the South West of Scotland, particularly strong in Dumfries and around Glasgow, although there is also an active club in Aberdeenshire. Kirkconnel and Glenburn are the largest of the 12 clubs, with around 200 members each. However, *“like most sports struggling to survive against mounting odds, the enthusiasm of those who keep the game alive compensates for the lack of numbers”*.

5.2 Issues and barriers

Club membership fees are kept low (£5 per annum) so as to remain affordable to the ageing participants. Thus, maintenance of the ground and facilities has to be financed through personal contributions or fundraising events, such as raffles. There are however examples of public sector support on a discreet basis, with the South Lanarkshire club receiving £800 in 2003 for the replacement of the club’s turf. The Linwood club also received a £200 council grant for upgrading of club equipment in 2005. The SQA anticipate that affiliation with the FISSG will enhance recognition of the sport, and thus facilitate further council funding on a similar basis. Again, active official recognition is central to the continued sustainability of the game as it potentially enhances the ability to make funding applications to local councils or other funding bodies.

The lack of personal finance or annual public sponsorship means that the players, largely retired, have difficulty paying for transport. Given that travel costs are largely prohibitive, the SQA have difficulty coordinating a longer season, and a league structure (rather than the current open competition format) is therefore unachievable.

⁵ Scotland on Sunday article, “Quoiting on a shoogly peg Raymond”, Raymond Travers, 19/5/2002

Attracting young people is a major hurdle for each club. Coaching is on an entirely voluntary basis, and so access to the sport for new members relies on the availability and efforts of the existing members. Combining this with the short summer season length, the sport is particularly difficult to access.

5.3 Development

Even though there is little or no new interest from young members to the clubs, there are some roots of recovery in the game. 2006 sees the 1st British Championships since the 1960s, involving clubs from Scotland, England and Wales for a weekend event. The SQA are hopeful that this collaboration with neighbouring associations will “*help to sustain continued interest the sport for the near future*”.

In addition, the SQA is currently hoping to coordinate a Europe-wide gathering of similar events, such as horseshoe throwing, popular on the continent. Again, financing travel for this is likely to prove prohibitive for Scottish players.

At school level, an annual practice session and tournament is still organised in Kirkconnel (where the sport is strongest) for 14-16 year olds, held for pupils of Sanquhar Academy. This event is sponsored by Dumfries and Galloway council and includes a half-day from school, transport to the local rink and training with a club member. While the SQA perceive this as a fun and popular event, there is no evidence of continued participation or club joining from the school children as a result.

Finally, the SQA are hopeful that their new affiliation with the FISSG will result in new opportunities for collaboration and wider marketing of the game. For example, Highland Games are thought to offer a suitable vehicle for increasing the geographic reach of the sport. To date, club fliers have been circulated at some Highland Games in an attempt to measure interest in this approach. As with the back-hold wrestling, the game could form links as part of other events, perhaps agricultural shows and Highland Games, to increase participation and make the game more generally available and accessible to attract new interest.

5.4 Recommendations

It is difficult to sustain a sport that has no new members and very little apparent interest from younger generations, outside occasional fun events. The surviving clubs are making progress towards development of participation, but the culture centres more on non-playing members and maintaining a sense of community – generally amongst the elderly.

We recommend that the sport, widely acknowledged as a pub game, could be preserved and benefit from the creation of a website outlining the rules of the game and offering recommendations to landlords of where to purchase equipment. The SQA feel that this approach is also suitable (though they would also argue a case for annual funding to sustain the regular playing members).

6 Policy Environment

The Scottish Executive's Partnership Agreement prioritises the promotion of sport, culture and tourism in Scotland, and to contribute to the health and physical activity agenda. Within this context, DTZ have identified a number of cross-cutting policy areas potentially relevant to the promotion of indigenous sports:

- Sport policy
- Tourism policy
- Cultural policy
- Education policy
- Health policy
- Youth Crime
- Social Inclusion

In any project seeking public sector support or funding it is important to review its complementarities with Government policy. This section discusses these policy agendas in turn, together with the potential contribution of minority indigenous sports in meeting their objectives.

6.1 Sport

- SportScotland state that, to receive recognition, sporting activity must meet the European Sports Charter, which states: "Sport means all forms of activity which, through casual or organised participation aim at expressing and improving physical fitness and mental well-being forming social relationships and obtaining results in competition at all levels".

The national strategy for sport in Scotland – *Sport 21 2003:2007 Shaping Scotland's Future* - defines the remit for increasing participation in sport at all levels, and in developing and realising potential. There is a strong emphasis on the wider benefits that sports can bring, both in economic and social terms. The strategy is founded on 3 visions to be achieved by 2020:

- A country where sport is more widely available to all;
- A country where sporting talent is recognised and nurtured; and
- A country achieving and sustaining world-class performances in sport.

The key challenge is stated as "by 2020, 60% of adult Scots will take part in sport at least once a week"⁶.

There are a further 11 targets relating to participation in various social and demographic groups, including children, teenagers, those of working age and those living in SIP areas. It is targeted that over 1 million Scots will play in membership clubs, while 150,000 volunteers will contribute to the delivery and development of Scottish Sport.

SportScotland state that they "are committed to putting in place a long-term, sustainable infrastructure for Scottish sport" and will be working to develop the following:

⁶ Sport 21 2003:2007 Shaping Scotland's Future

- An Active Schools network
- Sustainable club structures
- A coaching network
- Regional Sports Partnerships
- The Institute Network
- A network of national, regional and local sports facilities

Speaking at the FISSG conference in 2003, SportScotland representatives indicated that funding was determined by primary physical activity targets and stated “*it is our view that indigenous sports will be unlikely to contribute significantly to these targets as part of the structured curriculum*”. “*We are of the view that individuals already participating in some of the major sports are not likely to move into indigenous sports*”.

SportScotland have however stated that indigenous sports may have a role to play in 2 of the 11 targets within the national sporting strategy:

- Increasing club membership; and
- Development of volunteers.

Indigenous sports are also perceived to have “*a role more generally in the provision of diversity in sport to attract those individuals not turned on by what the mainstream sports have to offer*”. The involvement of the crowd at some Highland Games events and with back-hold wrestling demonstrations offers a direct introduction to sport to generate wider interest, an element lost in more competitive professional sports.

SportScotland require a recognised governing body and established organisational structure before support can be offered – individual payments are not usual. That said, the FISSG have received SportScotland funding for hosting their 2003 conference, in recognition of their attempt to establish an umbrella body. It should be noted however, that a number of recognised governing bodies do not get funding, but rather have simply initiated two-way communication with SportScotland.

Highland Games

The SGA are still on SportScotland’s affiliated list of recognised Sports, but this is not an active relationship. The list of affiliated sports was inherited when the Royal Charter was instituted, but since then processes have been strengthened and a number of governing bodies have lost contact. Promotion of this affiliation when making applications to local authorities for local Games funding may facilitate more success.

It is entirely down to a LAs own discretion if they choose to support a sport, but to date they have tended to follow SportScotland’s prescribed list. In general, SportScotland will support bodies with shared ambitions, i.e. in the case of Shinty where the Camanachd Association’s business plan was centred on the principles of Sport 21 (see appendix A for more details). However, HIE offered a challenge to the practicality of some of these targets, for example the requirement for a certain proportion of Scotland’s population to have access to facilities within 10 minutes – this was achievable with the central belt population, but not in outlying areas that are sparsely populated.

Wrestling

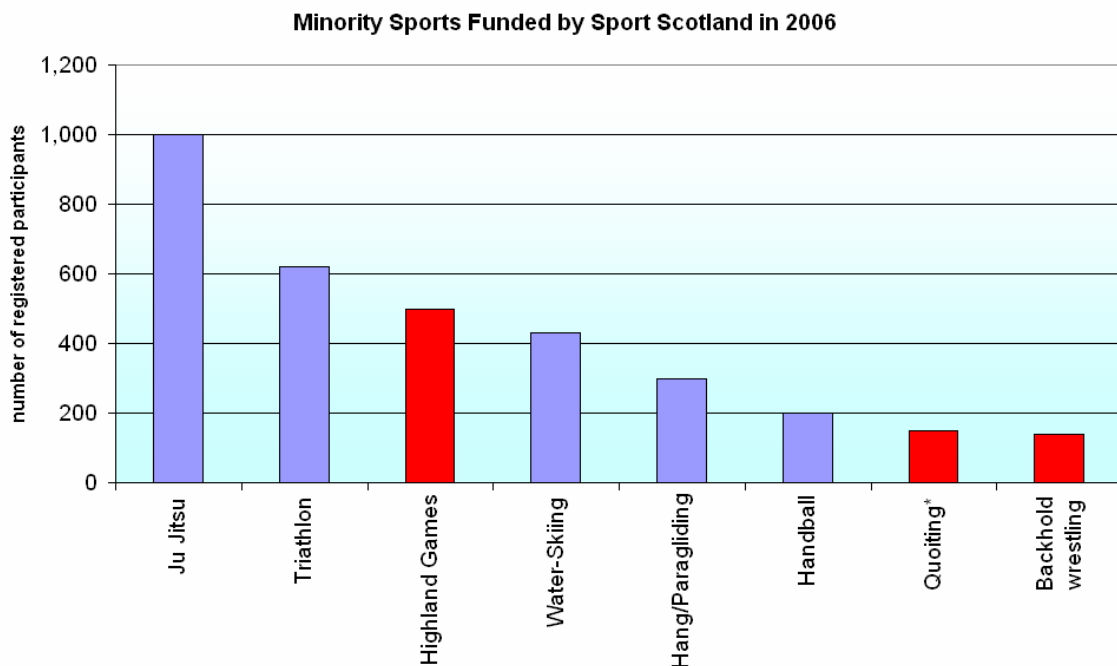
The main aim of back-hold wrestling is to achieve active official recognition as an individual sport, and independent technique, so that the participants will be taken more seriously. A degree of two-way communication with SportScotland will also potentially facilitate funding applications with local authorities, given that they often take a lead on funding from central public bodies with regard to sports.

Funding can currently potentially be channelled through the Scottish Wrestling Association, which is independent from the Scottish Wrestling Bond. SportScotland's preference is for a single governing body for this activity, but back-hold wrestling is affiliated, so it has access to public funding, and thus no need for further affiliation through the FISSG.

Quoiting

Youth participation is an important staple for SportScotland funding, while as a rule they tend not to support declining sports, given the increasing popularity of a number of new sports competing for funding.

There are a number of minor participation sports accredited by SportScotland in 2006. These are illustrated in the following chart with blue bars. The non-supported indigenous sports have been included for context (the red bars).



*There are around 1,000 registered members in Quoiting clubs, but the majority are not active. SQA estimate that around 40-50 players attend each competitive event so, avoiding double counting, DTZ estimate that around 150 is a reasonable maximum estimate for the number of regular active participants.

However, in cases where minority sports are supported by SportScotland, it is usually justified because they require official accreditation to gain access to international

competition, rather than receiving substantial funding, although funding is obviously opened to them.

Major Events

Local tourist impacts are disregarded by SportScotland, who focus instead on development and legacy of the sport itself. Event Scotland works in partnership to help to coordinate major tourist events. Again, access to Event Scotland's expertise could prove a major benefit to the indigenous sports, if facilitated through official accreditation.

Individual major event, judged to have the highest potential impact could be coordinated through either SportScotland or Event Scotland in order to ensure maximise impact on the local economy, and to derive cost efficiencies from their expertise, without overall sponsorship of all Highland Games, as one potential route to enhance recognition of minority participation sport.

Financial support may not be the optimal route through which SportScotland can develop indigenous sports. As an alternative, SportScotland can offer coordination expertise, and potentially give access to these sports to their established educational framework with schools, colleges and universities to promote access.

If the national bid is successful, the Commonwealth Games 2014 in Glasgow will mean that there is additional funding available for the promotion of sports to tourists and visitors. This offers a unique opportunity to market Scotland's sporting culture through demonstration events, such as wrestling or Highland Games to an international audience. A recent example of such publicity was at the World Cup, where the opening ceremony in Germany showcased the local, traditional Bavarian whip crackers.

6.2 Tourism

The Scottish Executive's latest tourism strategy⁷ outlines a series of priorities in its Action Plan for the next decade. The most relevant to indigenous sports are:

- *"We must think creatively, innovatively and collaboratively to develop new products and enhance existing ones.....to ensure they are exceeding our visitors' expectations."*
- *"Culture and heritage organisations will also develop new activities and experiences in response to emerging markets."* (an opportunity for minority indigenous sports to offer an innovative and differentiated visitor attraction)
- *"Tourism businesses will work with culture, heritage and sport organisations to set up a product development network for the heritage, history and events segment of this market."*
- *".....culture and heritage organisationswill use effective marketing techniques to increase the number of visitors who come to Scotland as a direct result of advertising and other forms of marketing."*

Visit Scotland define cultural tourism as *"realising the tourism potential of Scotland's traditional and contemporary culture"*. While there is currently an emphasis on escaping

⁷ "Scottish Tourism – a Draft Framework for Change"; Scottish Executive, January 2006

the so-called “tartan and shortbread image” for international marketing, the traditional culture remains an area of strong comparative advantage, due to its unique and distinctive nature.

Visit Scotland are of the opinion that “*indigenous sports and Highland Games do not play a significant role in attracting target visitor markets to Scotland*” and that there is no research to validate this claim. However, it is acknowledged that the “iconic” elements of Scotland’s culture are marketable as part of the total offering, and indeed Visit Scotland’s website draws on images of Caber Tossing and other Highland Games events in its promotion.

Highland Games

Although there is a lack of robust information relating to Highland Games, this report finds that there is a quantifiable additional expenditure impact on Scotland’s economy in the range of £10 to £16 million per annum. There is also evidence from a range of sources (newspapers, HIE reports and anecdotal from consultations) that the Games attract a higher proportion of overseas visitors than other cultural and heritage tourist attractions, albeit that the majority of these overseas visitors have not stated the Games as their main reason for travel.

In addition, the participants at events will have an impact on top of that generated by the spectators and organisers. This is likely to be small, given that the sport is minority participation, but will increase the overall total. This could take the form of international participants spending in the area during the event, or displacement of spending from urban to rural areas within Scotland as domestic competitors travel to the Games.

Back-hold Wrestling

Back-hold wrestling is a demonstration event, showcasing Scotland’s unique technique and kilt image, which appears to have an impact on international promotion. Again, this is based on anecdotal evidence from consultations, combined with published press reports to validate claims of international popularity. While the sport is not necessarily an individual attraction, it can form an integral component of festival-style events aimed at demonstrating Scotland’s diversity.

Quoiting

At present, quoiting has no impact on the tourist market. If current plans to introduce annual British and European Championships are completed, there may be local impacts as competitors travel, however these are anticipated to be very marginal as are likely to draw very few spectators.

Indigenous sports are currently thought to suffer from a “crisis of PR” with little in the way of coordinated marketing. Local organising committees lack the managements and advertising experience to effectively promote their events outside the local area, and thus significant additional benefits may be achieved through coordination of this activity by Visit Scotland. At a minimum, the recommendation of approved suppliers and techniques, or access to public sector resources, may result in marginal cost savings for individual organising bodies.

6.2.1 The Highlands & Islands perspective

HIE differs from Scottish Enterprise as its remit includes community development – cultural preservation is a core development area. Environment and culture sustainability are essential staples, as the Highlands tourist focus is widely acknowledged to be on outdoor activities. Given that HIE's focus is not sport development, they are only able to sustain the cultural attributes of sport which contribute to community identity, while sports associations tend not to be supported without rationale or validation from SportScotland.

That said, indigenous sports form a crucial part of the Highlands distinct culture, defined as those “*which you wouldn't reasonably expect to develop in other areas of the world if they didn't exist in Scotland*”.

In general, current funding for sports and events is small scale and is usually targeted towards advice and coordination of marketing campaigns also, in some cases, capital innovations to help extend sporting seasons and thus boost sustainability i.e. indoor ski centre, indoor dive centre. The skiing market in the Highlands is in a very fragile period, losing its core UK and overseas visitors to bargain resorts on the continent, so they are increasingly looking to identify alternative outdoor sports to promote in order to plug this emerging gap.

Funding to date has been made available by HIE for local Highland Games and through LECs in response to bespoke requests by each local organiser. Any assistance given is usually with publicity and marketing of the events to ensure maximum visitor and participant numbers.

HIE would “*certainly consider any approach by FISSG / indigenous sport associations on the basis of sustaining local culture, but to date haven't had a mechanism by which to support traditional games, other than the Camanachd Association*”. Shinty is now supported, as is the Highland Mod, given that they have acknowledged governing bodies that are able to coordinate the distribution of central funds. These are accepted as “*building community confidence levels*” as the rationale for investment. “*Certainly culture is valuable in itself and can sustain economic benefits*”.

In 2007, Inverness is hosting the World Highland Games championships as part of the year of Highland Culture. This is supported financially through the Highland 2007 organisation which is 1/3 funded by the LECs, HIE and the Scottish Executive with responsibility for staging events through the year. The World Highland Games is focal point, thought to offer significant potential to attract the American diaspora and prove a major event – “*nothing else in the Highlands can attract comparable visitor numbers*” (up to 20,000 have been attracted in previous years).

6.3 Scotland's Culture

On 19th January 2006, Culture Minister Patricia Ferguson made a statement on the direction of Scotland's cultural landscape to the Parliament, entitled ‘Scotland's Culture’⁸. Of particular relevance to this study are the following ‘key principles’ and policy statements:

⁸ “Scotland's Culture: Scottish Executive Response to the Cultural Review”, Scottish Executive, January 2006

- *“Our commitment is for all seasons. We remain ambitious for Scotland’s cultural life – ambitious to promote our twin aspirations of excellence and access”*
- *“We aim to maximise practical opportunities for all citizens to access culture of real quality”*
- *“We must ensure that our future cultural achievements, and those of our partners, are delivered in ways that boost participation, access and enjoyment”*

At the heart of cultural policy is an investigation whether the infrastructure is in place to realise the hope of Scotland’s people having an equal opportunity to participate in the nation’s cultural life and heritage. Responsibility falls to local authorities to deliver local area entitlements through their cultural and Community Planning responsibilities, and that this *“represents a powerful package of rights for communities to access and enjoy the best, and widest possible, range of cultural activity”*.

Highland Games

There is a distinct variation in the nature of Highland Games according to their host geography. While major Games are marketed as tourist attractions, many of the local Games form an annual community gathering for the community, and a time when families return to the area. This is particularly the case in the remote rural areas of the Highlands and Western Isles. These Games have been run *“by communities, for communities”* and are sustained through the efforts of volunteers. They are also acknowledged to form an *“iconic”* symbol of Scotland’s heritage.

Quoiting

The SQA acknowledges that the vast majority of club members in the game are elderly and non-playing. However, the 12 surviving clubs act as a community focal point for these non-playing members, who otherwise may be hard-to-reach.

6.4 Other key policy areas

Health

The physical activity task force highlight that sport can make a significant contribution to improving the physical and mental well-being of the nation. The Executives Physical activity strategy focuses on 4 target groups: schools, communities, home and the workplace.

Highland Games and back-hold wrestling are largely demonstration events and spectator spectacles. However, there are open events and opportunities at local Games to participate in the events for both children and adults. Moreover, SportScotland feel that increasing the diversity of available sports can serve to access some hard-to-reach individuals who might otherwise not participate in any physical activity.

Quoiting is largely participated in by the elderly, as it represents one of the more easily accessible Games for the retired age group. The elderly are a specific target group for the Physical Activity Taskforce given that there are benefits from developing and maintaining strength, postural stability and balance, and is effective in preventing and treating mood disorders.

Education

Sport can help individuals develop interpersonal skills as well as technical sporting skills, and through participation can potentially increase school attendance and reduce truancy rates;

Youth crime

Participation in sport is acknowledged as providing an alternative to antisocial behaviour and criminal activity.

Social Inclusion / Rural Development agenda

Participation in organised sport is recognised as improving the cultural identity of both Scotland and local areas, facilitating social cohesion. SIP areas are a particular focus of the national sport strategy, while rural areas are amongst those most likely to benefit from participation boosts.

There is evidence from a range of sources (international research and anecdotal from the consultations), that indigenous sports can contribute to the rural development and social cohesion agendas, bringing additional expenditure into remote areas, and forming a focal point for local communities. Research from Australia and Canada on indigenous sports states that they can encourage social interaction within community groups, while Highland Games, particularly in the Western Isles act as community gathering points, attracting back the islands diasporas on an annual basis.

7 Conclusions and Recommendations

This study was commissioned to assess the current contribution, impact and future potential of Scottish indigenous sports that currently have no established regime or existing public sector funding, and have relatively low participation. These were agreed in consultation with the steering group to include:

- Highland Games– combining heavy events and light athletic competitions with other non-sporting elements such as piping and storytelling;
- Back-hold wrestling – a technique in which opponents stand chest-to-chest, chins on each others right shoulder and attempt to throw each other; and
- Quoiting – tossing of a weighted hoop towards a marker stake (or hob).

Perhaps due to their minority nature and informal organisational structures, there is very little published research relating to indigenous sports. Furthermore, their minority nature means that there are no directly comparable and robust participation statistics available through official sources such as SportScotland. Quantifiable data presented in this report is therefore largely based on the evidence from consultations, validated where possible with additional sources such as promotional brochures, newspapers and bespoke public sector reports. These estimates should thus be seen as broadly indicative rather than definitive, precise figures. Despite these constraints, there are some clear patterns and messages emerging.

By definition, minority sports are limited in what they can contribute towards the objectives of individual public sector bodies, and thus have “fallen between chairs” when looking to access support, given that they do not meet the full requirements of either body. However, they do demonstrate a noticeable impact on towards a number of policy areas, which can be encouraged and sustained.

In general, the requirements of the indigenous sports are for organisational structures, marketing and management expertise, rather than block annual grants – although this too is desired by the individual coordinating bodies.

The majority of the participating athletes have access to other funding streams through other club memberships (i.e. Heavies for Highland Games through weightlifting membership with SportScotland). SportScotland are of the opinion that indigenous sports will not become mainstream and mass participation, but can contribute through accessing hard-to-reach individuals who avoid other major sports. This opinion is validated by the comparatively low numbers participating in the events, but does imply that a degree of support is justified through the social inclusion agenda. In terms of the Executive’s more general TCS (Tourism Culture and Sport) sport targets of participation and excellence, indigenous sports are limited in their contribution, due to their minority nature.

The main impacts associated with Highland Games relate not the physical agenda, but to the promotion of Scotland to overseas and other UK tourists, offering additional expenditure of some £15m in the Scottish economy per annum. This suggests that better coordination between the national tourist board and the Games organisers could enhance the sustainability of these events.

Sustainability hinges on the continued enthusiasm of volunteers. Increasingly sports tending towards more structured, official delivery and thus volunteers are feeling more entitled to a degree of reimbursement. On this front, each of the indigenous sports could benefit substantially from any public sector expertise available in the areas of volunteer recruitment, retention and compensation, being given access to central facilities. It is not uncommon for sports governing bodies to be almost completely reliant on volunteers for their administration, so the position of Indigenous Sports is not unique, but enhanced two-way communication with SportScotland could potentially ease or mitigate the problem by offering access to knowledge and expertise in these issues.

We conclude that each of the sports analysed in this report are worth supporting to a degree based on their impact at the national level, fit with policy objectives across a number of areas and in particular tourist potential. An overview of recommendations for each of the assessed sports is included in the following table:

Summary of recommendations			
Sport	Structure and impact	What might be a rationale for support	Recommendations
<p>Highland Games</p> <p>A mixture of traditional Scottish cultural activities, including:</p> <ul style="list-style-type: none"> • Heavy events, • Light athletics; • Piping; • Dancing; • Story telling <p>The Heavies are a focus of the sporting events, presenting the iconic image of Scotland, including caber tossing, putting the stone, throwing the hammer, and throwing weights for height and distance.</p>	<ul style="list-style-type: none"> • Low participation of competitors – 500 registered with the Scottish Games Association, with a particularly low number of Heavies (20). • Around 100 events run individually by local organising committees, with some coordination through the Scottish Games Association at 67 of these. • Spectator events expected to attract between 215,000 and 344,000 visitors per annum depending on the weather. • Volunteers predominantly run the Games. 	<ul style="list-style-type: none"> • Net additional expenditure impact on the Scottish economy is prudently estimated to be within the range of £10.5 to £16.1 million per annum (based on 2006). • Evidence from a range of sources suggests significant overseas tourist interest in major events. • Direct crowd participation in events can make sport in general more accessible. • Evidence suggests that Games contribute to local cohesion in communities. 	<ul style="list-style-type: none"> • Central coordination of local organising committees by Visit Scotland / the Scottish Executive to give access to marketing and management expertise, and potentially event insurance. • Exploring potential routes for the recruiting and retention of volunteers, perhaps through offering reimbursement for expenditures incurred, or coordinating a link with local colleges and universities to offer hands-on management experience to students. • Central coordination and support for core marketing opportunities such as the World Highland Games 2007. • As with shinty, Games could benefit from TV exposure, with the Gaelic sports programme offering a

			potentially suitable vehicle and easy access point.
<p>Back-hold wrestling</p> <p>A uniquely Scottish wrestling technique, which is predominantly a demonstration event.</p>	<ul style="list-style-type: none"> • Low participation – 150 registered participants. • A demonstration event with no formal competitive league or structure. • Rather than an individual sport, it tends to form part of wider cultural and sporting events. • Affiliated with the Scottish Wrestling Association. 	<ul style="list-style-type: none"> • Attraction to overseas visitors and promotion of Scotland - Competitors wear kilts and demonstrate at international events. • Crowd participation – often open demonstrations, thus offering an easy access point to sports 	<ul style="list-style-type: none"> • Enhanced communication with Visit Scotland to take advantage of international marketing opportunities. • Coordination and management support – access to central marketing and management expertise. • Support for athletes’ travel expenses for promotional events if coordinated by Visit Scotland.
<p>Quoiting</p> <p>A game in which metal hoops are thrown towards a peg (or hub). Distinctive Scottish nature comes from weight of hoops and length of pitch.</p>	<ul style="list-style-type: none"> • Low participation and a lack of interest from young people. 1000 registered club members, but less than 150 active regular players. • 12 active clubs with short competitive season. Arranged on an informal basis at the annual general meeting of the clubs. 	<ul style="list-style-type: none"> • Sustainability – a lack of interest from young people to sustain the sport. • Social cohesion – particularly strong in the South West areas, and clubs involve a number of non-playing, retired members. 	<ul style="list-style-type: none"> • Coordination of a website promoting the game to landlords of pubs and hotels. • Enhanced recognition of the game, with active communication with the public sector, to enhance opportunities of funding with local authorities.

Appendix A

Shinty (a benchmark sport, not included in the main analysis)

Shinty is certainly considered as one of Scotland's indigenous sports. While it is currently publicly funded through the Camanachd Association, and thus not a focus for this study, it has only recently modernised and achieved a greater degree of recognition. There are therefore a number of learning points that relate directly to our findings for Highland Games, Wrestling and Quoiting.

Shinty - key points summary

- A major overhaul of the governing body was required to modernise delivery, supported by SportScotland investment in areas with joint outcomes – Scottish Shinty has *“a structure now and a management ethos, so we can deliver now if somebody gives us the money”*.
- The sport is largely self-sustaining, and corporate sponsorship is widely available, but ring fenced funding is required for the core organisational and administrative structures.
- Funding is channelled towards organisation, administration and development of the game, rather than equipment, subsidised membership etc, based on a developed strategy (aligned with Sport 21 principles).
- No involvement with Visit Scotland or Event Scotland – *“they undervalue the iconic appeal of indigenous sport”*.
- Highland Year of Culture (2007) sponsorship for Shinty Cup of £30k *“represents the first public sector recognition of the cultural significance of indigenous sports”*.
- Barriers to development in school include lack of insurance if PE teachers aren't trained, and scale of child protection vetting for volunteers.
- Gaelic TV has vastly increased exposure and appeal to sponsors – vehicle only possible route to this exposure (thus Shinty is indirectly publicly funded).

Shinty overview

Shinty has a Scotland-wide distribution of clubs and schools, the former participating in a 35-week season (March to September), with successful clubs playing up to 5 additional Camanachd Cup games.

In terms of participation, there are (Camanachd Association figures):

- 57 teams playing adult Shinty – 1,025 registered members
- 120 teams playing first Shinty – est. 1,800 players
- 90 teams at primary level – est. 1,300 players
- 32 teams at under 14 level – est. 480 players
- 20 teams at under 16 level – est. 300 players
- 12 women's teams – 215 registered members
- 120 players with learning disabilities
- Total – **est. 5,200 players** (est. based on 15 members per team - 12 + 3subs)

In terms of non-playing participation, there was a recorded audience of 5000 at the Camanachd Cup final in September, with a further 115,000 watching on TV.

Organisational Change

Previously, the Camanachd Association found SportScotland difficult to approach when they felt under resourced, as they did not have the appropriate mechanisms in place for affiliation and recognition. However, in the last 18 months (following recognition) there has been a total transformation:

- The Association now has a single entry point to SportScotland (a manager);
- An entirely new organisational structure has been put in place to unlock SportScotland support, including appointment of full-time official staff (see table below):

Full Time paid staff in Camanachd Association	
Position	Funding source
Chief Executive	Tulloch sponsorship and SportScotland
Administration manager	SportScotland
Technical manager	SportScotland
Youth development manager	SportScotland and Argyll & Bute Council
Area coaches *2 (1 for each area):	c. £18k each basic pay
Highlands	Highland Council
Argyll	Argyll & Bute Council

- The established governing body (the Camanachd Association) converted into a registered limited company (“*the biggest change in the history of the sport*”)
- Annual funding secured with Executive (£100,000). Scottish Shinty has “*a structure now and a management ethos, so we can deliver now if somebody gives us the money*”
- The Shinty Development Plan and structures are aligned to Sport 21 targets - “*we need to have a plan in place before allocating resources – it can’t work the other way round*”.

Board members (8) in the Camanachd Association are still all voluntary. The function of the financed core staff structure is to support the needs of the volunteers. Following recognition, the Board replaced the original Executive Council of 20. Responsibility is now concentrated with fewer people, but there are more demands on these resources, hence the requirement for compensation. Company registration as the governing body adds a greater burden to deliver and be efficient.

The Camanachd Association has developed official branding (using designers) to appear on all advertising / promotion / event material, and branding guidelines to achieve identity improvements. This mechanism was put in place following SportScotland involvement, acts as a catalyst for development and again consistency helps with sponsorship. This type of joint approach was previously lacking, as is the case with Highland Games.

Speaking of SportScotland: “*you have to play the game to get success. It takes time, and that’s why the core has to be resourced*”. “*We now view ourselves as a strategic operation*”

where planning and forward looking strategy is crucial. But this can only be achieved in partnership”.

Financial overview

Funding is focussed into the administration and organisation of the sport i.e. maintaining the core staff, and into development of the game (promotion and in schools).

Individual clubs are self-sustaining through membership fees, private sponsorship, lottery schemes and in 2 cases: licensed clubhouse premises. Some of the core cost centres are provided in the table below on a per club basis:

Main costs of delivery (on a per club basis)		
Cost centre	Per club	Est. Total (57 adult clubs)
Entry fees (tournaments)	£205	£11,685
Membership fees	£180 per member	£184,500
Player insurance	£986	£56,202
Referees fees	£960	£54,720
Stick costs	£900	£51,300
Cost incurred by the club / cost incurred by the individual member		

The Camanachd Association emphasise the importance of recognition of the sport with SportScotland, saying that in the past they had difficulty accessing funding. An order of prioritisation exists, whereby local authorities may not authorise funding for discreet local sporting projects without the official validation of SportScotland recognition. Thus, official recognition unlocks LAs as an additional funding source.

Sponsorship is also an important funding stream to maintain, rather than replace with public money. The Camanachd association were of the opinion that:

- The wide portfolio of sponsors is indicative of the appeal of the sport:
- It gives additional corporate clout to the sport, as the sponsors’ management and distribution systems can be used in wider profile raising e.g. Scottish Hydro producing Shinty brochures and distributing through their retail network; and
- Sponsors take a very business orientated view, trying to win community support for company projects and so may contribute beyond the financial level.

Development of the sport and barriers

The remit of the 2 Camanachd Association area coaches is the development of the game, supporting clubs, schools and the playing of shinty. There is now an area coaching structure in place, delivered through area coaching committees (all volunteers). This approach was necessary given the restriction that PE teachers are not trained in shinty, so schools cannot get insurance to play as a curriculum activity (because of the dangerous nature of sport).

Child protection is also a major barrier to provision, given that all trainers/coaches are volunteers. Therefore, all those associated with the governing body have to be trained and

vetted. The Camanachd Association is considering the implementation their own certification scheme for PE teachers to develop the sport.

Difficulties are being experience when developing in some out-lying areas e.g. Western Isles, as this would require large resource inputs and the Association are limited to 2 positions at present. Therefore, the key development priority is the consolidation of areas currently involved in shinty.

McLennan's (2000) preliminary study of the economic impact of the annual combined Shinty/Hurling between Scotland and Ireland noted that the BBC coverage of the event in 1998 attracted some 120,000 viewers. The 1999 international match was estimated to generate £7,200 of accommodation expenditure (not the total impact of the event in the economic sense of the term) over two nights as a result of 120 bed nights in Inverness. The Clarecastle/Lochaber shinty project generated 150 bed nights at £25 a night for 4 nights in 1998. Indigenous sporting connections between Scotland and Ireland (involving festivals) remain a relatively untapped source for developing tourism, culture and sport in Scotland and between Scotland and Ireland.

The "biggest single leap" achieved by Shinty has been through enhanced exposure on Gaelic TV:

- BBC2 Scotland's pilot show "Spors" includes an update on the Shinty league and game highlights;
- The same TV production company (SMG) also stream live feeds of weekly games on their website to boost exposure;
- The map of hits to the SMG website suggests widening international interest in the sport – USA, Norway, Spain, Australia and New Zealand (100,000 hits per month on website this year).

TV exposure has been key for securing corporate sponsorship – Gaelic has been the only vehicle available for this level of exposure, thus an important catalyst for development of the game. SMG suggest that, if Spors is popular, indigenous sport will form a core element of the channels programming, suggesting a promotional opportunity may exist for Highland Games and Back-hold Wrestling.

The key is that the core needs to be strong i.e. organisation, administration and coordination of the sport – "*all funding and promotion opportunities revolve around the Governing body*". If core costs are guaranteed, then the Camanachd Association feels the sport itself can draw in the other aspects required for sustainability and development – strong planning and organisation systems need to be in place to coordinate satellite funding and support.