

AN COMUNN GÀIDHEALACH
Western Isles Mòd, 2011
An Evaluation (Final Report)

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EXECUTIVE SUMMARY

Study Objectives and Approach

1. Our objective in evaluating the Mòd is to add value whenever possible, not only in the assessment of its impact but also in taking An Comunn Gàidhealach itself forward as an organisation and significant Gaelic institution.
2. In this context, strong foundations have been built. Gaelic institutions are now more organised and listen to An Comunn. An Comunn is more confident on the basis of its acknowledged success in running the Royal National Mòd and through the work that has been done by its Chief Executive in particular in strengthening the finances of the organisation.
3. Given this background, our evaluation this year has quite properly again focused on an assessment of the social and economic impacts of the 2011 Mòd. Whenever relevant, we have drawn on comparisons with previous years; but we have also looked forwards. We have begun - in association with An Comunn - to shape how the organisation can also move *beyond the Mòd* in order to strengthen Gaelic heritage, culture and language in a way that will bring real benefits to the tourism as well as the Gaelic economy.

Field Survey Results and Analysis

4. The calculation of attendance numbers is always challenging. In making our assessment each year we not only use the firm knowledge we have about competitor numbers but also use our survey analysis of numbers attending the Mòd with competitors. We then set the outcome against previous attendance numbers in making relevant comparisons. On this basis, our estimate of attendance numbers at the 2011 Western Isles Mòd is 7900 people (both competitors and visitors).
5. The full results of the field survey work at the 2011 event are presented in Chapter 2. Highlight findings include the fact that £2.1 million was spent by visitors, competitors and organisers at the 2011 event. In addition, 56% of those attending the Western Isles Mòd indicated that they would *definitely* return for a future leisure trip or holiday on the islands in the future.
6. In comparing the findings four key questions asked during the past four evaluations we have undertaken we found that a significantly higher than normal proportion of those attending the 2011 event were from within the host area (45%) - that is, the Western Isles itself; that less than normal would have taken no alternative holiday on leisure trip had they not attended the Mòd in 2011 (71%); that, as noted earlier, a higher proportion than normal - including those attending the Oban event in 2009 - said that they would

definitely return for a future holiday or leisure trip; and that those with no Gaelic but a great desire to learn the language were on a par with the Caithness percentage last year (17%), this question having not been asked at either the Oban or Falkirk events.

ROI and Other Analyses

7. The main means of assessing impact is through calculating the return on investment (ROI) as far as public sector contributions to the Mòd are concerned. In particular, this is done at the Western Isles level on behalf of Comhairle nan Eilean Siar and for EventScotland at the national level. The methodology requires local residents and casual visitors (as well as repeat visitors but these are not significant at the Mòd) to be omitted from the ROI calculations. After this is done the ROI at the Western Isles level was found to be 6 to 1 whilst that at the national level was 5 to 1.
8. We also “invented” a new means of assessing impact which was to calculate the amount of net new job creation associated with the event (84.5 full-time equivalent jobs) and use this and the visitor spending figures to assess the amount generated in tax, National Insurance and VAT income as a result of the event. The public sector costs are then divided into the combined revenue generation figure to produce a Treasury “pay-back” period. Perhaps surprisingly - at least to some - was that this was found to be less than five months! Various other social impacts set by Highlands and Islands Enterprise were more than met, as described in Chapter 3.
9. Our analysis of the copious amount of press cuttings generated by the event - itself a positive outcome as far as the Gaelic community is concerned - demonstrated the power of the press in relaying information and knowledge at local levels throughout Scotland as well as nationally. The big stories, however, were the return of the Mòd to the Western Isles, the continuing need to increase the number of Gaelic speakers, and the innovative suggestion by the An Comunn President that work should begin with the objective of having the Western Isles designated as a UNESCO World Language Site.

Beyond the Mòd

10. The beginnings of a new vision for An Comunn and the wider Gaelic movement have emerged from the 2011 Mòd. Quite independently, the organisation’s President raised the UNESCO World Heritage Language Site possibilities referred to earlier. At the same time, the An Comunn Chief Executive was thinking along broader but similar lines in bringing Gaelic heritage, culture and language together within Provincial Mòd destinations in particular. These ideas have great merit and real potential: for visitors and residents alike, the more an authentic sense of place can be developed and delivered by Scotland's destinations the greater will be the experience

enjoyed by those who visit them and the stronger will be their sense of community spirit and pride.

11. The key to moving forwards lies in a combination of factors. Information will be important in terms of letting potential stakeholders know about the development vision and giving them a chance to influence how it is translated into action. Collaboration will then be needed in working together in an *integrated* way that of necessity shares resources as well as knowledge and effort. Innovation will not only be required to do justice to the concept - which is itself different - but also because differentiation is a powerful attribute in today's crowded marketplaces. Finally, sound administration (and more than a little diplomacy) will be required to deal with the inevitable complexities and even differences of opinions which will inevitably emerge. If these different characteristics can be brought together in a coherent way the project can be developed in time for launch at the 2014 "homecoming" Mòd in Inverness and the new ways of thinking as well as a working may well prove to be a worthy testament to Bruce and Bannockburn as well as to the Highland Capital itself.
12. Fine ideas are, however, little more than ideas. Without development and implementation they are rather worthless. Whilst a huge amount of collaborative effort will go a long way towards transforming the ideas into visionary actions there is no escaping the fact that finance will also be required. In this context, a new investment fund for the Cultural Economy has just been opened by Creative Scotland which seeks to promote "sustainable development". Grants of between £15,000 and £100,000 will be made under this fund at intervention rates of up to 90%. It is therefore clearly a potential source of initial funding to develop the concepts in a pilot project which will in effect be a standard model which can then be rolled out elsewhere. In order to move this possibility forward we have suggested that four particular actions should be taken in advance of submitting the required detailed application to Creative Scotland in early March 2012. The steps are as follows.
 1. That initially local Mòd organisers should be surveyed to determine "*where we are*" in terms of local Mòds and "*where we want to get to*" in terms of their integration into the broader proposed heritage, culture and language project.
 2. That consultations should then be held with a range of Feisan organisations and Gaelic Medium Schools/Units - especially in four pilot areas which we suggest should be Dunoon, Paisley, Inverness and the Western Isles.
 3. That in the light of the survey and consultation outputs the integration and collaboration project should be further defined, and that the initial ideas and propositions to emerge should then be discussed with the

DMO (or equivalent) bodies in each of the four pilot areas.

4. That the project be further developed and defined before an application for between £50,000 and £100,000 is submitted to Creative Scotland for Sustainable Development funds from within the Cultural Economy investment pot. These funds will be sought to develop a pilot project for the 2014 "*homecoming*" Mòd in Inverness, on the basis of testing it in each of the Dunoon (in terms of concepts) and Paisley Mòds (through further development of these concepts) and rolled out after the Inverness Mòd as part of the wider UNESCO project that has been mooted for the Western Isles.

In developing the project key objectives will include the development of organisational and financial models which will strengthen An Comunn and others and the part they play in the enhancement of Gaelic heritage and culture as well as its language through greater collaboration, integration, innovation and sound administration within and amongst their tourism and Gaelic partners.

1. STUDY OBJECTIVES AND APPROACH

- Study Objectives
- An Comunn Development
- The Study Approach

The Study Objectives

Our mainstream objective is to evaluate the 2011 Royal National Mòd in the Western Isles in terms of its economic and social impacts. However, each year we are fortunate to be asked to evaluate this prestigious event we try to take our analysis further.

For example, we have begun to compare the results of each year's evaluation with those that have gone before, given the consistency of the methodology applied in all but one of the years since 2004. In the past, we have also compared the Royal National Mòd with the Eisteddfod in Wales, drawing some interesting conclusions and providing relevant exemplars in the process - despite the very different scales and funding of the events.

There has, however been one constant. The Royal National Mòd has always evaluated well; and each evaluation has produced results that are credible - from the new Lowland venue in Falkirk in 2008 to the "home" of the Mòd in Oban in "Homecoming" year 2009 to last year's evaluation in a new Mòd Highland destination in Caithness.

This year, the Royal National Mòd has returned to the home of Gaeldom: the Western Isles. This has coincided with exciting new ideas on the future of Gaeldom and the Gaelic language, of which more later. In the meantime, An Comunn itself is in a much stronger position to consider the future on a sound financial basis that takes it "*beyond the Mòd*" without in any way diminishing the significance of this national event.

An Comunn Development

Complacency must always be avoided. However, the established success of the Royal National Mòd can almost be taken for granted by all but those responsible for organising it, with the role of the Local Organising Committee in each of the event's host venues being as noteworthy as that of An Comunn itself.

The work done in recent years by An Comunn and its executive staff is also impressive. From a position of financial weakness which threatened its foundations, An Comunn is now on a sound financial footing - although more funds are always welcome, especially if the organisation is to continue to move forwards.

With more funds An Comunn will be able to strengthen its position in the work it does, especially in fostering and developing the role of the Gaelic language in today's Scotland but also in linking this to Gaeldom's heritage and culture. In so doing, it can help to bring Gaelic and Gaeldom to the fore, not only in the minds of Scottish residents but also to the attention of Scotland's visitors. At one and the same time, social and economic progress can be made through highlighting the importance of our Gaelic language, heritage and culture - with a strengthened An Comunn itself playing a key role in achieving this.

The Study Approach

These aspirations provide the backdrop to this year's Mòd evaluation. Our approach has included conventional field research amongst Mòd visitors and competitors, whilst also making the fullest use of the database of competitors which An Comunn has assembled over the years. This has allowed us to evaluate the impacts - both economic and social - which can be associated with the 2011 Mòd in the Western Isles.

However, our approach has also sought to take the organisation out of what might (rather unkindly) be referred to as its "*comfort zone*" through laying foundations for its involvement in an exciting new initiative which will quite literally and metaphorically take it "*beyond the Mòd*". In doing so, we have taken the exciting ideas of the An Comunn President to establish the Western Isles as a UNESCO World Language Site through building this around the notion of Gaeldom as a "*place*". In time, it is a place which can be expanded into other parts of both Highland and Lowland Scotland to the benefit of the Gaelic language and its associated heritage and culture.

At this stage, however, we have not provided a comprehensive plan to take An Comunn and Gaeldom along this route. Rather, we have considered what is involved and structured what will need to be done to produce such a plan in reaching a brighter future for the Gaelic language as well as its heritage and culture.

This has been achieved by working with others: the Western Isles local authority and Bord na Gaidhlig in particular. In due course, this will also include local Feisan groups, Gaelic medium schools and units, VisitScotland, EventScotland and Highlands and Islands Enterprise. Establishing the foundations for consultation and the assembly of relevant opinions has therefore been a key part of our approach which will continue beyond this evaluation. At the same time, we have of course kept the main purpose of this year's assignment - the evaluation of the 2011 Royal National Mòd which was held in the Western Isles - firmly in mind.

The focus of chapters 2 and 3 are therefore on the evaluation. In chapter 2 we present the results of our analysis of the An Comunn database of competitors, our field survey outputs, and our comparison of these outputs with key findings of our

evaluations for each of the Mòds held in Falkirk, Oban and Caithness respectively (i.e. those held in each of the last three years); in chapter 3 we have carried out a conventional economic impact analysis along with a new approach which seeks to calculate the return on investment earned from the taxpayer's investment in the 2011 event by the public purse as well as an analysis of the social impacts associated with it. Having presented these results, however, in chapter 4 we venture "*beyond the Mòd*" in an assessment of what needs to be done in pursuing a major project which will see Gaelic heritage, culture and language brought together in a way that will enhance both local and visitor knowledge and add to their experiences of Scotland as a country.

2. FIELD SURVEY RESULTS AND ANALYSIS

- Attendance Numbers
- Field Survey Results
- Comparative Analysis and Conclusions

Attendance Numbers

Over the past four years the Mòd has attracted an average of c3680 competitors. This year the figure was 2817. In using the baseline competitor number figure to extrapolate and build an assessment of total visitors as well as competitors at the event we have over the years be consistently cautious.

This year we concluded that each competitor was accompanied by around 1.8 friends and family which provided an estimate of total attendees of 7900. When comparing this figure with the c6000 estimate for Caithness and the 8000-10,000 estimated total attendees figure for Oban in the previous year our 7900 estimate for the 2011 Western Isles Mòd appears credible - even although there is an argument that the 2.8 party size figure could be on the low side. Nevertheless, we have continued with our cautious approach.

Our analysis of competitor numbers over recent years is interesting. Expressed as indices for the event is held over the past four years the figures are as follows.

Host Venues	Adults	Juniors	Total Competitors
Falkirk	93	100	100
Oban	106	113	110
Caithness	88	81	82
Western Isles	113	106	107
Averages	100	100	100

The indices show the relative strengths of Oban and the Western Isles among its competitors compared to numbers attracted to less popular host venues like Falkirk and Caithness. This is not intended to imply any criticism of the efforts and potential of these latter areas, each of which has only hosted the Royal National Mòd on one occasion - and Caithness in particular with considerable success when it did so.

The table simply reflects what one would expect although the juxtaposition of the indices for each of Adults and Juniors between Oban and the Western Isles is interesting. Our field survey results and analysis follow below.

Field Survey Results

In 2011 200 interviews with Mòd competitors and visitors were conducted at the Western Isles Mòd. A particularly important question in undertaking economic evaluations is the area of residence of those attending the event. As far as the 2011 Mòd is concerned this information is presented in **Table 1** below.

Table 1: Area of Residence

	%	Base
Western Isles	46	92
Elsewhere in Highlands	25	51
Elsewhere in Scotland	25	49
Elsewhere in the UK	4	7
Outside the UK	1	1

As Table 1 indicates, less than half of those interviewed were from the Western Isles (46%), with 25% coming from each of the Highland Region and elsewhere in Scotland respectively. The survey indicated that 7% came from elsewhere in the UK and 1% came from overseas.

Table 2 shows the main reason why interviewees had attended the event.

Table 2: Main Reason for Attending the Mòd

	%	Base
Spectator at daytime event	16	33
Regular follower of the Mòd	10	20
Competitor	30	60
Friend/family of competitor	40	80
Mòd organiser	-	-
Attending social events in evening	4	7
Other	-	-

Forty per cent were attending with family and friends compared to 30% who were competitors. Sixteen per cent gave their main reason for attendance as to spectate at daytime events whilst 10% said they were there because they were regular followers of the Mòd. Four per cent said that the main reason was to attend social events in the evening.

Awareness of the Mòd was also tracked, results being presented in **Table 3**.

Table 3: Respondent awareness/attendance of the Mòd

	%	Base
Visit the annual Mòd on a regular basis	65	129
Visit the annual Mòd occasionally	21	41
First visit to a Mòd for me, but other members of my family have attended previous events	7	14
Only recently become interested in the Mòd	1	1
Hadn't heard about it until visited Caithness during time of Mòd	1	1
Followed the Mòd by TV/radio before but this is my/our first visit to the actual event	6	12
Other	1	2

Despite the differences between the host areas, the above results are remarkably similar to those set out in the Caithness evaluation last year. The table shows that 65% were regular Mòd visitors, with another 21% doing so occasionally.

Table 4 records the proportion of visitors to the 2009 Mòd who had visited previous Mòds during the last eight years. Once again, results are broadly similar to those found in Caithness last year. There is one understandable exception: a far greater proportion of those who had attended the Western Isles Mòd in 2005 attended the event in 2011 compared to those who had gone to Caithness in 2010. For those attending the 2011 Mòd, over the eight year period 49% had on average attended a previous Mòd, with above average numbers attending the 2009 Oban event and below average numbers attending the 2010 Mòd in Caithness.

Table 4: Mòds attended in the previous 8 years

	%	Base
Caithness 2010	45	90
Oban 2009	57	114
Falkirk 2008	51	101
Lochaber 2007	54	107
Dunoon 2006	44	88
Western Isles 2005	59	117
Perth 2004	39	78
Oban 2003	43	86
None	16	32

Although not shown in the tables, we have estimated that those attending were away from home for 5.8 nights, of which 4.8 nights were spent on the Western Isles. Another half day was spent in either the Highlands and/or the rest of Scotland. The summary results also indicate that c2.5 family and friends attended the event in the company of a competitor. Compared to the 1.8 family and friends figure of last year this year's estimate of 2.5 family and friends per competitor seems rather high.

As noted earlier, we have therefore opted for a more cautious figure of 2.8, which includes both competitors and their friends and family, in assessing the total number attending the 2011 event. Given this, our estimate of 2011 Western Isles Mòd competitors and visitors - using an average party size of 2.8 - is 7900 in round terms.

Table 5 contains information on the base of those attending the 2011 event.

Table 5: Are you visiting this year's Mòd?

	%	Base
While staying away from home with specific purpose of attending the Mòd	45	89
From home in the Western Isles	45	90
On a day trip from home from outside the Western Isles	4	6
Staying away from home while a on a more general holiday/a short break (i.e. Mòd is incidental to the wider trip)	8	15

The type of accommodation used by people staying away from home while attending the Mòd is shown in **Table 6**. Seventy per cent used hotels and guest houses/B&Bs, while a further 14% stayed in self-catering. A relatively high 20% stayed with friends and relatives, 3% stayed in the hostel/activity centre and 6% indicated that they had stayed in some other form of accommodation.

Table 6: Type of accommodation used

	%	Base
Hotel	49	53
Guest House/Bed & Breakfast	21	23
Rented Property/Hired Caravan	11	12
Own Caravan/Motor Van/Tent	3	3
Staying with Friends/Relatives	20	22
Hostel/Activity Centre	3	3
School/Community Hall	-	-
Other	6	6

The annual Mòd has always been an event that has little displacement associated with it. That is, if the Mòd had not taken place those attending it would not have spent their "Mòd money" elsewhere in Scotland on an alternative holiday or short break. This is confirmed in **Table 7** below which shows that 74% of the 2011 expenditure in the Western Isles would not have been spent in Scotland if the Mòd had not taken place.

Table 7: Significance of Mòd in Taking Trip

	%	Base
Had an alternative holiday/leisure trip in the Western Isles	8	16
Had an alternative holiday/leisure trip Scotland	18	35
Had an alternative holiday/leisure trip elsewhere in the UK	3	5
Had an alternative holiday/leisure trip overseas	-	3
Would not have taken holiday/leisure trip at this time	71	141

Although the 26% displacement figure is still a low one it is significantly higher than the normal 10% or less of previous years. One explanation for this could be the economic climate and the tendency towards “*staycations*”. That is, for a higher than normal proportion the Mòd was perhaps the main annual holiday in 2011. Had it not taken place they would have - at least to a slightly greater extent than normal - chosen to holiday elsewhere in Scotland - and even in other parts of the UK but on a much smaller scale.

The estimated per expenditure per person by 2011 Mòd visitors is shown in **Table 8**.

Table 8: Average Party Expenditure (2.8 person party size)

Spending:	Day Visitor	Overnight Visitor
At Mòd Events (food/drink, entrance fees, other, Fringe)	£171.49	£247.60
Other Spending in the Western Isles (travel, accommodation, food/drink, other)	£200.46	£553.16
Other Spending in Scotland	-	£864.17
Average Spend/Person	£132.83	£594.62

Base: 200

The above expenditure figures cover an average party size of 2.8 people. This would mean that the average spend per person was £61.24 for day visitors on Mòd events plus £71.29 on other spending in the Western Isles. On this basis, total day trip expenditure per person would amount to £132.54 which appears to be very high, even after taking travel within the Western Isles into account. Given this, in the interests of caution we have reduced the per person figures by one third to £40.83 on Mòd events and £47.73 elsewhere in the Western Isles. However, the spend per person figure for overnight visitors appears to be realistic.

This year, we asked a question about the impact of Road Equivalent Tariff (RET) on encouraging visits to the Western Isles Mòd. Results are shown in **Table 9 below**.

Table 9: RET Impact on Western Isles Mòd Visits

Spending:	%	Count
Yes - it had an impact	26	51
No - it had no impact	16	53
Did not know anything about it	12	24
Western Isles resident	46	92

Twenty six percent indicated that RET had a positive impact on the decision to come to the 2011 Mòd against 16% who did not think so. However, another 12% did not know anything about it and 46% were residents of the Western Isles to whom RET was irrelevant in terms of their decision to go to the Mòd from within the islands.

The results in **Table 10** highlight the extent to which visitors undertook particular activities while attending the Mòd.

Table 10: Activities pursued while attending the Western Isles Mòd

	Most Days %	Some Days %	Once Only %	None %	Don't Know %
Attending Mòd Performances	51	37	9	-	3
Eating out in the Western Isles	34	49	8	4	6
Visiting Western Isles pubs	27	28	5	20	22
Taking part in official Mòd Fringe events in the day/evening	18	29	5	16	33
Shopping in the Western Isles	18	44	10	7	23
Visiting attractions and/or places of interest in the Western Isles	5	24	5	31	37
Visiting other parts of area for a day/half-day trip	2	5	5	51	38

Base: 200

The picture which emerges from **Table 10** above is one of Mòd attendees who attended Mòd performances on most or at least some days, who have also eaten out on most or some days and who had visited the islands' pubs reasonably frequently. The Fringe events were also quite popular but visiting local attractions and/or other parts of the area and islands was less so. Given the inclement weather during the Mòd week, this is not surprising.

Table 11 records visitor satisfaction in respect of particular features of the 2011 Mòd for those visitors who made use of them. Last year, we changed the question by asking interviewees to rate particular features against their prior expectations of

them. In looking at the table the key performance indicator (KPI) is the percentage who stated that the feature was **well above expectations**. Given this, observations on the table are as follows.

Table 11: Satisfaction with particular features of this trip

	Well above expectations %	Above expectations %	Matched expectations %	Below expectations %	No comment %
Mòd/Fringe events added to the overall experience	9	16	30	2	44
Attending Mòd/Fringe events	7	14	34	3	43
Eating out in the Western Isles cafes and restaurants	8	21	55	3	14
Experience of Western Isles pubs	4	13	44	1	39
Visiting attractions and/or places of interest in the area	6	12	40	6	37
Information on the Mòd	9	11	69	5	8
Overall Mòd "Buzz"	12	15	48	16	10
Organisation of the Mòd	7	14	67	9	5
Competition venues	9	13	66	8	5
Western Isles as the host venue	14	15	58	4	10
The Town Centre	5	10	53	4	29
Accommodation	11	11	41	3	35

Base: 200

- ❖ The top KPIs were recorded for the Western Isles as a host venue followed by satisfaction with the accommodation on the islands and the overall buzz of the event.
- ❖ This was followed by satisfaction with information on the Mòd, the event venues and the extent to which the Fringe added to the overall Mòd experience.
- ❖ The lowest ranking KPIs were visitor attractions and the "feel" of the town centre, despite high satisfaction with the 2011 "buzz factor".

Visitors to the Mòd were also asked about the likelihood of their returning to Western Isles for a holiday/short break. The results in **Table 12** are highly encouraging in that 56% said that they would definitely return, the Caithness figure last year being 23%. This is another key performance indicator in that those interviewed could have

opted for “possibly” as the answer but chose to be more definite - despite the inclement weather during the event.

Table 12: Respondent likelihood of returning to the Western Isles for a holiday/short break

	Return for General Holiday %	Base
Definitely	56	60
Possibly	42	45
Probably Not	2	2
Definitely Not	1	1

Bord na Gaidhlig is particularly keen to see the uptake and use of the Gaelic language extended. The question below was therefore included at their request last year along with a cross tabulation on the impact of interviewee attendance at the Mòd on aspirations to learn or improve Gaelic skills. Both questions were asked again this year as they help to provide insights on an important subject, especially when they are cross tabulated against each other.

Table 13: How respondents described themselves in relation to the Gaelic language

	%	Base
No Gaelic but would like to learn	15	29
Not interested in learning Gaelic	8	15
Speak Gaelic and use it regularly	41	82
Currently learning to speak Gaelic	11	22
Lapsed Gaelic learner	4	8
Speak Gaelic but do not have the opportunity to use it	9	11

Base: 200

The cross tabulation results are shown overleaf.

Table 14: Influence of Mòd on Desire to Learn/Improve Gaelic

Current Situation	Not at All	A Little	Some	A Lot	Greatly	Bases
No Gaelic but would like to learn	12%	14%	16%	18%	17%	29
Not interested in learning Gaelic	10%	11%	7%	-	-	15
Speak Gaelic and use it regularly	59%	46%	25%	29%	39%	82
Currently learning to speak Gaelic	6%	6%	9%	24%	30%	22
Lapsed Gaelic learner	10%	9%	29%	12%	9%	30
Speak Gaelic but do not have the opportunity to use it	7%	11%	9%	-	-	14
Speak Gaelic but would like more opportunity to use it	-	3%	5%	18%	4%	8
Bases	69	35	56	17	23	200

Although not shown in the above table we know from the analysis that 21% of those interviewed indicated that their desire to learn Gaelic was either great or a lot. If this is a truly representative figure it implies that there are some 1659 people who attended the Western Isles Mòd in 2011 who had no Gaelic but who had a strong desire to learn the language. This appears to us to be a fairly significant number of people.

The percentages in the table are calculated against the overall base of 200. Perhaps surprisingly, therefore, the strongest desire to learn the language would appear to be amongst those who already speak and use it regularly. One suspects that the respondents may well have been either talking on behalf of others or exercising a degree of wilful thinking; if so, the overall 5% who stated that they had no Gaelic but would like to learn the language - which converts into a still significant 395 people - is perhaps more telling, especially when it is added to those that are already learning to speak the Gaelic language.

Again as we normally do, respondents were asked how they believed the success of the annual Mòd could be built upon. It is a question which always shows a polarisation of views, as indicated in **Table 15** below.

Table 15: Perceived ways in which the success of the Royal National Mòd might be built upon

	%	Base
Retain its current format but increase its scale through additional features and facilities	43	86
Place it at the centre of a Scottish version of the Pan Celtic Festival in Ireland	13	26
Add other Scottish - but not necessarily Gaelic - events	22	44
Make little or no change to what exists	30	60

Note: Base figures add up to more than 200 as this was a multi answer question.

Finally, some comparative analysis we have undertaken on key answers provided in our field research during each of the last four Mòd evaluations is provided in the final section of this Chapter.

Comparative Analysis and Conclusions

Absolute information is valuable but when set within a relative context it can provide greater insights, as displayed in our earlier analysis of the Mòd competitor database over the past 4 years. We have taken this comparative analysis approach further by focusing on four key questions which we have - by and large - consistently asked during the past four years in our programme of field research.

These questions relate to the following.

- ❖ Reasons for attending the Mòd.
- ❖ The alternative to attending the Mòd if the event was not held.
- ❖ The likelihood of returning to the host area on a holiday trip.
- ❖ The influence of the Mòd on the desire to learn Gaelic.

The resultant analysis is presented below.

Reasons for attending the Mòd	Western Isles	Caithness	Oban	Falkirk
Away from home specifically to attend the Mòd	45%	54%	73%	36%
On a day trip within the host area	45%	15%	16%	12%
On a day trip from outside the host area	4%	15%	7%	47%
On a more general holiday	8%	16%	4%	5%

There are some interesting variations in the above table. Firstly, at this year's Western Isles Mòd the percentage taking a day trip from home to attend the event is relatively high - but credible in view of the significance of Gaelic and the Mòd to the area and its population as well as the dispersed nature of the host area. The percentage at the Oban Mòd - and to a lesser but still significant extent at the Caithness event as well - who were staying in the area specifically to attend the Mòd is impressive, as (in its own way) is the relatively high percentage at the Falkirk Mòd who came from outside the area on a day trip to attend the 2008 event.

Alternative to attending the Mòd if event not held	Western Isles	Caithness	Oban	Falkirk
Take alternative holiday in host area	8%	3%	4%	5%
Take alternative holiday elsewhere in Scotland	18%	19%	16%	20%
Take alternative holiday elsewhere in the UK	3%	n/a	n/a	n/a
Take alternative holiday overseas	-	n/a	n/a	n/a
No alternative holiday/leisure trip	71%	78%	80%	75%

The most stunning - and extremely consistent - figure in the above table is the very high percentage who stated that had they not attended the Mòd they would not have taken any alternative holiday or leisure day trip. That is, the Mòd is an annual event which has very low displacement: people come to the host area because of it and would not have done so to any significant extent had it not been held there (only 8% at this year's Mòd and only 3% at the Caithness event). The question about holidaying elsewhere in the UK or overseas was not asked in 2008, 2009 and 2010 but will be from now on.

Likelihood of returning for a holiday trip	Western Isles	Caithness	Oban	Falkirk
Definitely	56%	23%	51%	5%
Possibly	42%	53%	36%	20%
Probably not	2%	19%	9%	68%
Definitely not	1%	4%	4%	7%

There is a little more variation in the answers to the question about the likelihood of returning to the host area on a future holiday trip. In the traditional host areas - Oban and the Western Isles - the percentage saying they would definitely return is at least 50%; and this year's Mòd an impressive 98% stated that they would definitely or

possibly do so, the equivalent Oban figure being 87%. In many respects, the Caithness figure of 76% who indicated that they would definitely or possibly return to the area on a holiday trip is in its own way even more impressive but the 25% who indicated a possible or definite likelihood of returning on holiday to Falkirk is much lower. This is reinforced by the 68% who said they would probably not do so.

Mòd influence on the desire to learn Gaelic	Western Isles	Caithness	Oban	Falkirk
None but would like to learn	17%	17%	n/a	n/a
Not interested in learning language	-	-	n/a	n/a
Speak and use Gaelic regularly	39%	17%	n/a	n/a
Currently learning to speak Gaelic	30%	48%	n/a	n/a
Lapsed Gaelic learner	9%	7%	n/a	n/a
Speak Gaelic but do not have the opportunity to use it	4%	7%	n/a	n/a

In the above cross tabulation the percentages refer to those who indicated that the Mòd had a great influence on their desire *to learn Gaelic*. The strongest - but also perhaps the most surprising - figure in the above table is 39% who already speak and use Gaelic regularly who indicated a significant desire to learn the language! That apart, the figures in the report are perhaps the more relevant categories of having no Gaelic but with a desire to learn, being a lapsed Gaelic learner, and being able to speak the language but not having the opportunity to use it are very similar to the results found at Caithness last year.

This brings our relatively brief comparative analysis to a close. We hope that the insights it provides will be helpful: if so, and we are fortunate enough to be asked to evaluate future Mòds we will look at the possibilities of extending it. In the meantime, we have applied our key findings to the calculation of various impacts in the third chapter of our report.

3. ROI AND OTHER ANALYSES

- ROI Impact Analysis
- Other Social and Economic Impacts
- Analysis of Press Cuttings

ROI Impact Analysis

In the case of events - which are essentially a marketing tool (although they also improve the short-term experience of visitors as well) - it is more relevant to calculate the return earned on the public sector investment (the ROI) in the event rather than full-time equivalent jobs (FTEs).

In doing so we have used the methodology defined by EventScotland in its eventIMPACTS document. This involves the following steps.

1. The calculation of total attendees, broken down by competitors and non-competitors and eliminating double counting of repeat visitors to produce unique visitors to the event.
2. Spending by *local residents* at the levels for which rates of return are calculated - i.e. Western Isles and Scotland - is then removed as according to HM Treasury this is seen as "deadweight" expenditure that would have occurred anyway.
3. Casual visitors are also discounted. That is, visitors in the Western Isles or Scotland who did not come because of the event. This is understandable - but with an important caveat. That is, if the event - in this case the Royal National Mòd - contributed to the overall enjoyment of the visit and as a consequence encouraged more repeat visits to the Western Isles or Scotland in the future it will have had some form of economic impact. Nevertheless, in accordance with the defined methodology casual visitors have also been excluded.
4. This produces "*eligible visitors*" who are then broken down into overnight visitors and day visitors, the former in turn normally being broken down according to whether or not they are commercial or non-commercial visitors, although in this instance no commercial visitors were interviewed.

The Calculation of Unique Visitors

According to An Comunn records the Mòd in the Western Isles in 2011 attracted 1140 adult and 1677 junior competitors, broken down as follows.

Types of Competitor	Adults	Juniors	Total Competitors
Individuals	121	723	844
Duets	38	86	124
Choirs	896	700	1596
Quartets	52	-	52
Groups	33	168	201
Totals	1140	1677	2817

As noted in our analysis of Mòd attendees we have been able to use the competitor total of 2817 to assess the total number of competitors and visitors to the event, which we have estimated at 7900. This is the figure which we have taken as “unique visitors” at the 2011 Western Isles Mòd.

The Calculation of Eligible Visitors

According to the 2011 survey undertaken during the Mòd the percentages of those interviewed who lived in each of the Western Isles, Scotland and elsewhere were as follows.

1.	Western Isles	46%
2.	Scotland	50%
3.	Elsewhere	4%

Given the earlier unique visitor number of 7900 this suggests the following totals in terms of “local” visitors.

1.	Western Isles	3634
2.	Scotland	7584
3.	Elsewhere	316

In the above estimates, the 3634 Western Isles eligible visitors are included in the 7584 total for Scotland as a whole. The deduction of those living in each of these areas leaves the following visitor numbers in respect of each of the Western Isles and Scotland geographic levels.

1.	Western Isles	4266
2.	Scotland	316

In our survey work we found that 45% claimed to be staying away from home with the specific purpose of attending the Mòd and that another 4% were from outside the host area on a day trip. Another 45% were from within the area but these have already been discounted as Western Isles residents.

Given these figures, we can assume that 316 external day trippers can be included as eligible visitors with the balance of 3950 being eligible overnight visitors at the Western Isles level. At the Scottish level the 316 eligible visitors who came from outside Scotland can all reasonably be assumed to be overnight visitors.

Our earlier estimates of day and overnight visitor spends are as follows.

	Day	Staying
At Mòd Events	£40.83	£88.43
Elsewhere in Western Isles	£47.73	£197.56
Elsewhere in Scotland	-	£308.63
Total Expenditure	£88.56	£594.62

This information, allied to the costs incurred in staging the 2011 Mòd, are applied to the calculation of Returns on Investment (ROIs).

The Calculation of Returns on Investment

The figures are firstly applied to the spending figures drawn from the survey analysis for each of day trippers and overnight visitors respectively in the Western Isles. The average spend per head is based on an average party size of 2.8, with the spends per head being repeated below for ease of reference. Spending within the Western Isles is assumed to be on site whilst that elsewhere in Scotland is taken as offsite expenditure.

(a) Spends per Head

	Day	Staying
At Mòd Events	£40.83	£88.43
Elsewhere in Western Isles	£47.73	£197.56
Elsewhere in Scotland	-	£308.63
Total Expenditure	£88.56	£594.62

(b) Day Trippers

Geographic Area	Average Spend/Head	Total Eligible Visitors	Total Spending
Western Isles	£88.56	316	£27,985
Scotland	-	-	-

(c) **Overnight Visitors**

Geographic Area	Average Spend/Head	Total Eligible Visitors	Total Spending
Western Isles	£285.99	3950	£1,129,661
Scotland	£308.63	316	£97,527

An Comunn received £195,000 in grants, £150,000 of which came from Comhairle nan Eilean Siar. Another £43,250 was raised in commercial revenue, with the local Mòd Committee raising £22,250, sponsorship providing £41,000 and the BBC £10,000. In total, this amounts to £311,500.

Directly attributable Mòd costs were £218,480, the vast majority of which (an estimated 75%) were on the Western Isles in staging the event. In addition, if only 50% of An Comunn staff and other costs are allocated to the Mòd (which is conservative) total Mòd staging costs amount to £311,793 - almost all of which is covered by the income generated by the event from grants, sponsorship, commercial activities, the local Mòd Committee and the BBC. As noted earlier, we estimate that 75% of the 2011 event costs will have been spent on the Western Isles, with the balance of 25% being spent elsewhere in Scotland.

In summary, therefore, the breakdown according to whether or not the expenditure was in the Western Isles or Scotland and the split by whether it was on or off site is as follows.

	On Site Expenditure	Off Site Expenditure
Western Isles	£233,845	-
Scotland	-	£77,948

As a result of our earlier calculations we know the spending by eligible visitors in each of the Western Isles and Scotland. The expenditure incurred in staging the Mòd has been added to these respective totals. The resultant figures are as follows.

	On Site Expenditure	Off Site Expenditure
Western Isles	£1,391,491	-
Scotland	-	£175,475

We can use these figures — which in total add to the £1,566,966, of which almost 90% (89%) was spent directly on site in the Western Isles - in calculating various returns on investment (ROIs). However, they do not take account of the impacts associated with indirect and induced on site expenditure. This will require the use of multipliers. The ones we have used are the income multipliers for a visitor attraction on Skye, given that this is the closest type of geographic area available and because there are no multipliers available for events.

Before applying the multipliers, however, the on and off site expenditure figures for each of the geographic areas have to be taken back to 1990 values as this was the year in which the multipliers were calculated. This is done through applying the appropriate Consumer Price Index indices, as indicated below.

On Site

Western Isles: $£1,391,491 \times (71.5 \div 119.4) = £833,263$

Off Site

Scotland: $£175,475 \times (71.5 \div 119.4) = £105,079$

These are the spending figures that have been used in calculating the ROIs associated with the event at each of the above geographic levels. The indirect and induced multipliers we have used are as follows.

Indirect: 0.0251; Induced: 0.0416

The total income generated at each of the different geographic levels next has to be calculated. This is done for direct (on and off site) expenditure as well as for the associated indirect and induced expenditure at each of the geographic levels in the calculations below, direct income being taken from earlier calculations which were based on the survey findings and the estimate of Mòd staging costs.

(1) Western Isles

Direct: £833,263

Indirect: $£833,263 \times 0.0251 = £20,195$

Induced: $£833,263 \times 0.0416 = £34,664$

Off Site: Assumed to be included in direct spending total

Total Income Generated = £888,122

(2) Scotland

Direct: £105,079

Indirect: $£105,079 \times 0.0251 = £2,638$

Induced: $£105,079 \times 0.0416 = £4,371$

Total Income Generated = £112,088

These total figures are taken as the income generated at each of the Western Isles and Scotland geographic levels on which the ROIs for each of Comhairle nan Eilean Siar and EventScotland investments in the event are calculated.

Comhairle nan Eilean Siar

Western Isles = £888,122 divided by £150,000 = 6 to 1

In our view the most appropriate ROI is the one calculated at the Western Isles level. This is because the impact of the Mòd is essentially local in nature. The ROI at the Western Isles level is lower than the 9 to 1 achieved in Caithness last year. This is largely because there were proportionally fewer people from Caithness attending the 2010 Mòd than the 45% from within the Western Isles in 2011 - all of whom had to be discounted from the ROI calculations.

EventScotland assess local impacts at local authority level and last year's ROI of 7 to 1 for the Highland Region was very similar to the 6 to one found in respect of the Western Isles this year. On this basis, the estimated ROI of 6 to 1 is good especially when the more local impacts are also taken into account, including "softer" ones which are discussed in the next section.

EventScotland

Scotland = £112,088 divided by £25,000 = 5 to 1

The EventScotland ROI last year was 3 to 1 at the Scotland level. This year's ROI is therefore better as far as EventScotland is concerned.

We suspect that Comhairle nan Eilean Siar will also be well pleased with a return on investment of 5 to 1 against its contribution of £150,000, especially when the fact that over £2.1 million at today's prices was generated in spending in the Western Isles by the event.

These ROIs are calculated after omitting expenditure by Western Isles residents and casual visitors. This is required in terms of the EventScotland methodology but it should nevertheless not be allowed to mask the total spending of over £2.1 million in the Western Isles at the 2011. Such spending must have made a difference to the local economy but the 2011 Royal National Mòd also generated other economic and social impacts which are considered in the next section.

Other Economic and Social Impacts

Impact can also be assessed through calculating the net new jobs created as a result of visitor, competitor and organiser expenditure at and on the Mòd. In this instance, we know that 7900 people attended the event and that 54% (4424) stayed overnight whilst 46% were day trippers travelling from either home or outside the Western Isles. We have taken the spend on Mòd events as *on site* expenditure with that elsewhere in the Western Isles or beyond being taken as *off site* expenditure.

These assumptions are reflected in the table below.

	On Site	Off Site
Expenditure on Western Isles		
• visitors and competitors	£1,874,514	-
• organisers	£233,845	-
Expenditure elsewhere		
• visitors and competitors	-	£1,267,852
• organisers	-	£77,948

As multipliers will be used which were researched and established in 1990 these figures have to be taken back to 1990 values. This is done by multiplying the on and off site spending by 71.5 and then dividing it by 118.7 (the CPI for 1990 and our estimated CPI for 2011) to produce the following values.

On site spending: £2,108,359 x 71.5 divided by 119.4 = £1,262,543

Off site spending: £1,345,800 x 71.5 divided by 119.4 = £805,902

Direct, indirect and induced jobs created can be calculated by applying the employment multipliers for a visitor attraction in an island location (Skye being the closest available). This is done below.

On site

Direct Jobs = 1262.543 x 0.0593 = 74.9

Indirect Jobs = 1262.543 x 0.0027 = 3.4

Induced Jobs = 1262.543 x 0.0052 = 6.6

Off Site

Off site = 805.902 x 0.0363 = 29.3

This suggests that the equivalent of 114.2 net new jobs were created as a result of expenditure at and on the 2011 Western Isles Mòd. However, displacement next has to be taken into account: that is, only *net new* expenditure generated by the Mòd should be used. We know from the answer to the relevant question in the survey of visitors and competitors that at least 74% of the 2011 expenditure would not have been incurred if the Mòd had not taken place. Displacement is therefore relatively low at 26%, which reduces the full-time equivalent (FTE) job creation figure to 84.5.

These net new jobs are an impact in their own right but we can also use this figure to assess the tax and National Insurance income generated through their creation, and the VAT generated by visitor spending. As far as VAT is concerned we have assumed that 90% will be displaced rather than the 26% assumed earlier in calculating the amount of net new jobs created (see below). We believe that both these assumptions are fair and reasonable.

In calculating the tax and National insurance income we have assumed each job will be paid at the average annual wage for the country as a whole. This is £24,128 which produces £3329.66 per person in National Insurance revenue and another £3330.60 in income tax, assuming that each job holder qualifies for the personal tax allowance of £7475. With the equivalent of 84.5 net new jobs being created this produces total Exchequer revenues of £562,792.

Spending at today's prices by Mòd visitors and competitors amounts to £3,142,366, of which £523,728 will be VAT if all the purchases were on items that attracted the standard VAT rate of 20%. As this is unrealistic, we have reduced the VAT revenue generated by 25%. However, there will be high displacement as far as VAT is concerned due to the money which was not spent at the Mòd being mostly spent elsewhere in the UK economy. It would therefore accrue to the Exchequer. Nevertheless, there will be some leakage in terms of savings and/or expenditure on alternative overseas holidays. Given this, we believe it fair to include 10% of the VAT figure in our calculations which leaves £39,280 in VAT revenue. However, another £51,965 - reduced to £25,983 - is raised from the VAT charged on the amount spent in staging the event. When the tax and National Insurance receipts are added the total Exchequer take amounts to £627,965.

The total public expenditure involved in staging the 2011 Mòd was £150,000 from Comhairle Eilean nan Siar, £25,000 from EventScotland and £20,000 from the Local Enterprise Company. Given the projected returns to the Exchequer this means that the "payback period" as far as the public sector is concerned would be less than five months. This is astonishing by any standards, especially when one considers that the unemployment benefit payments saved by the net new job creation have not been taken into account. In addition, we have assumed that the revenue earning period will be a full year when in reality it is much shorter than this. When these two factors are taken into account we believe it is fair to assume that the Mòd requires little or even no deficit funding in real terms which take account of its contributions to the public purse.

In addition to these economic impacts, Highlands and Islands Enterprise is particularly interested in the social impacts associated with the event. These include the number of community groups supported by the event and the beneficiaries of it. Obviously, the business community in the Western Isles benefited from the Mòd as did the Gaelic community as a whole. In addition, individual community groups in the form of the 60 choirs and 80 quartets and other groups were also supported by the Mòd in the sense of the national stage it provides for them; and the 7900 visitors and competitors were obviously all beneficiaries of the event as well along with the many individual businesses - especially in the accommodation, catering, retail and beverage sectors.

Another target which the 2011 Mòd was expected to meet was assistance from 100 volunteers in staging the event. In reality, this number was exceeded in that the

local Mòd Committee estimates that the volunteer involvement in the event amounted to at least 232, including 140 stewards. One project was expected to be run that supported a cultural event - as the Mòd itself most certainly is - and another target was to achieve one project that supported the Gaelic economy. Again, the 2011 Mòd as a whole achieved this, with An Comunn having plans to significantly expand this in the coming years (see chapter 4).

The Western Isles HIE office was also keen to see local groups, such as Hebridean Chocolates which is a Social Enterprise in the Outer Hebrides, benefiting from the event. Others we have been made aware of include the following.

Haggis & Black Pudding - WJ Macleod Butchers
Black Pudding – Charles MacLeod
Smoked Mackerel & Lewis Salmon- Islander Shellfish
Mussels - Derek Macleod
Lamb - Brue Highlander
Venison - Morsgail Estate
Hebridean Ale - The Hebridean Brewery
Oatcakes & cake - Stag Bakeries
Whisky - Abhainn Dearg Distillery

In addition, all vegetables were sourced from Lewis & Harris Horticultural Producers.

On a number of different levels, therefore, the 2011 Royal National Mòd which was staged in the Western Isles was a considerable success. It is therefore interesting to note the extent to which the press coverage of the event reflects this.

Analysis of Press Cuttings

This year's press cuttings were more extensive than ever. In perusing them one is immediately struck by the amount of information they provide on competitions and winners. This is then extended throughout the country through local newspapers picking up the successes of local individuals and choirs. For example, the Falkirk Herald reported that the local Junior Gaelic Choir had won two out of the three competitions it entered - and this in its 50th anniversary year.

Local successes were also reported in the Illeach on Islay and the North Star in Dingwall as well as many others like the West Highland Free Press and the Stornoway Gazette. This local coverage - which included a plea from Caithness Gaelic activists for the Mòd to return to the area within the next two years - helps to strengthen the language and culture associated with the event in many parts of Scotland. In short, it is immensely helpful to the whole Gaelic community.

Publicity is also generated by the unusual: for example, former Gaelic rocker, Calumn Martin, spoke out on the need to broaden the audience for, and use of, the Gaelic language. In this context, he welcomed the introduction of "rap as a great

style to teach young people Gaelic" in response to an announcement by the Scottish Qualifications Authority that this rapid fire style is one of several language study units qualifications from the Authority.

It was also interesting to note that a new "Learn Gaelic" website was launched at the event by STV weatherman Sean Batty; and that this year's Mòd saw two of its long-standing competitors tying the knot. "We attend every Mòd" said husband Murdo McRitchie. "Sheena competes but I just take in the atmosphere." Many of their friends and family who attend with competitors would echo this sentiment even although they may well stop short of also marrying each other!

Concern remains, however, on the need to increase the numbers of people speaking the Gaelic language. John Angus Mackay, the Chief Executive of Bord na Gaidhlig, called for a doubling in the number of children going into Gaelic medium education in primary one. "We have to try to balance the numbers that are coming into Gaelic with what we lose annually through people dying" he claimed.

The big story as far as the Western Isles itself was concerned was of course the return of the event to the Outer Hebrides. In the words of the Council Convener, Alex MacDonald, "There is no more appropriate setting for this week long celebration of Gaelic language and culture than the Gaelic heartland of the Western Isles." Many would agree, including perhaps the president of An Comunn itself. John Macleod sees the Western Isles as a potential UNESCO World Language Site. "I do not promote any ban on the use of English, but I am calling for a sea change in the public attitude to Gaelic to make it the main language of public use as far as possible in the Western Isles."

This theme is returned to later. Almost at the opposite end of the past and future spectrums, however, are the views of the President's daughter. Mairi MacLeod spoke about the solution found by the Carloway Choir, who lived hundreds of miles apart. In order to overcome this they used Skype communications technology in their practising. "It's been challenging", said Mairi, "but we were determined to keep it going". In fact, the choir did not get together for the first time until five days before the Mòd."

With this spirit in the family An Comunn and its President may well see their UNESCO hopes realised at some time in the future. After all, amongst other things the Mòd is the place where dreams come true. If in doubt about this, a brief conversation with Canadian Lewis MacKinnon, who was crowned as the first transatlantic Bard at the event, will perhaps convince the doubter otherwise.

4. BEYOND THE MÒD

- The Development Context
- Where Now and Where To?
- Arriving Successfully

The Development Context

During recent years An Comunn and the Royal National Mòd have come a long way. The evaluations we have undertaken since the 2004 Mòd in Largs have all reinforced the message that the event has a real and accepted impact on the host communities. In addition, as the major national Gaelic event, our evaluations have also demonstrated the significance of the Mòd amongst Gaelic and non-Gaelic speakers alike; and the contribution it makes to ensuring the uptake of learning and speaking the Gaelic language. For example, at this year's Mòd in the Western Isles we found that 21% of interviewees who could not speak Gaelic had a significant desire to learn the language. If this is a representative figure amongst the 7900 attendees it means that there were 1659 who came into this category.

The necessary foundations for development of An Comunn as an organisation with a very significant place in Gaeldom have therefore been built: it is now a much stronger organisation in terms of its finances and its confidence than it was some years ago. However, the building process must now be taken further through implementing the organisation's desire to see the Gaelic language strengthened even further throughout Scotland. In this context, An Comunn itself sees one of its prime objectives as reversing the downward trend in the number of Gaelic speakers in this country.

If this is to be achieved the organisation will have to think "beyond the Mòd" as far as An Comunn's own development is concerned, especially if development of the organisation can be allied to strengthening the place of the Gaelic language in Scotland at the same time. In this context, John Morrison and his An Comunn President, John Mcleod, have shared views on the way forward.

The former would like to see greater development of Gaelic heritage as well as its culture. The latter would take this a stage further in having the Western Isles designated as a UNESCO World Language Site that would see the place of the language significantly strengthened throughout the Western Isles. In many respects, these separate but obviously linked objectives present exciting opportunities for Highland destinations in particular, and perhaps ultimately for a number of Lowland ones as well. There is an opportunity to promote and develop a *different* heritage which will be both attractive and interesting to many.

This may well be particularly true as far as Scotland's visitors are concerned. Whilst there is a place for cosmopolitan products and services in any country it is surely a

simple fact that visitors come to a particular country - in this case Scotland - have done so because they want to experience authenticity: they want to find the real Scotland and an excellent means of satisfying their appetites is the use the nation's distinctive culture and language along with its rich heritage in providing a fantastic tapestry of local experiences which can differentiate one part of Scotland from another without in any way diminishing Scotland's overall national identity. **Set against at least some of today's values, those of Gaeldom and its heritage, along with its distinctive culture, must surely be part of what is nowadays a more confident and resurgent nation that is steadily taking more control of its own destiny.**

In short, the preservation and presentation of Gaeldom's heritage will surely contribute to the "*sense of place*" of Highland Scotland in particular through the destinations which embrace the opportunities which Gaelic heritage and culture provide. This will in turn develop new opportunities to present that heritage and its associated culture to Scotland's visitors; and there are not many - indeed not any - Highland destinations in particular that can afford to ignore this opportunity in view of the significance of tourism to the economy of the Highlands and Islands.

An Comunn sees the Provincial Mòds being strengthened to become an important building block in this process of change. If this can be achieved it will see junior competitions being held at local Mòds throughout the country, with competition finals being held at the annual Royal National Mòd itself. In this way, the Provincial Mòds will be enhanced, as indeed will be junior finalist competitions held at the National Mòd.

In addition, through these local Mòds there will be a particular opportunity to bring the Mòd and Gaelic heritage, culture and language to visitors whilst at the same time solving a problem of success in helping An Comunn to handle the growing number of junior competitors. That is, there will be new opportunities to present Gaeldom in terms of its heritage, culture and language to visitors at the Provincial Mòds - not least because there will be beds available for visitors in the Provincial Mòd locations, which cannot always be said of those that host the Royal National Mòd itself.

This is the backdrop to a new drive within An Comunn which will see it build upon the proven successes of the Royal National Mòd in recent years. It would be relatively easy for the organisation to rest on his laurels but that is neither its current style nor its ambition. In thinking beyond the Mòd its prime objective is to bring Gaelic culture, heritage and language together within local destinations; and in doing so to encourage both local residents and visitors to take a real interest in them as a means of enhancing Gaeldom's real assets, including its language in particular.

At least for the moment - the last words are left with John Mcleod and his opening address at this year's Mòd in the Western Isles. "**Gaelic belongs to the whole of Scotland, but it needs a healthy and secure homeland, and the Western Isles has the best environment for that.**" We hear of World Heritage Site designations under

UNESCO, given to areas that have special **cultural** or **physical** significance. I would suggest that such a designation could be most applicable to these islands if it could meet the criteria of ***bearing a unique or at least exceptional testimony to a cultural tradition or to a civilization which is living or which has disappeared.*** That would surely give added support and status to our language through these difficult times.

We hear of World Heritage Site designations under UNESCO, given to areas that have special **cultural** or **physical** significance. I would suggest that such a designation could be most applicable to these islands if it could meet the criteria of ***bearing a unique or at least exceptional testimony to a cultural tradition or to a civilization which is living or which has disappeared.*** That would surely give added support and status to our language through these difficult times.”

These are visionary words which are matched by an equally visionary goal: to establish the Western Isles as a UNESCO site on the basis of the contribution they make to a cultural tradition and civilisation which is still alive but which could without more concerted action yet disappear. The mortar which is available to build upon this vision is Gaeldom’s heritage and culture underpinned by the Gaelic language. An Comunn, through its President, has set the ball rolling. Within the limited context of this report we will do our best to begin the process of taking it closer to the end goal. Within 21st-century Scotland to do otherwise by ignoring the challenge would not only be dangerous it could well also ultimately prove to be a tragedy.

This will not be achieved without resources. Both money and people will be needed to move these aspirations forward in a tangible way that will bring real change within local destinations which will in turn encourage a greater interest in Gaeldom’s culture, heritage and language. In order to begin this process during 2012 and beyond An Comunn will seek the support of Creative Scotland in particular.

The Business Planning Approach: Where Now and Where to?

The approach we are proposing asks four questions as far as the development proposition is concerned. These are as follows.

1. Where are we now?
2. Where do we want to get to?
3. How will we get there?
4. How will we know when we have arrived?

In this section we will answer the first two of these questions, with the next two being dealt with in the final section of this report.

We begin with the ideas and concepts outlined in the previous section: that is, to bring the Gaelic heritage, culture and language alive in a meaningful way at a local level through an enhancement of the local Mòds and greater integration into the concept of “*place*” which ultimately defines the residents’ and visitors’ quality of

life and quality of holiday experience. People may live in or come to Scotland for a holiday but it is their experiences of the **places** in which they stay and visit which define the quality of lives and visits.

In order to take these ideas forwards will require a number of characteristics and activities which will generate *positive* change: collaboration; integration; innovation; and even sound administration. In addition, the linked concept of having the Western Isles defined as a UNESCO World Language Site provides its own innovative edge.

In taking the project forwards there will be a real need to learn about and define local attitudes to these concepts, in the Western Isles and elsewhere, in terms of Gaelic, community and tourism interests. This will require survey and consultation work in order to not only determine reactions to the concepts but also to begin to develop them in real terms, as well as commencing the process of partnership building which will be fundamental to success.

In particular, early survey work amongst local Mòd organisers and local Feis organisations will be needed, as will local consultations with Gaelic Medium Schools and Units as well as Destination Management Organisations (DMOs) or their equivalents. This will provide a baseline of invaluable and highly relevant knowledge on reactions to the development concepts as well as initial inputs to their development.

In moving forward we would suggest initial testing in four key areas in particular: Dunoon in Argyll which is the host community of the 2012 Mòd; Paisley which hosts the 2013 Mòd and is a Lowland destination; Inverness - the Highland capital - which hosts the 2014 Mòd in the next national "*homecoming*" year; and the Western Isles which is the area designated as a potential UNESCO World Heritage Site. These four areas provide a useful cross-section of localities which combine Gaelic culture and tourism potential to varying extents.

In determining where we are, however, it will also be necessary to define (at least in initial terms) where we want to get to through the pursuit of collaboration, integration, innovation and administration referred to earlier. Each is considered in turn in determining what the development route could look like.

- **Collaboration** is clearly essential. The local Mòd and Feis movements can work together to great effect, especially if they are also linked into the Gaelic Medium educational drive which is taking place in many parts of the country. Together they are capable of enhancing the sense of place within the host local Mòd communities through increasing the Gaelic heritage, culture and language of the *area and nation* whilst at the same time working closely with the local DMOs (or equivalents) in order to enhance the appeal of Gaeldom features and values within destinations in a way that will be attractive to non-Gaels

and visitors alike.

- **Integration** represents a means of taking collaboration further; of achieving greater efficiency and economies of scale through integration of local resources and efforts whenever possible. This implies local bodies not only sharing a vision of where they want to get to but also a willingness to work together in a practical way to achieve the end goals to the benefit of the individual organisations and the collective whole in a way that ensures that the sum of their efforts is greater than those of the individual contributors.
- **Innovation** will underpin the whole concept: it is difficult to bring heritage, culture and language together; it is equally difficult to bring different Gaelic and tourism bodies together; and it is obviously challenging to do so in a way that will enhance lives, livelihoods and experiences of local destinations. The prize of success, however, will be worth the effort if it results in an enhanced *sense of place* for those who live in or visit these destinations – **but this will demand innovative approaches if it is to be achieved.**

Finally, **administration** will be required in pursuing the tasks involved in delivering the concepts and in ensuring that the necessary collaboration, integration and innovation are effectively delivered. *How* this might be achieved is discussed in the next section.

The Development Route: Arriving Successfully

Physical development projects - if they are to get off the ground, let alone succeed - require two fundamental conditions to be met: they must have planning consent and they need the finance required to develop them. Event-based projects also require consent: in this case, in terms of the "consent" implicit in the time and effort often involved in them by local volunteers; through the confidence shown by the competitors who elect to participate in them; and by their audiences who demonstrate their consent in the attendance numbers and the prices they are willing to pay to attend the event. Successful annual events clearly have the necessary all-round consent required to ensure their ongoing sustainability.

This can clearly be said of the Royal National Mòd. To varying - but possibly lesser - extents this can also be said of the local Mòds. The project we are proposing will build upon this success whilst at the same time extending it to embrace Gaeldom in a broader sense that is also appealing to local residents and visitors alike. As noted earlier, however, projects also need finance - especially in their early years - if they are to sustain any initial success they may achieve.

A new "Cultural Economy" investment fund has just been opened by Creative Scotland. This is designed to "*develop the cultural economy by building the long-*

term organisational resilience and financial sustainability of the cultural and creative sector in Scotland". It envisages this is being achieved through:

- greater collaboration;
- new sources of income;
- improved governance;
- and the development of social enterprise models.

To this end, Creative Scotland has prepared and published a detailed report entitled "Capital Matters". Familiarity with this document will clearly be required but in the meantime Creative Scotland is looking for innovative financial and organisational models to achieve the changes it is seeking - and willing to stimulate and support - within the Cultural Economy. We suspect that Creative Scotland would approve of the "ions" approach to development and its ability to combine collaboration with integration and sound administration to produce innovative solutions.

Important criteria in seeking Creative Scotland support are as follows.

- Evidence of a mission-led strategic approach to business development.
- Demonstration of organisational need and motivation for a revised approach in addressing it.
- Clear indication of how the proposed development approach will meet the defined need.
- A defined plan of the stages and activity to achieve this, allied to a demonstration of how best practice inputs and outputs will be shared across the sector.

For projects to meet these criteria the "Sustainable Development" fund will provide between £15,000 and £100,000 at an intervention support rate of 90%: our soundings suggest that the An Comunn project which is being proposed should be valued at between £20,000 and £70,000 in developing a "standard model" that can be rolled out in enhancing the local Mòds - and their links with the National Mòd - in a way that will bring Gaelic heritage, culture and language together.

In doing so, it will take these pillars of Gaeldom into the visitor economy through enhancing the "sense of place" of local destinations. This in turn can obviously be linked into the particular Western Isles objective of having the Outer Hebrides declared a UNESCO World Language Site.

Arriving successfully will therefore demand that a number of steps be taken to advance the project and take An Comunn as an organisation "beyond the Mòd".

At this early stage in development thinking we suggest the following for consideration.

1. That initially local Mòd organisers should be surveyed to determine “*where we are*” in terms of local Mòds and “*where we want to get to*” in terms of their integration into the broader heritage, culture and language project.
2. That consultations should then be held with a range of Feisan organisations and Gaelic Medium Schools/Units - especially in the four pilot areas referred to in the last section (i.e. the Dunoon, Paisley, Inverness and the Western Isles).
3. That in the light of the survey and consultation outputs the integration and collaboration project should be further defined, and that these initial ideas and propositions should then be discussed with the DMO (or equivalent) bodies in each of the four pilot areas.
4. That the project be further developed and defined before an application for between £50,000 and £100,000 is submitted to Creative Scotland for Sustainable Development funds from within the Cultural Economy investment pot. These funds will be sought to develop a pilot project for the 2014 “*homecoming*” Mòd in Inverness, on the basis of testing it in each of the Dunoon (in terms of concepts) and Paisley Mòds (through further development of these concepts) and rolled out after the Inverness Mòd as part of the wider UNESCO project that has been mooted for the Western Isles.

In developing the project key objectives will include the development of organisational and financial models which will strengthen An Comunn and others and the part they play in the enhancement of Gaelic heritage and culture as well as its language through greater collaboration, integration, innovation and sound administration within and amongst their tourism and Gaelic partners.

The four point plan above brings our evaluation of the 2011 Western Isles Mòd to a close. It would be fitting if the plan was to prove to be the launching pad for, ultimately, a successful UNESCO World Language Site bid.

APPENDIX : The Field Survey Questionnaire

Lowland Market Research
Enterprise House, Southbank Business Park
Kirkintilloch
G66 1XQ
Tel: 0141 775 211

EDIT

Sampling Point

Number

FC:

Name: Mr/Mrs/Miss/Ms _____
Address _____
County _____
Postcode

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 Tel No. _____

INTERVIEWER DECLARATION

I declare this questionnaire was completed and checked by me, within the Code of Conduct of the Market Research Society and the job instructions. The informant was unknown to me at the time of this interview.

Interviewer's Signature _____ Date _____
Interviewer's Name (Print) _____

"Good morning/afternoon. My name is _____ from Lowland Market Research. We are undertaking a survey of visitors to this year's Mòd on behalf of the sponsors of the event. Would you be willing to spare me around ten minutes of your time to answer some questions about your visit to the event?"

SHOWCARD 1

1. (i) What is your main reason for attending the Mòd ... **SINGLE CODE**
ii) How many events will you be competing in and/or be a spectator at?

	(i) reason for attending	(ii) number of events attending (write exact number)
Competitor		
Friend/family of competitor(s)		
Regular follower of the Mòd but not related to or friend of competitor(s)		
Spectator at daytime event		
Mòd organiser		
Attending social events in evening		
Other (write in)		

2. If competing in a Senior Competition can you indicate if you have previously competed at an earlier Mòd as a Junior?

Yes	
No	
How many? (estimated number previously competed as a Junior)	

3. We would like to know the number of competitors and non competitors/spectators in your party who are attending this year's Mòd. **[WRITE IN EXACT NUMBER]**

(i) How many competitors are in your party attending the event?	
(ii) How many friends and/or family - excluding competitors - are in your party attending the event	
(iii) Total persons in your party	

4. Are you part of a school group, choir or other large party?

School Group	
Choir	
Other large party	
Not part of a large group	

SHOWCARD 2

5. Looking at the list, where do you live **SINGLE CODE**

The Western Isles	
Highland Region/Skye	
Elsewhere in Scotland	
Elsewhere in the UK	
Outside the UK	

SHOWCARD 3

6. How would you describe your awareness/attendance of the Mòd? **SINGLE CODE**

Hadn't heard about it until visited the Western Isles	
Only recently become interested in the Mòd	
Followed the Mòd by TV/radio before but this is my/our first visit to the actual event	
First visit to a Mòd for me, but other members of my family have attended previous events	
Visit the annual Mòd on a regular basis	
Visit the annual Mòd occasionally	
Other (specify)	

SHOWCARD 4

7. Which previous Mòds have you attended in the last 8 years? **MULTI CODE**

Caithness 2010	
Oban 2009	
Falkirk 2008	
Fort William 2007	
Dunoon 2006	
Western Isles 2005	
Perth 2004	
Oban 2003	
None	

SHOWCARD 5

8. Are you visiting this year's Mòd ... **SINGLE CODE**

From home within the Western Isles	
On a day trip from home outside the Western Isles	
On a more general day trip from home outside the Western Isles (Mòd incidental to this)	
While staying away from home with specific purpose of attending the Mòd	
Staying away from home on a more general holiday/a short break (Mòd is incidental to the wider trip)	
Other (state) _____	

9. How many days will you visit the Western Isles Mòd? **SINGLE CODE**

One	
Two	
Three	
4+ (write in exact number)	

SHOWCARD 6

10. What type of accomMòdation are you staying in? **MULTI CODE**

Hotel	
Guest House/Bed & Breakfast	
Rented Property/Hired Caravan	
Own Caravan/Motor Van/Tent	
Staying with Friends/Relatives	
Hostel/Activity Centre	
School/Community Hall	
Other	

11. How many nights are you staying away from home on this trip?

	Nights
Within the Western Isles	
Within the Highland Region	
Elsewhere in Scotland	
Total Nights away from home	

SHOWCARD 7

12. What would you have done today/this week if the Mòd was not staged in the Western Isles?
SINGLE CODE

Had an alternative holiday/leisure trip in the Western Isles.	
Had an alternative holiday/leisure trip elsewhere in Scotland	
Had an alternative holiday/leisure trip elsewhere in the UK	
Had an alternative holiday/leisure trip Overseas	
Would not have taken holiday/leisure trip at this time	

SHOWCARD 8

- 13(a) During your overall visit to this year's Mòd, can you say how much you and your immediate party will have spent on the following? (**Essential to get TOTALS where applicable**)

(i)

Food/drink at Mòd competition venues in the Western Isles	
Entrance fees to competition venues in the Western Isles	
Other spending at Mòd venues (evening events etc)	
Spending at Mòd Fringe Festival events	
TOTAL Spending at Mòd Events	

(ii)

Travel in the Western Isles	
Accommodation in the Western Isles	
Food/drink, car parking, shopping, other attractions in the Western Isles	
Other spending in the Western Isles	
TOTAL Other Spending in the Western Isles	

(iii)

Accommodation in the Highland Region	
Other spending in the Highland Region	
TOTAL (in the Highland Region)	

(iv)

Accommodation elsewhere in Scotland	
Other spending elsewhere in Scotland	
TOTAL (elsewhere in Scotland)	

- 13(b) How many people does the above spending cover? _____ persons

- 13(c) Has the impact of introducing Road Equivalent Tariff had a noticeable affect on your travel costs by ferry to/from the Western Isles?

Yes	
No	
Did not know anything about it	
No impact as I live in the Western Isles	

- 13(d) Has its introduction had any impact in encouraging you to visit this year's Mòd in the Western Isles?

Yes	
No	
Did not know anything about it	
No impact as I live in the Western Isles	

SHOWCARD 11

14. While attending this year's Mòd in the Western Isles, can you tell me the extent to which you will be pursuing the following activities during your trip?

	Most Days	Some Days	Once Only	None	Don't Know
Attending Mòd Performances					
Taking part in official Mòd Fringe events in the day/evening					
Eating out in the Western Isles					
Visiting Western Isles pubs					
Shopping in the Western Isles					
Visiting attractions and/or places of interest in the Western Isles					
Visiting other areas outside the Western Isles for a day/half-day trip					
Other (state)					

SHOWCARD 9

15. Against your prior expectations, how satisfied have you been with the following features of this year's Mòd?

	Well above Expectations	Above Expectations	Matched Expectations	Below Expectations	Well below Expectations	No Comment
(A) Organisation of the Mòd						
(B) Mòd Competition Venues						
(C) Information on the Mòd						
(D) The Western Isles as the Host Destination for the Mòd						
(E) Local shopping						
(F) The Wider "Town Centre" Experience in Stornoway or in Harris, the Uists or Barra						
(G) Local Restaurants/Cafes						
(H) Local Pubs						
(J) Your Overnight Accommodation						
(K) Mòd Fringe events						
(L) The Buzz/Overall Atmosphere of the Mòd						
(M) Visitor Attractions						
(N) The Food Offer						

16. [Where answer "below expectations"/"well below expectations" at Q14, ask] Why were you less satisfied with....? [INDICATE CAPITAL LETTER TO WHICH EACH COMMENT REFERS]

SHOWCARD 10

17. Again, against prior expectations, if you attended any Mòd Fringe events, how would you rate them as a whole in adding to the Mòd experience? **SINGLE CODE**

Well above expectations	
Above expectations	
Matched expectations	
Below expectations	
Well below expectations	
No opinion	

18. What is the likelihood of you/your party returning to the Western Isles for a holiday/short break in the future? **SINGLE CODE**

	Return for General Holiday
Definitely	
Possibly	
Probably Not	
Definitely Not	

SHOWCARD 11

19. In relation to the Gaelic language, which of the following describes you best? **SINGLE CODE**

I have no Gaelic but would like to learn	
I am not interested in learning Gaelic	
I speak Gaelic and use it regularly	
I am currently learning Gaelic (classes/self-taught)	
I am a lapsed Gaelic learner	
I can speak Gaelic but rarely use it	
I can speak Gaelic but rarely use it and would like more opportunities to speak the language or improve my language skills	

SHOWCARD 12

20. How has your attendance at the Royal National Mòd impacted on your aspiration to learn or improve your Gaelic skills? **SINGLE CODE**

Not at all	
A little	
Some	
A lot	
Greatly	

Note: hand card if they wish more information on learning to speak Gaelic and also suggest they visit the Mòd Information Desk at the Nicolson Institute in order to register their interest.

SHOWCARD 14

21. In your view, should the success of the Royal National Mòd be built upon in any of the following ways? **MULTI CODE**

Retain its current format but increase its scale through additional features and facilities	
Add other Scottish - but not necessarily Gaelic - events	
Place it at the centre of a Scottish version of the Pan Celtic Festival in Ireland	
Make little or no change to what exists.	

22. Do you have any other particular comments or suggestions to make about future Mòds and how they should be developed and/or run?
-

THANKS FOR YOUR HELP