

An Comunn Gàidhealach  
The 2012 Dunoon Mòd  
Final Evaluation

THE arket  
SPECIALISTS

7 Bonnington Avenue, LANARK ML11 9AL  
Tel: 01555 664219. Fax: 01555 663331  
E-mail: [enquire@themarketspecialists.com](mailto:enquire@themarketspecialists.com)

January 2013

## CONTENTS

	<b>Page No.</b>
1. STUDY OBJECTIVES AND APPROACH	1
<ul style="list-style-type: none"><li>● The Background</li><li>● The Study Objectives</li><li>● The Study Approach</li></ul>	
2. FIELD SURVEY RESULTS AND ANALYSIS	3
<ul style="list-style-type: none"><li>● Attendance Numbers</li><li>● Field Survey Results</li><li>● Comparative Analysis and Conclusions</li></ul>	
3. ROI AND OTHER ANALYSES	16
<ul style="list-style-type: none"><li>● Methodology and Attendees</li><li>● The Calculation of ROIs</li><li>● Other Social and Economic Impacts</li></ul>	
4. THE MÒD PARTNERSHIP MODEL	26
<ul style="list-style-type: none"><li>● National Responsibilities and Local Responsibilities</li><li>● 2012 Press Perspectives</li><li>● Building From the Bottom Up</li></ul>	
5. SUMMARY, CONCLUSIONS AND RECOMMENDATIONS	33
<ul style="list-style-type: none"><li>● Summary</li><li>● Conclusions</li><li>● Recommendations</li></ul>	

### **Appendix**

The Field Survey Questionnaire

## 1. BACKGROUND, OBJECTIVES AND APPROACH

- The Background
- The Study Objectives
- The Study Approach

### The Background

Evaluations are important. They are not only required by funding bodies but can also be immensely helpful to the project organisers themselves: in this case, An Comunn Gàidhealach.

However, as well as objectively reviewing the impacts of the event - the 2012 Royal National Mòd in Dunoon - we are firm believers in adding value through learning the lessons of the past in making the Mòd and An Comunn itself even more successful each year.

In adopting this approach we have also - in previous Mòds we have evaluated - brought new dimensions to the evaluation. For example, we have visited the organisers of the Eisteddfod in Wales to see if there are lessons to be learned from this major international event for An Comunn and the Royal National Mòd.

This year our focus has been on the highly effective partnership that is forged each year between the national efforts of An Comunn in planning, organising and supporting local efforts, and the Local Organising Committee in contributing to the running of the event. The latter is through the efforts of committed volunteers who have planned and raised money for it during the previous three years. It is a model in partnership working from which many others could perhaps learn.

### The Study Objectives

Our prime objective was to evaluate the 2012 Royal National Mòd which was held in Dunoon in October this year. This was done in a way that was not only acceptable and helpful to An Comunn and the Local Organising Committee but also the event funders - and particularly those from within the public sector.

We have done this through:

- determining the return on both local and national investment earned by public sector funders, in this case Argyll and Bute Council, Highlands and Islands Enterprise and EventScotland;
- also assessing the impact in terms of net new full-time equivalent (FTE) job creation;

- and in addition we have used the FTE analysis to assess the broader return on investment (ROI) earned by the Exchequer in terms of the time taken to return the public sector contributions through national insurance, taxation as a result of the net new job creation and the estimated savings on paying unemployment benefits. That is, we have assessed the return on investment to the Exchequer by applying a "Payback" estimate to measure this.

In addition to these impact objectives, we have also - as noted earlier - considered the lessons to be learned from the national and local partnership that is involved in staging the Royal National Mòd each year.

### The Study Approach

The approach is underpinned by the Field Survey interviews conducted at the Mòd. These were undertaken by Edinburgh Napier University, using a technique which we have described as "*supervised self completion*". This involved handing the questionnaire (see appendix) out to between one and three people at the same time but being on hand to answer queries whilst the interviewees were completing the questionnaire. Returned questionnaires were then quickly checked and obvious gaps filled before the interview was completed. In addition, ongoing inputs were sought and received from a small number of key individuals involved in organising the Mòd. These were:

- John Morrison, the An Comunn Gaidhealach Chief Executive.
- James Graham, the An Comunn Mòd Manager who is obviously heavily involved in organising the national event.
- Jim Anderson, who was the senior Argyll and Bute Council official who is involved in the Dunoon Mòd.

The invaluable inputs from these sources were drawn together in preparing the evaluation and the remainder of this report, beginning with the analysis of the Field Survey results.

## 2. FIELD SURVEY RESULTS AND ANALYSIS

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

### Attendance Numbers

This year the Mòd attracted 2691 competitors. In using this baseline competitor number figure to extrapolate and build an assessment of total visitors (including competitors) at the event we have over the years been consistently cautious.

This caution is again reflected in our assessment of visitor numbers this year. In our survey we found that competitors represented 34% of those attending the event and application of this figure allows the total number of people attending the 2012 Mòd to be calculated. That is, if competitors represented 34% of the total and there were 2691 of them the total figure attending the 2012 Mòd would be 7915.

As is normal - and in the interests of the aforementioned caution - we normally reduce this initial estimate of numbers attending the event by comparing it to others. In this instance, our benchmarks were Oban in 2009 which attracted between 8,000 and 10,000 people, Caithness in 2010 where our estimate was around 6600, and the Western Isles last year with its 7900 attendees.

We believe that Dunoon will have attracted less than Oban and also a little less than the Western Isles, the former being seen as the "home" of the event and the latter as the "heart" of Gaeldom. Nevertheless, Argyll & Bute is a strong area as far as the Mòd is concerned and in view of this we believe that the figure for Dunoon will be much closer to that for the Western Isles than that for Caithness, but still considerably less than the number attending the 2009 "Homecoming" Mòd in Oban.

**In addition, we have introduced a 5% tolerance level this year to take account of these considerations. In rounding down the initial 7915 estimate by applying this percentage we have a final estimate for Dunoon in 2012 of 7519 which includes the 2691 competitors. In presenting this figure, however, we point out each year that our desire to be cautious means that the event may regularly be attracting more people to it than we estimate.**

### Field Survey Results

In 2012 336 surveys were completed by Mòd competitors and visitors at the Dunoon Mòd. A particularly important question in undertaking economic evaluations is the area of residence of those attending the event. As far as the 2012 Mòd is concerned this information is presented in **Table 1** below. (Note that some tables include figures for 2011 for comparison.)

**Table 1: Area of Residence**

	Dunoon Mòd 2012		Western Isles Mòd 2011	
	%	Base	%	Base
Argyll and Bute	25	83	46	92
Elsewhere in Highlands	-	-	25	51
Elsewhere in Scotland	72	241	25	49
Elsewhere in the UK	1	3	4	7
Outside the UK	3	9	1	1

As Table 1 indicates, a quarter of the people visiting the Mòd came from within Argyll and Bute with 72% coming from other areas within Scotland. The remaining 4% were from elsewhere, with only 1% coming from within the UK and 3% from overseas.

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

**Table 2: Main Reason for Attending the Mòd**

	Dunoon Mòd 2012		Western Isles Mòd 2011	
	%	Base	%	Base
Spectator at daytime event	6	19	16	1
Regular follower of the Mòd	18	61	10	20
Competitor	34	113	30	60
Friend/family of competitor	30	100	40	80
Mòd organiser	1	5	-	-
Attending social events in evening	1	3	4	7
Other	11	36	-	-

Thirty per cent were attending with family and friends compared to 34% who were competitors. Only 6% gave their main reason for attendance as to spectate at daytime events whilst 18% said they were there because they were regular followers of the Mòd. One percent said that the main reason was to attend social events in the evening, while another 1% were involved in organising the event.

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

**Table 3: Respondent awareness/attendance of the Mòd**

	Dunoon Mòd 2012		Western Isles Mòd 2011	
	%	Base	%	Base
Visit the annual Mòd on a regular basis	64	216	65	129
Visit the annual Mòd occasionally	17	58	21	41
First visit to a Mòd for me, but other members of my family have attended previous events	2	8	7	14
Only recently become interested in the Mòd	3	9	1	1
Hadn't heard about it until visited Dunoon during time of Mòd	2	6	1	1
Followed the Mòd by TV/radio before but this is my/our first visit to the actual event	5	15	6	12
Other	7	24	1	2

Despite the differences between the host areas, the above results are remarkably similar to those set out in the Western Isles evaluation last year. The table shows that 64% were regular Mòd visitors, with another 17% doing so occasionally.

**Table 4** records the proportion of visitors to the 2012 Mòd who had visited previous Mòds during the last eight years. Once again, results are broadly similar to those found in the Western Isles last year. For those attending the 2012 Mòd, over the eight year period 49% had on average attended a previous Mòd, again in line with last year's figures. Above average numbers attended the 2011 Western Isles Mòd, the 2009 Oban event and Falkirk in 2008. Below average numbers attended the 2010 Mòd in Caithness, Dunoon in 2006, the Western Isles in 2005, Perth in 2004 and Oban in 2003. Only 10% of the visitors had not attended a Mòd in the past, compared to 16% in the Western Isles in 2011. This pattern will obviously vary from year to year as the Mod moves around host areas.

**Table 4: Mòds attended in the last nine years by those attending in 2012**

Dunoon Mòd 2012	%	Base	Western Isles Mòd 2011	%	Base
Western Isles 2011	61	206	-	-	-
Caithness 2010	46	153	Caithness 2010	45	90
Oban 2009	61	204	Oban 2009	57	114
Falkirk 2008	50	169	Falkirk 2008	51	101
Fort William 2007	49	164	Lochaber 2007	54	107
Dunoon 2006	48	162	Dunoon 2006	44	88
Western Isles 2005	41	137	Western Isles 2005	59	117
Perth 2004	43	146	Perth 2004	39	78
Oban 2003	44	149	Oban 2003	43	86
None	10	32	None	16	32

Although not shown in the tables, we have estimated that those attending were away from home for 4.4 nights, of which 3.6 nights were spent in Argyll and Bute. Another 3.5 days were spent elsewhere in Scotland, but this included two people on 14 day trips and a visitor from Australia. In the interests of caution we have excluded these individuals from our calculations.

**The final estimated overall average length of stay is therefore 3.2 days, with 2.3 of them being spent in Argyll and Bute. The balance of 0.9 days was spent elsewhere in Scotland.** The summary results also indicate that c2.5 family and friends attended the event in the company of a competitor. This is exactly the same as last year's figure,

**Table 5** contains information on the base of those attending the 2012 event.

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

	Dunoon Mòd 2012		Western Isles Mòd 2011	
	%	Base	%	Base
While staying away from home with specific purpose of attending the Mòd	67	220	45	89
From home in Argyll and Bute	11	35	45	90
More general day trip from home outside Argyll and Bute (the host area), not specifically for the Mòd	2	6	-	-
On a day trip from home from outside Argyll and Bute (the host area)	10	34	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)	7	23	8	15
Other	3	11	-	-

It can be seen that the Mòd has a loyal following from people who live outwith the Argyll and Bute area although those living within the host area were the next largest group. Day trippers from outside Argyll and Bute were much fewer but were still the third largest group, followed closely by those on a day trip from outside the host area.

The type of accommodation used by people staying away from home while attending the Mòd is shown in **Table 6**. Forty per cent used hotels and guest houses/B&Bs, while a further 26% stayed in self-catering. A relatively low 7% stayed with friends and relatives, 2% stayed in the hostel/activity centre and 9% indicated that they had stayed in some other form of accommodation. Sixteen per cent stayed in their own homes.

**Table 6: Type of accommodation used**

	Dunoon Mòd 2012		Western Isles Mòd 2011	
	%	Base	%	Base
Own Home	16	54	-	-
Hotel	28	96	49	53
Guest House/Bed & Breakfast	12	42	21	23
Rented Property/Hired Caravan	23	76	11	12
Own Caravan/Motor Van/Tent	3	10	3	3
Staying with Friends/Relatives	7	23	20	22
Hostel/Activity Centre	2	6	3	3
School/Community Hall	-	-	-	-
Other	9	30	6	6

The economic impact of the annual Mòd is extremely important for local communities during the shoulder tourist season. When looking at the significance of the Mòd to the regular followers (shown in **Table 7** below), 75% of the people surveyed would either not have taken a leisure trip at this time or if they had would have taken one outside of Scotland. Hence this income stream is substantially due to the Mòd.

**Table 7: Significance of Mòd in Taking Trip**

	Dunoon Mòd 2012		Western Isles Mòd 2011	
	%	Base	%	Base
Had an alternative holiday/leisure trip in the host area	6	18	8	16
Had an alternative holiday/leisure trip Scotland	19	58	18	35
Had an alternative holiday/leisure trip elsewhere in the UK	3	10	3	5
Had an alternative holiday/leisure trip overseas	5	15	-	3
Would not have taken holiday/leisure trip at this time	67	207	71	141

Although the 25% displacement figure is a low one it is similar to the 26% figure from the 2011 Mòd and significantly higher than the normal 10% or less of previous years. Like last year, 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 2012. 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 expenditure per person by 2012 Mòd visitors is shown in **Table 8**.

**Table 8: Average Party Expenditure**

Spending:	Dunoon Mòd 2012		Western Isles Mòd 2011	
	Day Visitor	Overnight Visitor	Day Visitor	Overnight Visitor
At Mòd Events (food/drink, entrance fees, other, Fringe)	£38.48	£124.34	£171.49	£247.60
Other Spending in the host area (travel, accommodation, food/drink, other)	£81.36	£360.03	£200.46	£553.16
Other Spending in Scotland	£20.00	£235.34		£864.17
Average Spend per Party	<b>£49.91</b>	<b>£287.89</b>		
<b>Average Spend/Person</b>	£38.48	£124.34	<b>£132.83</b>	<b>£594.62</b>

**Base: 278 for 2012 (average spend per party based on 55 Day visitors, and 223 Overnight visitors. Sample sizes varied for individual section depending on the number of people responding to that question); 200 for 2011**

The above expenditure figures cover an average party size of 2.8 people for day visitors and 2.5 for those staying overnight. **They are per person per night spending figures rather than per trip which will obviously have to be kept in mind in the later assessment of impacts.**

This means that the average spending per person per night for **day visitors** at **Mòd events** was £38.48 compared to £124.34 for **overnight visitors**. Spending per person on **food and transport within Argyll and Bute** for **day visitors** was £29.06, compared to £144.01 for **overnight visitors**. Finally the average spend per person per night in **other parts of Scotland** for **day visitors** was £7.14 compared to £94.14 for **overnight visitors**, with an overall average spend per party per night for **day visitors** of £49.91, compared to £287.89 for **overnight visitors**.

The results in **Table 9** highlight the extent to which visitors undertook particular activities while attending the Mòd.

**Table 9: Activities pursued while attending the Dunoon Mòd shown in %**  
(Base 2012: 336, Base 2011: 200; **2012 figures** shown in **bold**)

Q 14 - Pursing activities	2012	2011	2012	2011	2012	2011	2012	2011	2012	2011
	Most days %	Most days %	Some days %	Some days %	Once only %	Once only %	None %	None %	Don't Know %	Don't Know %
Attending Mòd performances	<b>61</b>	51	<b>23</b>	37	<b>14</b>	9	<b>3</b>	-	<b>0</b>	3
Eating out in A&B	<b>56</b>	34	<b>28</b>	49	<b>10</b>	8	<b>5</b>	4	<b>1</b>	6
Visiting A&B pubs	<b>38</b>	27	<b>30</b>	28	<b>7</b>	5	<b>20</b>	20	<b>5</b>	22
Taking part in official Mòd Fringe events daytime/evening	<b>36</b>	18	<b>26</b>	29	<b>14</b>	5	<b>17</b>	16	<b>7</b>	33
Shopping in A&B	<b>28</b>	18	<b>42</b>	44	<b>11</b>	10	<b>14</b>	7	<b>5</b>	23
Visiting attractions or places of interest in A&B	<b>7</b>	5	<b>25</b>	24	<b>12</b>	5	<b>49</b>	31	<b>8</b>	37
Visiting other areas outside A&B for a day/half-day trip	<b>3</b>	2	<b>9</b>	5	<b>8</b>	5	<b>71</b>	51	<b>10</b>	38
Other	<b>0</b>		<b>11</b>		<b>6</b>		<b>61</b>		<b>22</b>	

The picture which emerges from **Table 9** 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 town's pubs reasonably frequently. The Fringe events were also quite popular but visiting local attractions and/or other parts of the area was less so.

When comparing the two years, more people attending the Dunoon Mòd spent most days doing all of the suggested activities compared to the results for 2011. The differences ranged from between 1% and 22% with the greatest increase being in people eating out most days followed by taking part in Fringe events and eating out in pubs. Shopping and attending performances both showed a rise of 10%. However, there was minimal difference in visiting other attractions in the host area.

**Table 10** shows visitor satisfaction with particular features of the 2012 Mòd. A few years ago 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**. We believe that this percentage is a meaningful one in that those interviewed had the option of simply saying "above expectations": and similarly, those unhappy with any particular feature could have opted to respond by saying it was "below expectations" rather than the more extreme "well below expectations".

In summary, Dunoon outperformed the established Western Isles host venue in one key area – by some margin – and this was the organisation of the event. An Comunn, the Local Organising Committee and Argyll and Bute Council can all be proud of this. However, it should also be noted that the overall percentages for "well above expectations" were lower than those from last year with an average score of

5.9% compared to 8.4% although the scores for “above expectations” are very similar (Dunoon average = 13.8%, Western Isles average = 13.5%).

**Table 10: Satisfaction with particular features of this trip**  
(Base 2012: 336, Base 2011: 200; **2012 figures** shown in **bold**)

	Well above expect %2012	Well above expect % 2011	Above expect %	Above expect % 2011	Matched expect %2012	Matched expect % 2011	Below expect % 2012	Below expect % 2011	Well Below expect %2012	Well Below expect % 2011	No comment %	No comment % 2011
Mòd /Fringe events added to the overall experience	-	9	-	16	-	30	-	2	-	-	-	44
Attending Mòd / Fringe events	<b>4</b>	7	<b>12</b>	14	<b>33</b>	34	<b>2</b>	3	<b>0</b>	-	<b>49</b>	43
Eating out in the local cafes and restaurants	<b>5</b>	8	<b>19</b>	21	<b>45</b>	55	<b>8</b>	3	<b>1</b>	-	<b>23</b>	14
Experience of local pubs	<b>4</b>	4	<b>12</b>	13	<b>40</b>	44	<b>3</b>	1	<b>0</b>	-	<b>40</b>	39
Visiting attractions and/or places of interest in the area	<b>3</b>	6	<b>6</b>	12	<b>35</b>	40	<b>6</b>	6	<b>1</b>	-	<b>50</b>	37
Information on the Mòd	<b>6</b>	9	<b>13</b>	11	<b>53</b>	69	<b>10</b>	5	<b>0</b>	-	<b>18</b>	8
Overall Mòd “Buzz”	<b>6</b>	12	<b>16</b>	15	<b>47</b>	48	<b>11</b>	16	<b>1</b>	-	<b>20</b>	10
Organisation of the Mòd	<b>10</b>	7	<b>15</b>	14	<b>57</b>	67	<b>5</b>	9	<b>0</b>	-	<b>13</b>	5
Competition venues	<b>7</b>	9	<b>16</b>	13	<b>58</b>	66	<b>3</b>	8	<b>0</b>	-	<b>15</b>	5
Dunoon as the host venue	<b>7</b>	14	<b>20</b>	15	<b>54</b>	58	<b>4</b>	4	<b>2</b>	-	<b>14</b>	10
The Town Centre	<b>4</b>	5	<b>7</b>	10	<b>46</b>	53	<b>11</b>	4	<b>1</b>	-	<b>32</b>	29
Accommodation	<b>9</b>	11	<b>16</b>	11	<b>35</b>	41	<b>8</b>	3	<b>2</b>	-	<b>30</b>	35
The Food Offer	<b>3</b>	-	<b>9</b>	-	<b>39</b>	-	<b>4</b>	-	<b>1</b>	-	<b>44</b>	-
Local Shopping	<b>5</b>	-	<b>8</b>	-	<b>45</b>	-	<b>12</b>	-	<b>1</b>	-	<b>29</b>	-

Visitors to the Mòd were also asked about the likelihood of their returning to Argyll and Bute for a holiday/short break. The results in **Table 11** show 75% of the people interviewed would possibly or definitely return for a general holiday. This is less than last year where 98% said they would return but this was exceptional and almost certainly reflects the views of those with close ties to the islands.

In addition, there is always the aspect of ‘social desirability’ influencing responses in any type of questionnaire, but self completion with anonymity should reduce this. The surveys in previous studies were all interview based, and hence may have shown a bias towards saying what the interviewee thought the person doing the interview would like to hear. On the other hand, the Western Isles are a beautiful area of Scotland, and this may also be reflected in answers to this question.

**Table 11: Respondent likelihood of returning to Argyll and Bute for a holiday/short break**

	Dunoon 2012		Western Isles 2011	
	Return for General Holiday %	Base	Return for General Holiday %	Base
Definitely	26	79	56	60
Possibly	49	146	42	45
Probably Not	16	47	2	2
Definitely Not	8	23	1	1
Other (e.g. home)	1	4		

Bord na Gaidhlig is particularly keen to see the uptake and use of the Gaelic language extended. The question below is therefore of particular interest to this organisation as well as to An Comunn itself, as is the 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 12: How respondents described themselves in relation to the Gaelic language**

	Dunoon 2012		Western Isles 2011	
	%	Base	%	Base
No Gaelic but would like to learn	10	31	15	29
Not interested in learning Gaelic	9	28	8	15
Speak Gaelic and use it regularly	38	119	41	82
Currently learning to speak Gaelic	16	49	11	22
Lapsed Gaelic learner	13	40	4	8
Speak Gaelic but do not have the opportunity to use it	10	30	9	11
Speak Gaelic, rarely use it, would like to speak it more and improve it	5	16	-	-

**Table 13: Influence of Mòd on Desire to Learn/Improve Gaelic**

Current Situation	Not at All	A Little	Some	A Lot	Greatly	Bases
How has your attendance at the Mòd impacted on your aspirations to learn or improve your Gaelic	20%	24%	21%	22%	15%	278
<b>Bases</b>	56	68	58	60	36	

From the above table we know that 37% of those interviewed indicated that their desire to learn Gaelic was significantly influenced (great or a lot) by their attendance at the Mòd . This compares with 21% from last year's event. Taking an average of these two percentages and applying it to the 7519 attendees at the 2012 Mòd implies that there were some 2180 people at the Dunoon event who had a real desire to learn or improve their language skills.

### Comparative Analysis and Conclusions

Absolute information is valuable but when set within a relative context it can provide greater insights. We have taken this comparative analysis approach further by focusing on four key questions which are likely to be consistently asked during the future programmes 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.

**Table 14: Reasons for attending the Mòd (Comparative table)**

Reasons for attending the Mòd	Dunoon	Western Isles	Caithness	Oban	Falkirk
Away from home specifically to attend the Mòd	63%	45%	54%	73%	36%
On a day trip within the host area	9%	45%	15%	16%	12%
On a day trip from outside the host area	10%	4%	15%	7%	47%
On a more general holiday	6%	8%	16%	4%	5%
Other	11%	-	-	-	-

The most significant variation in the above table relates to those taking a day trip from home. At this year's Mòd the percentage taking a day trip from home to attend the event is low compared to the Western Isles Mòd. This is not surprising, especially since it is not dissimilar to the percentages for each of Caithness, Oban or Falkirk.

**Table 15: Alternative to attending the Mòd (Comparative table)**

Alternative to attending the Mòd if event not held	Dunoon	Western Isles	Caithness	Oban	Falkirk
Take alternative holiday in host area	6%	8%	3%	4%	5%
Take alternative holiday elsewhere in Scotland	19%	18%	19%	16%	20%
Take alternative holiday elsewhere in the UK	3%	3%	n/a	n/a	n/a
Take alternative holiday overseas	5%	0%	n/a	n/a	n/a
No alternative holiday/leisure trip	67%	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 6% at this year's Mòd and only 8% at the Western Isles 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.

**Table 16: Likelihood of returning for a holiday trip (Comparative table)**

Likelihood of returning for a holiday trip	Dunoon	Western Isles	Caithness	Oban	Falkirk
Definitely	26%	56%	23%	51%	5%
Possibly	49%	42%	53%	36%	20%
Probably not	16%	2%	19%	9%	68%
Definitely not	8%	1%	4%	4%	7%
Other	1%	n/a	n/a	n/a	n/a

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%; Dunoon is well below this figure at 26% but it is slightly above the Caithness figure and well above that for Falkirk.

**Table 17: Mòd influence on the desire to learn Gaelic (Comparative table)**

Mòd influence on the desire to learn Gaelic	Dunoon	Western Isles	Caithness	Oban	Falkirk
None but would like to learn	10%	17%	17%	n/a	n/a
Not interested in learning language	9%	0%	0%	n/a	n/a
Speak and use Gaelic regularly	38%	39%	17%	n/a	n/a
Currently learning to speak Gaelic	16%	30%	48%	n/a	n/a
Lapsed Gaelic learner	13%	9%	7%	n/a	n/a
Speak Gaelic but do not have the opportunity to use it	10%	4%	7%	n/a	n/a
Speak Gaelic, rarely use it, would like to speak it more and improve it	5%	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 38% who already speak and

use Gaelic regularly who indicated a significant desire to learn the language and the similarity of the percentages for Caithness and Dunoon in recent years!

**Setting that aside, the percentages who either have no Gaelic but would like to learn + those currently learning to speak the language + those who can speak Gaelic but rarely use it and the finding that all three groups have a desire to learn the language is very important. If true – and this picture was very similar in the Western Isles and Caithness as well – it means that there are probably at least 2000 people at the Mòd each year who are willing to learn or improve their Gaelic language skills.**

This important finding 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 through the calculation of various impacts in the third chapter of our report.

### 3. ROI AND OTHER ANALYSES

- Methodology and Attendees
- The Calculation of ROIs
- Other Economic and Social Impacts

#### Methodology and Attendees

We have initially used the methodology defined by EventScotland in its eventIMPACTS document. This has been used in previous years and 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. Argyll and Bute 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 Argyll and Bute 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 Argyll and Bute 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.

This is the methodology we have used over the past three years which has been acceptable to EventScotland. It is therefore repeated this year although we have also added other impact measures to it.

### The Calculation of Unique Visitors

**As noted in our analysis of Mòd attendees (see Chapter 2) we have been able to use the competitor total of 2691 to assess the total number of competitors and visitors to the event, which we have estimated at 7519. This is the figure which we have taken as “unique visitors” at the 2012 Dunoon Mòd.**

### The Calculation of Eligible Visitors

According to the 2012 survey undertaken during the Mòd the percentages of those interviewed who lived in each of Argyll and Bute, Scotland and elsewhere were as follows.

1.	Argyll and Bute	25%
2.	Rest of Scotland	72%
3.	Elsewhere	3%

Given the earlier unique spectator number of 7,500 this suggests the following totals in terms of “local” visitors.

1.	Argyll and Bute	1880
2.	Scotland	7294
3.	Elsewhere	225

**Note:** in the above figures Argyll and Bute residents are included in the figure for Scotland.

The deduction of those living in each of the Argyll and Bute and Scotland areas leaves the following visitor numbers in respect of each of the geographic levels.

1.	Argyll and Bute	5,639
2.	Scotland:	225
3.	Elsewhere	225

Taking the number of casual visitors (i.e. those on a holiday or day trip to Dunoon for other than Mòd reasons) interviewed during the survey, we estimate that the number of casual visitors at the 2012 Mòd was 900 (see Table 5 in the field survey results) and these will also have to be deducted from the above figures. There is a danger of double counting here in that some of those already subtracted from the unique spectator numbers because they lived in the geographic area will also be casual visitors, especially at the Scotland level.

Nevertheless, in the interests of caution we have subtracted the 900 casual visitors from each of the Argyll and Bute and Scotland figures to leave the numbers set out below. The Scottish figure is difficult to assess but as there were only 225 visitors from outside Scotland after subtracting those living in Scotland and the 900 casual visitors

we have assumed that these will all be eligible at the national level. On this basis, the remaining figures are as follows.

1. Argyll and Bute: 4,739
2. Scotland: 225

As only 23% were day-trippers – over half of whom were travelling from home or from outside the host area but not specifically because of the Mòd and therefore ineligible – we have assumed that only 10% of the final eligible figure will be day-trippers at both the local and national levels.

	Day	Staying	Eligible Visitors
Argyll and Bute	474	4265	4739
Scotland	22	203	225

**The figures in the above table are therefore our estimates of eligible visitors in each of the two geographic areas.**

#### The Calculation of ROIs

These figures are then applied to the spending figures drawn from the survey analysis for each of day-trippers and overnight visitors respectively in each of Argyll and Bute and Scotland.

The table containing the party size expenditure is re-presented below for ease of reference, followed by the calculations for each of day-trippers and overnight visitors respectively. However, as noted earlier these figures refer to the per person per night expenditures whereas we need the per **person per stay** values. We have therefore calculated the spend per person per stay figure by multiplying the per night figure by the average length of stay figure of 3.2 days in the case of staying visitors whilst leaving the spend per person figure unaltered for day visitors. We know from our earlier analysis that 10% of eligible visitors to the 2012 event were day-trippers whilst 90% were staying visitors. Because of low cross tabulation cell sizes we have applied the same figures at each of the geographic levels.

### Average Party Expenditure

Spending:	Dunoon Mòd 2012	
	Day Visitor	Overnight Visitor
At Mòd Events (food/drink, entrance fees, other, Fringe)	£38.48	£124.34
Other Spending in Argyll and Bute (travel, accommodation, food/drink, other)	£81.36	£360.03
Other Spending in Scotland	£20.00	£235.34
Average Spend per Party	<b>£49.91</b>	<b>£287.89</b>
<b>Average Spend/Person/Stay (average 3.2 nights)</b>	<b>£38.48</b>	<b>£397.89</b>

Base: 185

#### (a) Day Trippers

Geographic Area	Average Spend/Head	Total Eligible Visitors	Total Spending
Argyll and Bute	£38.48	474	£18,240
Scotland	£38.48	22	£847

#### (b) Overnight Visitors

Geographic Area	Average Spend/Head	Total Eligible Visitors	Total Spending
Argyll and Bute	£397.89	4265	£1,697,001
Scotland	£397.89	203	£80,772

**In assessing these figures in respect of spending within Dunoon and the surrounding Argyll and Bute area (on site) as opposed to elsewhere in Scotland (off site) it appears to us that some 90% was on site whilst only 10% was off site.**

According to information provided to us by An Comunn the amount spent in staging the 2012 Mòd in Dunoon was £338,761, of which £214,374 was in Argyll and Bute and £124,387 was spent elsewhere in Scotland (but still within the Highlands and Islands). This includes An Comunn head office costs, given the significance of the event to the organisation and its workload.

In addition, Argyll and Bute Council gave a contribution of £101,847 to the Mòd and also spent an estimated £5,000 plus on staff and other more direct contributions as well as providing the Mòd venues (Queen's Hall and local schools) at no charge; and the Local Organising Committee provided an estimated £40,000 to this year's event. Grants of £25,000 and £20,000 were received from EventScotland and

Highlands and Islands Enterprise respectively and another £60,000 was received in sponsorship. Bord na Gaidhlig also provided core funding of £73,500.

As far as this impact assessment is concerned, however, it is the Mòd visitor expenditure and staging costs that are critical along with whether the spending was within Argyll and Bute or elsewhere in Scotland. This is presented in the table below.

Funding Source	Spending in Argyll & Bute	Spending Elsewhere in Scotland	Total Spending
Mòd Staging Costs	£214,374	£124,387	<b>£338,761</b>
Visitor Spending	£1,715,240	£81,619	<b>£1,796,859</b>
<b>Total Spending</b>	<b>£1,929,614</b>	<b>£206,006</b>	<b>£2,135,620</b>

As noted earlier, on the basis of our survey findings we believe it reasonable to assume that at each of the local Argyll and Bute and national Scotland levels the on-site spending will be 90% of the total and the of-site spend will be 10%. This is reflected in the table below.

	On Site Expenditure	Off Site Expenditure
Argyll and Bute	£1,736,653	£192,961
Scotland	£185,405	£20,601

We can use these figures 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. We have used the income multipliers for a visitor attraction in a rural area, given that there are no multipliers available for events.

Before applying the multipliers, however, the various 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

**Argyll and Bute** £1,736,653 x (71.5 ÷ 124.7\*\*) = £995,755

**Scotland:** £185,405 x (71.5 ÷ 124.7\*\*) = £106,307

**Highlands and Islands:** £2,054,001 x (71.5 ÷ 124.7\*\*) = £1,177,715

#### Off Site

**Argyll and Bute** £192,961 x (71.5 ÷ 124.7\*\*) = £110,639

**Scotland:** £20,601 x (71.5 ÷ 124.7\*\*) = £11,812

**Note\*\*** The CPI stood at 124.2 in October 2012. With an assumed annual rate of inflation of 2.5% over 12 months (or 0.208% per month) we have increased the 2012 CPI for 2012 to the 124.7 figure shown above.

These are the spending figures that have been used in calculating the ROIs associated with the event at each of the above geographic levels, with all the An Comunn expenditure being in the Highlands and Islands. As noted above, the multipliers we have used are the income ones for rural areas. These are as follows.

### **On Site**

Indirect: 0.0441; Induced: 0.0391

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) Argyll and Bute**

Direct (on and off site): £1,106,394

Indirect: £1,106,394 x 0.0441 = £48,792

Induced: £1,106,394 x 0.0391 = £43,260

Off Site: Assumed to be included in direct spending total

**Total Income Generated = £1,198,446**

#### **(2) Scotland**

Direct (on and off site): £118,119

Indirect: £118,119 x 0.0441 = £5,209

Induced: £118,119 x 0.0391 = £4,619

Off Site: Assumed to be included in direct spending total

**Total Income Generated = £127,947**

#### **(3) Highlands and Islands**

Direct (on and off site): £1,177,715

Indirect: £1,177,715 x 0.0441 = £51,937

Induced: £1,177,715 x 0.0391 = £46,049

Off Site: Assumed to be included in direct spending total

**Total Income Generated = £1,275,701**

These total figures are taken as the income generated at each of the Argyll and Bute and Scotland geographic levels on which the ROIs for each of Argyll and Bute Council and EventScotland investments in the event are calculated. In addition, the Highlands and Islands ROI is also calculated on the basis of spending in the Highlands and Islands and the HIE contribution of £20,000 to the 2012 Mòd.

### **Argyll and Bute Council**

Argyll and Bute = £1,198,446 divided by £107,000 = 11 to 1

In our view the most appropriate ROI is the one calculated at the Argyll and Bute level. **This is because, as has been previously stated, the impact of the Mòd is essentially local in nature.** On this basis, the estimated ROI of 11 to 1 is clearly excellent.

### **EventScotland**

Scotland = £127,947 divided by £25,000 = 5 to 1

The ROI is less than that for the host area but in view of the above comments this is hardly surprising. At 5 to 1 it is still very respectable.

### **Highlands and Islands Enterprise**

Highlands and Islands = £1,275,701 divided by £20,000 = 64 to 1

All the HIE expenditure was in the Highlands and Islands, as was all the visitor spending in the host area. Total eligible spending in this case is therefore greater than that for Argyll and Bute but the HIE contribution was clearly much less than that of Argyll and Bute Council. This combination produces a very high ROI as far as Highlands and Islands Enterprise is concerned.

**However, if the Argyll and Bute Council and EventScotland contributions are added to those from Highlands and Islands Enterprise and all are used in the ROI calculation for the Highlands and Islands the Return on Investment falls to 8 to 1. Given that the impact of the Mòd is both essentially Highland and local in nature we believe that if one is seeking an overall ROI for the event then this is the one that is most representative of what the Mòd seeks to achieve – and at 8 to 1 it compares well with the 2009 Homecoming ROI of 10 to 1 which was of course a truly national event with slightly different objectives.**

However, all the above ROIs are impressive - and the HIE one is quite exceptional. All concerned with the 2012 Mòd in Dunoon, including all its investors and sponsors as well as the Local Organising Committee and An Comunn itself, can therefore be well satisfied with these impact conclusions. **Those in Dunoon who put so much effort**

**into the event - and the business community which benefited from these efforts - will not be surprised by its economic success, and those who attended it have confirmed its social and cultural success as well.**

### 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 c7500 people attended the event and that 67% (5025) came to the area for the Mòd and stayed overnight whilst 21% (1575) were day-trippers travelling from either home or outside Argyll and Bute.

We have taken spending on Mòd events and in the host area as **on site** expenditure with that elsewhere in Scotland being taken as **off site** expenditure. As noted earlier, we believe that 90% of local visitor expenditure was on site whilst the remaining 10% was off site. These assumptions are reflected in the table below which focuses on the local level as this is where the real impact is created and felt.

	On Site	Off Site
Expenditure in Argyll and Bute:	£1,736,653	£192,961

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 124.7 (see above) to produce the following values.

On site spending: £1,736,653 x 71.5 divided by 124.7 = £995,755

Off site spending: £192,961 x 71.5 divided by 124.7 = £110,639

Direct, indirect and induced jobs created can be calculated by applying the employment multipliers for a visitor attraction in a rural location. This is done below.

#### On site

Direct Jobs = 995.755 x 0.0593 = 59.1

Indirect Jobs = 995.755 x 0.0027 = 2.7

Induced Jobs = 995.755 x 0.0052 = 5.2

#### Off Site

Off site = 110.639 x 0.0363 = 4.0

This suggests that the equivalent of 71 new jobs were created as a result of expenditure at and on the 2012 Dunoon 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 an estimated 72% of the 2012 expenditure would not have been incurred in the UK if the Mòd had not taken place. Displacement is therefore relatively low at 28%, which reduces the full-time equivalent (FTE) job creation figure to 51.

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. We have ignored possible income from VAT contributions as - one way or another - we believe that most of them would be displaced.

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 £3,330 per person in National Insurance revenue and another £3,205 in income tax, assuming that each job holder qualifies for the personal tax allowance of £8105.

With the equivalent of 51 net new jobs being created this produces total Exchequer revenues of £333,285. However, the proportion of these job holders which will be taken out of unemployment will also produce Exchequer savings in respect of unemployment benefits paid. If only 50% are taken out of unemployment at an estimated average saving to the public purse of £15,000 per person per year another £382,500 can be added. This produces a total saving to the public purse of £715,785.

The total public expenditure involved in staging the 2011 Mòd was £107,000 from Argyll and Bute Council, £25,000 from EventScotland and £20,000 from Highlands and Islands Enterprise. 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 three months. This is even less than the five months in respect of the Western Isles Mòd last year and is obviously an excellent return to the public purse.

**Whilst it is certainly true that An Comunn and the Mòd require ongoing annual public sector support we believe it is fair to point out that when the returns associated with national and local expenditure associated with it are taken into account the event requires little or even no deficit funding in real terms.**

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. To varying extents, the business community in the host area will also have benefited from the Mòd as did the Gaelic community as a whole from the profile of the Mòd as a major event on the Scottish cultural calendar. In addition, individual community groups in the form of the choirs, quartets and other groups were also supported by the Mòd in the sense of the national stage it provides for them; and the 7519 visitors and competitors were obviously all beneficiaries of the event as well

along with the individual local businesses - especially in the accommodation, retail and catering sectors.

Another target which the Mòd is normally expected to meet is assistance from volunteers in staging the event. We have already mentioned the contribution of the many volunteers who are involved in the planning and organisation of the Mòd, and who contribute to the success of what is a major cultural event of real significance in supporting the Gaelic community and language as well as Highland heritage.

It is therefore encouraging to note the support provided to the event by national organisations like EventScotland as well as Historic Scotland which was represented as a stall holder in the Highland Showcase. Also, at a regional level, the support of Highlands and Islands Enterprise is always welcome and the more local financial and other support provided by Argyll and Bute Council was both invaluable and very much appreciated.

As noted earlier, the 2012 Mòd was as successful as its predecessors in terms of its economic impact on the locality. This is important: whilst many are focused on displacement and are focussed on the argument that projects must be capable of bringing **new spending** into Scotland there is a perfectly valid argument that spending in less well off rural tourism areas is in its own right just as valuable.

**Certainly, tourism and Scotland would be a lot worse off if there were not a distinctive Highlands and Islands that was populated and able to serve the needs of its visitors as well as protecting its own unique culture. The Mòd contributes significantly to this and to taking Gaeldom into new parts of Scotland, as it will do next year when it visits Paisley.**

**On a number of different levels, therefore, the 2012 Royal National Mòd which was staged in Dunoon in Argyll and Bute was a considerable success. It is therefore interesting to note the extent to which this is dependent upon the very real partnership which exists between An Comunn and the local authorities along with the band of loyal and committed local volunteers who are essential to its continuing success. This very important subject is therefore considered in the next chapter.**

#### 4. A PERFECT PARTNERSHIP

- National and Local Roles and Responsibilities
- 2012 Press Perspectives
- Building on the Past

##### National and Local Roles and Responsibilities

The Mòd is an excellent example of how a national organisation can work effectively with the Local Organising Committee each year in the hosting of what is a major national event. **Without national leadership and co-ordination allied to volunteer local commitment and effort, the Royal National Mòd could simply not be held each year.** It is therefore worth looking at respective national and local responsibilities before adding some perspectives on how this unique partnership works in practice.

The host venue is decided upon each year by considering bids from local branches of An Comunn Gaidhealach. The successful branch is then informed and it sets up a Local Organising Committee to take responsibility for organising the event at a local level in association with An Comunn. These bids carry various commitments with them, including a commitment to raise a significant amount of money: in the case of the Dunoon Mòd this year the sum was £25,000.

Local fundraising is very important but so are the efforts of An Comunn itself in securing advance sponsorship and public sector grant commitments. From the outset a strong partnership has to be forged between An Comunn and the Local Organising Committee (LOC) as well as the Local Authority. For example, the LOC has responsibility for the following in particular.

- The required shuttle bus;
- provision of catering for the Massed Choirs;
- organisation of the Mod Football Cup;
- the town decoration;
- venue directional signage;
- Iomall/Feis a Mhoid Programme;
- the provision of refreshments for Chairpersons and Adjudicators;
- and Church Service catering.

This leaves An Comunn itself with a host of duties, including the production and printing of the Official Mod Programme, venue decoration and meeting the associated costs, as well as organising venue seating sound and light.

The Opening Ceremony, Mod Shinty Cup, Mod Sponsors' Lunch/Dinner, Official Receptions and the Gaelic Showcase venue costs are also An Comunn responsibilities. In addition, the national organisation is responsible for organising

effective Communication and PA systems, finding and providing Official Mod Accommodation, catering for the Massed Choirs, the Fiddlers Rally High Tea/Evening Meal, AMNR official catering, steward catering, providing the Mod Sponsors' Lunch/Dinner and Official receptions.

Literature Awards, meeting Adjudicator fees, providing the post Drama buffet and organising transport for officials and VIPs are all the responsibility of the national body and its small but very committed staff. In each case – at both a national and local level – financial responsibility goes with the organisational responsibility for each particular task.

These tasks give an idea of the amount of work involved, as well as the extent of local, volunteer commitment to the Mòd each year. Generally, the work of the local committee starts immediately after the choice of host venue has been made around three years before the event takes place in the particular host area. In order to ensure the ongoing annual success of this “perfect partnership” - and in recognition of the role of volunteers within it – An Comunn has drawn up its own Volunteer Policy in order to ensure that the inputs of volunteers are recognised and that their contributions are both well targeted and hugely appreciated by not only An Comunn but also by those attending the event.

This human dimension to the Royal National Mòd is further exemplified in the following anecdotes provided by a senior member of An Comunn staff who is heavily involved in the organisation of the event.

- A Local Organising Committee member who was a key figure in helping to organise and co-ordinate the Mòd worked very closely with An Comunn Gàidhealach in the run up to the Mòd. Towards the end of Mòd week, with almost no accommodation to be had in Dunoon, he met a gentleman who had travelled to Dunoon for the Mòd but was unable to find accommodation. He very kindly offered his own house to the gentleman and he stayed with him for 2 nights.
- Argyll & Bute Council technical staff encountered a breakdown with their vehicle whilst on their way down from Oban with PA and equipment for use at the Opening Ceremony, on the opening night of the Mòd. One of the staff paid over £300 of his own money and hired another vehicle in order to salvage the situation and get the gear there on time. A selfless act if ever there was one!
- One of the chief Stewards came in for special praise at this years' Mòd in Dunoon for the unflustered, helpful and friendly manner which he displayed when dealing with the public. The gentleman was cited on numerous occasions to the staff by members of the public who wished to put on record just how obliging and co-operative he was when dealing with them. This gentleman was genuinely passionate about

the Mòd and epitomised the great atmosphere that is evident at the event each year. Our Interviewers at the event can testify to this individual's helpful manner which was in every sense "over and above the cause of duty".

- For the first time ever, visual screens were introduced to proceedings in the main venue to provide non Gaelic speakers with adequate translations in order to follow what was being said between performances. A native Gaelic speaker who is a keen Mòd supporter volunteered his skills and time to manage and operate this system for us. This individual has been attending the Mòd for many years and enjoys getting around the venues and seeing various competitions and events. However, this year, he worked selflessly all week on operating the projector and screens which proved a huge success with the public. Volunteers like him are fundamental to the Mòd being a success each year. Far from being "amateur" in any way their contributions combine enthusiasm with a real professionalism and love for the Royal National Mòd.

The evidence that this "trusting" partnership works is evident from the annual success of this national Gaelic event which is so welcomed by - and which brings so much benefit to - its local host destination each year. A particular example of this partnership at work is provided by the committee chaired by Janet MacDonald (who is an An Comunn Company Director) and the ten to twelve people who work with her each year to prepare invaluable books on music which are sourced locally. So far, Janet's committee has found, and prepared books with music for 85 songs, many of which have become forgotten over time and some of which may well have been lost to the language without the efforts of Janet and her committee.

This impressive supply of music is provided for numerous different categories of Gaelic speaker, from young learners to older experienced, fluent speakers of the language; for solo singers and Gaelic choirs, and for children as well as adults. As well as the song books, items of poetry have also been produced by this volunteer committee in which national leadership has combined with local volunteer effort to produce an output which is important to the preservation of Gaelic culture whilst at the same time giving real meaning to the whole concept of "partnership", with the focus of the songs and poetry produced being directly related to the culture and heritage of the particular host venue.

### 2012 Press Perspectives

In recent times An Comunn has used the services of a Press Agency which monitors coverage of all media outlets before, during and after the event. This year the cuttings show that there was 160 press and other media stories about the 2012 Mòd. Although dominated by press articles in a range of local and the most significant national newspapers - as well as the BBC - online features were also evident.

In order of significance, the ranking of the main carriers of press stories about the 2012 event was as follows.

	<b>Number of Cuttings</b>
1. The Press and Journal	20
2. The Oban Times	17
3. The Scotsman	11
4. The Stornoway Gazette	10
5. The Argyllshire Advertiser	7
6. The Dunoon Observer	6
7. The Herald	5
8. Edinburgh Papers (3)	4
9. The Cumbernauld News	4
10. Paisley Papers(3)	4
11. Lochaber News	2
12. Others	70

Few will be surprised by the high ranking of the Oban Times but some may find it surprising to see that it was beaten into first place by the Press and Journal. The high ranking of the Scotsman is encouraging whilst the Stornoway Gazette also covered the event well. In total the two main Argyll papers produced 13 individual press cuttings between them followed by the Herald with 5. Local Edinburgh and – more particularly – Paisley media outlets produced relatively few cuttings but the coverage of the Mòd in the Cumbernauld News was surprisingly high, especially when compared with that of the Lochaber News in view of Fort William's Mòd history and good reputation as a Mòd venue. We do not have access to comprehensive circulation figures but clearly the extent and spread is excellent.

The coverage was wide as well in terms of storylines but this year the combination of “localism” and “internationalism” in them was particularly relevant. That is, this year's press cuttings reflect the unique success of the Mòd. It is an event which is at one and the same time essentially local in nature whilst also being international in its appeal. For example, there are countless stories - especially in local newspapers - of local success. Like the brother and sister from Lochaber who each won junior gold medals; or the many other stories of successful local choirs, from Islay to Ross and Cromarty and many other parts of Scotland. Another local twist is the fact that Fergie McDonald's latest CD was launched at the Mòd – “As Highland as it Gets” being its entirely suitable title - which quickly sold 3000 copies. Fergie may not be internationally known but he is truly famous amongst the Gaels.

The Mòd sometimes brings localism and internationalism together in an inspiring way. Elena Piras from Sardinia, for example, was the winner of the Margaret Campbell Trophy this year, having learned Gaelic in the space of just one year. That is remarkable enough, but when one learns that she is blind and also suffered

damage to her hearing abilities as a result of the 2005 London bombings it is truly inspiring.

This “winner” might well provide a role model for Mike Russell, the Education Minister who is so supportive of the Gaelic language. Announcing another £60,000 of Scottish Government support for Gaelic education projects, he warned Gaels about the need to speak the language. “Use it or lose it” was his stark warning. This sentiment was echoed by John Macleod, the An Comunn President. “While we can build up a large bank of Gaelic speakers if they do not use the language it is of little use to us” he stated.

Against this backdrop, the “conversion” of Historic Scotland to the cause was also very pleasing. Its newly appointed Gaelic Officer was at the event in the Highland Showcase. The organisation now also has a Gaelic Plan which envisages greater use of the language through signage and print at many of its most prominent properties. This is another example for some other national organisations to follow - and this time there is no need to travel overseas to places such as Sardinia to find the necessary inspiration!

The International appeal of the Mòd is very evident in this year's press coverage of the event. Reference has already been made to the inspiring story of Elena Piras and a girl from Abu Dhabi won the poetry recitation competition in the '11/12-year-old learner' category. Also of significance is the fact that Ruairidh McLean - who comes from Broughty Ferry but moved to England and then went on to Tasmania - was named as this year's Gaelic Ambassador at the event. “His weekly Gaelic Learners newsletter has been an inspiration to countless Gaelic learners for many years” said John Morrison, the An Comunn Chief Executive. “No other Scot has the understanding of Gaelic place names of Scotland that Ruairidh possesses.”

Yet another international dimension was illustrated by the winner of the Oban Times Gold Medal. Andreas Wolff is from Berlin in Germany but after his success in Dunoon he now feels very much at home in his adopted Gaeldom. Perhaps an equally significant sign of the event's growing importance is Edinburgh's interest in hosting it in the future “because of its success and the economic benefit it brings”.

However, “localism” is always to the fore as far as this “bottom up” event is concerned. In this context, it was announced that the Mòd will return to the home and heart of Gaeldom in the Western Isles in 2016, only five years after being held there in 2011. Despite this, however, this will only be the sixth time in its 120 year history that the Mòd has been held in this most Gaelic of areas. There - and in all its host venues - it will continue to demonstrate its localism and internationalism at one and the same time in a way that does credit to both.

### Building on the Past

During recent years An Comunn and the Mòd has gone from strength to strength. There is a more justifiable confidence within the organisation as a result of both its own sound management and equally sound financial position - as well as the success of the Mòd itself during this time – and the organisation is now more than ready to build upon its recent successes.

Indeed, this led us to suggest last year that the time had perhaps come for An Comunn to think “beyond the Mòd”. In an earlier report we had also suggested that An Comunn should seek funding for two new posts: one to assist bodies like Bord na Gaidhlig to reverse the decline in the number of Gaelic speakers; and the other to research and secure new sources of funding for the organisation. In making this suggestion, we drew parallels with the Eistedfodd national event in Wales and its success in attracting funding from a variety of sources.

Our suggestion last year that An Comunn should expand its thinking and its influence beyond the organisation of the National Mòd and involvement in those held locally was accepted by the organisation to the extent that An Comunn submitted an application to Creative Scotland for funding under the “Sustainable Development” programme it had recently launched. The project put forward was built around the need to help the Provincial Mòds held each year in various parts of Scotland whilst at one and the same time strengthening the Gaelic heritage and culture as well as the Highland\*\* economy.

The local Feisean movement was enthusiastic and keen to be involved in this initiative and it was supported by Bord na Gaidhlig and Comunn na Gaidhlig as well through the respective officers we met. The evidence to support the initiative was found in a survey of local Mòd organisers which An Comunn commissioned in 2012. The findings included the following.

- Around 30 volunteers are involved in organising the local Mòd and around 10 times this number (on average) attend them. The average number of competitors is around 150 and the average local Mòd costs some £4000 to run each year.

*\*\* Most Mòds are held in the Highlands and Islands but they are also held in Lowland Scotland. Since 2004, non-Highland host venues have been Largs, Perth and Falkirk, with Paisley being the host area next year.*

- There was a real desire to see organisations in the Gaelic economy – and especially An Comunn and the Feisean movement - being more prepared to work together at a local level.
- Local Mòd organisers also wanted to strengthen the links to – and support from – An Comunn, perhaps through appointing a Provincial Mòds Officer.

**In addition, the c2000 people who attended the National Mòd in each of the last two years who had expressed a desire to improve their Gaelic language skills provided further evidence of the significant role that the Mòd has for both fluent and Gaelic learners in terms of the contribution it can make to increasing their use of the language. If this could be built upon through strengthening local Mòds it would not only help a key national Gaelic objective to be achieved but also strengthen the language in local areas within Gaelic - and even some non-Gaelic - speaking communities to the obvious benefit of the language and the heritage and culture associated with it.**

Sadly, the initial application was rejected but follow-up conversations with Creative Scotland have resulted in a decision to prepare a new application for funds which will shortly be submitted.

**These are therefore exciting times for An Comunn Gàidhealach. They could also herald a new beginning for the Gaelic movement through working together on sustainable initiatives that lead to the strengthening of the Gaelic language and its associated heritage and culture.**

## 5. SUMMARY, CONCLUSIONS AND RECOMMENDATIONS

- Summary
- Conclusions
- Recommendations

### Summary

Evaluations are important in assessing what has gone before but they can also be important in allowing those responsible for projects to build upon any lessons learned from the past in looking to the future. An Comunn has consistently done this but in recent years we have also sought to expand our work beyond the Mòd to the benefit of the event and An Comunn Gàidhealach itself.

Nevertheless, evaluation lies at the heart of our approach. It is based on field research which was this year conducted by Edinburgh Napier University. In working with the University we have adopted a new approach to interviewing which we have termed “*supervised self completion*”. This has allowed us to increase the sample size from 200 to 336 this year without any increase in costs.

We estimate that 7519 attended this year's Mòd, including almost 2700 competitors. A quarter of those attending came from Argyll & Bute (the host area) with the vast majority of the remainder coming from the rest of Scotland - although 3% came from overseas. Competitors and their friends and family represented almost 2/3 of the total number of attendees. Perhaps coincidentally, the same percentage (64%) are regular followers of the event.

On average, the length of stay of those attending the Mòd this year was 3.2 days, 2.3 of them (72%) being spent in Argyll & Bute. Some two thirds of those attending the 2012 Mòd would not have taken a holiday or leisure trip elsewhere if the event had not taken place. Average expenditure figures are also important: these were £38.48 per person for day trippers and £397.89 per person per stay for those staying overnight. Both these figures are less than those found last year in the Western Isles but this is not surprising in view of both the deteriorating economic climate and the location of the 2011 event.

**The organisation of this year's Mòd was highly rated by those interviewed, which is a credit to both An Comunn and the Local Organising Committee. In addition, the senior Argyll & Bute Performance Manager who had particular Local Authority responsibility for the event along with Councillor Dick Walsh, who is a prominent local Councillor, are also deserving of praise as far as this is concerned.**

The significant number saying that they would definitely or possibly return to the area for a leisure break (75%) is encouraging, as is the finding that there are around 2000 people who had little or no Gaelic but would like to learn, are currently learning to

speak the language, or speak Gaelic but want more opportunity to use it who attend the Mòd each year (on the evidence of this and last year's survey). Clearly there is an opportunity here in terms of meeting the key objective of stemming the decline in the number of Gaelic speakers.

Total visitor spending at the event amounted to £2,135,620 once the event staging costs of £338,761 have been added. However, the impact of the Mòd is not calculated on these gross figures as far as visitor spending is concerned. Before the impact can be assessed, the "unique" visitor number of 7519 has to be reduced to an "eligible" visitor number through excluding those staying within the host area (in respect of local impact) or in Scotland as a whole (for the national impact assessment). In addition, those coming to Argyll and Bute at the time of the Mòd - but not for the specific purposes of attending the event - also have to be excluded. When this is done the eligible visitor number is 5864. On the basis of our research we estimate that 10% were day trippers and 90% stayed overnight.

These numbers and the spend/person per stay numbers are used to assess eligible visitor spending at each of the Argyll & Bute and Scotland levels, with the same process being adopted in respect of expenditure incurred in staging the event.

According to our calculations - which relate the public sector contributions of each contributing agency to its particular local or national coverage - the returns on investment (ROIs) for each of EventScotland, Highlands and Islands Enterprise, and Argyll and Bute Council are as follows.

	ROIs
EventScotland	5 to 1
Highlands and Islands Enterprise	64 to 1
Argyll and Bute Council	8 to 1

These are excellent ROIs, although the one for Highlands and Islands Enterprise (HIE) is rather inflated by the relatively low HIE contribution compared to that of Argyll and Bute Council. That said, it was close to the £25,000 provided by EventScotland, HIE providing £20,000. **However, if the HIE, EventScotland and Argyll and Bute Council "public sector" contributions are all included at the Highlands and Islands level the ROI is still a very respectable 8 to 1. Indeed, this ratio is much more credible than the 64 to 1 produced for HIE expenditure alone.**

We have also added other measures of impact, including an assessment of Full Time Equivalent (FTE) jobs created as a result of non-displaced visitor spending at the event. These amount to 51. This figure is then used to assess the return to the Exchequer - as the ultimate provider of all public sector funds (if the taxpayer is excluded) - on the public sector investment in the 2012 Dunoon Mòd. The return in this instance is expressed in terms of the time taken to recoup the public sector contributions through tax and national insurance payments and an estimate of possible savings made in the payment of unemployment benefits. Any payback

period that is less than a year is seen as positive, the payback period in respect of the 2011 Western Isles Mòd, for example, being 5 months. The figure for Dunoon is under three months which is outstanding in conventional terms, even by private sector standards..

**The Royal National Mòd model is built from the bottom up rather than imposed from the top down. In this respect, it provides an exemplar that others in various social and economic fields would perhaps do well to follow.**

Its success is annually reflected in the press coverage of the event, and this year has been no different. The coverage was wide, some 160 press cuttings in national and local newspapers as well the BBC and online sources being produced by the Press Agency retained by An Comunn to cover the event. These cuttings demonstrate the “localism” of the Mòd in terms of participation but also in terms of media coverage, allied to the international flavour associated with some of the storylines which is in itself refreshing.

We therefore strongly believe that the time has come for An Comunn Gàidhealach to work with its sister Gaelic bodies through bringing them together in the first instance to discuss future co-operation in general and in the launching of a new initiative that will in particular strengthen the Provincial Mòds as well as Gaelic heritage, culture and language. This would be through the addition of two new An Comunn posts and the pursuit of a project that will hopefully be financially supported by Creative Scotland (and which is outlined in the previous chapter). It is on the basis of this brief summary that our conclusions and recommendations follow below.

## Conclusions

An Comunn Gàidhealach and the Royal National Mòd are success stories. This is amply reflected in our evaluation this year, as it has been in previous ones as well. But we believe the time has come for An Comunn to move beyond the Mòd: to play a full part in strengthening the language, heritage and culture of Gaeldom in a way that is wholly in line with national objectives related to seeking much-needed economic growth at the same time.

The means of achieving this through two new posts which are devoted to the development of the creative sector across its language, culture and heritage fronts have been identified, as has a particular project that will not only add to this but also help to stimulate much needed economic growth. However, significant money will be needed to develop these initiatives over the next two to five years and it is therefore to be hoped that the necessary funds can be found to allow them to proceed.

**These are initiatives of their time in terms of the way they enhance the Gaelic and broader cultural communities through bringing them together in a meaningful way in**

order to achieve benefits that are mainstream economic as well as social and cultural ones. They are initiatives that An Comunn Gàidhealach is more than capable of contributing to through sparking imaginations and volunteer efforts in association with other Gaelic and tourism organisations at a local level.

Like the Mòd itself - which these new initiatives will also enhance - they are “built from the bottom up”. In many respects, they lie at the heart of our broader conclusion that the true value and potential of An Comunn Gàidhealach is perhaps not being fully utilised for perfectly understandable reasons. An Comunn itself knows how far it has come during the past five years and we are more than aware of it as a result of the evaluation work we have carried out during that time. However, perhaps the time has come to make others aware of this progress and An Comunn’s willingness to work with others in strengthening Gaeldom and its cultural and creative sectors as a whole.

One of An Comunn’s virtues is the natural modesty of those within it. It is in our view time for a little less modesty and a little more confidence in taking the initiative within the Creative and Cultural communities in a way that will bring benefits to all, including the Gaelic language, heritage and culture as well as local economies.

**This can be achieved through working together in a way that will be wholly beneficial to various local as well as national objectives. The recommendations which follow seek to achieve this on the basis of solid foundations - many of which have already been laid. We believe these will lead to the effective delivery of a regional initiative that will make a difference to the lives of individuals through achieving cultural, heritage and economic growth.**

### Recommendations

We have six recommendations to make in bringing this evaluation to a close.

1. Accept the principle of moving forward “beyond the Mòd” and consider the options in doing so, including those suggested below.
2. At the same time, reconsider the merits of seeking funding - possibly from Creative Scotland - to allow the appointment of two Project Officers (each on a five-year basis): one would be responsible for developing the creative effort on a broad front (a Creative Development Officer); and the second would work with other agencies (a Language and Mòds Development Officer).
3. Work with Bord na Gaidhlig in seeking to use the interest in Gaelic which is evident at the Mòd; and in advancing the heritage and culture which is associated with the event and the Gaelic language throughout Scotland - ideally in a way that also benefits local economies in the process.

4. In moving forward, prepare a Press and Political Strategy for An Comunn which should guide its external relations, especially in respect of its proposed new initiatives.
5. Work up and submit applications for funding from Creative Scotland (and possibly others as appropriate) for the proposed new An Comunn posts and the creative project previously referred to whilst keeping the other Creative, Heritage and Gaelic bodies informed and supportive in the process.
6. Review progress at a senior level within An Comunn every three or four months in taking these initiatives forward in order to ensure that ongoing progress is maintained.

These recommendations bring our evaluation of the 2012 Royal National Mòd in Dunoon to a close.

## APPENDIX : The Field Survey Questionnaire

We, THE market SPECIALISTS in collaboration with Edinburgh Napier University, are undertaking a survey of visitors to this year's Mòd on behalf of An Comunn Gàidhealach. Please note that we are consultants who are not in any way involved with the organisation or running of the Mòd. Would you be willing to spare around ten minutes of your time to answer some questions about your visit to the Mòd? We ensure anonymity of your responses, so please answer the questions as honestly as possible.

1. **What is your main reason for attending the Mòd ...**

	Reason for attending
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.**

(i) How many competitors are in your party attending the event? <b>(Do not include choir members outside your immediate friends and family)</b>	
(ii) How many friends and/or family - <b>excluding competitors</b> - 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		Other large party	
Choir		Not part of a large group	

5. **Where do you live? (please choose from list given below)**

Argyll and Bute	
Elsewhere in Scotland	
Elsewhere in the UK	
Outside the UK	

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

Had not heard about it until visited the area	
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 occasionally	
Visit the annual Mòd on a regular basis	
Other (specify)	

7. **Which previous Mòds have you attended in the last 9 years?**

Western Isles 2011		Dunoon 2006	
Caithness 2010		Western Isles 2005	
Oban 2009		Perth 2004	
Falkirk 2008		Oban 2003	
Fort William 2007		None	

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

On a day trip from your home within Argyll and Bute?	
On a day trip from home outside Argyll and Bute?	
On a more general day trip, from home outside Argyll and Bute, but not specifically to visit the Mòd?	
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 Dunoon Mòd?**

One	
Two	
Three	
4+ (write in exact number)	

10. **Where are you staying?**

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

11. **How many nights will you be away from home on this trip?**

	<b>Nights</b>
Within Argyll and Bute	
Elsewhere in Scotland	
<b>Total Nights away from home</b>	

12. **What would you have done today/this week if the Mòd was not staged in Argyll and Bute?**

Had an alternative holiday/leisure trip in Argyll and Bute.	
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	

13(a) **During your visit to this year's Mòd, how much will you and your immediate party spend on the following?**

Spending at Mòd Events in Argyll and Bute (e.g. Mòd and Fringe events and related items such as souvenirs)	
Other Spending in Argyll and Bute (Accommodation, food, transport, souvenirs, etc.)	
Spending elsewhere in Scotland (Accommodation, food, transport, souvenirs, etc.)	
<b>TOTAL</b>	

13(b) **How many people does the above spending cover? \_\_\_\_\_ persons**

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

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

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) Dunoon as the Host Destination for the Mòd						
(E) Local shopping						
(F) The Wider "Town Centre" Experience in Dunoon						
(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. **If any of your answers were 'below or well below expectations, please explain why. (please give letter of the comment to which it referred)**

17. **What is the likelihood of you/your party returning to Argyll and Bute for a holiday/short break in the future?**

	Return for General Holiday
Definitely	
Possibly	
Probably Not	
Definitely Not	

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

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	

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

Not at all	
A little	
Some	
A lot	
Greatly	

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

**THANK YOU FOR YOUR HELP**