
To: Leadership Board

On: February 21, 2024

Report by: Chief Executive

Heading: Royal National Mòd 2023

1. Summary

- 1.1 This report updates Elected Members on the economic, social and cultural impact of hosting the Royal National Mòd in Paisley in 2023. The Report outlines the ways the event has contributed to promoting Gaelic language and culture in Renfrewshire and how it supports the aims and objectives of Renfrewshire's (draft) Gaelic Language Plan for 2024 – 29 and the Council's Events Strategy 2022-23. The report also provides members with information on the wider engagement programme that accompanied the event, including the school's engagement programme and Mòd Fringe programme.

2. Recommendation

- 2.1 Elected members are asked to note the social, cultural and economic impact of hosting the Royal National Mòd in Paisley in 2023 and to note the official handover to Oban on October 21st October 2023. Members are asked to also note the contribution that hosting the Mòd and pre-event engagement has made to Renfrewshire's Gaelic Language Plan commitments.

3. Background

- 3.1 In November 2016, the Director of Children's Services brought a Report to Leadership Board to recommend a Council bid to host the Royal National Mòd in 2021. The report followed the successful hosting of the Royal National Mòd in Paisley in 2013 and an independent evaluation that found there had been a significant positive impact on the local economy. The bid to stage the 2021 event received cross-party support and it was highlighted that hosting the Mòd would be a key platform for Gaelic cultural activity as part of a year of culture in 2021 and would contribute to the promotion of Paisley as

a vibrant and connected location for hosting events and festivals; make a significant contribution to the local economy and contribute to the delivery of the Council's Gaelic language plan. Members agreed to progress the bidding process and a budget commitment of £300,000 should Paisley's bid be successful and a further total budget of £12,500 per annum to be available from financial year 2017/18 up until 2021 to stage and support several Gaelic events, activities and projects in preparation for hosting the Royal National Mòd.

- 3.2 The bid was led by the Marketing and Communications service and was submitted in 2017, at which time both Paisley and Perth submitted bids to host the event in 2021. An Comunn Gàidhealach later confirmed the high quality of both bid submissions meant both Paisley and Perth would host the event, with Paisley opting to host in 2022. As a result of the Covid-19 pandemic and the cancellation of the Royal National Mòd in 2020, Paisley's host year was delayed until October 2023.
- 3.3 A Local Organising Group originally convened in 2019 and paused in 2020, was reconvened in October 2022, in a new format established by An Comunn, to support delivery of the 2023 event in Paisley. The Local Organising Group was Chaired by Angus Ferguson and attended by Provost Lorraine Cameron, Councillor John Shaw and Councillor Janis McDonald, the Director of Finance and Resources, council officers from marketing, communications and events and Childrens Services and several place partners and local Gaelic supporters. The Group were responsible specifically for the marketing and promotion of the event nationally and locally, delivery of pre-events and the Mòd Fringe, local engagement programmes – including engagement with schools, and establishing the required volunteering capacity and town readiness programme.

4. Strategic context

4.1 Gaelic Language Plan

Renfrewshire Council is committed to supporting the development of Gaelic in our organisation and in our communities. The Gaelic Language Plan 2024-2029 highlights our aims for Gaelic language, culture and education over the next five years, and considers opportunities and identifies actions that will nurture and cultivate Gaelic in line with local need. The plan supports communities to celebrate and realise the benefits that embracing Gaelic presents. Doing so will help safeguard the future of Gaelic in Renfrewshire as a language that is visible, utilised, and respected.

High-level aims presented within the plan were co-produced with the support of Bòrd na Gàidhlig. The high-level aims identify strategic actions, closely linked to the National Gaelic Language Plan 2018-23, and are framed around the three themes:

- Increasing the use of Gaelic
- Increasing the learning of Gaelic
- Promoting a positive image of Gaelic

Supporting delivery of the third high-level aim in particular, the marketing, communications and events service will continue to promote a positive image of Gaelic and progress the following actions incorporated in the Plan:

- Promote handy phrases in Gaelic through Renfrewshire's visitor website Paisley.is and on the council website.
- Continue to promote and support Fèis Phàislig activity and schools' engagement programmes.
- Provide a platform for Renfrewshire's trad musicians through the council's event programme.
- Continue to support the Gaelic choir and work with Fèis Phàislig to promote Gaelic music opportunities to our young people.
- Continue to incorporate opportunities to learn and use Gaelic within the council's event programming.

4.2 Renfrewshire Council Event Strategy 2022-23 & 2024-26

Renfrewshire Council's interim events strategy 2022/23 was produced in the context of the Covid recovery and was incorporated within Renfrewshire's Visitor Plan, with major outdoors event brands positioned as a driver of visitor numbers and spend, especially during seasonal closures and during the refurbishment of cultural assets and venues. A new events strategy is being developed for 2024-26 informed by the ambition and strategic priorities of Scotland's National Events Strategy 2024-2035.

The marketing of visitor events has been a key component of the strategy, destination marketing and the Future Paisley programme, significantly contributing to changing the reputation of Paisley nationally and securing VisitScotland and EventScotland partnerships and funding. Hosting the Royal National Mòd 2023 in Paisley formed part of the strategy to elevate the regions' connections to Gaelic culture through programming, co-design with local communities and local business engagement. It also delivered significant publicity for the region.

5. **Event hosting and delivery**

5.1 The Royal National Mòd took place in Paisley during 13-21 October 2023. The eight-day national festival was organised by An Comunn Gàidhealach, supported by Renfrewshire Council and the Local Organising Group, and featured a range of competitive disciplines, including Gaelic song, poetry, literature, drama, instrumental, Highland dancing and sport. In addition to this, the Mòd fringe events programme included activities for children and families, at venues in and around the town centre. A schools engagement programme including Mòd Academy and Stramash presented further opportunities for young people across the region to engage.

5.2 A programme of pre-engagement activity was designed and delivered over the course of twelve months in the lead up to Mòd week. A range of PR opportunities, Gaelic language events and activities were supported by Renfrewshire Council and the Local Organising Group as detailed below:

Publicity

- Handover of the Mòd flag to Paisley at The Massed Choirs event in Perth in October 2022.

- Promoted Paisley's hosting of the Mòd and benefits during World Gaelic Week in February 2023.
- Highlighted Fèis Week in July 2023 run by Fèis Phàislig.
- Roll out of shinty in select primary schools in Renfrewshire.

Sponsorship

- Category sponsorship of FilmG Gaelic Film awards 2023.
- Stage sponsor of the inaugural The Reeling Festival at Rouken Glen Park in June 2023.

Events

- The Renfrewshire Collection Concert at the Bungalow hosted by Fèis Phàislig in summer 2023.
- Hosted The Scots Language Awards 2023 at Johnstone Town Hall.
- Hosted a secret gig featuring Tideline's front man Robert Robertson at The Sneddon in September 2023.

Community Engagement/Events

- Gaelic conversation coffee mornings and an awareness raising ceilidh at The Wynd Centre.
- Renfrewshire groups Community Circus and Fèis Phàislig participated in Seachdain na Gàidhlig (World Gaelic Week) in February 2023 to further promote the use of Gaelic in our communities.

Town Readiness

As part of the Local Organising Group, council officers worked closely with Paisley First to engage with local businesses in preparation for Town Centre readiness; this included a Paisley First Open Event for local businesses, popular Gaelic phrases and language training, the provision of welcome packs and promotional information including a food and drink map, bunting, Gaelic welcome signs and coffee stencils. Three local businesses also stocked the Mòd merchandise.

5.3 Mòd Fringe programme and flagship events

- 5.31 Mòd Phàislig got underway with the Cuirm-Fosglaidh a' Mhòid 2023 (Mòd 2023 Opening Concert) at Paisley Town Hall on Friday 13th October, featuring contemporary folk act, Breabach. Other signature Fringe events included a concert celebrating the publication of The Francis Tolmie Collection, and a sold-out, closing concert with folk-electronica band Niteworks playing their only Scottish indoor venue gig of the year in the newly refurbished Paisley Town Hall.
- 5.32 Ar Cànan 's Ar Ceòl (Our Language Our Music) showcased young talent from Renfrewshire and beyond. Celtic Praise and Gaelic Church Service took place at Paisley Abbey. While other flagship events included Battle of the Bands, Literature Prize Giving, Book Launch events, The Silver Pendant Final, the Mòd Drama Final, Gold Medal Final, Combined Rural Choirs' Competition,

Traditional Gold Medal Final, Highland Art Exhibition & Prize Giving, Combined Area Choirs and the Massed Choirs closing event.

- 5.33 For the first time ever, the Mòd hosted its very own Festival Club in Paisley at the Sneddon Bar offering a variety of pop-up live music sessions programmed by the Bungalow in conjunction with the Local Organising Group. Bars around the town centre were programmed with live music as part of the festival's 'Late & Live' programme, including the Old Swan, The Keg and the Bungalow featuring 8 gigs across the festival week with lots of the festival's favourite top name musicians such as Valtos and Project Smok and local musicians such as Evelyn Laurie.
- 5.34 A full programme of children's events included a Gaelic Kids' Clubs across Renfrewshire in partnership with Erskine Arts, Lochwinnoch Arts Festival, the Tannahill Centre, and delivered in partnership with Fèis Phàislig. 20 Gaelic Kids Club sessions were delivered (10 session in Paisley, 10 elsewhere in Renfrewshire) with 182 participants. A further Gaelic Session was delivered with Gateway Intensive Support Service young individuals and another with individuals from Disability Resource Centre in the lead up to the Mòd. 5 Gaelic Bookbug sessions were delivered in partnership with Renfrewshire Libraries and Fèis Phàislig in Linwood, Glenburn, Foxbar, Ralston & Johnstone. A series of Family Ceilidhs also took place, including a multi-cultural ceilidh in the Tannahill Centre hosted by the School of African Cultures and Fèis Phàislig.
- 5.35 There was also an opportunity to connect with Gaelic outside with a Gaelic Nature Walk at Paisley's Fountain Gardens led by Alasdair Whyte and developed in partnership with community development organisation STAR Project.
- 5.36 Mòd Sporting Saturday was supported by OneRen Active Schools and the Camanachd Association and saw a selection of youth teams from across Central Scotland play alongside the main competitions for the Mòd Football Cup and Men's and Women's Shinty Cups at KGV Playing Fields in Renfrew. As part of legacy planning, OneRen purchased training kit to teach shinty to children in local schools to increase participation in the sport and were gifted a full-size set of shinty goals for future use.

5.4 Schools engagement

As part of the strategy for Mòd Phàislig, it was important to engage our learning communities to raise awareness and understanding of the Mòd and its cultural contribution to life in Scotland. There were two strands to the programme. The first, Stramash featured a series of workshops delivered by our third sector partner, Fèis Phàislig funded by Renfrewshire Council. 45 schools and around 11,000 young people participated in workshops across April and May 2023. Pupils got a 'taste' of the Mòd experience and what to expect in October with the aim of inspiring young people to engage with the wider programme at the Mòd. Workshops centred around Gaelic music, theatre/drama and cultural heritage. All schools had the opportunity to hear live

traditional music, learn some Gaelic, ask questions to the team of professional musicians. Importantly, the workshops were able to raise awareness of the Mòd and signpost to other opportunities for young people to engage with traditional music and Gaelic Culture.

The second input was Acadamaidh a Mhòid – Mòd Academy – a partnership between Renfrewshire Council and An Comunn Gàidhealach, delivered by Fèisean nan Gàidheal and funded by Bòrd na Gàidhlig and Scottish Government. All schools were given the opportunity to register interest and 16 schools participated in the programme, including the Gaelic medium department Sgoil an Iar at West Primary. The programme began in May 2023, with five tutors visiting each of the 16 primary schools every week over a six-week period. 8 schools took part in Phase 2 of the programme from August 2023. Feedback from schools highlighted that although pupils found the prescribed works for the Mòd to be challenging, learners responded positively to the vibrant nature of the workshops and the wider resources used. The children enjoyed singing in Gaelic and celebrating Scottish culture. Most children enjoyed learning the fast and upbeat Gaelic songs that had actions.

Both Stramash and Mòd Academy were delivered by practitioners who were fluent in the Gaelic language. Whenever possible, tutors delivered the session in Gaelic, with only general introductions and occasional prompts involving the use of English. Stramash reached around 11,000 learners across their 45 workshops, while Mòd Academy impacted 979 young people across 300 sessions. Both programmes have received positive feedback from schools, and the council's music service have confirmed it is the intention to embed Gaelic Medium expressive arts within the annual programme to schools.

5.5 Competitions

There were over 200 competitions throughout the event, ranging from traditional instruments like accordion, fiddle, and piping, to solo Gaelic singing, storytelling, poetry, sport, and choir competitions, which the first half of the week dedicated to children's competitions. The week attracted fluent and learner Gaelic speakers, with a host of other interested attendees. Competitions involved more than 1,600 competitors, watched by friends and family, with almost 400 day-tickets sold, and took place at multiple venues across Paisley including at Re:Hope Church, The Wynd Centre, Paisley Town Hall, The Methodist Central Hall and Paisley North Church.

5.6 Volunteers

A key component of the delivery model is the provision of local volunteers to support attendees and support event management at each of the competition venues. A target of 40 volunteers was set, based on the previous volunteer numbers at Mòd events. In total 85 people registered to volunteer at the Mòd 2023, who were supported with training in advance, and a total of 68 local people undertook volunteering during the Mòd week (excluding lead volunteers provided by the An Comunn Gàidhealach office). 1623 local volunteering hours were generated over the Mòd week.

Volunteering roles varied from Mòd merchandise volunteers, to meet and greet volunteers, assisting and providing information to the public, competitors and audiences, checking and selling tickets and wristbands, and overseeing smooth running of the competitions.

80% of volunteers agreed they would volunteer again with Renfrewshire Council events team and/or Royal National Mòd, with 20% responding maybe. Over 90% of volunteers agreed their time was well spent volunteering at the Royal National Mòd: “I enjoyed the Mòd experience and met incredibly talented people. Friendly and welcoming.” (Mòd Volunteer, 2023)

5.7 Marketing and communications support

A Scotland-wide marketing and PR campaign was delivered to encourage attendance at Mòd Phàislig and Mòd Fringe events from regular attendees, visitors and local people. In partnership with An Comunn, officers showcased the programme of events taking place across the town centre for the duration of the festival. The plan included regular PR content, paid-for advertising promoting the Mòd in the Scottish Highland and Grampians and Scottish Islands, out-of-home advertising in Glasgow and Renfrewshire including bus rears, large poster sites, digital advertising activity and social media. Our social media activity included paid-for and organic content across council, partner and Paisley.is channels targeted to reach regular Mòd attendees and inspire local people to come and experience a celebration of Gaelic culture. The team also designed and produced a range of marketing materials including the event programme, visitor handbook, digital newsletters, partner toolkits and Mòd merchandise. All marketing materials were dual language. See **Appendix 1 – Mòd 2023 Marketing Campaign** for further information.

5.8 The table below provides members with an update on the delivery of the combined programme:

Programme Strand	Attendees / participants	Highlights
Mòd Fringe Programme including Flagship events (20k Council investment)	<ul style="list-style-type: none"> Attendees: 7,630 Participants: 760 	<ul style="list-style-type: none"> Programme of 56 events and activities held across 26 local venues. 25 local (17) and national (8) cultural delivery partners. Local businesses directly engaged (music prog. / merchandise / catering): 15 Community groups directly engaged: 12 Local Performers: 88 <p>*NB: Total number of performers: 221 (not including performers involved in Flagship competition events, which is captured under competitors fig.)</p> <p>Re-furbished Paisley Town Hall inaugural festival:</p> <ul style="list-style-type: none"> Civic Reception & Opening Concert feat. Braebach attracted more than 500 attendees.

		<ul style="list-style-type: none"> • Closing Concert feat. Niteworks sold out with more than 1,000 attendees. • BBC Alba Broadcast coverage across the 9 days. <p>Families and inclusion:</p> <ul style="list-style-type: none"> • 20 Gaelic Kids' Club (4-12years) sessions delivered (10 in Paisley, 10 across Renfrewshire) with 182 participants. • 5 Gaelic Bookbug sessions delivered across Renfrewshire in partnership with Renfrewshire Libraries. • Mòd Sporting Saturday (supported by OneRen Active Schools and the Camanachd Association) saw a selection of youth teams from across Central Scotland play alongside the main competitions for the Mòd Football Cup and Mòd Men's and Women's Shinty Cups. • Gaelic sessions delivered to young individuals from Gateway Intensive Support Service and Disability Resource Centre. • Series of themed Family Ceilidhs delivered, with 452 attendees, including a multi-cultural ceilidh in the Tannahill Centre hosted by the School of African Cultures and Fèis Phàislig. • Gaelic Nature Walk co-designed with STAR project participants for Fountain Gardens. • Inclusive Gaelic / BSL workshop and performance delivered. <p>Around town offer:</p> <ul style="list-style-type: none"> • 21 music gigs delivered as part of Mòd Festival Club (13) and Late & live (8) programmed across 5 local bars to around 1,300 attendees.
Schools' engagement (£13,292 Council investment)	<ul style="list-style-type: none"> • Approx. 12,000 pupils / participants 	<ul style="list-style-type: none"> • 45 schools and around 11,000 young people participated in workshops across April and May 2023 as part of Stramash. • Mòd Academy impacted 979 young people across 300 sessions (16 schools in phase 1, 8 schools in phase 2).
Competitions	<ul style="list-style-type: none"> • Attendees: 382 (based on day tickets sold) + friends & 	<ul style="list-style-type: none"> • More than 200 competitions throughout the event including traditional instruments such as accordion, fiddle, and piping and solo Gaelic singing, storytelling, poetry, sport, and choir competitions.

	family of competitors <ul style="list-style-type: none"> Participants (competitors) : 1,600 	
Volunteers	<ul style="list-style-type: none"> 68 	<ul style="list-style-type: none"> 68 individuals volunteered over the Mòd week, this number excludes lead volunteers provided by the An Comunn Gàidhealach office. Total volunteering hours over the Mòd week were just over 1623 hours.

6. Event impacts and key findings

6.1 Economic impact

- There were an estimated 8,410 in person attendees at the Mòd in Paisley, excluding an estimated 1,509 children. The Independent evaluation survey sampling frame size was 6,901 visitors.
- Almost all Mòd participants were residents in Scotland, mainly in the Highlands, Paisley, City of Glasgow, Renfrewshire, Argyll & Bute, Western Isles, and the City of Edinburgh
- 62% of all accommodation has taken place in Paisley and Renfrewshire. 34% of accommodation expenditure took place in the City of Glasgow and 4% elsewhere in Scotland.
- 84% of expenditure was additional to Scotland and 98% additional to Paisley and Renfrewshire
- Overall, the Mòd generated around £1.6m of direct visitor expenditure in Paisley during the event.
- There was an estimated £136,000 of direct expenditure from pre and post Mòd staying visitors and organiser spend. Including pre and post stays and organiser spend, the Mòd has generated around £2.3m direct expenditure in total.
- Expenditure at the Mòd supported around 21FTE jobs through total direct expenditure after taxation.
- The Mòd created Return on Investment for Renfrewshire Council of 11:1 and of 14:1 for Bord na Gàidhlig.
- A high proportion of respondents have visited the Mòd in recent years and are likely to be regular visitors (69% of attendees surveyed attended Perth 2022 / 67% Glasgow 2019).
- 95% said the Mòd was their only or their main reason to visit Paisley.
- There was a significant reduction in the percentage staying away from home – (66% staying away one or more nights / 34% on day trip home) by comparison to Perth in 2022 (83%/17%). This had an impact on the economic impact of the 2023 Mòd. The reduction in staying visitors is due to:
 - The proximity of Paisley to Glasgow with its high numbers of Gaelic speakers
 - The ability of that group to travel to Paisley on a day trip.

- By comparison to other venues such as Perth or Inverness where an overnight stay is required for almost all participants
- Consequently, the main element of visitor expenditure – accommodation - is reduced in Paisley by comparison to other venues.

6.2 Impact on Gaelic language & culture

% Attendees surveyed that agree or strongly agree that attending the Mòd has:

- Increased my aspirations to improve my Gaelic language skills - 64%
- Inspired me to attend cultural events or activities more frequently than I normally do - 62%
- Increased my awareness of Gaelic Arts - 56%
- Increased my understanding of Gaelic Arts - 50%
- Increased my confidence in use of Gaelic in conversation - 40%
- Encouraged me to use Gaelic more often - 61%
- Enhanced my Gaelic skills - 51%
- Led me to believe more strongly that Gaelic is important to Scotland - 75%

6.3 Social impact

- 61% agreed that participation in The Mòd was beneficial to mental health.
- 67% agreed that participation in the Mòd encouraged social engagement.
- 72% agreed that the Mòd was a great way to meet friends again.

6.4 Marketing & communications reach

Hosting the Mòd generated significant coverage for Renfrewshire, Paisley and the Council:

- Marketing activities including an extensive media buy in Highlands and Islands, Glasgow City Region and Renfrewshire generated 5,092,914 opportunities to see and hear (OTSH).
- Press and PR activities generated coverage in regional and national titles and generated 49,449,988 OTSH.
- Social media activity engaged with over 55,000 Facebook users and over 7,000 Instagram users.
- A dedicated event website available at www.Mòdphaislig.com from Feb 2023-Oct 2023 had 8,310 page views, with a further 11,940 page views of event-related content at www.paisley.is in same time period.

The full event evaluation report can be found at **Appendix 2 - Glamis Consultancy, Independent Evaluation Report**, commissioned by An Comunn Gàidhealach

Implications of the Report

1. **Financial** – none
2. **HR & Organisational Development** – none

3. **Community/Council Planning** – Council Plan PLACE - working together to enhance wellbeing across communities - positioning Renfrewshire as a destination of choice, through visitor and investor marketing and major events, building on our cultural infrastructure investment and the opportunities this will bring to Renfrewshire.
 4. **Legal** – none
 5. **Property/Assets** – none
 6. **Information Technology** – none
 7. **Equality & Human Rights** – none
 8. **Health & Safety** – none
 9. **Procurement** – none
 10. **Risk** – none
 11. **Privacy Impact** – none
 12. **Cosla Policy Position** –not applicable
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pháislíg²⁰²³

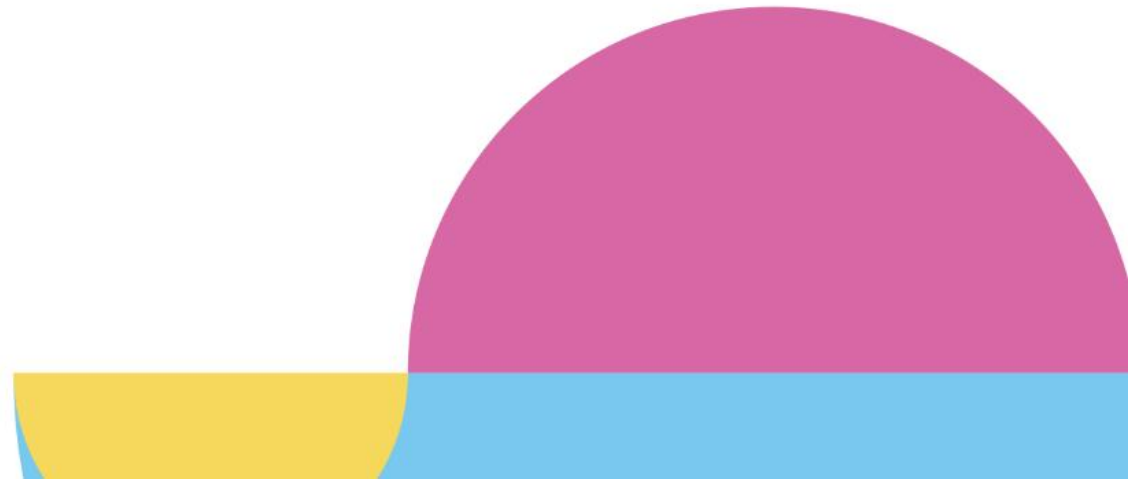
Aims & objectives

- **Promote Paisley's hosting of The Royal National Mòd and enhance its reputation as an events and visitor destination**
- **Encourage attendance at Mòd Phàislig and Mòd Fringe events from visitors and locals**
- **Provide a high-quality visitor experience with high visitor satisfaction, positive word-of-mouth and propensity to visit Paisley again**

Target audiences

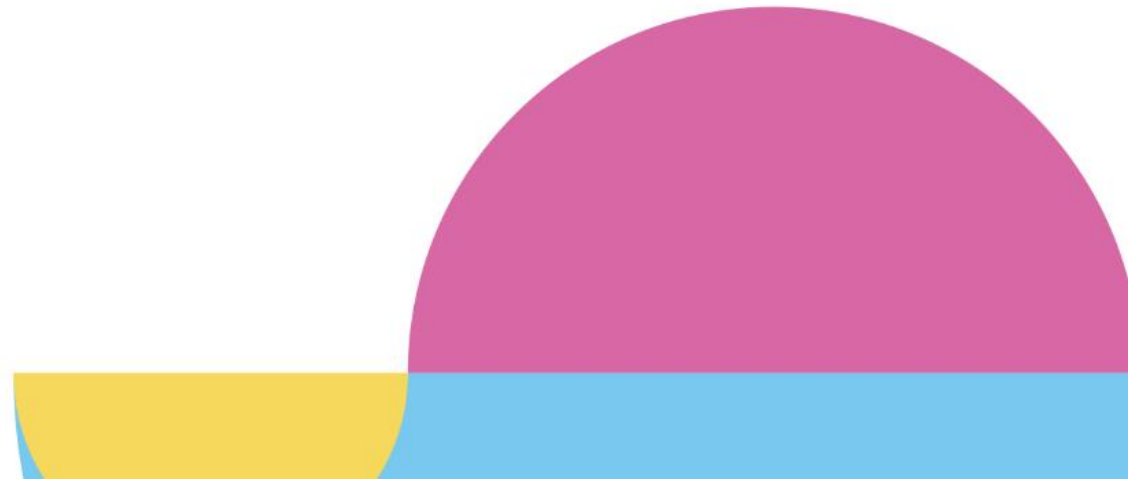
Targeting the existing Mòd audience encouraging to visit and enjoy Paisley in 2023

Target a potential local and regional (up to 1 hour travel time) audience who may enjoy Mòd and Mòd fringe events



Key activities

- Digital activity
 - Website management
 - Social media - organic and paid-for
 - Newsletters
- Media buy – portion of Renfrewshire Council's annual events promotion media buy
- Toolkit – images, artwork, copy, key messages – for all event partners and suppliers
- Media and PR activity
- Selling our place - things to see and do in Paisley and Renfrewshire
 - Visitor information and welcome materials
- Design and production - Mòd Phàislig programme
- Design and production of signage and dressing
- Merchandise - Design, production and management of pre-sales



Digital approach

www.modphaislig.org

Dedicated event website

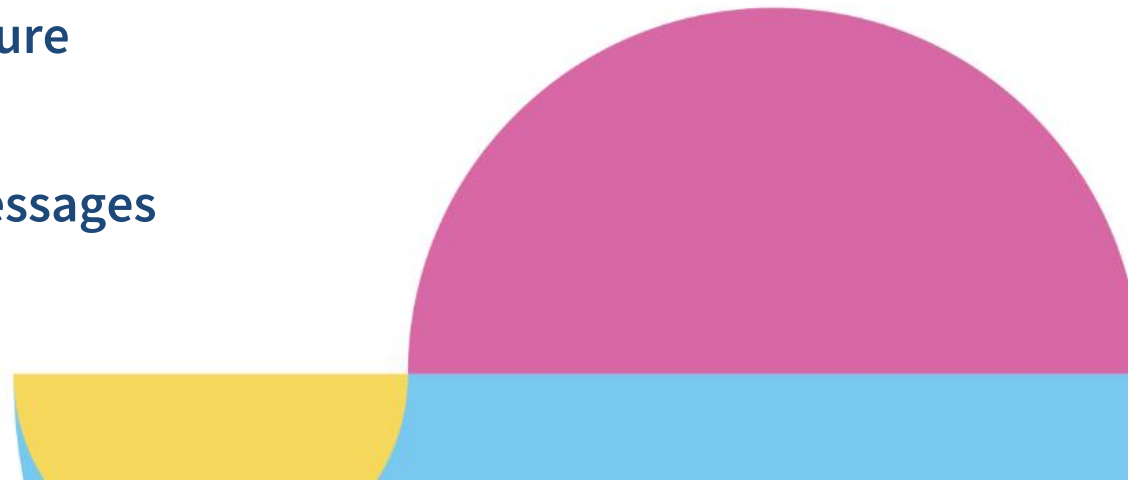
www.paisley.is/modphaislig

Renfrewshire Council's destination marketing website. Mòd Phàislig 2023 information linked to main menu and homepage

www.renfrewshire.gov.uk

Renfrewshire Council activities to promote Gaelic culture

Partner activity - URLs, partner copy, images & key messages to feature on partner websites

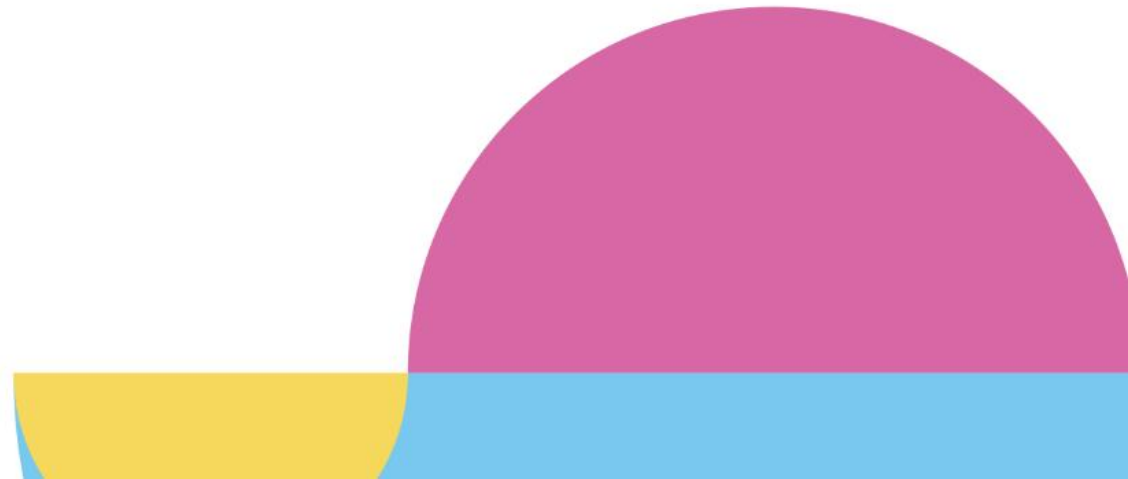


PR milestones

Promote Paisley's hosting of the Mòd with a calendar of proactive media activity

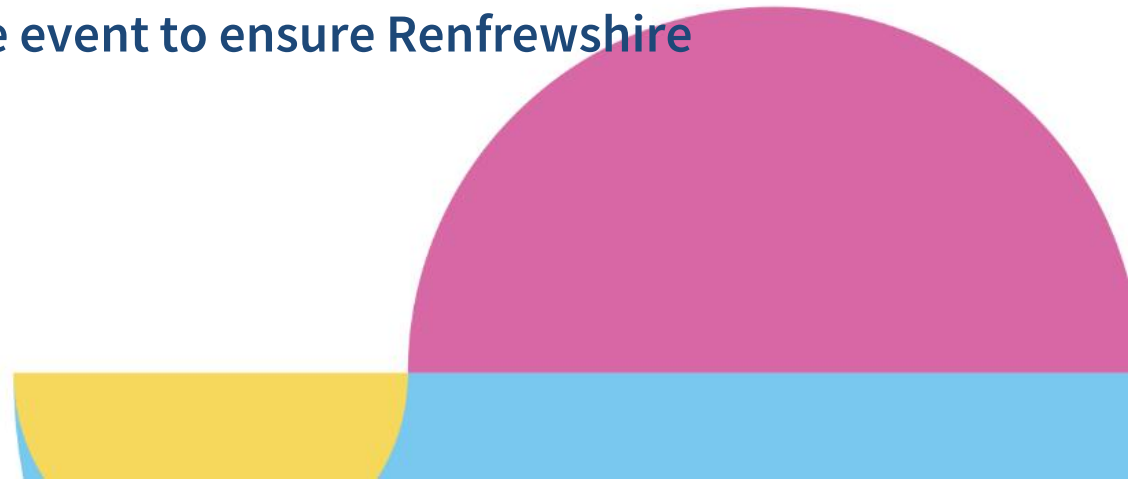
Worked collaboratively with An Commun and Innes and Campbell to support and provide comment on key event activity and communications:

- 27 January – World Gaelic Week Funding announcement
- 19 February – World Gaelic Week
- 18 July – Fèis Week activity
- 21 September – 10 things to see and do and the Mòd
- 28 September – Local Venues Late and Live programme
- 30 September – 2 weeks to go to the Mòd
- Early October – Launch of shinty in schools
- 9 October – Start of event
- 23 October – Post-event comms
- Early 2024 - Economic impact comms



Additional PR activity

- Prepared a Mòd Phàislig 2023 media pack – to include core scripts, briefs, Q&A, banked quotes from key spokespeople, Gaelic credentials, visitor offer info etc
- Created a MarComms handbook for the event which includes; key contacts, information on suitable outdoor broadcast locations, accessibility etc
- Innes & Campbell (AC Communications agency) – covered support in the media centre for the duration of Mòd Phàislig
- Key spokespeople provided for interview during the event to ensure Renfrewshire Council messaging was delivered



Media buy for Mòd Phàislig 2023

Media buy (Republic of Media)

- Regional newspaper package with MediaForce – 15x3 advert placements in Scottish Highland & Grampians and Scottish Islands titles / MPUs and digital billboards for online presence, linking to modphaislig.com. 21 August – 30 September.
- Bus rears (x21), bus interiors (x246), 4 sheets PGS and Central (x5) and D6s (x8). 2 October – 22 October.



Additional paid-for marketing activity for Mòd Phàislig 2023

The List

- Full page advert / 20K MPUs and 20K leaderboards / Social post / Newsletter inline ad. Oct 2023.

Media buy - £14,400

Top up media spend = £3,991

What's On Network

- Full network digital ad (MPU) from 11 September

FOC Media

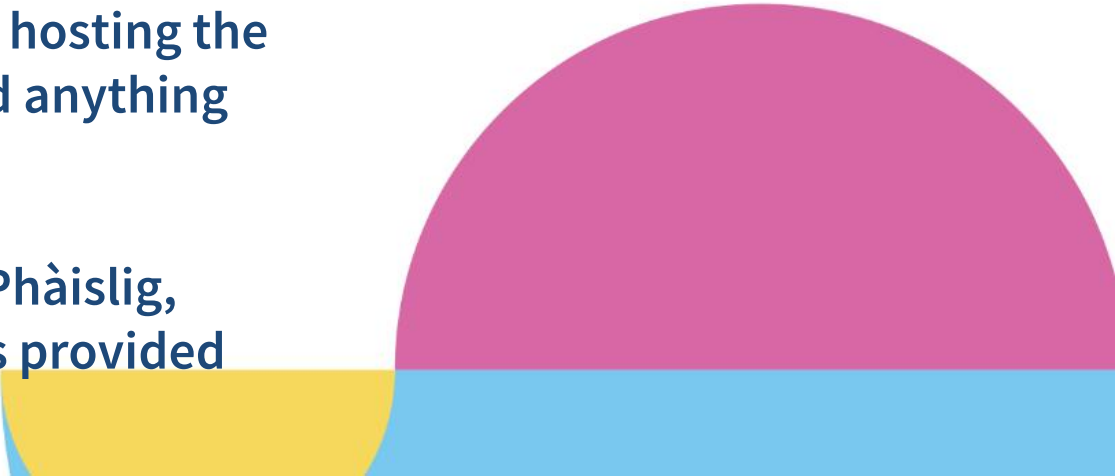
- Bespoke distribution of posters and flyers across Renfrewshire from 11 September.

The Poster Associates

- 20 x 4 sheet poster sites in Glasgow City Centre x 4 weeks coverage from 11 September



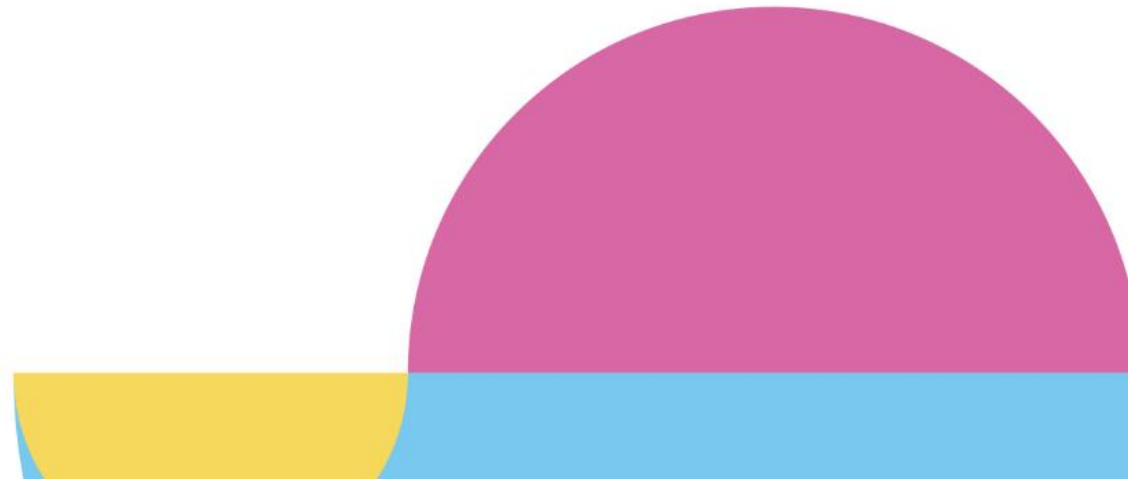
Social media approach

- Royal National Mòd - An Commun's channel
 - Renfrewshire Council – was the lead on need-to know for local residents and education in Gaelic medium across Renfrewshire
 - Paisley.is channel - lead on event information, raising awareness, ticket promotion and visitor information
 - Provost channel – content on Mòd from Provost
 - Future Paisley channel - lead on the social impact of hosting the Mòd, opportunities for community engagement, and anything Future Paisley-funded
 - Network of community partners (Paisley First, Fèis Phàislig, OneRen) and event-specific partners and supporters provided with social media assets
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Social media – organic content

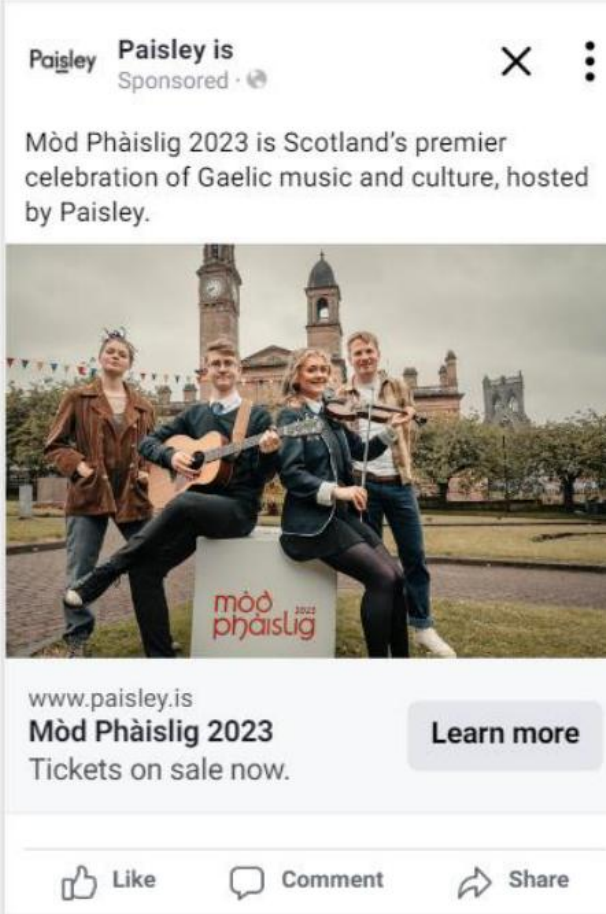
Some examples of the organic content that was created

- Quick guides – Mòd competitions, shinty, programme
- My Mòd – Meet the Pipers, Feis harpist & others
- 10 things you didn't know about the Mòd
- Practical information – travel
- 5 things not to miss
- Mòd handy phrases
- Mòd highlights – fringe programme
- Welcome to Paisley and Renfrewshire
- Mòd – Spend local spotlight
- Daily what's on
- Venue guide
- Photo galleries
- 5 things not to miss

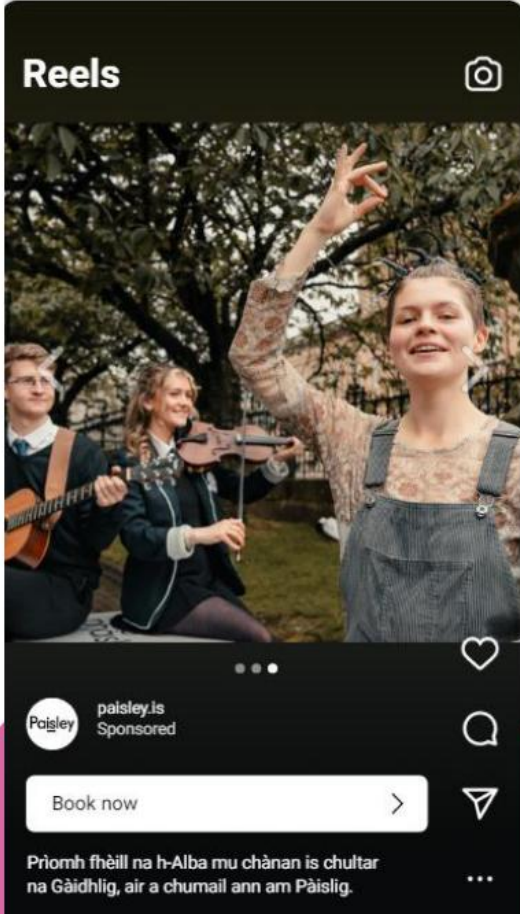


Social media – paid-for approach

- Prospecting campaigns on Facebook and Instagram delivered from 21 July – 18 September
 - 2180 landing page views, 54k accounts reach and 166k impressions delivered
 - £0.23 cost per result
- Remarketing campaign across Facebook & Instagram until 13 October
- Focused on driving traffic to **Mòd Phàislig** and pushing ticket sales to 5 ticketed events:
 - Battle of the Bands
 - Our Language Our Music
 - Frances Tolmie Collection
 - Breabach
 - Welcome to BSL by Evie Waddell
- £700 in total



A screenshot of a Facebook sponsored post. At the top, it says 'Paisley Sponsored'. The main text reads: 'Mòd Phàislig 2023 is Scotland's premier celebration of Gaelic music and culture, hosted by Paisley.' Below the text is a photograph of five young people (three women and two men) sitting on a stone wall in a park-like setting. They are dressed in traditional Scottish kilts and are playing musical instruments: a guitar, a violin, and a bagpipe. The text 'mòd phàislig 2023' is overlaid on the bottom right of the photo. Below the photo, the URL 'www.paisley.is' is shown, followed by 'Mòd Phàislig 2023' and 'Tickets on sale now.' A 'Learn more' button is positioned to the right. At the bottom, there are icons for 'Like', 'Comment', and 'Share'.



A screenshot of an Instagram Reel. The top left corner says 'Reels'. The video shows a young woman in the foreground, wearing a patterned top and denim overalls, making a peace sign. Behind her, two other young people are playing a guitar and a violin. The background is a park with trees. At the bottom of the reel, there is a 'Book now' button with a right-pointing arrow. Below the button, there is a line of Gaelic text: 'Prìomh fhèill na h-Alba mu chànan is chultar na Gàidhlig, air a chumail ann am Pàislig.' The Instagram interface elements like the heart, comment, and share icons are visible on the right side.

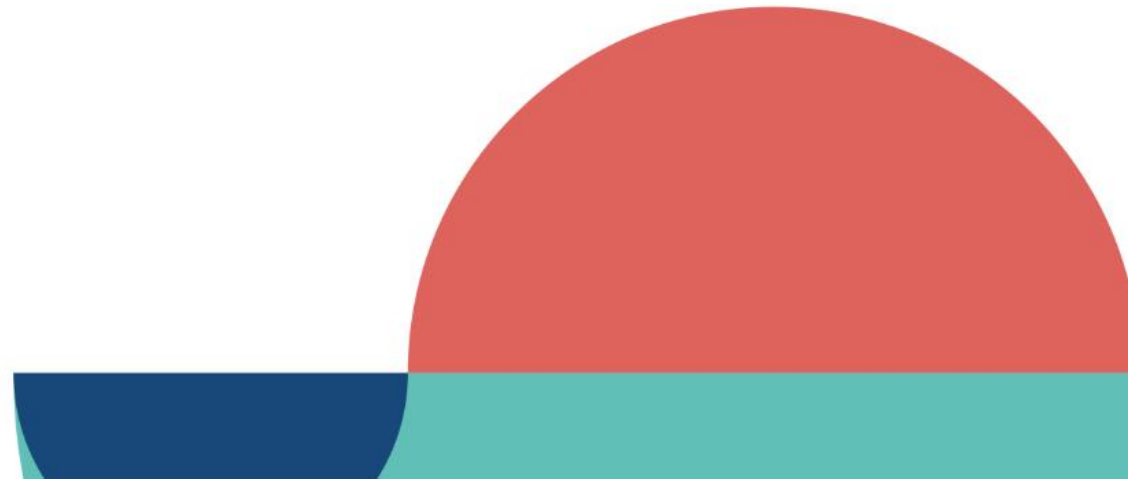
Signage

- Lamp post banners – Paisley town centre
- Venue dressing – exterior flags, pull up banners, digital signage, larger banner displays, pavement stencils, banners
- Branding assets – BBC and partners
- Business engagement – bunting, open/closed signs, toilet signs, coffee stencils. Awaiting costs from supplier for LOG consideration.



Additional activity

- Programme distribution
 - Paisley venues and Glasgow
 - Paisley First – Food and Drink map
- Paisley.is – visitor handbook
 - Distributed to all accommodation providers
 - Venues
 - Local hospitality
- Newsletter content
 - Paisley Town Centre
 - Schools and Nurseries
 - What's On – October
 - Elected members
 - AC newsletters
- Mòd merchandise
 - Pre-sales closed
 - Available during the week at Methodist
- Key competitor information
 - Email to competitors – getting here, travel information, useful links – Food and Drink map, What's On, merchandise etc
- Partner activity - Paisley First, OneRen and Glasgow City Region
- Paisley First – Business engagement



Evaluation

- **Marketing & media buy**

- outdoor impacts
- print circulation
- clicks to website
- digital impressions

- Rail 4 sheets – Regional stations; Print – Herald Mag, Daily Record, Glasgow Times; Digital – InVibes, Herald/Evening Times

- **Press & PR OTSH**
49,449,998

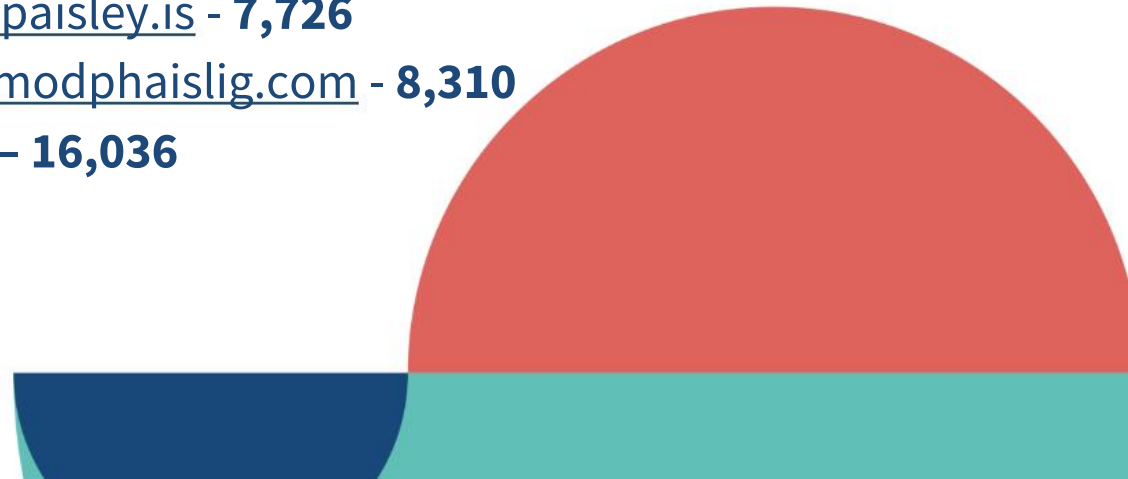
- **Social media (Paisley.is and Renfrewshire Council support)**

Paisley.is lead

- Reach: **195,447**
- Engagement: **8,519**
- Renfrewshire Council support
Reach:
- Engagement:

- **Website page views**

- www.paisley.is - **7,726**
- www.modphaislig.com - **8,310**
- **Total – 16,036**





AN COMUNN GÀIDHEALACH



AM MÒD NÀISEANTA RÌOGHAIL 2023, PÀISLIG 2023 - MEASADH

THE 2023 ROYAL NATIONAL MÒD, PAISLEY - EVALUATION

DECEMBER 2023



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Executive Summary

1. Introduction

On behalf of An Comunn Gaidhealach (An Comunn), The Glamis Consultancy Ltd has undertaken an evaluation of the 2023 Royal National Mòd held in Paisley at a range of venues and via the online programme of competitions and events (hereinafter referred to as the “online programme”) The main findings are as follows:

1. The 2023 Royal National Mòd has had a strong beneficial impact on Gaelic culture and arts and has created significant economic benefit for Paisley and the Renfrewshire area.
2. There were an estimated 8,910 “in person” attendees at the Mòd in Paisley excluding an estimated 1,509 children.
3. The sampling frame size was 6,901 visitors
4. Almost all Mòd participants were residents in Scotland, mainly in the Highlands, Paisley, City of Glasgow, Renfrewshire, Argyll & Bute, Western Isles, and the City of Edinburgh.
5. Around 95% of Mòd participants visited Paisley as their sole way of taking part in the Mòd.
6. 4% of respondents visited the Mòd both in person and via the online programme.
7. None of the Mòd audience members participated via the online programme only.
8. There was a lower proportion of all visitors staying overnight by comparison with the previous event in Perth in 2022

2. Economic Impact from Staying Visitors

An estimate of the economic impact was undertaken based on visitors attending the 2023 Royal National Mòd in Paisley in person.

1. There was a 12% increase in participant numbers by comparison with Perth in 2022.
2. The estimated total direct expenditure from attendees at the Royal National Mòd was around £1.7m
3. A further £136k was spent by visitors staying in Paisley prior to and following the Mòd.
4. There was an estimated £1.7m of direct expenditure from Mòd visitors including those who stayed before and following the event.
5. There was an estimated £557k of organiser expenditure.
6. Estimated total direct expenditure was around £2.3m including pre/post visits and organiser spend.
7. 62% of all accommodation has taken place in Paisley and Renfrewshire
8. 34% of accommodation expenditure took place in the City of Glasgow and 4% elsewhere in Scotland.
9. 84% of expenditure was additional to Scotland and 98% additional to Paisley and Renfrewshire

10. The multiplier impact of the Royal National Mòd means that the Direct and Type I expenditure generated by the Mòd was £1.65m after taking taxation impact into account.
11. This expenditure supported around 27 FTE jobs after Type I multiplier impact is considered.
12. The Mòd created Return on Investment for Renfrewshire Council of 11:1 and of 14:1 for Bord na Gàidhlig.
13. Based on additional value created by the Mòd for Scotland, the RoI for Event Scotland is estimated to be 73:1
14. The Mòd created £390k of potential future visitor spend from returning visitors to Paisley.

4. Impact of The Online programme

An Comunn continued to offer an “online programme” In 2023. The findings in relation to the online programme were as follows:

1. Usage was significantly lower than in 2022 - no respondents used the online programme solely whilst 4% used the online programme and also attended in person.
2. 6% of online programme users participated as performers – fewer than 1% of all performers.
3. The online programme was positively regarded by users.
4. 65% of online programme users indicated that they would have participated in the Mòd if they had not done so via the online programme.
5. The online programme, whilst still of limited use, did not fulfil the same importance as a performance route as it did in previous years.
6. If there had been no online programme, 44% of online participants would not have taken part in the Mòd at all whilst 56% would have competed in Paisley.
7. Whilst the actual number of users of the online programme is now very small, it still plays an important role for those Mòd participants who made use of it.

5. Cultural Impact of the 2023 Mòd

The 2023 Royal National Mòd in Paisley has had the following overall impacts:

1. Participant numbers increased by 12% compared with 2022
2. There are high levels of visitor satisfaction overall with both the Mòd itself and Paisley.
3. The Mòd continues to have a highly positive cultural impact. It has:
 - Stimulated interest in Gaelic language, arts, and culture
 - Had a positive impact on mental health.
 - Stimulated a high level of demand to attend Oban in 2024
 - Created a high level of recommendation.
4. An Comunn were highly regarded by participants for their efforts.

1. Introduction

In August 2023, The Glamis Consultancy was commissioned by An Comunn Gàidhealach (The Highland Association – An Comunn) to undertake a social, cultural, and economic evaluation of The Royal National Mòd (hereafter referred to as the Mòd) which was held in Paisley and via an online programme in October 2023.

The Royal National Mòd is the biggest Gaelic cultural festival staged in Scotland with a history dating back to 1892. The Mòd has a varied and broad schedule of events which includes dancing, music, sport, literature, and drama. The main Mòd events run concurrently with the Mòd Fringe, a programme of non-competitive events covering main Gaelic artforms.

The main aims of An Comunn are to support and develop all aspects of the Gaelic language, culture, history, and heritage at local, national, and international levels. As a result, the Mòd forms a central component of their ongoing efforts.

2023 once again witnessed a full-scale Mòd event. Nevertheless, aspects of the online programme were retained for 2023. An assessment of the impact of the Mòd is set out in the remainder of this report.

2. Terms of Reference

The study terms of reference reflected those for previous Mòd events namely, to undertake an evaluation of the 2023 Royal National Mòd held in Paisley from Friday October 8th to Saturday October 16th, 2023, together with assessment of the impact of the Online programme.

3. Methodology

In 2023 the evaluation methodology successfully employed an online survey.

3.1. Advantages of an Online Survey Approach

There are many reasons why an online survey approach was preferred for 2023. These are:

- It is retrospective - respondents have already attended the Mòd so they can reflect upon their entire experience rather than having to estimate halfway through their visit as would be required in a face-to-face survey at the Mòd.
- More detailed questions are possible because the survey completion time can be longer.
- They can respond in their own time from the comfort of their own home.
- It was possible to include users of the online programme – a face to face survey at the Mòd would have missed those who took part only via the online programme.
- It was anticipated that with the “in person” attendance likely to be higher than in previous years, a representative response would again be achievable.

The sampling frame is made up of:

- Mòd visitors who have left their contact details with An Comunn through online booking and other captured data.
- Those who made ticket purchases at the Paisley venues i.e. mainly “walk up” spectators who visit the Mòd without preplanning.
- Media, sponsors and other supporters for whom An Comunn holds contact details.

3.2. Achieving a Representative Sample

By again using an online survey, it was hoped that the following representative sample could be achieved:

- 99% confidence level
- 10% margin of error

Audience analysis from An Comunn indicated that the total audience size was estimated to be 8,910 of whom 500 were duplicates and 1,509 were children. The deduplicated sampling frame was 8,410 which was comprised of an estimated 6,901 unique participants. Invitations to participate were distributed via an email composed by The Glamis Consultancy and distributed to contacts via An Comunn with reminder emails sent and a prize draw incentive included within the survey.

To achieve the anticipated levels of confidence required 170 responses. The survey achieved 317 responses which represents:

- 99% confidence level
- 7% margin of error

This response level means that the survey data gathered was representative of the totality of the Mòd audience and exceeded the target margin of error.

4. Participant Profile

In this section the profile of the Mòd audience was analysed.

4.1. Age Profile

The average number of people in each age group attending the Mòd in Paisley in person is shown in Table 4.1.

Age Range	Average Number of People
55 – 64 years	5.0
65 – 74 years	4.4
45 – 54 years	4.2
35 – 44 years	4.2
27 – 34 years	4.1
18 – 26 years	3.3
8 – 17 years	2.6
75+ years	2.4
Aged 7 or under	1.1

Table 4.1 shows that, as in previous years, the age profile of the Mòd is balanced mainly towards adults in the over 27-year-old categories.

4.2. Country of Residence

The main country of residence was predominantly Scotland (Table 4.2).

Scotland	98%
Other	2%

The “other” countries specified were all “United Kingdom” for reasons unclear given that all choices were those countries which comprise the United Kingdom. Nevertheless, around 95% - 98% of all respondents are resident in Scotland.

4.3. Place of Residence in Scotland

The usual place of residence of those participants in Scotland is shown in Table 4.3.

TABLE 4.3 PLACE OF RESIDENCE IN SCOTLAND	
Highland	16%
Glasgow City	12%
Argyll & Bute	12%
Eilean Siar	11%
Renfrewshire	11%
Edinburgh City	8%
East Dunbartonshire	3%
Perth & Kinross	3%
North Lanarkshire	3%
Fife	2%
North Ayrshire	2%
Stirling	2%
Aberdeenshire	2%
Dundee City	2%
East Renfrewshire	1%
Midlothian	1%
South Lanarkshire	1%
Aberdeen City	1%
Angus	1%
East Ayrshire	1%
Falkirk	1%
Inverclyde	1%
Moray	1%
West Dunbartonshire	1%

Most respondents are resident in areas with highest Gaelic speaking populations or more rural areas where the Gaelic language and culture are strongest. The exception is Renfrewshire which is the host community where only 1% of participants resided in 2022.

4.4. Gender

Respondents were invited to indicate their gender (Table 4.4).

TABLE 4.4 GENDER OF RESPONDENTS	
Female	71%
Male	27%
Prefer not to say	2%
Other	1%

4.5. Gaelic Language Skills

Respondents were invited to indicate what they thought of their own level of Gaelic language skills (Table 4.5).

Level of Gaelic Language Skills	Percentage
Some / limited knowledge of the Gaelic language	38%
Fluent Gaelic speaker	26%
Learner	23%
Don't speak Gaelic	10%
Enthusiast / Novice	3%

Table 4.5 indicates that most participants are in the “non fluent” wider category but 64% are fluent or have some knowledge of Gaelic. Most participants are in the “non fluent” wider category with around a quarter being learners or enthusiasts.

4.6. Attendance at Previous Mòd

Respondents were asked to indicate which, if any, Mòd events they had attended in the past (Table 4.6).

Perth 2022	69%
Glasgow 2019	67%
Dunoon 2018	52%
Fort William 2017	51%
Oban 2015	47%
Inverness 2014	42%
Inverness 2021	40%
Western Isles 2016	40%
Paisley 2013	40%
Oban 2009	38%
Dunoon 2012	36%
Fort William 2007	35%
Western Isles 2011	33%
Falkirk 2008	31%
Dunoon 2006	29%
Caithness 2010	28%
Western Isles 2005	28%
None	15%

As in previous years, a high proportion of respondents have visited the Mòd in recent years and are likely to be regular visitors.

4.7. Performance at Previous Mòds

All respondents were asked if they had competed at previous Mòds (Table 4.7)

Yes	67%
No	33%

Over two thirds of respondents indicated that they had competed at previous Mòds.

4.8. Finding Out About the Mòd

Respondents were asked how they found out about the Mòd (Table 4.8).

I had always known about the Royal National Mòd	61%
Previous visit to the Royal National Mòd	46%
Mòd competition online programme	35%
Social media	35%
Word of mouth	28%
Website	27%
Mòd competition printed programme	25%
Mòd fringe online programme	17%
Other (please specify)	15%
Mòd fringe printed programme	11%
TV coverage/advertising	10%
Radio coverage/advertising	9%
Social media advertising	8%
Newspaper / magazine coverage / advertising	6%
Education Experience/Opportunity	3%
An Comunn Twitter Account	3%
Information at accommodation or attraction	1%
I was passing by	1%
Visitor Information Centre	0%

Unsurprisingly given the level of previous visits, most respondents have always known about the Mòd. Amongst those who said that their main source of information was a website, the most popular website was the An Comunn website with 68% using it as their main way of finding out about the Mòd (Table 4.9).

TABLE 4.9
WEBSITES USED

An Comunn website (www.ancomunn.co.uk)	68%
Paisley Local Committee Website (www.modphaislig.com)	17%
Paisley.is	8%
Other (please specify)	6%
VisitScotland.com	0%

By comparison to 2022 use of the local committee website increased by 15% whilst use of the An Comunn website decreased by 15%. Use of Paisley.is represented a 3% increase over the comparator local authority website in 2022.

4.9. In Person or Online Visitors

Respondents were also asked about ways in which they participated in the Mòd (Table 4.10).

TABLE 4.10
PARTICIPATION AT THE MÒD IN PAISLEY

In person at a specific Paisley Mòd venue	95%
Both in person and via the online competitions	4%
Via the online competitions only	0%

Most respondents indicated that they had participated through attendance in person in Paisley only, whilst 4% indicated that they had also used the online programme in addition to visiting Paisley in person. No respondents indicated that they participated via the online programme only.

4.10. Further Analysis

These responses were then used as the basis of further detailed analysis. In subsequent sections the following have been assessed:

- Opinions of those who visited Paisley.
- The economic impact of those who visited Paisley.
- The opinions of participants using the online programme

For subsequent analysis, the total audience was disaggregated into two broad categories:

- “In Person” visitors to the Mòd in Paisley (including some who may also have used the online programme)
- Participants who used the online programme to participate in the Mòd.

5. “In Person” Visitors to Paisley

Overall, 99% of respondents indicated that they had visited Paisley at some point during the Mòd either as a staying or non-staying visitor.

5.1. Reason to Visit Paisley

For a very high number of respondents, the Mòd was their only or their main reason to visit Paisley (Table 5.1).

The Mòd was my only reason for the visit	85%
The Mòd was the main reason for the visit	10%
The Mòd was one of a number of reasons for the visit	4%
The Mòd had no influence on the decision to visit	2%

5.2. Main Reason for Attending the Mòd

Taking part in competitions or performing were the main reasons for attending the Mòd. By comparison to previous years, friends and family, spectators and other groups have increased following the ending of Covid-19 restrictions. (Table 5.2).

Competitor	51%
Friend or Family of Competitor	21%
Spectator	11%
Other (please specify)	6%
Volunteer	5%
Organiser	3%
Performer/Artiste	2%
Delegate	1%
Media representative	0%
Sponsor / VIP	0%

5.3. Days in Attendance

Respondents were asked which days they attended the Mòd in person (Table 5.3).

TABLE 5.3
DAYS ATTENDED

Friday 13th October	16%
Saturday 14th October	21%
Sunday 15th October	10%
Monday 16th October	27%
Tuesday 17th October	38%
Wednesday 18th October	41%
Thursday 19th October	54%
Friday 20th October	62%
Saturday 21st October	37%

The days with the highest attendance were Thursday and Friday, 19th and 20th October with Friday 20th October being the day of highest overall attendance.

5.4. Main Method of Buying Tickets

Respondents were asked about their main way of buying tickets for the Mòd (Table 5.4).

TABLE 5.4
TICKET PURCHASES

Online (in advance of the event)	37%
At venue(s) during the event	37%
Did not buy/book any tickets	28%
Other (please specify)	5%
At venue in advance of the event	4%
Telephone (in advance of the event)	0%
By post (in advance of the event)	0%

It is clear that the advance purchase of tickets by post and telephone has reduced to zero whilst online advance sales have increased from previous years. Many respondents did not buy tickets, probably because they were part of a choir and had their tickets bought by other people.

Most respondents in the 5% “other” category indicated that they were part of a choir and so did not themselves buy tickets. This is borne out by the finding that for most competitors, they were participating as part of a choir (Table 5.5).

TABLE 5.5.
“OTHER” CATEGORY OF TICKET PURCHASES

Choir	76%
Soloist	14%
Other (please specify)	7%
School Group	2%
Other Performing Group	1%

5.5. Staying or Non-Staying Visitor

To inform the economic impact assessment it was essential to ascertain what percentage of visitors to Paisley were staying overnight or on a day trip from home (Table 5.6)

	Perth 2022	Paisley 2023
Staying away from home for one or more nights	83%	66%
On a day trip from home	17%	34%

Table 5.6 shows that there was a significant reduction in the percentage staying away from home by comparison to Perth in 2022. This had an impact on the economic impact of the 2023 Mòd as will be shown in Section 6. The reduction in staying visitors is due to:

- The proximity of Paisley to Glasgow with its high numbers of Gaelic speakers
- The ability of that group to travel to Paisley on a day trip.
- By comparison to other venues such as Perth or Inverness where an overnight stay is required for almost all participants
- Consequently, the main element of visitor expenditure – accommodation - is reduced in Paisley by comparison to other venues.

5.6. Locations of Staying Visitor Nights

To estimate how much leakage in accommodation spend has accrued to Paisley and Renfrewshire, it was also essential to ascertain where those staying away from home stayed (Table 5.8).

Elsewhere in Renfrewshire (All other PA postcodes)	46%
City of Glasgow (G postcode)	34%
Paisley Town Centre (PA1 postcode)	16%
Elsewhere in Scotland	4%
Elsewhere in UK	0%

It was apparent that a high percentage of staying visitors (62%) stayed in Paisley and Renfrewshire but that 38% of staying visitor nights took place in the Glasgow area or elsewhere in Scotland. This means that 38% of accommodation expenditure has “leaked” from the Paisley and Renfrewshire area to other local authority areas.

5.7. Types of Accommodation Used

Most staying visitors, (73%) used hotels, In total, 75% of respondents used serviced accommodation whilst 13% used rented accommodation including short term lets. Around 14% stayed with Friends and Relatives, a 12% increase on 2022, which may reflect strong family and friends’ networks within the Glasgow and Paisley areas (Table 5.9)

TABLE 5.9
TYPES OF ACCOMMODATION USED

Hotel	73%
Staying with friends / relatives	14%
Rented apartment / house (e.g., via Airbnb)	11%
Rented apartment / house	2%
Guest House	1%
Other (please specify)	1%
B&B	1%
Hostel	0%
Tent / Motorhome	0%

5.8. Average Time Spent Away from Home

The average time spent away from home at the Mòd in 2023 was 3.6 nights. Non staying visitors attended the Mòd on an average of 2.89 days.

5.9. Activities Undertaken Whilst Visiting the Mòd

What do Mòd visitors do during their visit? Table 5.10 gives insight into their activities.

TABLE 5.10
ACTIVITIES UNDERTAKEN BY MÒD VISITORS

	Most days	Some days	Only once	None
Attending paid for Mòd Performances	17%	29%	34%	20%
Attending free Mòd Performances	12%	19%	29%	40%
Attending paid Mòd Fringe events	3%	15%	18%	64%
Eating out in the Paisley area	23%	31%	32%	14%
Visiting pubs and bars in the Paisley area	15%	22%	23%	41%
Shopping in the Paisley area	6%	19%	26%	49%
Visiting attractions and/or places of interest in the Paisley area	2%	15%	17%	65%
Visiting other areas in Paisley and Renfrewshire	1%	9%	10%	79%
Attending free Mòd Fringe events	3%	13%	14%	68%
Attending the Mòd Festival Club	1%	5%	12%	80%
Attending Late N Live sessions	1%	3%	4%	90%

Unsurprisingly, visitors mainly attended Mòd events and activities and are much less likely to visit attractions or places of interest. However, around a fifth say that they did not attend paid for Mòd Performances. They regularly eat out and use the cafes, bars, and pubs although shopping is not a frequent activity.

5.10. Number of Events Participated

Table 5.11 indicates that paid for Mòd events were the most popular events but that fringe events were also important.

TABLE 5.11 AVERAGE NUMBER OF EVENTS PARTICIPATED IN	
Answer Choices	Average Number
Number of paid for Mòd events and/or competitions (excluding Fringe events)	3.1
Number of free Mòd events (excluding Fringe events)	1.3
Number of paid Mòd Fringe events	0.7
Number of free Mòd Fringe events	0.8

5.11. Expectations of the Mòd in 2023

How well did An Comunn and the host community do in organising the Mòd in 2023? Respondents were asked to give their views on how the Mòd had matched up to their expectations prior to their visit (Table 5.12).

TABLE 5.12 EXPECTATION AND REALITY					
	Well Above Expectations	Above Expectations	Matched Expectations	Below Expectations	Well Below Expectations
Organisation of the Mòd	13%	25%	54%	6%	3%
Mòd Competition Venues	18%	38%	39%	4%	1%
Mòd Fringe Events	12%	19%	52%	12%	5%
Information on the Mòd	10%	22%	57%	9%	2%
Paisley as the Host Destination for the Mòd	18%	29%	39%	7%	7%
Atmosphere of the Mòd	15%	30%	35%	13%	7%

Overall, the Mòd generally matched, was above or well above the expectations of visitors who went to Paisley. As the host destination, Paisley generally exceeded expectations. This was investigated in a more detailed question about the host town.

5.12. Expectations of the 2023 Host Town

Respondents were asked to give their views on how the host city of Paisley had matched up to their expectations prior to their visit (Table 5.13).

TABLE 5.13
COMPARISON WITH EXPECTATIONS OF PAISLEY

	Well Above Expectations	Above Expectations	Matched Expectations	Below Expectations	Well Below Expectations
Local shopping	1%	13%	62%	17%	6%
The Wider “Town Centre” Experience in Paisley	6%	19%	49%	20%	6%
Local Restaurants and Cafes	4%	33%	49%	11%	3%
Local Pubs and Bars	3%	19%	59%	16%	2%
Your Overnight Accommodation	8%	24%	57%	8%	4%
The Buzz and Overall Ambience of Paisley	8%	21%	42%	16%	13%
Visitor Attractions	6%	17%	61%	11%	5%
Cleanliness	5%	25%	62%	6%	2%

Overall, Paisley generally matched or exceeded expectations for most visitors to the Mòd but there were a few aspects which may have been slightly below expectations – mainly due to the lack of “buzz” which may have been expected and which may be lacking to a degree because of the general impact of various factors on the overall visitor market in 2023.

5.13. Opinions on the Mòd Fringe

Although not solely organised by An Comunn, the Mòd Fringe is an integral part of the overall event experience. Respondents were asked to give their views on the 2023 Fringe by comparison to that of previous years (Table 5.14).

TABLE 5.14
COMPARISON OF THE 2023 MÒD FRINGE WITH OTHERS ATTENDED IN THE PAST

N / A – never been to Mòd Fringe event before	51%
About the same	22%
Better	11%
Not as good	11%
Much less good	5%
Much better	2%

Just over half of respondents indicated that they had not been to a Fringe. Within the roughly half who were able to compare with past events, the Fringe was regarded by 35% as being similar or much better to previous years although 16% indicated that it was less or much less good.

5.14. Future Visits to Paisley

In person visitors to Paisley were asked how likely they were to visit the City of Paisley for a future leisure visit (Table 5.15).

Unlikely	31%
Likely	26%
Neither Likely nor unlikely	18%
Highly Likely	16%
Highly unlikely	9%

These findings indicate that there is a 42% likelihood that Mòd participants will return to Paisley in future on a future leisure visit. However the propensity to return in future was not as marked as it was in Inverness in 2021 or Perth in 2022.

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6. Economic Impact Assessment

6.1. Introduction

In this section of the report we undertake an assessment of economic impact, employment impact and return on investment created by the hosting of the Royal National Mòd in Paisley.

The economic impact of an event has been defined as *"the net economic change in a host community that results from spending attributed to a sports event or facility"*.¹

The key elements of economic impact are:

- Visitor Spend
- Organiser Spend
- Multiplier Impact

This study aimed to ascertain the levels of expenditure at the Mòd and to assess the economic and employment impact of the event. The following sections set out our findings in more detail.

6.2. Analysis Base

In the next three subsections we set out the baseline from which the economic impact assessment is undertaken.

6.2.1. Attendance Numbers

Analysis of An Comunn figures indicated that attendance numbers increased slightly on those for Perth in 2022. Based on data from An Comunn, it is estimated that the actual attendance numbers were as follows:

- Total attendance 9,551
- Attendance less duplications 8,410
- An estimated 1,509 children

There were an estimated 6,901 "In Person" attendees who have been used as the sampling frame for the economic impact analysis.

6.2.2. Online Programme Impact on Economic Impact

The online programme allowed participation from home for a small number who did not wish to visit in person and therefore did not spend anything in Paisley. Those participants have not been included in estimates of the economic impact of the Mòd.

6.3. Defining the "Host Economy"

The starting point for calculating the direct economic impact attributable to an event is to formally establish the geographical area i.e. the Host Economy. In this case, it is appropriate

¹ "Conducting economic impact studies of recreation and parks special events" Douglas M. Turco, Craig W. Kelsey. National Recreation and Park Association, c1992.

to define the “host economy” as the Royal Burgh of Paisley and, for some of the analysis, the wider Renfrewshire Council local authority area.

6.4. Direct Expenditure and Multiplier Effects

Direct Economic Impact measures the ‘first round’ of spending, i.e. direct transactions between those outside the host economy and those inside the host economy – for example between a visitor and the owner of a local restaurant or accommodation establishment. Multiplier analysis can then be used to estimate the impact of the event on further levels of the economy and on employment.

6.5. Estimating Direct Expenditure

Direct expenditure is the amount of money spent directly in the host economy because of staging the Royal National Mòd in Paisley. Estimating levels of direct expenditure requires information on:

- Number of participants
- Expenditure per person
- Average length of stay

Participation and audience data was obtained from An Comunn or by incorporating appropriate questions into the survey questionnaire. Direct expenditure also accrues from organiser spend in the local area and this information has been derived from information made available from An Comunn.

6.5.1. Staying or Non-Staying Visitors

A significant number of respondents were staying away from home for one or more nights (Table 6.1)

Staying away from home for one or more nights	66%
On a day trip from home	34%

6.6. Length of Stay of Staying Visitors

By incorporating suitable questions into the visitor survey it was estimated that the average length of stay was 3.6 nights for those staying overnight during their visit to the Mòd.

6.7. Expenditure Analysis

The Scottish Tourism Multiplier Study ² undertaken in 1992 by the Scottish Office, Scottish Enterprise and HIE identified several expenditure categories to be taken into consideration when assessing the economic impact of tourism projects and events. These categories were adopted for this study and are as follows:

² Scottish Tourism Multiplier Study 1992, ESU Research paper No. 31 January 1993

- Accommodation (Staying visitors, excluding VFR)
- Eating and drinking in cafes, pubs & restaurants
- Shopping
- Entertainment excluding Mòd events (including visits to attractions, events & tours)
- Travel & transport to and around Paisley (including parking, fares & fuel)

6.7.1. Staying Visitor Expenditure

By incorporating appropriate expenditure questions in the survey and considering the average group size, it was possible to estimate the total direct expenditure for staying visitors (Table 6.2).

TABLE 6.2 EXPENDITURE OF STAYING VISITORS	
Answer Choices	Average £
Tickets for Mòd events (not including Mòd Fringe events)	£23.29
Tickets for Fringe events	£9.40
Accommodation	£275.22
Eating and drinking in cafes, pubs & restaurants	£138.28
Shopping	£78.06
Entertainment excluding Mòd events (including visits to attractions, events & tours)	£34.71
Travel & transport to and around Paisley (including parking, fares & fuel)	£82.19

6.7.2. Non-Staying Visitor Expenditure

Non staying visitors indicated that they attended for 2.89 days on average, again reflecting the nature of the Mòd as a celebration of Gaelic culture to which they returned on more than one occasion as day visitors.

By incorporating appropriate expenditure questions in the survey and considering the average group size, it was possible to estimate the total direct expenditure for non-staying visitors (Table 6.3).

TABLE 6.3 EXPENDITURE OF NON-STAYING VISITORS	
Answer Choices	Average £
Tickets for Mòd events (not including Mòd Fringe events)	£37.06
Tickets for Fringe events	£35.58
Accommodation	£0.00
Eating and drinking in cafes, pubs & restaurants	£64.25
Shopping	£37.32
Entertainment excluding Mòd events (including visits to attractions, events & tours)	£13.33
Travel & transport to and around Paisley (including parking, fares & fuel)	£20.51

6.8. Estimating the Total Direct Expenditure of All Visitors to the Mòd

By applying estimates from the survey for group size and numbers of staying and non-staying visitors, it is estimated that the direct visitor expenditure generated at the Mòd was around £758k (Table 6.4).

TABLE 6.4 TOTAL DIRECT EXPENDITURE	
Total Direct Expenditure of Staying Visitors	£1,077,572
Total Direct Expenditure of Non-Staying Visitors	£523,252
Total Direct Visitor Expenditure - Non staying and Staying Visitors	£1,600,824

6.9. Pre and Post Mòd Overnight Stays

Responses from the survey indicated that the Mòd has generated overnight stays from visitors before and after the event itself. These are summarised in Table 6.5.

TABLE 6.5 PRE AND POST MÒD STAYS IN PAISLEY		
	Staying Before	Staying After
Yes	6%	4%
No	94%	96%

6.9.1. Impact of Pre Mòd Stays in Paisley

As a result of questions placed in the survey, it is estimated that:

- There were 421 visitors staying in Paisley prior to the Mòd
- They stayed an average of 1.33 nights.
- They are estimated to have generated £100k in direct expenditure prior to the Mòd.

6.9.2. Impact of Post Mòd Stays in Paisley

For post Mòd visitors, the survey yielded the following estimates:

- There were 269 visitors staying in Paisley after the Mòd
- They stayed an average of 0.76 nights.
- They are estimated to have generated £36k in direct expenditure after the Mòd.

It is estimated that there is a total of £136,142 pre and post event expenditure in Paisley (Table 6.6).

TABLE 6.6 PRE- AND POST- MÒD STAY	
% staying pre-Mòd	6.1%
Number staying pre Mòd	421
Average expenditure per visitor (average from Mod staying visitors only)	£178
Nights pre Mòd	1.33
Total Expenditure pre-Mòd	£99,713
% staying post Mòd	3.9%
Number staying post Mòd	269
Average expenditure per visitor (average from Mod staying visitors only)	£178
Nights post Mòd	0.76
Total Expenditure post Mòd	£36,429
Total pre and post stay	£136,142

6.10. Impact of Organiser Spend

Based on data from An Comunn, the estimated organiser spend was £556,725 over the organising period including during the event days. Given that the event was staged in Paisley, it is likely that much of the expenditure accrued to suppliers in the Paisley area although the distribution of organiser expenditure has not been assessed in such detail.

6.11. Total Direct Expenditure in Paisley and area generated by the Mòd.

Because it is entirely dependent upon the Mòd, all pre Mòd, post Mòd and organiser expenditure can be regarded as additional to the host area. In this section the *total additional* direct expenditure generated because of the Mòd taking place has been estimated by taking these expenditure items into account. Table 6.7 shows the total expenditure generated by the Mòd because of:

- Direct Visitor spend at the event itself generated by the Mòd.
- Organiser expenditure in the Paisley area
- Pre and post Mòd visitor expenditure

TABLE 6.7 TOTAL DIRECT EXPENDITURE	
Total Direct Expenditure from Staying Visitors	£1,077,572
Total Direct Expenditure from Non-Staying Visitors	£523,252
All Direct Expenditure	£1,600,824
Pre and Post Mòd Expenditure	£136,142
Organiser Expenditure	£556,725
GRAND TOTAL	£2,293,691

It is estimated that the Mòd in Paisley was responsible for generation of around £2.3m of total direct visitor expenditure throughout the planning, development, and delivery stages and because of visitor expenditure before, during and after the event. This value represents the total direct expenditure attributable to the organisation and visitor spend occurring because of the Mòd taking place in Paisley. This is slightly less than the £2,505,125 estimated to have been generated in 2022.

6.12. Estimating the Additional Direct Expenditure due to the Mòd

The next sections consider the impact of:

- Displacement and additionality
- Deadweight
- Leakage

6.13. Displacement, Additionality and Deadweight

HM Treasury Green Book defines additionality as:

*"a real increase in social value that would not have occurred in the absence of the intervention being appraised."*³

Essentially, we are concerned with what happened over and above what would have happened anyway – the *additional* impact created by the Mòd. To address this, suitable questions were incorporated into the survey to identify the impact of the Mòd in creating expenditure that was additional to that which would have happened in the host economy if the Mòd did not take place. The aim was to investigate:

- To what extent did the Mòd create economic impact that would not otherwise have occurred in Paisley (additionality)?
- To what extent would visitor expenditure have taken place anyway (deadweight)?
- To what extent did it displace economic activity from other parts of the Paisley and Renfrewshire Council area and within Scotland as a whole (displacement)?

These were investigated through placing appropriate questions in the survey. Displacement and additionality factors were then built into the analysis based on the estimated total direct expenditure value. The findings were that:

- 2% would have visited somewhere else in Paisley.
- 0% would have visited somewhere else in Renfrewshire.
- 14% would have visited somewhere else in Scotland.
- 7% would have visited somewhere else outside of Scotland.
- 22% would have gone to work.
- 551% would have stayed at home.

³ "The Green Book - Central Government Guidance on Appraisal And Evaluation" HM Treasury 2018

Based on these findings, it is estimated that 98% of all direct expenditure (from Table 6.5) expenditure taking place in Paisley and Renfrewshire is *additional* to that which would otherwise have occurred in Paisley if the Mòd had not taken place (Table 6.8).

TABLE 6.8 DISPLACEMENT AND ADDITIONALITY	
Displacement/Additionality Factor	Displaced/Additional or Deadweight Direct Exp
% additional in Paisley	£1,702,227
% displacement from elsewhere in Renfrewshire	£0
% displacement from elsewhere in Paisley	£52,109
% additional to Scotland	£1,459,051
% additional to Paisley and Renfrewshire	£1,702,227
% Deadweight in Paisley (would have happened anyway)	£34,739
% Deadweight in Renfrewshire (would have happened anyway)	£34,739

In summary, the Mòd has generated *net additional* visitor expenditure of around £1.7m in Paisley and an estimated £1.5m additional spend at the Scottish level.

6.14. Leakage of Accommodation Expenditure

It was possible to estimate leakage in accommodation expenditure from Renfrewshire by including an appropriate question in the survey. It is estimated that:

- Total accommodation expenditure was estimated to be £1,253,534.
- 38% of accommodation expenditure accrued elsewhere rather than in Paisley and Renfrewshire
- 34% of this “leaked” expenditure took place elsewhere in the City of Glasgow area.

Table 6.9 shows the impact of that leakage on visitor expenditure in the Paisley and Renfrewshire Council area.

TABLE 6.9 ANALYSIS OF ACCOMMODATION EXPENDITURE	
Estimated Accommodation Spend	£1,253,534
% Spend in Paisley Town Centre (PA1 postcode)	16%
% Spend Elsewhere in Renfrewshire (All other PA postcodes)	46%
% Spend in City of Glasgow (G postcode)	34%
% Spend Elsewhere in Scotland	4%
Actual Spend in Paisley Town Centre	£200,565
Actual Spend Elsewhere in Renfrewshire	£576,625
Total Spend In Paisley and Renfrewshire	£777,191
Expenditure in City of Glasgow	£426,201
Expenditure Elsewhere in Scotland	£50,141

Table 6.9 shows that there is a leakage of 38% of estimated accommodation spend from Paisley and Renfrewshire, mainly to the City of Glasgow which is unsurprising given that many of the larger hotels in the wider area are located in the city. It is also clear that within Renfrewshire, most of the accommodation expenditure took place outwith Paisley, presumably in major hotels in the vicinity of Glasgow Airport and in more rural areas of the county.

This is similar to the impact at both the Dunoon Mòd in 2018 and Glasgow Mòd in 2019 at which leakage of accommodation expenditure took place from the host community to nearby areas. In Inverness in 2021 and Perth in 2022 almost all accommodation expenditure took place within the host local authority area but given the geography of Renfrewshire and its proximity to major hotels in Glasgow, the level of leakage means that the bulk of accommodation spend accrues to Renfrewshire whilst just over a third accrues elsewhere.

6.15. Return on Investment

The Return on Investment (ROI) is a measure used by funders in their assessment of the value and contribution made because of their investment in events throughout Scotland. It is estimated by dividing the direct expenditure of around £2.5m attributed to the Mòd by the funding contribution of each of the major supporters of the event. Contributions from individual organisations which have helped An Comunn to meet the cost of staging the event and their return on investment are shown in Table 6.10.

Funder	Contribution	Rol
Renfrewshire Council	£205,000	11
Bòrd na Gàidhlig	£158,250	14
Creative Scotland	£4,000	573
Commercial Income	£40,000	57
BBC Alba or Scotland	£15,500	148
Event Scotland	£20,000	73
Scottish Government	£62,000	37
Caledonian MacBrayne	£10,000	229
SQA	£6,000	382
Donations & Gifts	£500	4587
Other	£14,000	164

Supporting the Mòd in 2023 represents Return on Investment of 11:1 for **Renfrewshire Council** and 14:1 for **Bord na Gàidhlig**.

For **EventScotland**, whose interest lies in creating additional expenditure in Scotland, the estimated Rol is 73:1 assuming that leverage is based *only* on the *additional* spend generated in Scotland value shown in Table 6.8.

It should be noted that these RoI values are inclusive of all direct expenditure arising from pre and post visits and organiser expenditure none of which would be likely to have occurred if the Mòd had not taken place in Paisley.

6.16. Multiplier Analysis

The concept of the multiplier is based upon the recognition that the various sectors which make up the economy are interdependent. In addition to purchasing primary inputs such as labour, imports etc, each sector will purchase intermediate goods and services produced by other establishments within the local economy.

Thus, any change which affects the level of tourist expenditure by visitors from outside the local economy (such as the Mòd) will not only affect the industry which produces that final good or service but also that industries suppliers and sub-suppliers etc. There are three types of multipliers which relate to expenditure by tourists. These are:

- Direct Effect
- Indirect Effect
- Induced Effect

The **Direct Effect** is that felt by those establishments and their employees where tourists spend their money and include accommodation establishments, restaurants, shops, attractions etc. This is what has been measured in the study so far.

The **Indirect Effect (Type I)** results from the need of an industry which has experienced an increase in demand to make purchases from other industries within an economy in order to produce its output. Thus a change in tourist expenditure on hotel accommodation will have a direct effect on hotel employment plus an indirect effect on the employment of suppliers to the hotel sector.

The **Induced Effect (Type II)** reflects the fact that as income levels rise throughout the economy as a result of the initial change in final demand, a portion of the increased income will be re-spent on final goods and services produced within the local economy. We have not assessed this impact in this study.

6.17. Employment Multiplier

The data gathered allows estimates to be made of the Type I employment effect which is attributable to the additional expenditure created by the Mòd.

6.18. Impact of Taxation

Before estimating the employment multiplier impact it is advisable to reduce estimated tourist spending by around 20% before applying the multiplier to account for taxes on products and final demand imports.

Based on Scottish Government multiplier data the Type I multiplier impact created by the Mòd has been estimated i.e. the impact on employment in the economy. Based on the most recently available Scottish Government employment multiplier data which indicates that in

2019 one FTE post in tourism was supported by around £61,950 of direct visitor spend, it is estimated that the total employment impact of the Mòd is to support around 21 Full Time Equivalent (FTE) jobs and 27 FTE by applying the Type I multiplier (Table 6.11).

Tax offset	80%
Total Direct Expenditure After Tax	£1,280,659
FTE After Direct Expenditure	21
Type I Multiplier (2019 ScotGov value)	1.29
D+I After Type I impact	£1,652,051
Total FTE	27

In summary, the employment impact of the Mòd has been to support around 21 FTE jobs locally because of additional direct visitor expenditure and up to 27 FTE overall in the wider economy.

6.19. Likelihood to Return to Paisley for a Future Visit

Finally, we ascertained the likelihood of visitors to the Mòd returning to Paisley for a future leisure visit. Around 42% of Mòd visitors indicated that they were likely or very likely to return to the area for a future visit (Table 6.12).

Total	6,901
Percentage likely or very likely to return to Paisley	42%
Likely returners	2,898
Average spend per staying visitor per night (based on all visitors from survey)	£178
Overnight stay (average stay post Mod)	0.76
Potential Future direct expenditure	£392,098

If it is assumed that:

- This represents around 2,898 potential returners.
- Staying 0.76 nights on average – similar to the average post Mòd visit stays.
- And each spending an average of £178 per night based on survey findings.

Then there is scope to generate a future direct expenditure of around £392K of further direct visitor expenditure in the area from visitors returning because of attending the Mòd in 2023.

6.20. Summary of Findings

The economic impact of the Mòd can be summarised as follows (Table 6.13).

TABLE 6.13 SUMMARY OF ECONOMIC IMPACT	
Total Direct Expenditure from visitors to the event	£1,600,824
Pre and post event and organiser direct expenditure	£136,142
Organiser Expenditure	£556,725
Total direct expenditure including pre, post and organiser spend	£2,293,691
FTE supported because of direct visitor expenditure after taxation	21
Employment supported as a result of Type I multiplier impact	27
Potential Future Direct Expenditure in host area	£392,098

The main findings are:

- Overall, the Mòd generated around £1.6mk of direct visitor expenditure in Paisley during the event.
- There was an estimated £136k of direct expenditure from pre- and post- Mòd staying visitors and organiser spend.
- Including pre and post stays and organiser spend, the Mòd has generated around £2.3mm *direct* expenditure in total.
- Taking taxation and the Type I multiplier impact into account, the direct and indirect expenditure was around £1.65m
- Expenditure at the Mòd supported around 21FTE jobs through *total* direct expenditure after taxation.
- And in turn supported up to 27FTE jobs in the economy because of direct and Type I indirect expenditure impacts.
- Potential future expenditure of £393k has been created due to hosting the Mòd in Paisley.

6.21. Economic Impact - Conclusions

We conclude that:

- The Mòd has created significant visitor expenditure in the economy in Paisley and Renfrewshire at a traditionally quieter time of the year.
- The Mòd has helped to create significant additional economic impact for Paisley and Renfrewshire
- There have also been economic benefits in Glasgow and other areas through accommodation expenditure.
- In person attendance numbers increased from those in 2022
- But direct visitor expenditure declined slightly.
- This was due to a higher proportion of visitors undertaking non staying visits from home.
- 98% of the economic impact created has been additional to the local economy and 84% to Scotland as a whole.

- The Mòd has helped to generate additional expenditure from visitors staying before and after the event itself.
 - The Mòd has generated significant expenditure because of its own organising activities.
 - The Mòd has provided strong support towards local employment.
 - A significant proportion of visitors are likely to return to Paisley for future leisure visits.
 - There is no doubt that the Mòd has been of great economic value to Paisley and to the Renfrewshire Council area in general.
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7. Evaluation of the Online Programme

7.1. Use of the Online Programme

All respondents were asked if they participated in the online Mòd competitions or watched any online events (Table 7.1).

TABLE 7.1 USE OF THE ONLINE PROGRAMME	
Yes	15%
No	85%

Although the online programme was primarily intended to allow participation in the Mòd from visitors unable to attend in person, it was clear that following removal of Covid-19 restrictions, the use of the online programme has declined significantly.

The small number of respondents who indicated that they had used the online programme were then asked if they participated in the Mòd as a performer via the online competitions (Table 7.2).

TABLE 7.2 USE OF ONLINE PROGRAMME AS A PERFORMER	
Yes	6%
No	94%

N=35

Use of the online programme as a route to participation in the Mòd competitions was very low. The 6% who indicated that they did use the online programme as a route to participate in the Mòd competitions represents only around 0.9% of all Mòd competitors.

7.2. Participation in the Absence of an Online programme

Participants were asked if they would have participated in the Royal National Mòd if they had not done so via the Online programme (Table 7.3).

TABLE 7.3 PARTICIPATION AT THE MÒD IF NOT VIA ONLINE PROGRAMME	
Yes	65%
No	35%

N=23

Table 7.3 indicates that in the absence of an online programme around two thirds of online programme users would still have taken part in the Mòd indicating that, in a year when no Covid-19 restrictions are in force, the use of the online programme as a major participation channel has declined significantly. Most online programme users would still have participated in the Mòd even in the absence of the programme.

The percentage indicating that they would not have participated in the Mòd in the absence of an online programme represents around 5% of all survey respondents.

7.3. Impact of the Online Programme

The online programme continued to have a positive impact upon the small numbers who used it (Table 7.4).

It made me want to go to the Mòd in 2024	52%
It made me want to get more involved in Gaelic culture in future	43%
It raised my awareness of Gaelic culture	38%
Other (please specify)	19%
It allowed me to participate in the Mòd even though I could not travel to Paisley	10%
It introduced me to Gaelic	5%
It allowed our local group/choir to take part even though we could not travel to Paisley	0%

N=21

Amongst the small number of respondents who used the online programme, the main impacts were to:

- Stimulate interest in attending the 2024 event.
- Stimulate involvement in Gaelic culture.
- Introduce Gaelic to new audiences and raised awareness of Gaelic language and culture.
- Encourage participation in the Mòd even though some people could not physically travel to Paisley.

7.4. Conclusions on the Online Programme

Since 2021 the use and relevance of the online programme has declined as a channel for competition and participation in the Mòd. However it appears that for a small number of Mòd participants it remains of importance in allowing engagement with the Mod and whilst its scale has been reduced, it remains as a valuable resource which may be worthy of continuation in the short term.

8. Impact on Gaelic Cultural Engagement

The core aim of An Comunn is to:

“support and develop all aspects of the Gaelic language, culture, history and heritage at local, national and international levels”.

The online survey approach allowed the opportunity to investigate the degree to which the Mòd helps to achieve those objectives.

The data presented in this section relates to responses from all participants in the survey.

8.1. Participation in Gaelic Arts and Culture

All respondents were asked to indicate how often they attended or participated in Gaelic cultural events or activities (Table 8.1).

Weekly	50%
Monthly	11%
Every 7 – 12 months	11%
Every 2 – 3 months	9%
Every 4 – 6 months	8%
Less than once every 12 months	7%
This is my first time	2%
Never	1%

Table 8.1 indicates that there a very high percentage of Mòd participants who regularly undertake a range of Gaelic activities in general.

8.2. Inspiring Gaelic Learning Amongst Non-Gaelic Speakers

8.2.1. All Respondents

Respondents were then asked about the extent to which they are interested in learning and improving Gaelic language skills (Table 8.2).

Interested	41%
Extremely interested	37%
Neither interested nor disinterested	18%
Disinterested	3%
Extremely disinterested	1%

Around 78% of respondents are interested or very interested in further developing and improving their Gaelic language skills.

8.2.2. Learners and Non-Gaelic Speakers

Analysis of the 28% who indicated that they were either learner, enthusiast / Novice or who do not speak Gaelic indicated that 73% of these respondents were interested or extremely interested in further developing and improving their Gaelic language skills indicating that Mòd participation inspires “non-Gaelic” speakers to improve their language skills.

8.3. Overall Impact of the Mòd

The impact of the Mòd on participants was assessed by asking about the extent to which respondents agreed with a range of statements prefaced by “Attending the Mòd has.....” (Table 8.3)

TABLE 8.3 IMPACT OF THE MÒD ON PARTICIPANTS	
	% Agree or Agree Strongly
...increased my aspirations to improve my Gaelic language skills	64%
...inspired me to attend cultural events or activities more frequently than I normally do	62%
...increased my awareness of Gaelic Arts	56%
...increased my understanding of Gaelic Arts	50%
...increased my confidence in use of Gaelic in conversation	40%
...encouraged me to use Gaelic more often”	61%
...enhanced my Gaelic skills”	51%
...led me to believe more strongly that Gaelic is important to Scotland”	75%

Attending the Mòd has had a universally positive impact upon use of Gaelic and awareness of Gaelic arts in general and has enhanced awareness of the importance of the language to Scotland as a whole.

8.4. Gaelic Arts for Young People in Paisley and Renfrewshire

Respondents were asked to what extent they were satisfied with the number of Gaelic Arts activities available for young people in Paisley and the Renfrewshire Council area (Table 8.4).

TABLE 8.4 SATISFACTION WITH GAELIC ARTS ACTIVITIES	
Not aware of any	16%
Neither satisfied nor dissatisfied	14%
Generally satisfied	13%
Generally, not satisfied	5%
Completely satisfied	1%
Not at all satisfied	0%

Note that Table 8.4 excludes 50% of total respondents who answered “don’t know” to the question because they were not familiar with Gaelic arts provision in the Renfrewshire Council area. Amongst actual respondents there is a 14% level of overall satisfaction with Gaelic arts provision in the Paisley area, with 16% of respondents indicating that they are not aware of any provision.

8.5. Conclusions on Impact of the Mòd on Gaelic Language and Culture

Overall, it is concluded that despite reduced attendance because of Covid and because of the efforts made to establish the online programme, the Mòd has:

- Has stimulated interest in Gaelic culture and language.
- Has helped to overcome isolation.
- Facilitated social contact between participants thus reducing social isolation.
- Had a positive impact on mental health.
- Encouraged participation and interest in other Gaelic language and cultural activities.
- Helped to offset some of the negative impacts of lockdown and Covid restrictions.
- Created very high levels of demand for future participation.

8.6. Social Impact of the Mòd

The impact of the Mòd on social engagement and well-being was investigated by including a question that invited respondents, to indicate the degree to which the Mòd had positive impacts on a scale from 1 to 5 (Table 8.5).

Statement	1 Strongly agree	2	3 Neither agree nor disagree	4	5 Strongly disagree
Participating in the Mòd has been beneficial to my mental health	37%	24%	30%	6%	2%
Participating in the Mòd encouraged me to engage socially	39%	28%	24%	6%	3%
The Mòd has been a great way to meet friends again	49%	26%	19%	3%	3%

Table 8.5 indicates that:

- 61% agreed that participation in The Mòd was beneficial to mental health.
- 67% agreed that participation in the Mòd encouraged social engagement.
- 72% agreed that the Mòd was a great way to meet friends again.

8.7. Recommendation of the Mòd

Respondents were invited to indicate how likely they would be to recommend the Royal National Mòd to friends and family (Table 8.6)

Highly Likely	59%
Likely	25%
Neither likely nor unlikely	12%
Unlikely	3%
Highly Unlikely	2%

Around 84% of respondents are likely or highly likely to recommend attendance at the Mòd to friends and family indicating that the levels of appeal of the Mòd amongst current participants is very high.

8.8. Likelihood to Attend the Mòd in Oban in 2024

There was a high propensity for respondents to attend the Mòd in Oban in 2024 (Table 8.7).

Highly likely	73%
Likely	16%
Unlikely	7%
Neither likely nor unlikely	3%
Highly unlikely	1%

Overall, 89% of respondents indicated that they were likely or highly likely to attend Oban in 2024.

9. Overall Conclusions

Overall, it is concluded that:

- The Mòd was a highly popular event in Paisley.
- The Mòd created significant economic impact for the host community most of it additional to Paisley and all of it additional to the Paisley & Kinross Council area.
- The Mòd has created employment benefits.
- It has created economic benefit for Paisley and the Paisley & Kinross Council area.
- Numbers have bounced back from 2021 when Covid repressed “in person” attendance numbers.
- The Mòd has continued to have significant cultural impact for Gaelic and Gaelic arts.
- The Mòd has had a positive impact on Gaelic awareness.
- The Mòd has had positive social benefits for participants.

Through continuation of the online programme the Mòd has had other positive impacts beyond Paisley. These are:

- There remains a role for the online programme in engagement with the Mòd.
- The Mòd has had a positive impact on mental health.
- The Mòd has stimulated interest in Gaelic language and culture.
- It has stimulated a high level of demand to attend Oban in 2024

Overall, An Comunn were highly regarded by participants for their efforts and are highly respected by respondents for their efforts in organising the Mòd. Overall, it appears that, the Mòd has reinforced its place as the main showcase for Gaelic language, culture, and arts in Scotland.

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